



# Streamlining Approvals and Automating Communication with EventEssentials

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# Why are we here today?

» Process efficiency saves you

- » Time
- » Money
- » Stress



# Agenda

- » Log into your account, or the Dude University Account
- » Create a unique Building and Room if you are using a Dude University account
- » Schedule Routing
- » Service Provider Routing
- » Room Occupants
- » FSDirect Emails
- » Questions

# Create your Building

**Location** Chris Shirley High School

**Building Name** Your Name

**Building Used By**

**Square Footage**

**Number of Students**

Note: Enter the number of students served by this building.

**Entry Managed By** Administrator : Joyner , Greg

## » Head to the Account Setup Tab

- » Click on the link for **Buildings**
- » Click **Add New Building**
- » Choose the Location **Chris Shirley High School**
- » Name the Building after yourself so you can find it later
- » Remember to click the **Save** button to create the Building


# Create your Room

Note: Room occupant may be assigned after the Room has been selected and saved.

**Location** Chris Shirley High School ▼

**Building** North Building ▼

**Area Type** -- Select Area -- ▼

**Room Name** Your Name Here! 

**Zone** -- Select Zone -- ▼ or new

## » Head to the Account Setup Tab

- » Click on the link for **Rooms**
- » Click **Add New Room**
- » Choose the Location
- » Choose your Building
- » Name your room after yourself so you can find it later
- » Remember to click the **Submit** button to create the Room

Submit

More Configurations

# Setup Schedule Status Routes

- » Head back to the Account Setup Tab
  - » Click on the link for **Setup Schedule Routing Rules**
  - » You can filter by Location or Status to make it easier to view only one section of your routing rules
  - » Choose the Location

Setup Schedule Status Routes

**i** Route to next is available only after selecting status, location and when route to. If a route to cannot be determined for a new schedule, then it is automatically routed to the comptroller setup under account settings.

**Filtering**

Status :  **Location :**

# How many routing rules do you need?

- » You can create routes with only one rule if there is only one approval needed, or you can create as many stops along the way as your work flow demands
- » Remember, the more approvals you need the greater the chance of some sort of delay or holdup

1 - 4 of total 4 listed « First ◀ Prev Next ▶ Last »

	Status	Location Building	Room	When Routed To Route To Next	
<input type="button" value="Edit"/>	Submitted	Chris Shirley High School North Building	Art Room	Williams, Roy	<input checked="" type="checkbox"/>
<input type="button" value="Edit"/>	Approved	Chris Shirley High School North Building	Art Room	Williams, Roy Pendergraft, Nick	<input checked="" type="checkbox"/>
<input type="button" value="Edit"/>	Approved	Chris Shirley High School North Building	Art Room	Pendergraft, Nick Admin, Dude	<input checked="" type="checkbox"/>
<input type="button" value="Edit"/>	Approved	Chris Shirley High School North Building	Art Room	Admin, Dude McConkey, Myles	<input checked="" type="checkbox"/>

# Routing basics

- » We can route based on the **Status**, **Location**, **Building**, and **Room** chosen on the Schedule
- » All routes need a **Status**, **Location**, and the **When Routed To/Route to Next section** completed

Setup Schedule Status Routes

**i** Route to next is available only after selecting status, location and when route to. If a route to cannot be determined for a new schedule, then it is automatically routed to the comptroller setup under account settings.

**Filtering**

Status : -- Select Status --

Location : Chris Shirley High School

+ Add New

0 - 0 of total 0 listed

Status	Location Building	Room	When Routed To Route To Next
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**Add New**

Status	Location Building	Room	When Routed To Route To Next
Submitted	Chris Shirley High School	Performing Arts Comp   Main Auditorium	-- Select Route To --
	Performing Arts Complex		Admin, Dude

Add New



# Multi-step routing chains

- » When creating routing for multiple approvers, it helps to think in terms of chains
  - » Always set the **Status** as **Submitted** for the first link in the routing chain
  - » The first person for **When Routed To** will always be blank
  - » The second rule onward in a chain will always be **Approved**
  - » The second rule onward in a chain will always list the previous approver as the **When Routed To**, and the next person receiving as the **Route to Next**

# How to create a routing rule

- » Below the list of existing rules is the **Add New** section
  - » Set your **Status**
  - » Set your **Location**
  - » For today's exercise, let's also set a **Building** and **Room**
  - » Leave the **When Routed To** as blank
  - » Set the **Route to Next** to **Dude Admin**

# Edit or delete an existing rule

» Click the **Edit** button to change an existing rule; remember to click **Save**

	Status	Location Building	Room	When Routed To Route To Next	
Edit	Submitted	Chris Shirley High School North Building	Art Room	Williams, Roy	✘
Edit	Submitted	Chris Shirley High School Athletics Complex	Main Gym	McConkey, Myles	✘
Edit	Submitted	Chris Shirley High School Performing Arts Complex	Main Auditorium	Admin, Dude	✘
Edit	Approved	Chris Shirley High School Athletics Complex	Main Gym	McConkey, Myles Admin, Dude	✘
Edit	Approved	Chris Shirley High School North Building	Art Room	Williams, Roy Pendergraft, Nick	✘
Edit	Approved	Chris Shirley High School North Building	Art Room	Pendergraft, Nick Admin, Dude	✘
Edit	Approved	Chris Shirley High School North Building	Art Room	Admin, Dude McConkey, Myles	✘

## Save

Status	Location Building	Room	When Routed To Route To Next
Submitted ▼	Chris Shirley High School ▼ North Building ▼	North Building   Art Room ▼	-- Select Route To -- ▼ Williams, Roy ▼

Save Cancel

» The red X to the right will delete the rule

# Remember to check your Site Administrators!

- » We must define the **Assigned Locations** for any **Site Administrator**
- » Open the **FSDirect Participant Page**, hover over **Shortcuts**, and select **Assigned Locations**
- » Check the appropriate **Locations**

Define Locations for Roy Williams

**Filter By:**  
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 All

Note: Location assignments are used to restrict schedule approval permission. Users can submit new schedule requests for any locations having facilities/areas available for use, but only users with location permission can approve usage.

1 - 20 of total 20 listed

Location	
Administration Building	<input checked="" type="checkbox"/>
Allen High School	<input type="checkbox"/>
Anderson Elementary School	<input type="checkbox"/>
Boon Elementary School	<input type="checkbox"/>
Boyd Elementary School	<input type="checkbox"/>
bUCKINGHAM pALACE	<input type="checkbox"/>
Chris Shirley High School	<input checked="" type="checkbox"/>
Dean Smith High School	<input type="checkbox"/>
DS Center	<input type="checkbox"/>
Dude Campus	<input type="checkbox"/>
Ereckson Middle School	<input type="checkbox"/>
Ethans Hall	<input type="checkbox"/>
Jones HS	<input type="checkbox"/>
Lipinski Building	<input type="checkbox"/>
Lowery Freshman Center	<input type="checkbox"/>

Participant Shortcuts

FSDirect Parti

- Add
- List
- Assigned Locations
- Back To Administrative Functions
- Contact Info
- FSD Role

Email

Receive email notifications.

- » Remember to click **Next Step** to save the addition

# Service Provider Routing

- » Head back to the **Account Setup** tab
  - » Click the link for **Setup Maintenance Service Provider Support** or the link for **Setup IT Service Provider Support**
  - » Filter by Craft/Problem Type or by Location
  - » No chains, only one rule per scenario
  - » Enter Craft and/or Location, then select Assignee
  - » Click Add New to create the rule
  - » You can edit or delete just like with routing rules

# Room Occupants

- » Room Occupants receive email notifications at the same time as Service Providers
  - » Set the email timeframe in **Account Settings** under the **Account Setup** tab
  - » Set a Room Occupant on the **Add/Update Room** page

# Set Up Emails

- » You can decide which emails are sent by role type
  - » Click the **Account Setup** tab
  - » Hover over the **Shortcuts** box
  - » Click the link to **Manage Email Notifications**

Manage Email Notification

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[View Sent Messages](#)

Site Administrators (includes Site Administrators I and II)

- Notify of **new** schedule? *Sample*
- Notify **site administrator** of schedule canceled? *Sample*

# Emails

- » Emails will automatically send to
  - » Room Occupants
  - » Service Providers
  - » These emails send overnight, unless the Event is the same day
- » Other emails send based on the selected actions
- » Check emails in the Schedule
  - » Hover over the **Shortcuts** box
  - » Click **Sent Messages**





SAN DIEGO  
MARCH 18-21

2018

SAVE THE DATE!

**DON'T FORGET!**

**IN THE APP:**

**SESSION SURVEYS**

**& REQUEST MORE INFO**