## Users are Routing Events to the Wrong Folder

We recommend setting up a cabinet and folder structure that follows our documented <u>best practices</u>. There are several mandatory routing rules that influence which folder an event is saved in:

- The event is always saved in a folder whose folder type contains the event's type in the Event Type Hierarchy found in the System Settings.
- The event is always saved in a folder with an appropriate date range.
- The user saving the event must have permission to see the folder as well as save events to it. See Permissions in Series25 Group Administration.

If multiple folders meet these criteria, then two more things can influence where the event routes:

- If the event has a category that matches a category on one of the folders, the event will be saved there.
- If the event's primary organization is on one of the folders, the event will be saved there.

If all of these criteria are applied to an event and there is still more than one folder where the event can be saved, then the available folders will be listed for the user to choose from.

## Prevent Users From Selecting a Folder to Route Events

This popup only appears when a user attempts to save an event and there is more than one folder where the event can be saved. Look over the routing criteria described above and structure your folders so that events will have only one possible option. Here are some tips:



- Reduce the number of folders in your event structure. Consult the <u>Best Practices</u> article to learn about ways you can simplify your cabinets and folders. Fewer folders means fewer choices.
- Set up Express Scheduling to route to a single folder.
- Auto-route events based on organizations or categories. Edit a folder and add one or more categories or organizations to the folder. Events with matching data will be saved in the corresponding folder. Set multiple folders up with mutually exclusive criteria: for example, put all your student organizations on one folder and all your external organizations on another.

## Prevent Users From Selecting "I Don't Know"

Requestors are often confused when they see the event heading choices, and if flustered just choose the "I don't

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know" option, which saves the event in a draft state. Administrators can lock users out of creating drafts by restricting the <u>security group</u>. If any security group doesn't have permission to create draft events, then the "I don't know" option will not display.