

ASTRA SCHEDULE

Astra Schedule User's Guide Introduction

An introduction to the Astra Schedule application.



This learning guide is based upon Ad Astra documentation. This document is for use at Stephen F. Austin State University for the purpose of training; the information contained is considered confidential.

For information on Ad Astra and links to extended user manuals and training can be found at: www.sfasu.edu/ieo.

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1 Introducing Astra Schedule

Astra Schedule is the application used by Academic Space Scheduling & Utilization to schedule rooms for classes and by academic colleges, schools, and departments to schedule events which require an instructional facility. Astra Schedule is the system of record for the scheduling of all educational and general (E&G) space on the SFA campus. Astra Schedule interfaces on a “real-time” basis with the Banner software; classes scheduled and changes made in Banner will appear in Astra Schedule. Rooms assigned to classes in Astra Schedule will display in Banner. Changes made in one system appear in the other after an import is prompted automatically (overnight) or manually by an administrator.

Notes:

2 Understanding the Data in Astra Schedule

Classes and Final Exams

All classes scheduled in Banner display in Astra Schedule. Final exams scheduled in Banner appear as classes in Astra Schedule in separate terms. These terms are designated with an “E” at the end. For example, final exams for Spring 2019 appear in term 015E in Astra Schedule.

Facilities

All E&G classrooms, class laboratories, special class laboratories, auditoriums, conference rooms, and meeting rooms are in the Astra Schedule (and Banner) facilities database. Campus offices and other proprietary facilities which are not scheduled for instructional or event use will not appear in Astra Schedule (or Banner). Each facility in Astra Schedule has been assigned a capacity, room type, and room feature(s).

Events

All events (e.g., meetings, convocations, camps, scholastic competitions, and others) conducted in E&G facilities are scheduled within Astra Schedule. Users requesting event spaces outside of their departmental control will be approved by the controlling department. Academic scheduling takes priority over event scheduling.

Astra Schedule Interaction with Banner

Astra Schedule only writes room assignment information to Banner. Astra Schedule cannot be used to create or modify any section data other than room assignments. Sections that are created or changed in Banner are moved to Astra Schedule via real-time interface and batch updates:

- Add, cancel, or delete section.
- Change meeting pattern (day, time, or dates).
- Add, remove, or change instructor.
- Change enrollment limit.

3 Accessing Astra Schedule

Browser Configuration

Requirements include:

- Internet Explorer 7.0 or higher, Mozilla Firefox 2.0 or higher, Safari 6.0 or higher.
- Pop-ups should be enabled in the browser. Astra Schedule uses pop-up windows to select and view data.
- VPN access since Astra Scheduler uses single sign on.

Logging into Astra Schedule

Log in through your MySFA, Resources Tab, Astra Schedule

or

Using an internet browser, go to the following internet address link and find the Space Management box and click on ASTRA SCHEDULE: <http://www.sfasu.edu/oie>



Note: There is a 60 minute "timeout" once logged into Astra Schedule. To logout manually, click the Logout button on the top left of the screen. Do not close your browser without logging out of Astra Schedule.

Where to get Help

SFASU ITS Help Desk
Phone: 936.468.1212
Fax: 936.468.3100
helpdesk@sfasu.edu
<http://www.sfasu.edu/its/>

Institutional Effectiveness Office
Office: 936.468.1038
<http://www.sfasu.edu/oie>

Ad Astra help site with access to manuals:
Use the Ad Astra Help link at: <http://aais.com/Help/75/index.html?welcome.htm>

Notes:

4 Navigating Astra Schedule

There are components to view calendars, search for room availability, and run reports. References to these components will appear throughout this guide.

Tabs

With the exception of the Calendars option, each tab reveals a list of possible choices for viewing information, performing tasks, and configuring data relative to a general area of the application. A brief description is provided for each of the options. Click on a link from the tab page to interact with a specific option. The links are mirrored across the top of the page as well. You may access these areas at any time to jump to a new option from a different page within the tab.

List Pages and Data Grids

In many areas of the application, lists of items are presented in a data grid on the right, often with search, filter and help options in a panel on the left. Use the search and filter options to narrow the list results or to find a specific record. To view more information about a specific record on the list, click directly on the record name link.



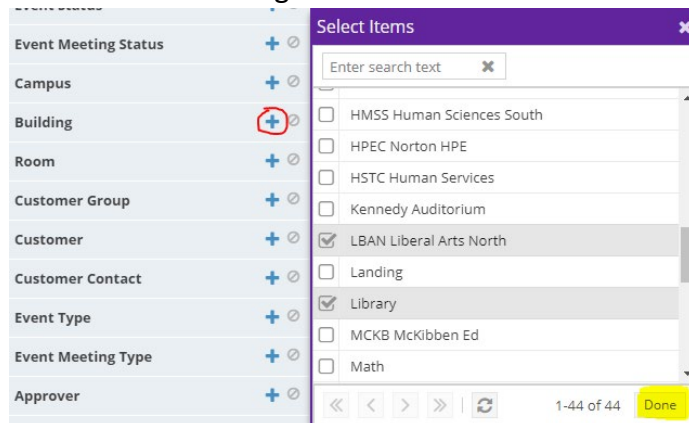
NOTE: Collapse the filter panel on a list page to make more room for the list results or task. Simply click on the panel arrow icon in the upper right corner of a panel to hide it. Click again to show the panel.

Filters

The list page filter options will vary depending on the type of record being displayed. Many filters allow for multiple choice selections.

To set a filter for a list page:

1. Click the + button to display the possible choices.
2. Check the box next to each item to include in the filter. After selections are made click on Done at the bottom right.



3. Click Search at the top right of the Filters box to update the list page.
4. Remove an individual filter by clicking on Clear next to the + or remove all filters by clicking on Clear All at the top left of Filters box.
5. Unless a default saved filter is configured, the last filter used is remembered for the next time you visit the page.

Notes:

Notes:

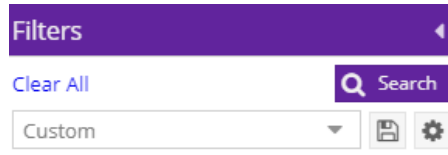
Column Filtering

To filter the data in a column, click the down arrow next to the column. Numeric columns filter by greater than, less than, and equal to values. Alphanumeric columns allow search string entry.

Saving Filters

Favorite filters may be saved on most list pages as well as the room and resource scheduling tools for both sections and events.

The saved filter toolbar can be found toward the top of each filter panel where applicable.



the top

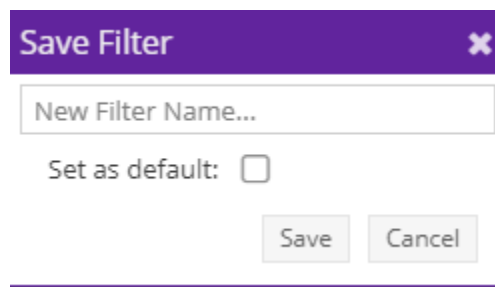
When filter selections are made in the filter

a list, the saved filter tool will display "custom" to indicate that manual filtering is being applied.

panel of


Saving filter selections:

1. Select the filter options to save in the filter panel.
2. Click the save button in the saved filter toolbar.
3. Enter a name for the saved filter.
4. Place a check in the box labeled "Set as Default Filter" to apply the filter by default when visiting the page.
5. Click ok to save the filter.



NOTE: If no default is specified, filtered lists will remember the last filter applied when returning to the page.

The saved filter is available for selection using the drop-down menu on the saved filter toolbar.

Edit or remove saved filters using the manage filters option  on the saved filter toolbar.

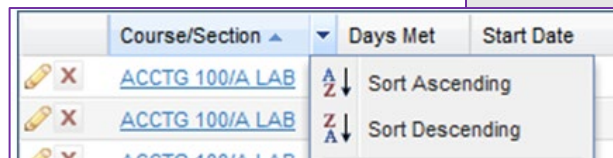
List Pagination

Depending on the data and filter settings, lists may include a number of pages. You may configure the number of records displayed per page, as well as navigate the various pages using the pagination options at the bottom of the list. Type in a specific page number or use the arrow buttons to move to the next page, last page, previous page, or first page.

Column Sorting

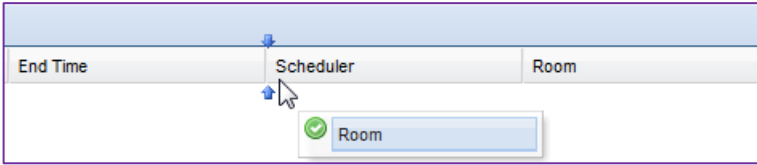
Often you can click on the column labels on the list page to change the way the list is sorted. Click again to reverse the sort order.

Another method is to click on the down arrow next to the column heading to Sort Ascending or Sort Descending.



Column Position

Columns in a list page may be rearranged. To move a column, click and drag the column header to a new position.



When the arrows appear between other columns in the correct position, release the mouse button to drop the column into its new position.

Column Customization

Listed columns are changeable and saved to the user. To customize the display, click on the right arrow on any column in the list and choose the Columns option.

All available column options for the record type being viewed are displayed. Place or remove a check mark to add or remove columns from the list page.

Course/Section	Days Met	Start Date	End Date	Start
ACCTG 100/A LAB			11/4/2009	11:00
ACCTG 100/A LAB			3/16/2009	11:00
ACCTG 100/A LAB			11/5/2008	11:00
ACCTG 100/A LAB				
ACCTG 100/B LAB				
ACCTG 100/B LAB				
ACCTG 100/B LAB				
ACCTG 100/B LAB	MWF	1/5/2009		
ACCTG 100/B LAB	MWF	1/14/2008		
ACCTG 100/N LAB	W	1/15/2007		
ACCTG 100/N LAB	W	8/26/2009		
ACCTG 100/N LAB	W	1/5/2009		
ACCTG 100/N LAB	W	8/27/2008		
ACCTG 100/N LAB	W	1/14/2008		
ACCTG 101/A LEC	M	5/14/2007		
ACCTG 101/A LEC	M	12/24/2008		
ACCTG 101/A LEC	MTWR	6/2/2008		
ACCTG 101/A LEC	MTWR	6/1/2009		
ACCTG 101/A LEC	M	5/4/2009		
ACCTG 101/A LEC	M	12/23/2009		
ACCTG 101/A LEC	MTWR	5/21/2007		
ACCTG 101/A LEC	M	5/12/2008		
ACCTG 101/B LEC	MWF	1/14/2008		
ACCTG 101/B LEC	MWF	1/5/2009		

Export to Excel

In many cases, the data displayed in grids can be exported to Excel by clicking on the Export to Excel icon at the bottom of the page. Raw table results can also be viewed by clicking on that icon.

Notes:

5 System Administration

Users

A user consists of a login, general identifying information, and associated roles through which application access and security is achieved. Every user record has a corresponding people record. When a user is created, the corresponding people record is generated automatically with “users” selected as a system responsibility. Users are maintained through administrative logins only.

View Users

Users are located in the Setup area of the application. Choose the Users option to view the User List page. From the User List page you may search for specific users by name and limit the number of users displayed using the Find Users area on the left side of the page. Enter a keyword and/or a filter and select the Search button to return results. To view additional details about a specific user, click directly on the user name from the list.

The user record includes a user name and Active flag, shown in the User Info section at the top of the window. The lower section of the window displays the role(s) associated with the user.

Roles

Roles are groups of application permissions and data profiles that may be applied to users. Default roles are provided in the application that may be used to quickly apply permissions to users. However, you may define additional roles, and/or add data profiles to individual permissions within roles as needed. One or more roles must be selected when creating users in the application. Roles are maintained through administrative logins only.

Permissions available through the Role include all tasks that may be performed within the system such as scheduling resources, editing and viewing data, and performing administrative duties and overrides.

View Roles

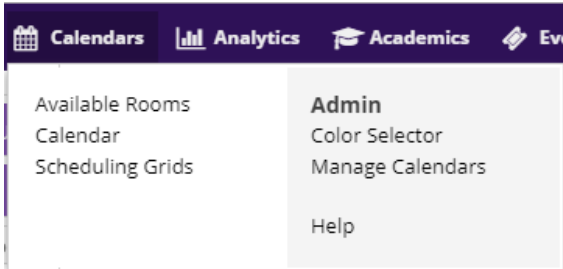
Roles can be located in the Setup area of the application. Choose the **Roles** option to display the Role List page. From the Role List page, search for specific roles by name using the Find Roles area on the left side of the page. Enter a keyword and select the **Search** button to return results. The list of roles includes the role name, description, and number of users to whom the role is attached. To view additional details about a specific role, click directly on the role name from the list. Scheduling permissions, editing permissions, administrative permissions, and data profiles are represented in each section as applicable.

Portals Configuration

Each Primary Responsibility available for People records in the application has portal settings that may be configured. A portal administrator can configure whether or not a user can configure their own portal page, which web parts are available to them if so, and even the default appearance of their portal page.

6 Calendars

Calendars are traditional and activity-based to help users and guests quickly find events and/or academic sections taking place on campus.



The information displayed and filtering options presented are configurable within saved calendar definitions.

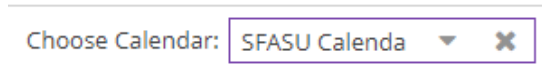
Saved calendar definitions include activity, room, and resource filters and custom filtering availability.

Depending on the role-to-calendar association, a user may have access to a single, restricted calendar with only pre-defined filters, multiple calendar options with pre-defined and/or custom filtering, or no assigned calendars at all with full access to filtering and calendar viewing options.

Using the Calendar

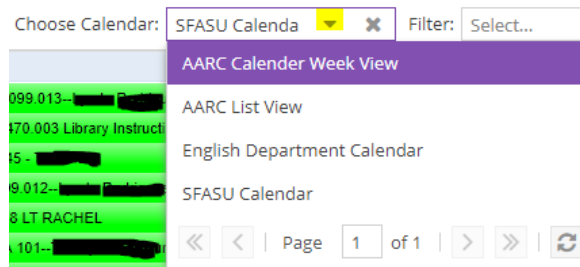
To access the Calendar from within Astra Schedule, click the Calendar option on the Calendars landing page.

A default Calendar will be displayed as defined by the calendar permission within your role. The default calendar view and filter are determined by the calendar definition.

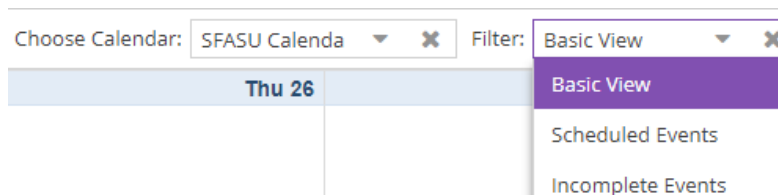


Choosing a Calendar and Filter

If more than one calendar is available, choose between different saved calendars using the Choose Calendar drop-down menu.



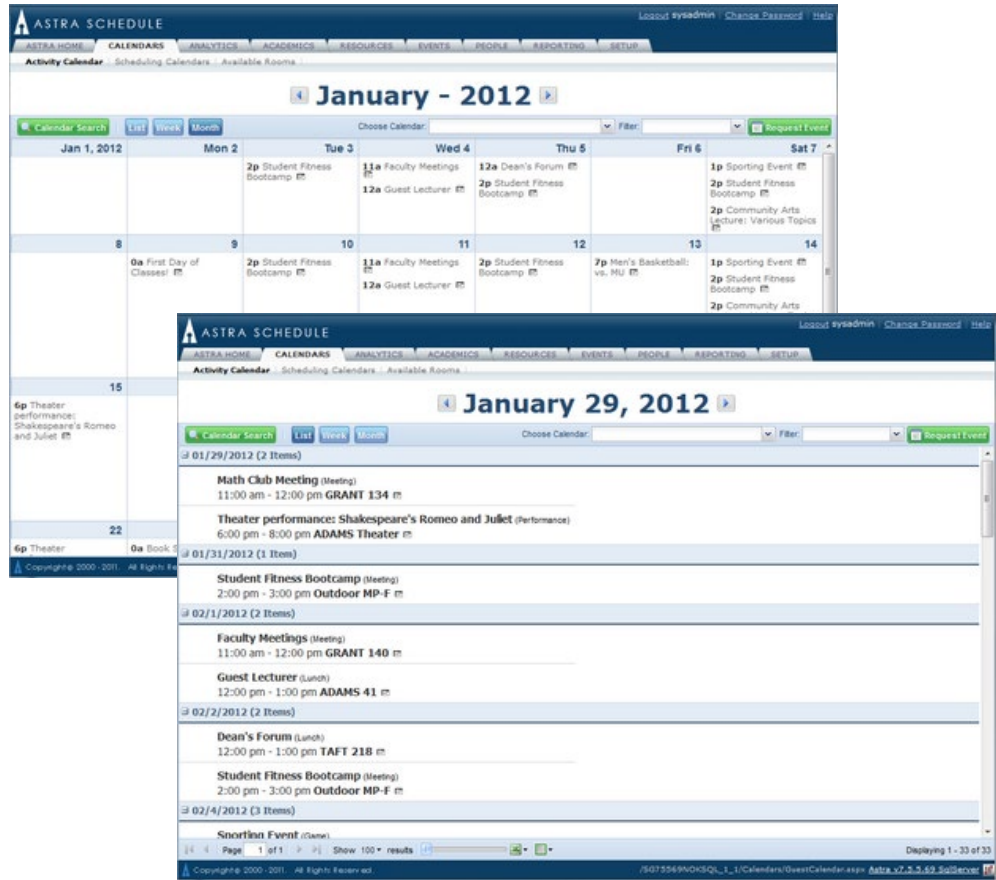
Pre-defined filters can be associated with saved calendars. If the selected calendar includes pre-defined filters, a user can choose between the saved filters using the Filter drop-down menu. Upon selecting a filter, the contents of the calendar being viewed will update accordingly.



Notes:

Choosing a Format

Using the format option buttons, choose Month, Week, Day, or List to change to the desired format.



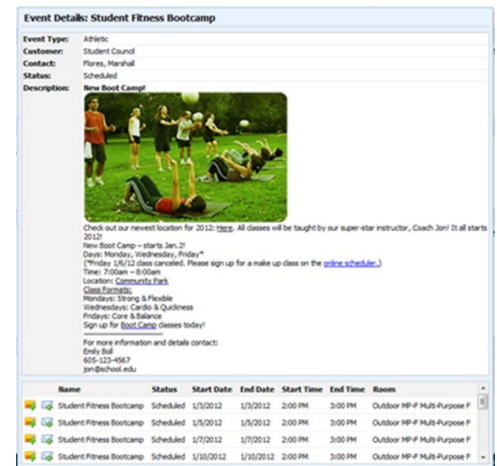
The **Month** and **Week** views of the calendar continue to expand each cell in size to accommodate the number of activities on a given day, up to 100. A link is displayed for any larger size to access the List view.

If a day has more than 100 activities, a link is provided to view the contents of that day in the **List** view.


The **List** and **Day** views display a list of activities, grouped by date.

Each activity displayed on the calendar, regardless of format, includes a small info dot (ⓘ) to the left of the activity summary.









Hover your cursor over this ⓘ to see more details about the activity, including contact information, a full description, and other meetings for the activity, if applicable.



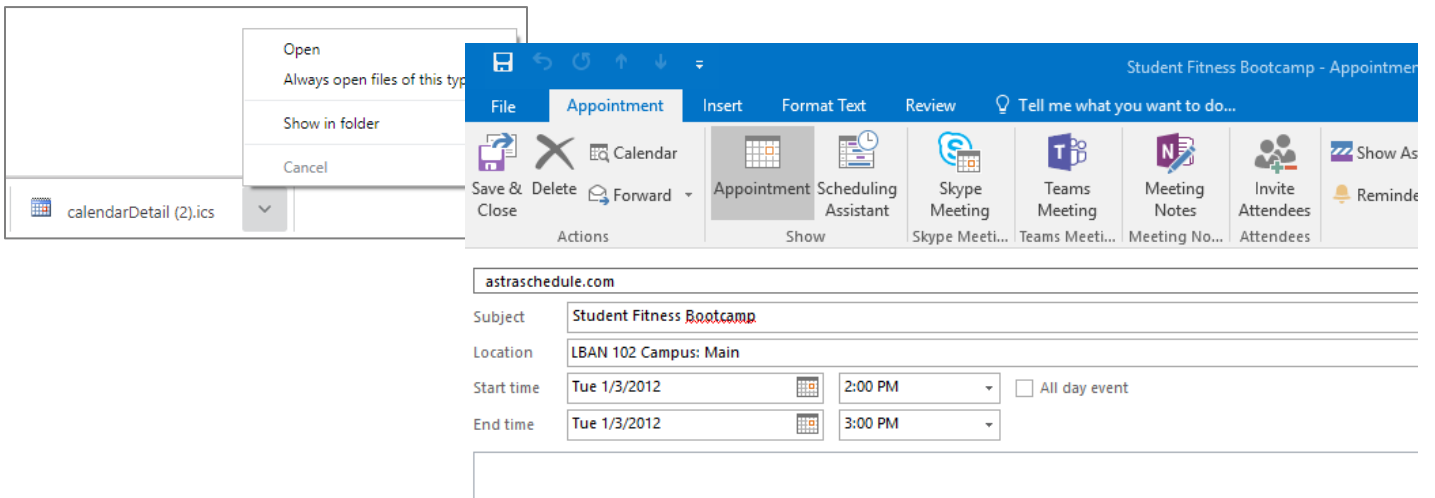
Adding an Activity to Your Personal Calendar

Activities on the Astra Schedule calendar may also be added to a personal calendar. When hovering over the  for an activity, the detail view also includes the option to add items to a calendar.

In the detail view, click the Add to Calendar icon for the activity as shown below.

Name	Status	Start Date	End Date	Start Time	End Time	Room
  Student Fitness Bootcamp	Scheduled	1/3/2012	1/3/2012	2:00 PM	3:00 PM	Outdoor MP-F Multi-Purpose F
  Student Fitness Bootcamp	Scheduled	1/5/2012	1/5/2012	2:00 PM	3:00 PM	Outdoor MP-F Multi-Purpose F
  Student Fitness Bootcamp	Scheduled	1/7/2012	1/7/2012	2:00 PM	3:00 PM	Outdoor MP-F Multi-Purpose F
  Student Fitness Bootcamp	Scheduled	1/10/2012	1/10/2012	2:00 PM	3:00 PM	Outdoor MP-F Multi-Purpose F

The event will download showing at the bottom your computer screen and will give you a list of options. Click Open and your Appointment window will open allowing you to save to your calendar.



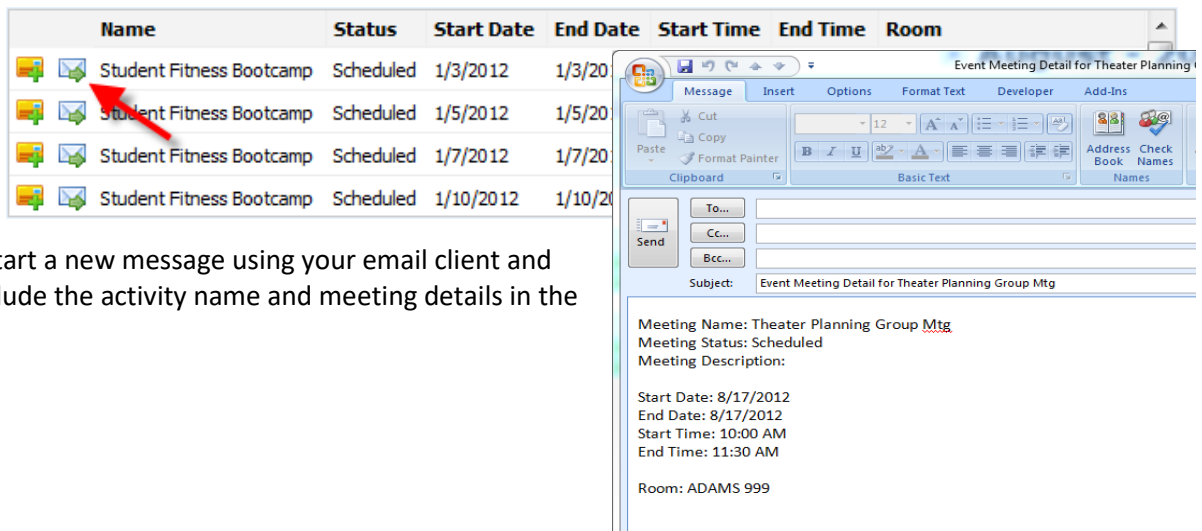
The screenshot shows a web browser window displaying an appointment for "Student Fitness Bootcamp" on "astraschedule.com". The appointment details are as follows:

Subject	Student Fitness Bootcamp	
Location	LBAN 102 Campus: Main	
Start time	Tue 1/3/2012	2:00 PM
End time	Tue 1/3/2012	3:00 PM

At the top of the browser window, a context menu is open over the "Add to Calendar" icon, with the "Open" option selected. The browser's ribbon includes "Appointment", "Scheduling Assistant", "Skype Meeting", "Teams Meeting", "Meeting Notes", and "Invite Attendees".

Emailing an Activity

If desired, you may email the details of an activity to anyone you choose. While hovering over the info icon to view details, click the email icon next to the activity you wish to send, as shown below.



The screenshot shows an email client window with a new message being composed. The subject line is "Event Meeting Detail for Theater Planning Group Mtg". The email body contains the following meeting details:

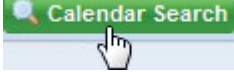
Meeting Name: Theater Planning Group Mtg
 Meeting Status: Scheduled
 Meeting Description:
 Start Date: 8/17/2012
 End Date: 8/17/2012
 Start Time: 10:00 AM
 End Time: 11:30 AM
 Room: ADAMS 999

The email client's ribbon includes "Message", "Insert", "Options", "Format Text", "Developer", and "Add-Ins". The "Send" button is visible at the bottom left of the message composition area.

The system will start a new message using your email client and automatically include the activity name and meeting details in the body.

Custom Searching and Filtering

If allowed by the calendar being viewed, users may create a custom search or filter the activities being displayed.

Start by clicking the button at  the top left of page to expand the Filter panel.

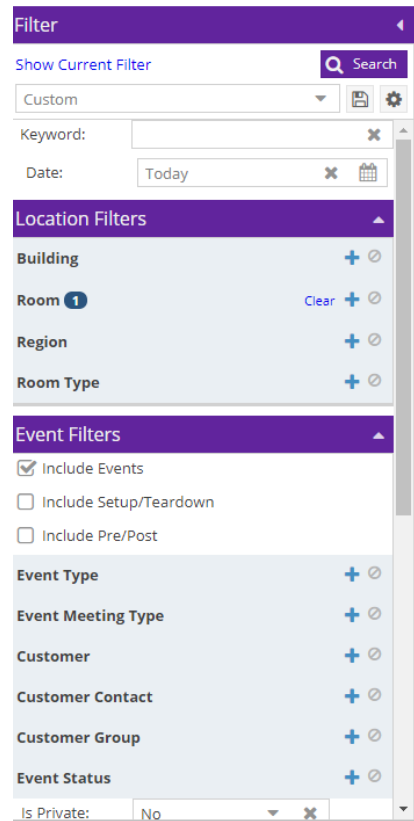
The calendar definition includes settings that determine custom filter panel availability and options. Filter types and the choices within each type may be limited.

Keyword search, start date, and various filter choices are available within filter panel.

Use the + button, if provided, to select one or more filter items from the list. Always click Done in the selection box before searching. Also, you may toggle filter items on and off by removing or adding the check marks where there is a box.

Click on Clear to clear any filters in that selection. To Clear All filters at the left of the filter box it may say Clear All or Show Current Filter, click on that selection until it says Clear All, then click one more time.

After filters are selected click **Search** to update the calendar results its current format.



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in

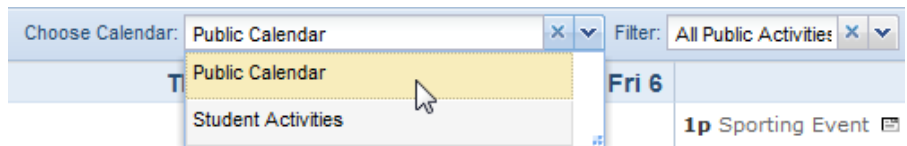
Scheduling Grids

Scheduling grids are room- or resource-centric scheduling tools to help visualize when schedule-able items are available. Scheduling grids include room and resource grids for identifying space- or equipment-based reservations.

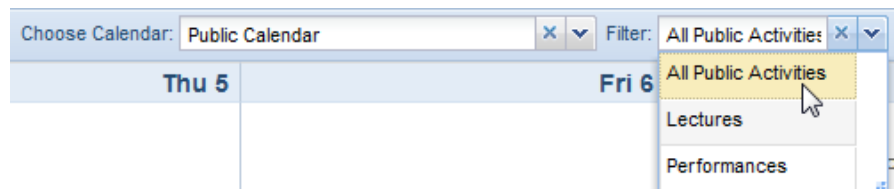
Access the grids by clicking on the Scheduling Grids option from the Calendars tab (if available to user role). A default grid (determined by the grid definition) will be displayed as defined by the calendar permission within the role.

Choosing a Grid and Filter

If more than one Scheduling Grid is available for the user, they may choose between different options using the Choose Calendar drop-down menu. Upon selecting a new saved grid, the display will refresh with that grid's default view and filter applied.



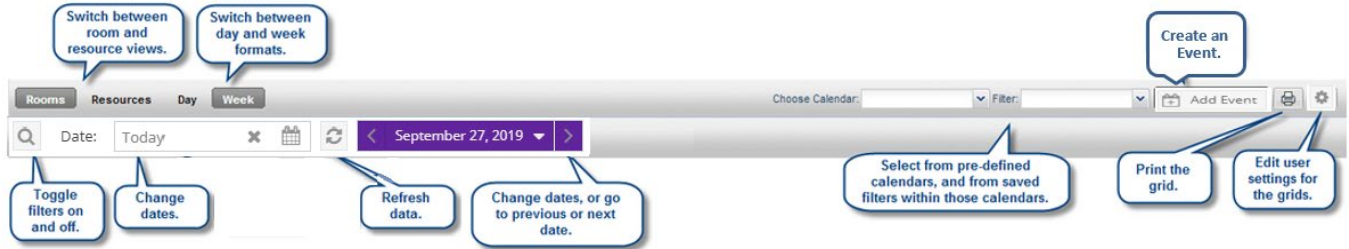
Pre-defined filters can be associated with saved grids. If the selected grid includes pre-defined filters, you may choose between the saved filters using the Filter drop-down menu. Upon selecting a filter, the contents of the grid being viewed will update accordingly.



Toolbar & Navigation

A user may choose to view either the Day or Week grid format, and navigate through a list of either rooms or resources. The list of rooms or resources is presented on the left, and activities using the applicable room or resource will appear as shaded cells in the grid to the right.

The grid toolbar, shown below, can be used to edit the date, filters, format, and settings of the grids.



At the bottom of the grid are paging controls, provided at the bottom of the screen, can be used to navigate pages, set page size, and export results.



Day & Week Format

Room #1	Buildin...	Type	Capacity	06:00 AM	07:00 AM	08:00 AM	09:00 AM	10:00 AM	11:00 AM	12:00 PM	01:00 PM	02:00 PM	03:00 PM	04:00 PM
AGRI 102 - AGRI 102	AGRI	350-Conference Room	10						ANS 250	AGN 331L/020 - Soil			AGN 331L/021 - Soil	
AGRI 108 - AGRI 108	AGRI	210 Lab-Agriculture	24											
AGRI 109 - AGRI 109	AGRI	220 Lab-Agriculture	25											
AGRI 110 - AGRI 110	AGRI	110-Classroom	93			AGM 120	ANS 301	AGN 110		AGN 110L/020 - Cro	AGN 110L/021 - Cro			
AGRI 115 - AGRI 115	AGRI	210 Lab-Agriculture	21						HRT 325/001 - Desig	AGR 100	ANS 250L/020 - Art	ANS 201/001 - Basic		
AGRI 116 - AGRI 116	AGRI	220 Lab-Agriculture	25											
AGRI 117 - AGRI 117	AGRI	210 Lab-Agriculture	32											
AGRI 118 - AGRI 118	AGRI	210 Lab-Agriculture	31				HRT 315	AGR 100	ANS 436	AGR 100	PLS 252/	PLS 252L/020 - Poul		
AGRI 121 - AGRI 121	AGRI	210 Lab-Agriculture	48					ANS 428	AEC 451/	AEC 451L/020 - Fart	AEC 451L/020 - Fart	ANS 150/022 - Intro		
AGSH 100 - AGSH 100	AGSH	220 Lab-Ag Mech	12											
AGSH 105 - AGSH 105	AGSH	220 Lab-Ag Mech	10											
AGSH 110 - AGSH 110	AGSH	220 Lab-Ag Mech	25											
AGSH 112 - AGSH 112	AGSH	220 Lab-Ag Mech	20											
ART 106 - ART 106	ART	110-Classroom	59						ART 280	ART 281	ART 281	ART 282		ART 487/001 - ART 587/001
ART 112 - ART 112	ART	210 Lab-Art	22											
ART 121 - ART 121	ART	210 Lab-Art	20						ART 395/001 - Art Developm	ART 110/001 - 2D Design		ART 110/002 - 2D Design		
ART 125 - ART 125	ART	220 Lab-Art	16						ART 470/001 - Advertising De	ART 170/001 - Introduction t		ART 270/001 - Advertising De		
ART 131 - ART 131	ART	210 Lab-Art	13						ART 317/001 - Digital Photog	ART 462/001 - Digital Media		ART 464/001 - Digital Media		
ART 133 - ART 133	ART	220 Lab-Art	15									ART 564/001 - Digital Media		

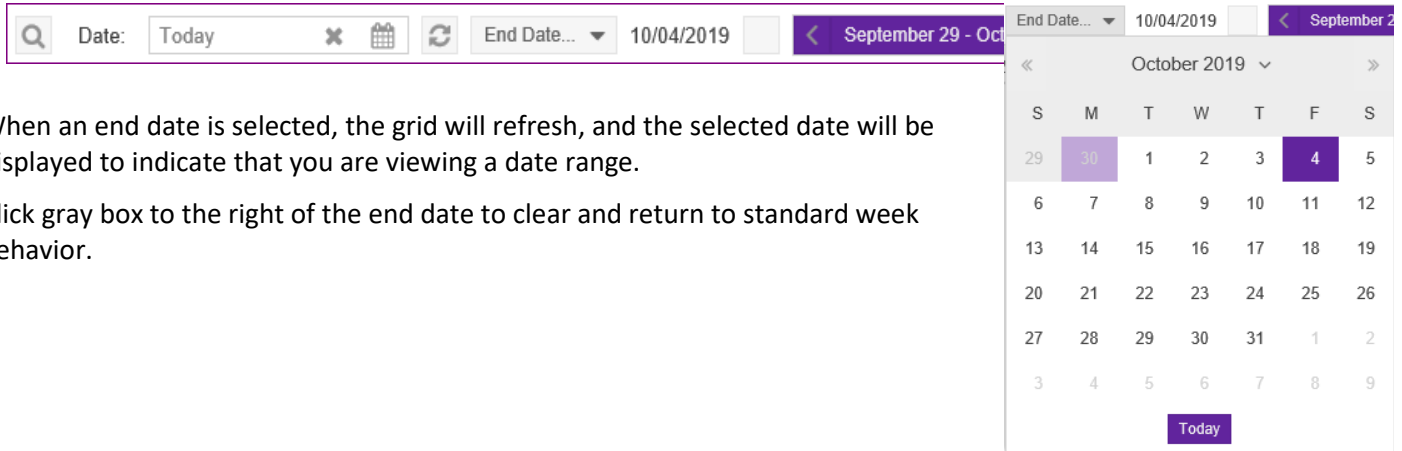
The Day view of the Grid displays each item's schedule on a single row. This view provides immediate feedback on availability and usage for a single day, across a page full of rooms at a time.

The Week view of the grid shows after selection of the room or resource chosen from the list on the left. This view provides immediate feedback on availability and usage for a full week or date range.

Room #1	Capacity	Type	Sun 09/29	Mon 09/30	Tue 10/01	Wed 10/02	Thu 10/03	Fri 10/04
EDAN 127 - EDAN 127	50	210 Lab-Human						
EDAN 128 - Culinary Cafe KIt...	20	550 Demonstrati						
FAAX 101 - FAAX 101 - Lana...	3	220 Lab-Special						
FAAX 105 - FAAX 105	20	210 Lab-Music						
FERG 171 - FERG 171	25	110-Classroom						
FERG 173 - FERG 173	26	110-Classroom			08:00 AM ENG 20900			09:00 AM ENG 20900
FERG 174 - FERG 174	25	110-Classroom				09:30 AM - 10:45 AM ENG 436/001 - Forensic Linguistics		09:30 AM - 10:45 AM ENG 436/001 - Forensic Linguistics
FERG 175 - FERG 175	25	110-Classroom			11:00 AM ENG 20900	11:00 AM - 12:15 PM ENG 131017 - Rhetoric & Composition		11:00 AM - 12:15 PM ENG 131017 - Rhetoric & Composition
FERG 176 - FERG 176	25	110-Classroom				12:00 PM ENG 20900		12:00 PM ENG 20900
FERG 177 - FERG 177- Engl...	25	210 Lab-Writing						
FERG 179 - FERG 179	42	110-Classroom			12:30 PM - 01:45 PM ENG 132000 - Research & Argument			12:30 PM - 01:45 PM ENG 132000 - Research & Argument
FERG 181 - FERG 181	25	110-Classroom		01:00 PM ENG 13101				01:00 PM ENG 13101
FERG 182 - FERG 182	25	110-Classroom		02:00 PM ENG 13201				02:00 PM ENG 13201
FERG 183 - FERG 183	30	110-Classroom						02:00 PM - 03:15 PM ENG 426/001 - Women and Science Fiction
FERG 184 - Computer Writin...	25	210 Lab-Writing						
FERG 271 - FERG 271	25	110-Classroom						04:00 PM - 06:30 PM SFA 226/002 - Employment Practicum
FERG 273D - FERG 273D	14	350-Conference						
FERG 291C - FERG 291C	10	350-Conference						
FERG 292 - FERG 292	20	110-Classroom						

Additionally, the Week view includes a feature that allows a specific date range. When viewing a date range instead of a single week, all activities that occur during the entire range will be shown together.

To specify a date range while in Week view, click the "End Date..." option to the right of the date selector.



When an end date is selected, the grid will refresh, and the selected date will be displayed to indicate that you are viewing a date range.

Click gray box to the right of the end date to clear and return to standard week behavior.

Room & Resource List

In both the Day and Week format, a list of rooms or resources is displayed on the left. In Day format, each row represents that item's schedule (based on filter settings) for the date selected. In Week format, users must click a room or resource on the list to view its weekly schedule.

7 Academics

Sections

Academic sections are imported from Banner and all listed here. Use the filters to view information for a section(s): Title, Enrollment, Meeting Dates & Times, Instructor, Room Location, etc. If a change needs to be made, make it in Banner and it will appear in Astra after the next daily batch import. . **Astra Schedule cannot be used to create or modify any section data other than room assignments.**

Notes:

8 Settings (People, Customers, Rooms, Notifications)

Notes:

People

Astra Schedule users, instructors, students, customer contacts and institution contacts can all be People records in the application. A person can be associated with one or more of these various roles, or Responsibilities.

Find People

1. Navigate from the Settings tab to the People option.
2. Enter the name and select + by **Responsibilities** for the list of options to narrow the search to include only people with certain primary responsibilities.
3. Click Search.
4. Click the Person's name to view additional details.

Add a Person

Certain people records may be added to the system automatically during import processes. For example, when academic section records are imported, the instructors assigned to those records are added to the database. Other contacts may be added manually at any time.

To add a new person record:

1. Click the Settings tab.
2. Select the People option.
3. Click the Add Person button.
4. Specify contact information (Unique email required) in the Person Info box.
5. Select a Primary Responsibility from the drop-down list.
6. From the Responsibilities list, select all responsibilities applicable to that person.
7. If the person is a customer contact for events, associate them with a customer.
 - a. Clicking on the Associate New Customer button.
 - b. Select the associated customer using the drop-down menu and enter any contact information that is unique to their association with the customer.
 - c. Click Save to save the customer contact information and return to the person's record.
8. If the person is an instructor copy their general contact information or specify new contact information specific to their role as an instructor.
9. Save to add the person to the system and return to the list.

Customers

A customer is an organization, department, or other entity used in event scheduling to which one or more individual contacts are associated. Both the customer and contact record are used during event scheduling and maintained in the People section.

Find Customers

Find an existing customer:

1. Click on the Settings tab.
2. Select the Customers option.
3. Enter all or part of the customer name in the search field to the left.
4. Click the Search button.
5. Click on a customer name to view additional details.

Create Customer Groups

Before creating customer lists in Astra Schedule, it is recommended to first create a list of Customer Groups. Customer Group is a customer field that categorizes customers for reporting purposes. Examples include Student Group, Alumni Association, Community Organization, Faculty and Staff, etc.

Create new Customer Groups:

1. Click on the **Settings** tab.
2. Under Configuration click on the **Master List** option.
3. Select **Customer Group** from the drop-down list. The list of Customer groups is displayed.
4. Find the blank entry fields at the bottom of the list.
5. Enter a new Customer Group name and description and click **Add**.
6. The new Customer Group entry will appear on the list.

Use the delete icon to the right of the entry to remove a Customer Group from the list, or use the edit icon to modify the name and/or description.

Add a Customer

Add a new customer to the system:

1. From the people tab, navigate to Customers=>Add a Customer.
2. Enter the name, contact information, and notes in provided fields.
3. Place a check next to any applicable Customer Groups (at least one is required).
4. Select a Price Level to which the customer should be associated.
5. Click Save to save the new customer records.

To create and add contacts to the Customer record:

1. Click **Add Existing Customer Contact** or **Associate New Contact** in the Customer Contact Information panel.
2. If Contact is already a user set up in Astra, select **Existing** Customer Contact from the drop down, then Save and Close. Otherwise skip to next step.
3. To **Associate New Contact**, answer "Yes" to save changes to the customer record at the prompt.
4. In the Customer Contact Info panel, add any contact information specific to the relationship with the customer. Otherwise provide the basic contact information in the Personal Info panel.
5. Click save to return to the customer form.

9 Events Scheduling and Management

Ways to Create Events

From the Calendar

You may use the Quick Event form to create a new event directly from a calendar. This option is designed to be a convenient way to quickly generate an event when you want to first identify a space using the calendar or grid views. To facilitate the event creation process, the Quick Event form automatically detects the time and date, and pre-filters your room selection to match your calendar or grid filters.

Create a new event directly from one of the calendar views:

1. Open a daily, weekly, or monthly calendar or resource grid.
2. Click on an open cell in the grid where you would like to place an event. The Quick Event form will open.
3. Enter an event name.
4. Select an Event Type from the drop-down list.
5. Edit the times and dates if needed.
6. Select a Customer from the drop-down list.
7. Select a Contact from the drop-down list.
8. If the calendar filter selection includes multiple rooms, the Location drop-down list will include the rooms in your filter. Select the room into which you would like to schedule the event.
9. Click **Save Event** to save and return to the calendar.

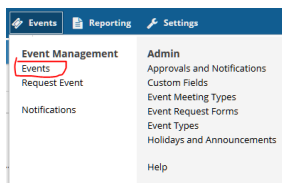
Notes:

Event Request Forms

This method of event creation makes the entire event form with all features and fields available when creating a new event. This option is designed to make the most detail available during the creation of a more complex event. This is the same form that is used when editing an existing event record. Currently SFA has NO Event Request Forms. The admin in each department should have access to Astra and be able to create and event. Otherwise e-mail SpaceManagement@sfasu.edu with detailed request information.

From the Events Tab

- 1) MySFA
 - 2) Resources
 - 3) Astra Schedule
 - 4) Events Tab  then Events
- Best way for SFA users to access Astra Schedule.**



5) + Add (Top left under Event List blue bar)

Event List		
	Add	
Event Name ^1	Reservation	
Administrator's Forum-Jana Redfield	20181004-00013	
Charles Schwab Recruiting - EAH	20180829-00033	
Computer Science Club Meetings	20180717-00058	

6) Select **Single**, **Multiple...** more than one w/ random dates, or **Recurring...** ex. Weekly, every Tues & Thurs

• **Single** - Enter **Start & End Time & Date of Event**

• **Multiple** - Enter **Start & End Time**, Select **Date(s)** on the Calendar, Click on

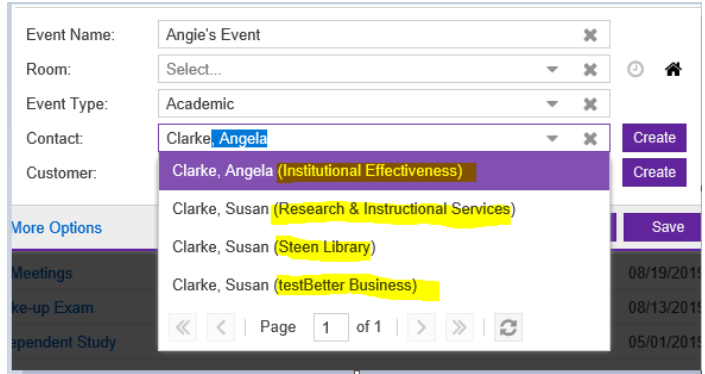
Today's date is always light blue or purple in case you don't know what day of the week it is. Everything that is dark has been selected for the event.

Once you are done picking your days, you click on the arrow icon and move the days into the Meetings box. You'll be prompted to give the meeting a name.

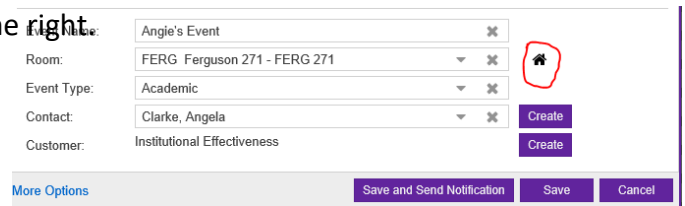
• **Recurring** - Enter **Start & End Time**, Select appropriate circle under **Recurrence Pattern** (Daily, Weekly, Monthly, or Yearly). Enter date pattern is to **Start**, and either how many **Occurrences** or **End**

by Date.

- 7) Enter an **Event Name**.
- 8) Skip **Room** for now. We will come back to it.
- 9) Enter **Event Type** from drop down. Select the type that best matches your event.
- 10) Enter **Contact** for event. Drop down button or start typing last name and it should show to select.
- 11) The **Customer** will fill in automatically for whichever department the Contact is connected with. If you are not finding your matching Contact and customer, contact Angie at 1038 to help.



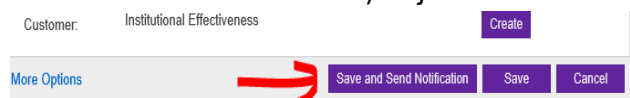
- 12) Now go back up to **Room**. If you know a room assignment is available to reserve, it can be selected from the drop down. Otherwise, click the little house to the right.



- a) A list of rooms will show with Filter options to the left.
- b) If needed minimize your room options using filters (specific building, room features, room types, regions of campus, etc. Just click the plus (+) sign, make your selections, CLICK DONE, and click SEARCH.)
- c) Select an available room by clicking "Available" to the right of the room name. It should turn green and say "Selected."
- d) Click OK, box at bottom left.

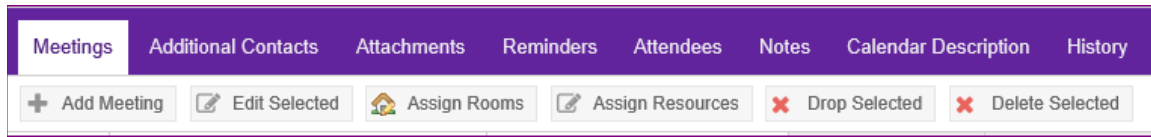
Filter	Room	Angie's Event 9/6/2019 Fri 6:00-6:30pm	Angie's Event 9/12/2019 Thu 6:00-6:30pm	Angie's Event 9/20/2019 Fri 6:00-6:30pm
	FERG 271	Selected	Available	Available
	FERG 378	Available	Available	Selected
	FERG 376	Available	Selected	Available
	HPEC 202	Available	Available	Available
	EDAN 114	Available	Available	Available
	AGRI 116	Available	Available	Available
	MUSC 108	Available	Available	Available
	HSTC 320	Available	Available	Available
	HSTC 314	Available	Available	Available
	GFNA 302	Available	Available	Available
	FERG 476	Available	Available	Available
	FERG 182	Available	Available	Available
	FERG 181	Available	Available	Available
	SWRK 201	Available	Available	Available
	FERG 176	Available	Available	Available
	BOYT 202	Available	Available	Available
	FERG 175	Available	Available	Available

- 13) **Save and Send Notification** (will save and send e-mail notification to the Contact) or just **Save**.



Event Information

Click on any Event Name in the Event List to view and be able to modify or add detail to the event. As well as the Event Name, Type, Contact, and Customer, there are more options that may be used to utilize Astra capabilities.



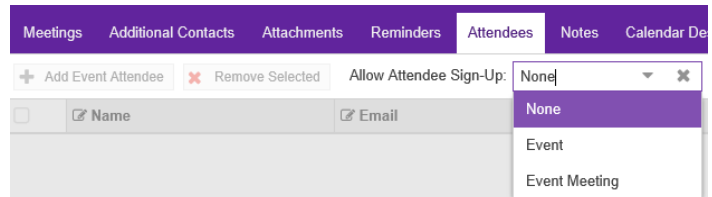
1. Meetings – Add, delete or change meetings within the event.
2. Additional Contacts – Add or remove contacts to the event for notifications.
3. Attachments – Add attachments that may apply to the event.
4. Reminders - Set up reminders that can be e-mailed to select individuals for pre-preparation items or anything that may pertain to the event.
5. Attendees – more detail below.
6. Notes – Take any before, during, or after event.
7. Calendar Description - Feature that allows you to create a different, or more visually appealing *description*.

Record Attendee Information

Attendees can be recorded for either the event as a whole (assumed) or on a meeting-by-meeting basis within an event.

To set the level at which attendees should be recorded, edit or create an event, click on Attendees tab and use the drop-down menu by "Allow Attendee Sign-Up" to select either "Event" or "Event Meeting".

An Attendees tab is provided for both the event and event meeting forms. This selection determines which of these tabs is enabled for editing.



Add Attendees

The attendee list for an event or meeting consists of basic contact information along with any notes you wish to record per attendee. This list is unique to each event or meeting.

To edit attendee information for an event or meeting, edit an event record, select the Attendees tab, then click **Add Event (or Meeting) Attendee** to insert a new attendee row in the list.

Click on the attendee fields to insert your cursor and enter information as desired.

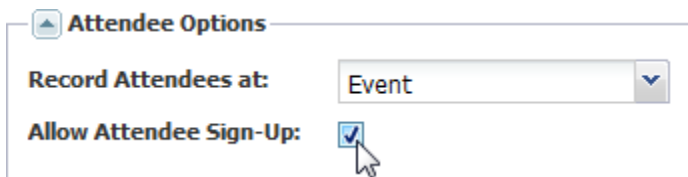
Existing attendee records may be edited in the same way, by clicking directly in the row and editing the value.

Notes:

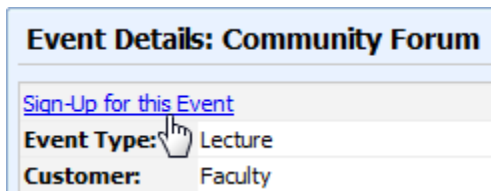
Attendee Sign-Up

You may optionally allow guests or other users with calendar access to voluntarily sign up for events or meetings. Again, this option is controlled by the event scheduler through the Attendee Options within the event record. Once enabled, the activity detail pop-up provided from the activity calendar when hovering on an activity will include an option to sign up for either the event or per meeting, depending on configuration. Sign-up is limited by event estimated attendance or event meeting max attendance, as applicable, but may be manually overridden by an event scheduler within the event.

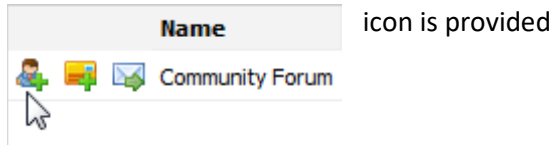
To enable attendee sign-up, create or edit an event, expand the Attendee Options section, and place a check in the box next to Allow Attendee Sign-Up, as shown below.



Now that sign-up is enabled, find the event on the activity calendar and hover on the info icon to display the detail pop-up. If sign-up is enabled for the event, a link is provided near the top of the window.



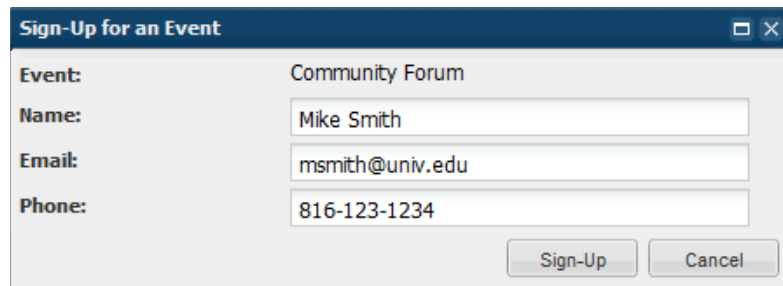
If sign-up is enabled for the meetings, an icon is provided next to each meeting.



When a guest or other user clicks on one of these options, a small form is displayed for entering their contact information. Upon clicking **Sign-Up**, their contact information is saved to the attendee list for the event or meeting in question.

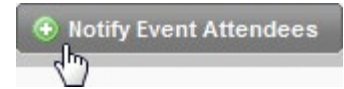
Email Notifications

Two options are provided to help simplify the sending of email messages to attendees. First, you may generate a blank email message to an attendee directly from within the attendee list. This option is handy for asking general questions of attendees or providing information. Second, you may include the list of attendees as



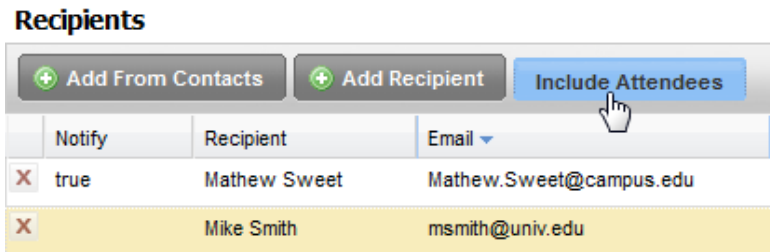
recipients in the standard Event Summary email. This is a convenient way to send information regarding dates, times, and locations to all attendees at once, if appropriate.

To generate an email to a specific attendee, open the attendee list, place a check in the box next to their name, and click **Notify Event (or meeting) Attendees**.



An email form is displayed with the attendee email address pre-populated. You may edit the recipient list, subject, and body as desired, and click **Send** to send the message.

To include attendees as recipients for the standard Event Summary message, click **Send Event Summary** from within an event. In the Recipients section of the event summary message form, click **Include Attendees** to add the attendee email addresses to the list of recipients.



10 Reporting

Astra Schedule includes a report server component that is installed with the application providing integration with Crystal Reports. This integration allows institutions to take advantage of industry standard report generation tools, using Astra Schedule to make them available to users either on-demand or by subscription.

A single Crystal Reports 2008 license is included in the Astra Schedule installation to support the reporting infrastructure and integration. Crystal Reports 2008 is installed on the server to allow the Astra Schedule report server to upload and deliver reports. This installation includes a single client license as well for use when editing or creating new reports for users. If a custom Crystal Report is required, please contact the Academic Space Scheduling & Utilization Office.

Notes:

Approval / Notification Groups

Approver Groups are groups of users to whom event, room, and/or resource requests are routed for approval. Each Approver Group can include one or more users and one or more specific event request forms, rooms, or resource groups. Generally, Approval Groups are based on Colleges' and Departments' associated facilities. When an Event is created for a room not in the 'Owner's' (person that created the Event) approval group, a request is submitted to the approval group for the requested room.

Create a new event request Approver Group (with admin permissions):

1. Access from the **Events** or **Settings** tab.
2. Click **Approvals and Notifications**.
3. Click the **Add** button.
4. Select Approver from the drop-down list and click **Add Group**.
5. Enter a name for the group.
6. Click the **Add User** button to browse a list of application users.
7. Select a user from the drop-down list and click **Add** to add them to the user list on the Approver Group form. Repeat as needed.
8. Click the **Add Event Request Form** button.
9. Select the desired request form from the drop-down list and click **Add** to add the form to the Approver Group.
10. Click **Save** to return to the Approver Group list.

Find a Report

Astra Schedule includes a collection of commonly used reports that are available for use immediately upon installation. Additional reports may be added to the system by an administrator.

Navigate Reports:

1. From the **Reports Tab**, select the **Reports option**.
2. If all or part of the report name and/or its group name is known, enter this information in the Find Reports section in the upper left corner of the page and choose **Search**.
3. At list display, click on column heading to sort the list by that header in ascending or descending order.

Run a Report

Run a Report:

1. From the Reports Tab, select the Reports option.
2. Identify and click the report name to view.
3. If report includes any user-configurable parameters, these options are displayed in the panel to the left of the report viewer. Click the **Edit** button to the right of the parameter to change and enter or select the required value in the dialog box.
4. Click **Apply** to refresh the report to reflect parameter entries.

Notes:

Subscribe to a Report

Users may subscribe to any available report to have that report delivered to them in a specific format at regular intervals. Additionally, an administrator may subscribe others to reports on their behalf.

Enter a report subscription:

1. From the Reports Tab, select the Reports Subscriptions option.
2. Click the **Add Report Subscription** button to show the Report Subscription Details form.
3. Select the report for subscription from the list.
4. Enter a name for the subscription.
5. Select the desired delivery format from the Output Format list.
6. Select the frequency with which the report should be generated from the Report Schedule drop-down list.
7. Click **Add** to add subscribers to the report.
8. Select a subscriber from the drop-down list and click **Save** to add them to the list.
9. Specify parameters to use in the report if applicable.
10. Click Save to save the subscription and return to the list.