ASTRA 7.5 Quick Reference Guide

Definitions

Portal Pages: Astra Home Page, whether for a guest or a user.

Guests can access Astra by going to astra.utah.edu. From here guests will be able to view calendars, find room availability and see room photographs. They can also fill out the Scheduling Office – Special Event Application.

Users will log into astra.utah.edu and have more options than the guest page. Information regarding all events scheduled that day or week, holidays, weather, outside source links and "Astra Quicklinks" to take users through the Astra application quickly will be available. New users will be required to fill out a Security Access Form and send to scheduling@sa.utah.edu in order to receive a login and password.

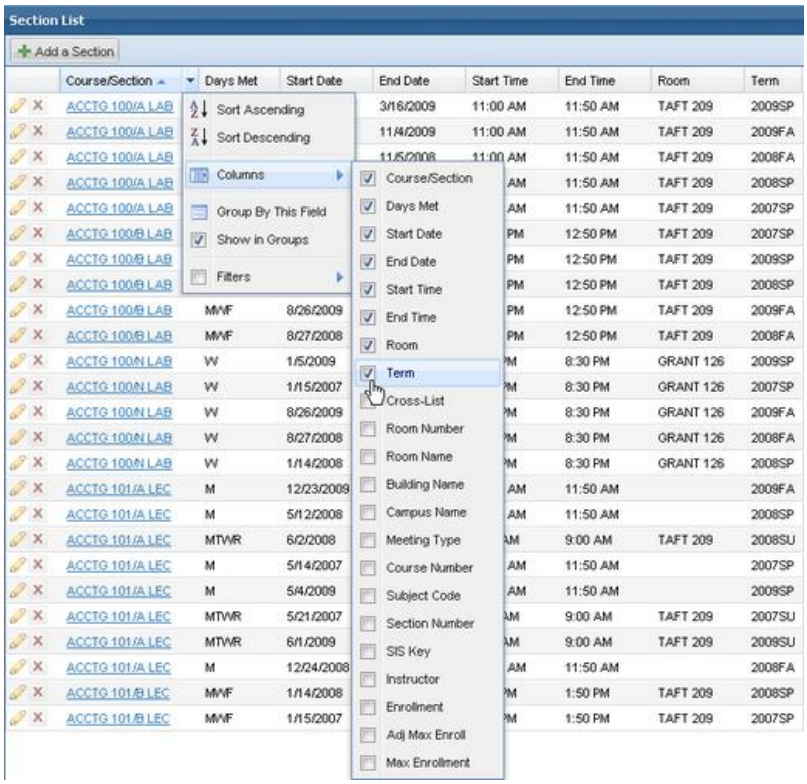
Event Type: Found at the start of an event describing the broad purpose for the event, i.e. Academic, Administrative, Community, Faculty and Student.

Meeting Type: The specific term that describes the event or meeting. This is what was formerly known, in Astra 5.2, as the "Event Type".

Event Summary: When creating an event the user will be prompted to save or finish before the event summary can be sent. Use "**Send Event Summary**" button to send confirmation.

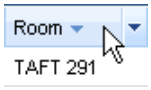
Page Formatting

Columns: You may define which columns you would like displayed on the list by clicking on the menu option for any current column and choosing "Columns". Check the box next to any column to add or remove it.

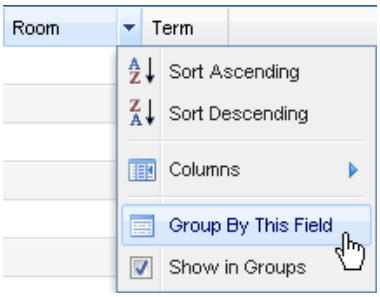


Once the list is returned the user may wish to change how the data is displayed within the list.

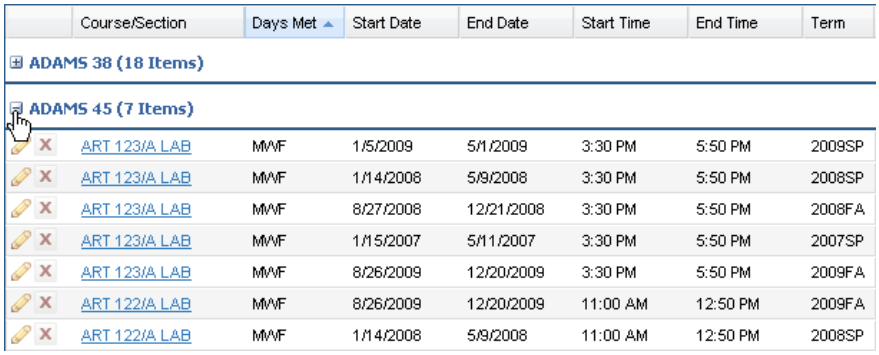
Data can also be sorted by clicking on any of the column labels. Click again to reverse the sort order. An arrow is shown on the column to indicate the sort direction.



Groups: To display the data in groups, click on the menu for a column and choose the "Group By This Field" option.



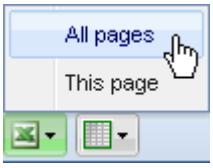
The data will be grouped by the selected field. Each group may be expanded or collapsed as needed.



Order: Customize the order of the columns displayed on the page by clicking and dragging a column to the desired position. Arrows will appear to indicate your position.

Navigate Pages: The event list may include a number of pages. Use the pagination controls at the bottom of the list to page through the results; configure the number of records displayed per page, and jump to a specific page.

Excel: To export to Excel, click the Excel button at the bottom of the list and choose the record set you would like to include.

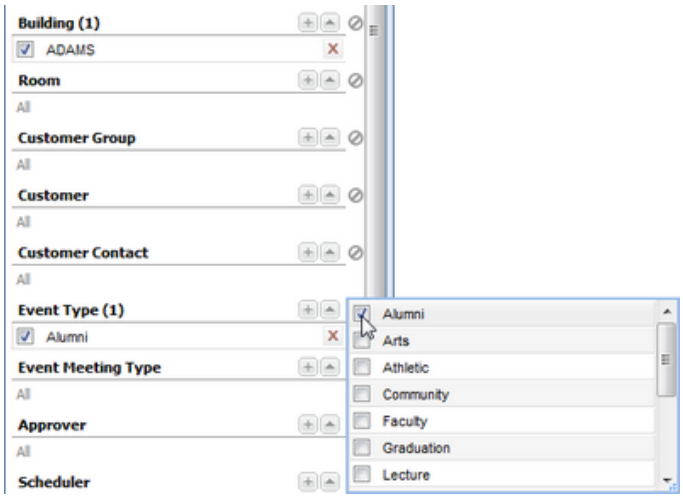


Filters

Filters can be applied from almost any page within the application. The desired search criteria can be entered in the filter (typically found on the left of the page) and then **Search** must be selected in order to receive desired information.

To search for specific records, enter search criteria in the "Keyword" text box at the top of the filter panel and click **Search** to view your results. The keyword search option searches event/meeting name and reservation number.

To limit the number of records displayed, enter filter criteria in the panel on the left. Select one or more of the available filter items as desired to further limit the event records listed.

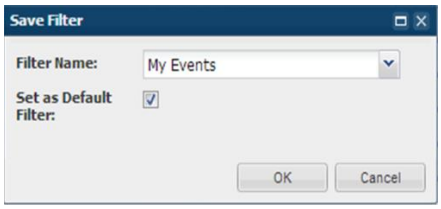


My Events Filter: The My Events filter option on the Events list page provides a simple way of finding only those events and event requests originated by the user. The list is pre-filtered based on the user's login and displays only those event requests submitted by or created by a specific user. Choose "Yes" or "No" to toggle this pre-defined filter on or off.

Search and filter criteria are combined as more options are entered. Filter criteria are retained and will continue to be displayed in the future. Click **Search** to retrieve your records.

Default Filter: There can only be one default filter within each page. A filter is created by entering the search criteria and clicking on the **Save** icon in the **Search bar** at the bottom of the page.

After clicking on the **Save** icon, enter the filter name and check the box next to “Set as Default Filter”.



Manage Filters: To change a filter from the default setting or to delete a filter, click the **Manage Filters** icon next to the **Save** icon at the bottom of the page in the search bar.

Scheduling Events

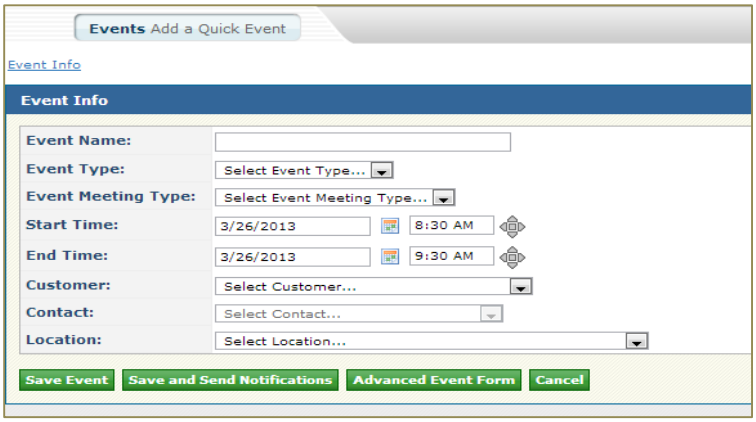
There are 3 ways to schedule an event effectively.

- **Calendar Quick Event**
- **Event List**
- **Event Wizard**

Calendar Quick Event:

To create a quick event from the calendar;

1. Click on the desired day and time on the calendar (This will open the quick event form).
2. Fill in the requested information.

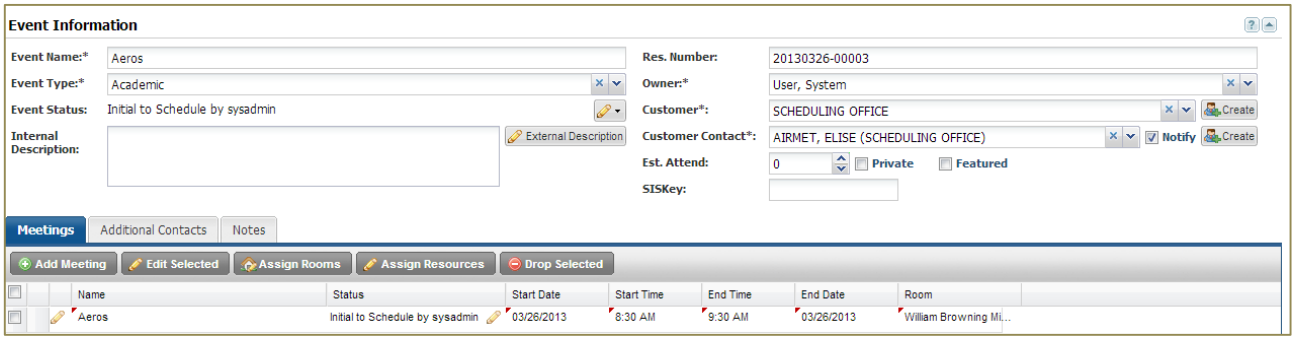


3. Choose and click one of the following three options;
   a) **Save Event** reserves the requested room for the day/time and takes the user back to the calendar grid.
   b) **Save and Send Notifications** reserves the requested room for the day/time and also sends the email summary to the assigned contact. The user will be taken back to the calendar grid.
   c) **Advanced Event Form** takes the user to a more detailed event form.

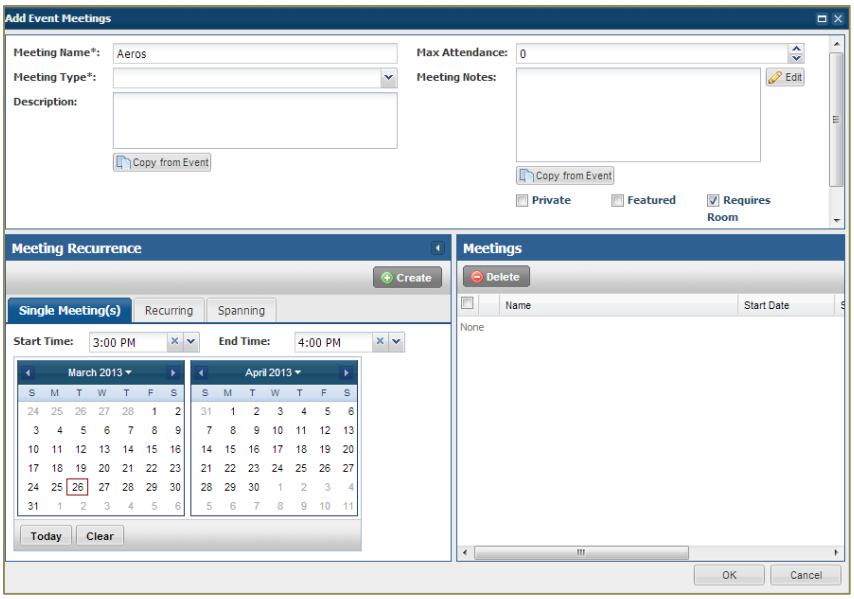
Event List:

This can be found from the **Events** tab. Under the **Events** tab click on the **Events** Link, which will display the **Event List;** this shows all events scheduled in Astra.

1. Click the **Add an Event** button.
2. Complete the event information. Boxes marked with an * are required content.

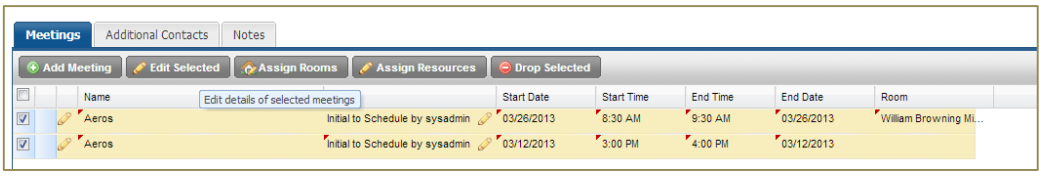


3. Additional meetings may be added by clicking the **Add Meeting** button in the meetings area of the Event Information Form.
4. Meeting days/times are created by completing the meeting information on the left and clicking the **Create** button. This should be repeated as necessary. When adding multiple meetings, be sure to uncheck any previously selected days or they will be added to your additional meeting.



5. Clicking **Recurring Meetings** will bring up the recurring meeting tab and will allow multiple meetings to be added to the list upon completion.
6. Spanning meetings can be added to the list by selecting the **Spanning** tab.
7. Once all meetings have been added to the list, click **OK** to return to the **Event Information** Form.
8. Individual meetings may be edited by clicking on the **Meeting Name** field in the **Meetings** area.

9. Check the gray box next to one or multiple meetings and click **Edit Selected, Assign Rooms,** or **Drop Selected.**



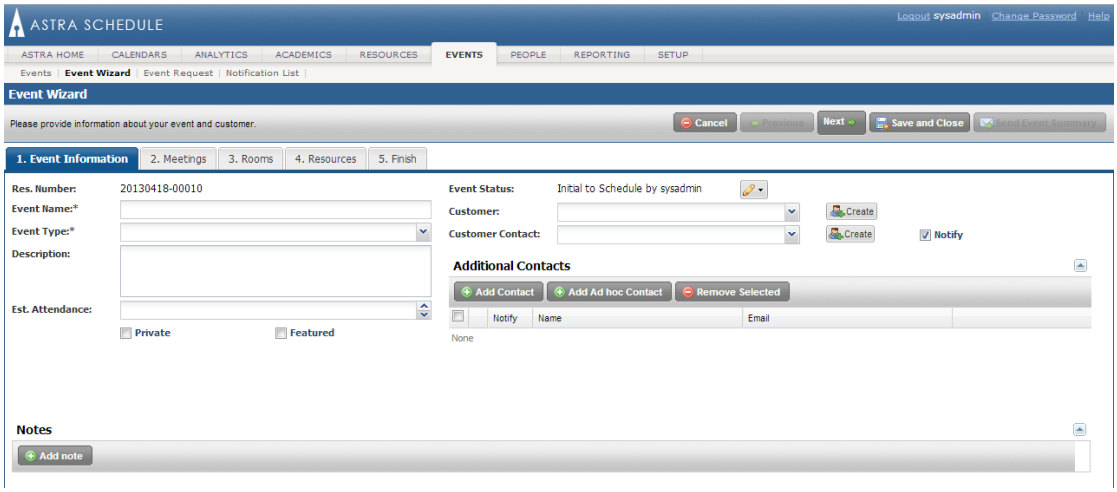
10. Additional Contacts may be added by selecting the **Additional Contact** tab and then selecting the **Add Contact** (already established People record).
11. Notes may be added by selecting the **Notes** tab, and then clicking the **Add Note** button.
12. Click **Save** to reserve the space in Astra. If desired, click **Send Event Summary** to send the confirmation email to contacts.

Event Wizard:

The **Event Wizard** tool allows the scheduler to create simple or complex events in a format that leads the user through the process step-by-step.

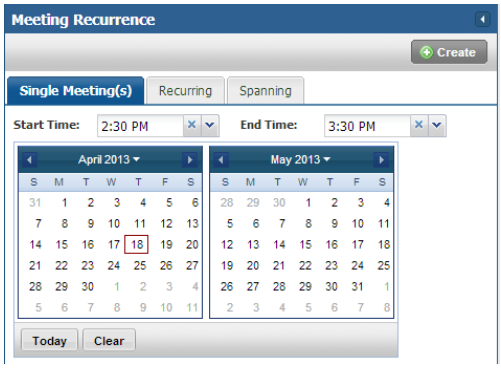
To create an event using the **Event Wizard**:

1. Select the **Events** tab then click the **Event Wizard** link.

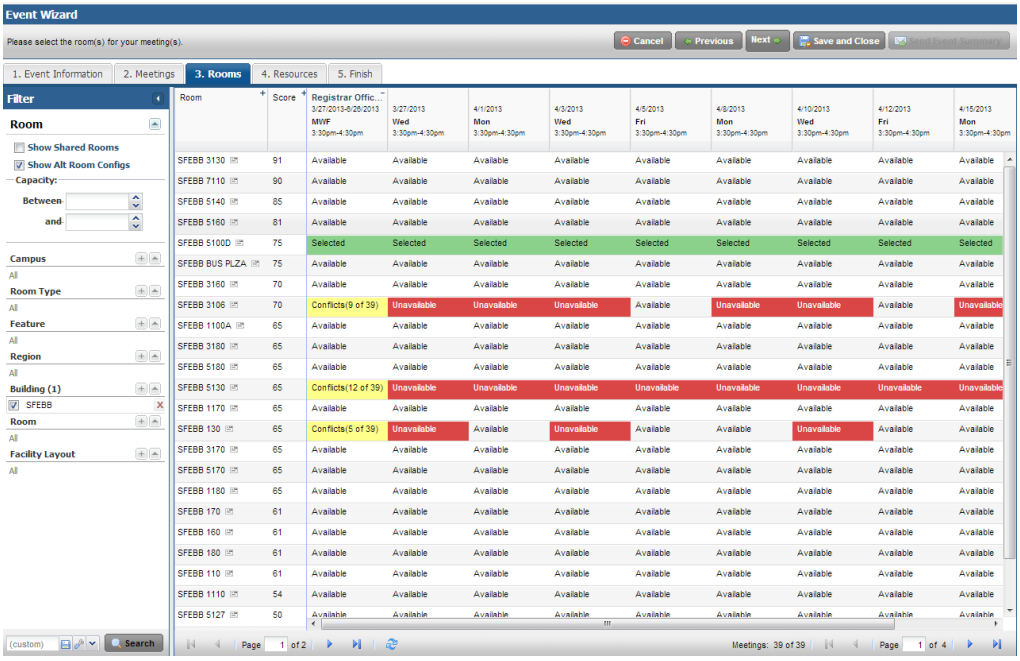


2. Enter the **Event Name**.
3. Select the **Event Type**.
4. Enter the **Customer, Customer Contact**, and any additional information.
5. Click **Next** or the **Meetings** tab to continue.

6. On the **Meetings** tab (step two) users will fill in the necessary information of Meeting Name and Meeting Type then proceed to set up the various meeting patterns (days/times) that make up the event, under the Meeting Recurrence Tab. After selecting the days/times, click the **Create** button.



7. Once all required meetings are included in the meeting list click **Next** or the **Rooms** tab to continue.
8. In the room selection form, single or multiple rooms may be selected for each meeting.
    a. To select the same room for every meeting listed, click the first column listed after the "Score" column (this is the overall event information and is not an actual meeting)
    b. To select a room for an individual meeting click the grid space under the meeting. To remove a selected room, click the space a second time.
    c. Mouse over spaces marked "Unavailable" to see what is currently booking the room.
    d. Mouse over the room comment icons to see room details.
    e. Use the filter tools (on the left of the form) to filter the room list.
9. Once rooms have been selected, click **Next** twice or click on the **Finish** tab to continue.



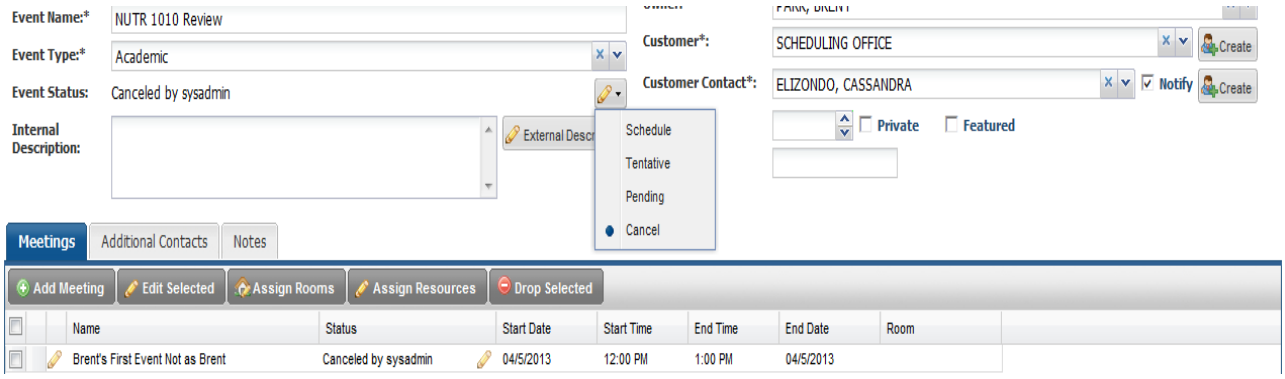
10. Here the event information can be reviewed.
11. Click the **Finish** button to complete the event.

12. Once completed, the user may choose one of the following options:
    a. **Send Event Summary** – sends the summary confirmation to the customer contact.
    b. **Edit this Event** – takes the user into the newly created event for editing.
    c. **Schedule another Event** – takes the user to the beginning of the Event Wizard.

Editing/Canceling an Event

Edit: From the Event List an event can be edited by clicking on the edit pencil found to the left of the event. If selecting the event, the user will need to click the **Edit** button and then click the edit pencil to change any information pertaining to the specific meeting.

Cancel: To cancel an event, display the event in edit mode. Click the edit pencil next to **Event Status:** and select cancel. The room will automatically be dropped after clicking **Save**.



Help

Within the application most pages have a **Help** link directing the user to the Astra Schedule User Help manual. Here the search tab can be selected and specific information can be searched.

If you need any further assistance please contact the Scheduling Office either at scheduling@sa.utah.edu or at 801-581-7854.