



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 space on the Alvernia campus. Astra Schedule interfaces on a “real-time” basis with the PowerCampus software; classes scheduled and changes made in PowerCampus will appear in Astra Schedule. Rooms assigned to classes in Astra Schedule will display in PowerCampus. Changes made in one system appear in the other, usually within a minute.

2. Understanding the Data in Astra Schedule

Classes and Final Exams

All classes scheduled in PowerCampus display in Astra Schedule. Final exams scheduled in PowerCampus appear as classes in Astra Schedule in separate terms. These terms are designated with an “/finals” at the end.

Facilities

All classrooms, class laboratories, special class laboratories, auditoriums, conference rooms, and meeting rooms are in the Astra Schedule (and PowerCampus) facilities database. Campus offices and other proprietary facilities which are not scheduled for instructional or event use will not appear in Astra Schedule (or PowerCampus). 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 Alvernia 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.

3. Accessing

Astra Schedule Browser Configuration Requirements include:

Mozilla Firefox 2.0 or higher, Google Chrome, Safari 6.0 or higher.

Logging into Astra Schedule

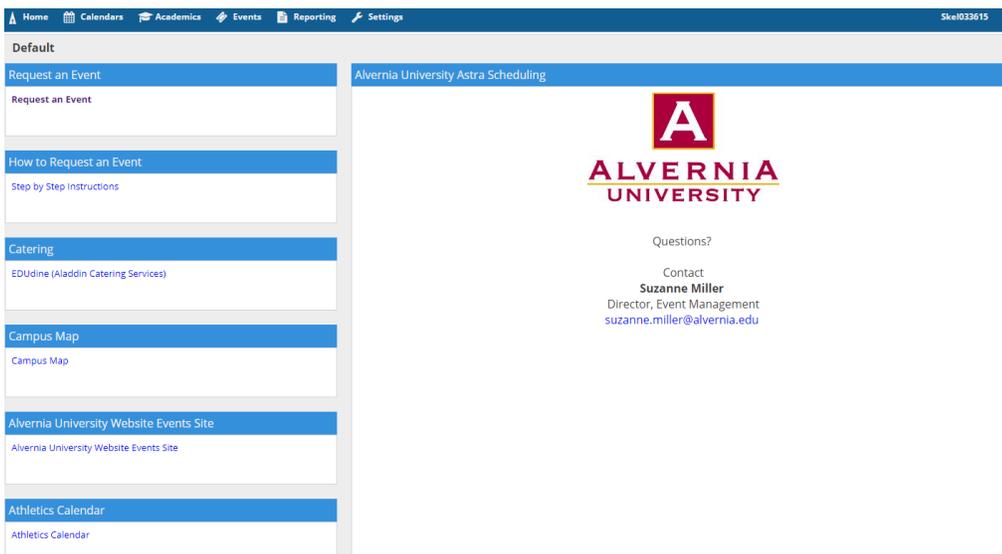
Using an internet browser, go to the following internet address for the login page link:

<https://www.aaiscloud.com/AlverniaU>

The login credentials are the Alvernia Username and Password.

Note: There is a 15 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.

Notes:

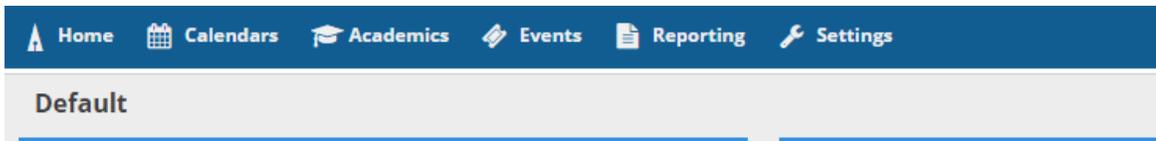


4. Navigating Astra Schedule

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. 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.

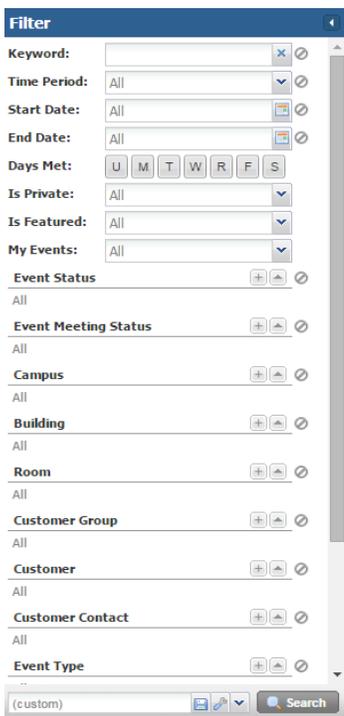
NOTE: Collapse the filter panel on a list page to make more room for the list results or task. Simply click on the panel arrow icon in the upper right corner of a panel to hide it. Click again to show the panel.

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. Notice that the items are added automatically to the filter list.
3. Click the Search button to update the list page.
4. Remove the filter item temporarily by removing the check mark while on the list page, or remove it permanently (until the next time you set the filter) by clicking the X button.
5. Unless a default saved filter is configured, the last filter used is remembered for the next time you visit the page.

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.

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 at the bottom of each filter panel where applicable.

When filter selections are made in the filter panel of a list, the saved filter tool will display "custom" to indicate that manual filtering is being applied.

Saving Filters

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.

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.



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.

Notes:

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.

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 icon to the right of the activity summary. Hover your cursor over this icon 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 info icon 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.

Select "Open with" and choose your calendar. Or save the iCalendar file and import it into a calendar later.

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.

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 **Calendar Search** button 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 the filter panel.

Use the + button, if provided, to select one or more filter items from the list. Otherwise, you may toggle filter items on and off by removing or adding the check mark.

Filter items may be permanently removed by using the red X.

Use the "not equal to" option to the right of each filter type to eliminate certain choices.

Click **Search** to update the calendar results in its current format.

Click **Search List** to immediately jump to the List format displaying all matching activities from the start date forward.

Scheduling Grids

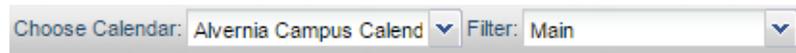
Scheduling grids are room- or resource-centric scheduling tools to help visualize when schedule-able items are available. Scheduling grids include room and resource grids for identifying space- or equipment-based reservations.

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 predefined 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.

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



Day & Week Format

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.

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 the X to remove the end date 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. Sections – Academics

Terms

Academic terms, (aka "semesters" or "sessions"), are used to define a group of academic course sections that are offered during a period of time. A term designation is associated with all course sections and managed through administrative logins only. View Terms Select the Terms option from the Academics tab to view a list of terms created in the application. Search for a specific term or terms and limit the number of terms displayed using the Find Terms area on the left side of the page. Click on the term name to view details.

8. People Records & Customer Creation

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 Responsibilities from 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 People 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 People 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 **Setup** tab.
2. 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 **Associate New Contact** in the Customer Contact Information panel.
2. Answer "Yes" to save changes to the customer record
3. In the Customer Contact Info panel, provide any contact information specific to their relationship with the customer. Otherwise provide the basic contact information in the Personal Info panel.
4. 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.

Using the Event Wizard

The Event Wizard guides users through the event creation process, providing access to commonly used event scheduling features in the order that makes the most sense. The tool is designed to help beginning users complete the steps required for event creation, and as a quick, simple way for advanced users to create basic events.

The Event Wizard can be accessed from the **Events** Tab by selecting **Event Wizard**.

Navigation through the Wizard is possible by using either a series of tabs provided at the upper left side of the form, or by using the navigation buttons provided at the upper right side of the form.

Once started, save progress at any time if there is an event name by clicking **Save and Close**. The incomplete event will be saved to the event list to be finished at a later time.

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.

Create a new event using the event form:

1. Click the Events tab and select the Events option.
2. From the event list page, click .
3. Enter Event Information including Event Name and Event Type (from list) NOTE: Edit the event status only if you do NOT want the event to be scheduled (i.e. Tentative or Pending).
4. Enter an internal description (only visible on the event form) if desired.
5. Optionally, click to add a rich text description.

NOTE: The external description will appear in the hover content on the calendars, grids, and list pages. Additionally, HTML content can be included to provide images and formatting, and links can be included to other sources of content.

6. Select a primary Customer Contact for the event from the list.
7. Select the Notify option if you would like the Customer Contact included in the notification recipient list by default.
8. Enter an Estimated Attendance.
9. Optionally, check a box to make the event Private or Featured.

Create Meetings

Create a new Meeting:

1. Select Add Meeting.
2. Enter a Meeting Name if different than the event name.
3. Select a Meeting Type from the list.
4. Enter a meeting description.
5. Adjust the Max Attendance value if different from the event record. This value is used to filter your room search to appropriately sized rooms.
6. Enter Meeting notes or click Copy from Event.
7. Enter date and time information and specify recurrence information if applicable.
8. Click **Create** to add your meeting(s) to the meeting list panel on the right.
9. Repeat steps as needed to build a list of all additional meetings you would like to add and click OK.

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 a request is routed from a specific request form or for a specific room, all users in the appropriate Approver Group will receive notification of the request.

Create a new event request Approver Group:

1. Access from the Events or Setup 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.

Notification List Preferences

Attendee management includes the option to record attendee data for events, allow guest calendar visitors to sign up for events, and send email messages to attendees from within an event.

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. Whether attendees are to be recorded at the event or event meeting level is determined by the event scheduler by editing an Attendee Option.

To set the level at which attendees should be recorded, edit or create an event and expand the "Attendee Options" section beneath the event information. Use the dropdown menu 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.

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. Signup 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.

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.

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.