Last Update:
August 2009
Release 7.3

# VII

# *Administration:*

# *General Overview*

This lesson is specifically designed to introduce system users to the look and feel of the web-based application.   This lesson will cover the common features throughout Astra Schedule, the location of key components and basic user navigation.

*Astra Schedule VII - Training Manual*

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# ASTRA SCHEDULE

## Table of Contents

- Deliver an overview of the Astra Schedule System

- Provide an understanding of the main user interface

- Identify the location of key scheduling components

- Introduce calendaring and portal functionality

**Lesson Objectives**

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**Common Practices**

- Costly conflicts and errors associated with manual scheduling

- Dual entry and errors due to SIS system / Scheduling incompatibility

- Inability to support multiple users across campus

- Unavailability of a Web client resource

- Lengthy scheduling processes and unrealistic deadlines on course

scheduling

- Misuse of resources, resulting in inaccurate forecasting for growth potential

- Lack of reporting needed to influence change

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- Enterprise calendaring with real-time conflict checking

- SIS integration

- Distributed scheduling capabilities

- Web-based solutions

- Optimized scheduling

- Scenario capabilities

- Resource utilization reporting

**Best Practices**

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**Concept Introduction**

Ad Astra Information Systems evolved from The Shaver Partnership, an innovative architecture firm formed in 1915 with the original mission of educational facilities design and – beginning in the 1950's – higher education space planning and analysis.  After decades of helping colleges and universities with resource and scheduling issues, our founder Tom Shaver chose to leverage this experience to provide solution services supported by an integrated, campus-wide scheduling system that can be configured to fit the unique needs of each institution.  The result is Astra Schedule, a software package using the latest technology that helps colleges and universities manage their resources, analyze data, and plan growth like never before.

## Notes:

In addition to this enterprise scheduling software package, Ad Astra has created additional tools and services for the advancement of course offering processes, greater student retention, higher on-time graduation statistics, and detailed space utilization analysis.  For more information on any of these areas, please visit our website at www.astraschedule.com, or contact your Regional Account Manager at (888) 343-1092.

**Welcome to Astra Schedule. Solutions that fit.**

## Portal Overview

Now in a web-based format, Astra Schedule has exciting new capabilities for easier access to and dissemination of scheduling information starting with the guest portal capability.

Once the system has been installed at a customer site, anyone visiting the designated URL will find information made available to the public through a customizable portal.

This portal page may contain web parts linked to information within the Astra System, other internet sites or RSS feeds. Additional pages may also be made available to the "Guest" role, including customizable calendars and resource lists.

**Public calendars tab, for event and academic information.**



**Holiday list from the scheduling system.**

**Local weather information from RSS feed.**

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### Vocabulary Terms:

Portal: Customizable web pages that allow for immediate access to desired features and information.

Web Parts: Modular web components that allow users the ability to create a web portal containing information from various systems or locations.

RSS Feed: Really Simple Syndication is a format for syndicating constantly updated information such as news, weather, blogs, etc. This is a widely used format for information sources available on the internet.

System users will then select the login option available in the upper right corner of the web page to enter the scheduling system.

**What is the benefit of the guest portal?**
Allow your guests to view a daily list of events, weekly calendar, or print public scheduling reports from the front page, not to mention request forms for events and equipment.

## Notes:

Once logged into the system, each user will have access to a personalized portal based on their system login. Like the guest portal, items available to **Astra Home** will be selected by the administrator, but may then be modified by the user to contain personally relevant information for immediate review.
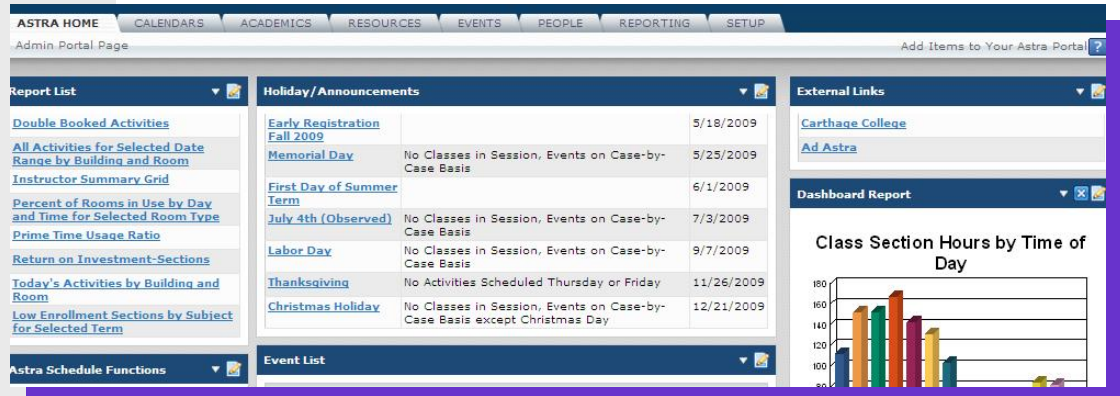


This may include scheduling information from the system, shortcuts to system features, or external RSS feeds.

Additional tabs available to users based on their individual settings are:
- **Calendars** (provides scheduling views for both resources and activities)
- **Academics** (contains sections and academic scheduling tools)
- **Resources** (inventory management including room and equipment editing)
- **Events** (event meeting information and event scheduling tools)
- **Reporting** (reports, configuration tools and subscription features)
- **Setup** (system settings and administrative functions)

### Portal Settings

During system implementation the administrator will need to configure the portal options. To select the options available to the guest and/or personal portal pages the administrator will follow these steps:

1. Login to the system with Administrative rights.
2. Click the **SetUp** tab.
3. Click the **Portal Configuration** link.
4. Select the portal currently being configured from the **Portal Page List**.
5. Click on the **Edit** button to choose the available web parts for this portal page.
6. Once the parts have been selected, the page layout may be configured using the **Click to configure portal page** link.
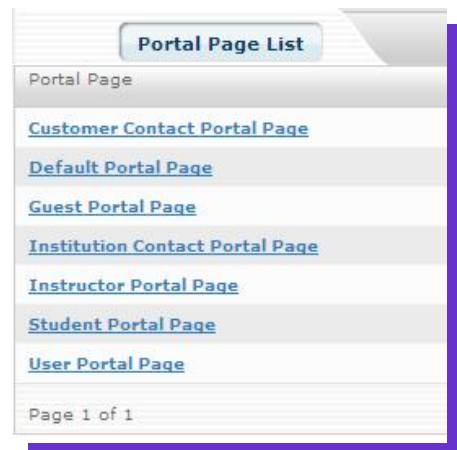


Items placed on a default page by the system administrator may be edited, but not removed by the user during customization.

A default configuration may be completed for each of the available portal pages by the system administrator during implementation.

## Customizing Portals

Portal pages are configured or customized using the following steps:

To add web parts to the portal page:

1. Users will click on the **Add Items to Your Portal** link in the upper right corner of the **Astra Home** page.
2. Select the desired web parts from the **Catalog Zone** model.
3. Select the desired position or zone from the drop-down menu. (Each portal has 3 columns.)
4. Click the **Add** button to add the web parts to the portal page.

Once added, web parts may be edited or removed using the icons in the web part header. Depending on the type of web part, data included may be filtered and titles may be customized to fit. For all web parts, the display zone and display order may be changed.

**Catalog Zone**
Select content for your portal

☐ Calendar
☐ Event List
☐ Yahoo Weather
☐ Astra Schedule Functions
☐ My Events List
☐ Dashboard Report
☐ External Links
☐ Holiday/Announcements
☐ Report List
☐ RSS Feed

Add to: LeftZone ▾   **Add**   **Cancel**

**Yahoo Weather** ▾ ☒ ✏

**Conditions for Kansas City, MO at 8:54 am CDT**
(Mon, 25 Aug 2008 8:54 am CDT)

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**Exercise #1**
Janice does not work with academic sections but must often create events, answer questions on upcoming events, and send event reports to interested parties throughout campus on demand. Create a personal portal for this user type.

**Notes:**

The **Calendars** tab allows users and guests (if desired) an overall view of scheduled resources and activities. With filters, searches and optional views this feature will easily become one of the most commonly used areas of the application.

💡 To create a quick event from the calendars, a user with proper security settings may click on any date/time to create the activity. For more information, see the **Activities - Events** training manual.

Calendars Overview

On the **Calendars** tab, many options may be made available to the user. This may include calendars and filters previously configured by an administrator, viewing options, a resource search tool for finding available rooms and equipment and access to create and edit personal filters.

**Current Filter Information**

**Available Viewing Options and Resource Search Tool**

**Preconfigured Calendars**

**Preconfigured Filters**

**Calendar View Tabs**

**Date Selector**

**Filter Options**

If not assigned a default filter, users will initially be viewing all activities in all locations (restricted only by user access settings) which may involve a vast amount of data.

Users with access to preconfigured calendars may change the view and data by selecting a new item from the **Calendar** drop-down menu.

💡 This date selection tool is available throughout the application. Clicking on the title at the top will open a month or year selector.

Data filters are changed by selecting a new item from the **Filter** dropdown menu or by using the **Edit Filter** button. Custom filters may be saved using the **Manage Filters** button.

## Resource Search Tool

The **Search** button allows users with access to look for available room, equipment, or service resources based on the dates and times required. This is extremely helpful for finding recurring meeting pattern rooms and resources for section and exam additions as well as providing quick answers to event schedulers.



To create a new search:
1. Click the **Calendars** tab.
2. Click **Search** to open the **Available Room and Resource Tool.**
3. In the **Meetings** area click **Add New** to enter the desired meeting information.

**Notes:**

4. Continue to add meetings as necessary.
5. In the **Search Filters** area, select the resource type(s) desired. (This option controls the overall search function, regardless of filters applied.)
6. Fill out the appropriate filter information.
7. In the Search Results area, select the purpose of the search.



Event schedulers may select one of the available rooms and use the **Create Event** button to create an event based on the search.

8. Click the Search button.
9. Returned results may be printed as a report, using the Print button.

## Calendar Management

A user with access to the **Calendar Management** area will be able to create and save standardized calendars for others to view on the **Calendars** tab.



**Manage Calendars**
Manage Calendar Definitions.



To create a new calendar:
1. Click the **Setup** tab.
2. Click the **Manage Calendars** link to view the **Calendars List**.

3. Click **Add Calendar**.
4. Enter a **Name** and **Description**.
5. Select data filtering options, starting with any overall restrictions to the locations or resources that will be available to viewers.
6. To add **Pre-defined Filters** to the calendar, use the **Add Filter** button. These filters must first exist in your personal calendar tab. Select one of these filters to be the default.

**Custom Filter Items**
☑ Allow Custom Filtering
   ☑ Allow Event Filtering
      ☐ Only Allow Featured Event Filtering

☑ Allow Section Filtering Only
☑ Allow Holiday Display Option
☑ Allow Announcement Display Option
☐ Allow usage Control Display Options
☑ Allow Room Filtering
☐ Allow Resource Filtering

**Display Options ▼**

☑ Show Calendar View
☑ Show Resource Grids
   ☑ Show Room Grids
   ☑ Show Equipment/Service Grids
☑ Show List View

When adding filters, be sure that the restrictions of the filter do not conflict with the restrictions set at the calendar level.

**Exercise #2**
Janice is an event scheduler in the student union. Create two different filters for her activities based on event type and location.

**Exercise #3**
Create a standardized event calendar which includes the two filters created in Exercise #2.

## Notes:

**Holidays and Announcements** are added to the enterprise calendaring system from the Setup Master List link. This area may also be accessed from **Events** tab | **Event Admin.** area or the **Academics** tab | **Academics Admin**. area.

Holidays and Announcements

To add a new **Holiday** or **Announcement**:
1. Click the **Add Holiday/Announcement** button
2. Enter the desired name in the text box.
3. Select a **Start Date** and **End Date**.
4. Choose the appropriate attributes.
5. Optionally enter a text description and view affected activities.
6. Click the **Save** button.

| Holiday/Announcement List | | | Add Holiday/Announcement | |
|---|---|---|---|---|
| Name | Description | Start Date | End Date | |
| Independence Day | The 4th of July | 7/4/2007 | 7/4/2007 | ✏ ⊖ |
| Thanksgiving | Eat Turkey - Watch Football | 11/22/2007 | 11/22/2007 | ✏ ⊖ |
| Ground Hog Day | Ground Hog Day | 2/2/2008 | 2/2/2008 | ✏ ⊖ |
| Spring Break | No Classes | 3/1/2008 | 3/8/2008 | ✏ ⊖ |
| Last Day of Class | Last Day of Class | 5/1/2008 | 5/1/2008 | ✏ ⊖ |
| Page 1 of 1 | | Display 25 ⌄ records per page. | | 1 |

To edit an existing **Holiday** or **Announcement**:
1. Click the **edit** icon at the end of the item row.
2. Edit the text box(es).
3. Click the **Save** button.

To delete an existing **Holiday** or **Announcement**:
1. Click the **delete** icon at the end of the item row.
2. Click **OK** to remove the item.

### Vocabulary Terms:
Holiday: Dates labeled for display on a campus calendar that may affect scheduling access.

Announcement: Items of interest to be displayed on a campus calendar on a certain date. Announcements do not affect scheduling features.

Featured: A visibility status setting that allows selected events, holidays, announcements and reports to be highlighted on the portal.

### Exercise #4
Add an academic holiday to the system that allows events and an announcement. View these on the calendar.
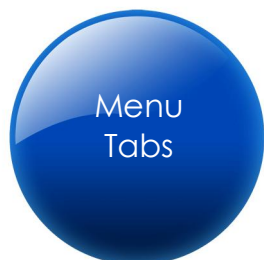
**Menu Tabs**

The remaining tabs in the Astra Schedule interface are menu tabs for the various functions associated with enterprise scheduling and system administration.

At the top of a menu tab are "Quick Link" navigation tools. The left column contains links for activity and resource management, resource assignment, reporting, and system configuration. The right column provides links to the **Help** documentation and administrative functions.

**Notes:**



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**Exercise #5**

Bob is the scheduler for the Biology department. Using the links on the menu tab, locate the sections list view, where Bob spends much of his time during scheduling.

**Notes:**

Most of the links found on the menu tabs will bring the user to a list page. This page is a list view of activities or resources within the system. From these data lists users can add, edit, and delete items based on security settings.

The list page selected appears as a sub-tab of the current menu tab. In the "Quick Links" menu, the current sub-tab name is in bold font. The left column is reserved for search, filter, and help options.

List Pages



The main column of the page will display the results of the current query and access to view or edit the details of any item returned. Users will also be able to add new items where applicable.

The left column may be minimized by clicking on the heading icons.

List pages may be sorted, by clicking on the column headings. Options are available at the bottom of the page for the number of records shown per page and for navigating through the results.

Items on this page may have additional detailed information that is available for viewing by hovering the mouse over the starburst icon next to the item's name.

**Exercise #6**
To make Bob's job easier, filter the **Section List** to the most current term and show only biology sections.

**Edit/Detail Pages**

Edit/Detail pages may be reached by selecting a specific item link in a list page, or by jumping into a specific activity, resource, setting, or person, from the calendars area.

Detail page content will vary based on the various components of the item being viewed. The top navigation links from the menu tab will remain available, while navigating individual records. Clicking on the menu links will bring the user out of the detail area and back into the appropriate list view.

The detail page will be comprised of various tools for adding/editing data including:

- Text boxes
- Date/time Selectors
- Drop-down lists
- Multiple-selection list boxes
- Checkboxes
- Data Trees

At the top of the detail area are additional quick links that allow a user to jump down the page data to the area of interest. Directly to the right of the quick links are the buttons that manage the page mode (view, edit, etc.) based on user access rights.

All of the information available on the detail pages is divided into collapsible panels for easier viewing and navigation. To expand or retract the selected area, click on the arrow icon, next to the collapsible panel header.

Context sensitive help links are also available.

## Notes:

While most of the data in the system is managed by the menu/list/detail hierarchy, more complex tasks are often handled by a "Wizard" feature, which walks the user through the task step-by-step.

Examples of this are:

- **The Event Wizard**
- **New Optimizer Runs**

When using a wizard, the user is presented with a form based decision tree which progresses to the next step by clicking on the **Next** button at the bottom of each form completed.

| 1. Event Information | 2. Create Meetings | 3. Select Rooms | 4. Select Resources | 5. Review | 6. Complete |
|---|---|---|---|---|---|
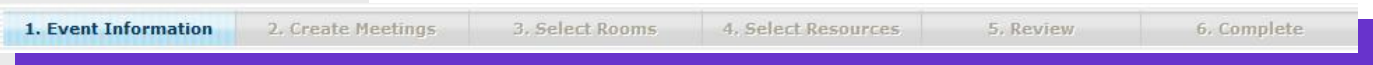
At the top of the wizard, the complete steps are listed, with the current step highlighted.

At the bottom of these pages are the navigation controls.

Previous | Next | Cancel
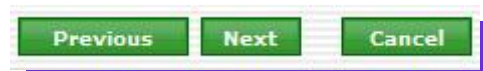
Once a task is completed, the newly created item is added to the proper inventory list for viewing and editing.

**Event List**

| Name | Reservation | Status | Type | Custo |
|---|---|---|---|---|
| ▶ CTAT | 20050719-018 | Scheduled | Administrative | Inform |
| ▶ OCS | 20050719-023 | Incomplete | Administrative | Inform |
| ▶ recurrence modal | 20070828-17 | Incomplete | Administrative | Ameri |

Page 1 of 1
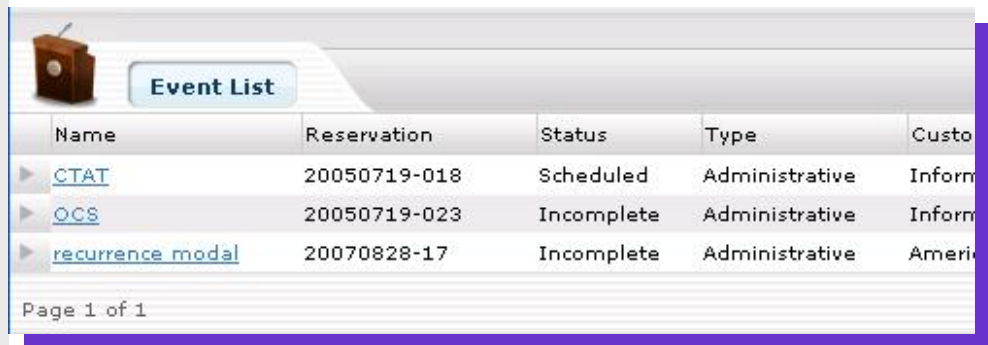
Other special areas include system configuration settings, where the menu selection takes the user directly into a detail/edit page.

These items generally do not have multiple entries and therefore, do not require search/filter views.

**LDAP Configuration**

LDAP Configuration Info

**LDAP Configuration Info**

**Fully Qualified Paths:**

**Max. Query Time (seconds):** 30

☑ Active Directory Server Type

Wizards /
Special
Features
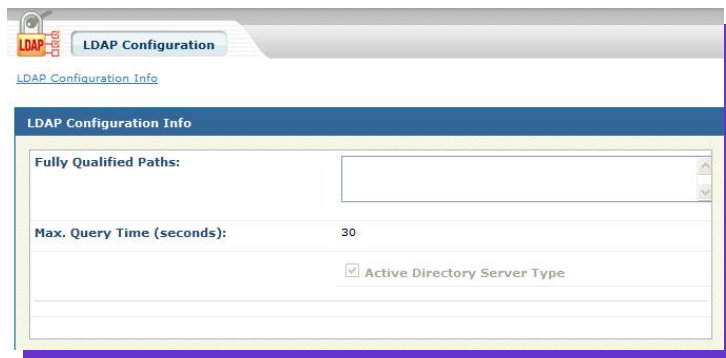
Reports

Management of the reporting system in Astra Schedule involves configuring the report server and email settings, managing the report user subscription list and report run history, and optionally editing, creating and uploading reports to the system.

The report server configuration will take place during installation and implementation of the product. These settings are located on the **Reporting** tab, under the **Report Admin** area.

MY PORTAL | CALENDARS | ACADEMICS | RESOURCES | EVENTS | PEOPLE | REPORTING | SETUP

Reports | Report Subscriptions |

**Reporting**
Access or manage reports on Astra Schedule resource and activity data.

**Reports**
View and manage reports.

**Report Subscriptions**
View and manage report subscriptions.

**Help**

Reporting Help

**Report Admin**

Report Server Configuration
Administer and configure Report Server

## Run a Report

To run a report in Astra Schedule:
1. Click the **Reports** tab.
2. Click the **Reports** link to view the **Reports List**.
3. Identify the report you would like to view and click the report name.
4. If the report includes any user-configurable parameters, these options are displayed in the left panel. Click the **Edit** button to the right of the parameter you wish to change and enter or select the required value in the dialog box.
5. Click **Apply** to refresh the report.

Main Report

✓ Apply | ✕ Delete

Select an academic term: ▼

Fall 2007

> Reports may be exported to various electronic formats. Clicking on the printer icon will export to .pdf format for printing and viewing. Users will require a .pdf reader.

## Report Subscriptions

Users may subscribe to any available report to have that report delivered to them via email at regular intervals.

To enter a report subscription:
1. Click on the **Reports** tab.
2. Click on the **Report Subscriptions** option.
3. Click the **Add Report Subscription** button. The **Report Subscription** details form will appear.
4. Select the report to which you would like to subscribe from the list.

5. Enter a **Name** for the subscription.
6. Select a format from the **Output Format** list.
7. Select the frequency with which the report should be generated from the **Report Schedule** drop-down list.
8. Click **Add** to add subscribers to the report.
9. Select a subscriber from the drop-down list and click **Save** to add them to the list.
10. If applicable, specify the parameters to be used in the report for this subscription.
11. Click **Save** to save the subscription and return to the list.



## View Report Runs

The history of report subscriptions that are generated are saved as **Report Runs** so the report and its subscription details can be viewed at a later date. The length of time this information is stored is configured during the **Report Server Configuration**.

To view the details of a **Report Run**:
1. Click on the **Reports** tab.
2. Click the **Report Runs** option.
3. Click on an individual subscription name to view the details of the run.

Crystal Reports 2008 is required to edit existing reports or create new reports to add to the Astra Schedule system. A new Crystal Report file (.rpt) can be uploaded to Astra Schedule and made available to users through the application. Please consult Crystal Reports help for more information on generating and editing report files.

**Exercise #7**
Select an academic report and create a weekly subscription for five faculty members.

**Overview
Summary**

Users that have completed this module should feel comfortable with navigating Astra Schedule, and using the web portal and calendar tools to customize the application for immediate access to the data they use most often.

Finding data in the system is handled through the main menu tabs based on the area of functionality. Once located, data may be viewed and edited based on filtered search results and customized views.

Context sensitive help links are available throughout the product for further instruction and step-by-step wizards walk the user through the more complex tasks as necessary.

For more information on any specific area of the application, please see the System User Help documentation.

**Notes:**

**Exercise #1**

Janice does not work with academic sections but must often create events, answer questions on upcoming events, and send event reports to interested parties through-out campus on demand.  Create a personal portal for this user type.

Exercise
Solutions

1. In the **Astra Home** tab click on the **Add Items to Your Portal** link.
2. Select event centric web parts for each zone.
   - **Astra Schedule Functions** (once on the portal, this can be filtered to event functions like Request Event and Schedule Event)
   - **Event List** (this might be added more than once on the portal as each version may be filtered to reflect a subset of events)
   - **Calendar** (this is recommended only in the middle zone due to the size of the calendar and can be filtered to an event only view if desired)
   - **Holiday/Announcements**
   - **Dashboard Reports** (may be filtered to an event dashboard report)
   - **Report List** (may be added more than once and filtered to specific subsets of event reports)

**Exercise #2**

Janice is an event scheduler in the student union.  Create two different filters for her activities based on event type and location.

1. In the **Calendars** tab select the calendar view button.
2. Click on the **Edit Filter** button.
3. In the **Location** filter select a campus and building.
4. Check the **Show Events** checkbox.
5. Select an event type.
6. Remove the check on the **Show Sections** checkbox if it exists.
7. Click the **View Calendar** button.
8. Click on the **Manage Filters** button.
9. **Name** the new filter and **Save**.
10. Repeat these steps, selecting a different event type in step 5.

**Exercise #3**

Create a standardized event calendar which includes the two filters created in Exercise #2.

1. Click on the **Setup** tab.
2. Select the **Manage Calendars** link.
3. Click on the **Add Calendar** button.
4. Enter a **Name** for the calendar.
5. In the **Filter Options** area click the **Add Filter** button.
6. Select the first filter and click **Save**.
7. Click the **Add Filter** button again.
8. Select the second filter and click **Save**.
9. Click the "**Set as Default**" option on one of the two filters.
10. Click the **Save** button at the bottom of the page to add this calendar to the system.

**Exercise #4**

Add an academic holiday to the system that allows events and an announcement.  View these on the calendar.

1. Click on the **Setup** tab.
2. Select the **Holidays and Announcements** link.
3. Click on the **Add Holiday/Announcement** button.
4. Enter a **Name** for the holiday.
5. Use the date tool to select a **Start Date**.  (The system will automatically set the **End Date** to the same day.)
6. Check the **Allow the Scheduling of Events on Holiday** checkbox.
7. Click Save to add the holiday to the system.
8. Click on the **Add Holiday/Announcement** button.
9. Enter a **Name** for the announcement.

10. Use the date tool to select a **Start Date**. (The system will automatically set the **End Date** to the same day.)
11. Check the **Announcement** checkbox.
12. Click **Save** to add the announcement to the system.
13. Return to the calendar page and use the date tool to find the newly created holiday and announcement.

**Exercise #5**

Bob is the scheduler for the Biology department. Using the links on the menu tab, locate the sections list view, where Bob spends much of his time during scheduling.

1. Click the **Academics** tab.
2. Select the **Sections** link.

**Exercise #6**

To make Bob's job easier, filter the **Section List** to the most current term and show only biology sections.

1. In the **Academics** tab select the **Sections** link.
2. Use the **Find Meetings** filter to restrict the list view to the current term and Biology subject.
3. Click the **Search** button to filter the list.

**Exercise #7**

Select an academic report and create a weekly subscription for five faculty members.

1. In the **Reporting** tab select the **Report Subscriptions** link.
2. Click the **Add Report Subscription** button to create the new subscription.
3. Enter in the required information, adding five **Subscribers** to the subscription.
4. Click **Save** to retain the subscription.

ASTRA SCHEDULE
SOLUTIONS THAT FIT.