Welcome to McGovern Medical School’s Internal User Guide for the Ad Astra Event Scheduling application!

The MS Internal User Guide has been created to introduce McGovern Medical School’s faculty, staff, residents and students to the Astra Schedule Event Module used for Room, Resource, Activity and Event Requests.

The Ad Astra Event scheduling tool allows a Scheduler to enter the event criteria, add meetings to the event and, when needed, identify rooms and resources for meetings. Room and resource information maintained in the database allow the scheduler to effectively select the appropriate resources for their event. Additionally, customer information is maintained and accessible through the tool.

Astra Schedule includes support for event notification, event request and resource request messaging via email. The event notification email message includes an event summary with meeting details. These messages are used as a confirmation of requests and approvals to a customer and as a general notification to identified contacts.

Each school at UTHealth has the opportunity to create Event Request Forms to include the criteria needed to request the use of shared spaced at the school’s buildings. The exceptions to these include but are not limited to events that fall into the category of Special Events (example: Weddings), External Users (non-UT attendees and guests), vendor solicitation and events with fees assigned for attendance. These exceptions will need to complete other forms to gain appropriate approvals. Additional forms may include Solicitation on Campus form and Request for Permission to Serve Alcoholic Beverages form.
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Application Access

To access the Ad Astra Application, perform the following:

1. Using web browser, enter the following link to access Ad Astra Application site:
   https://astraprod.uth.tmc.edu/astraprod/Portal/GuestPortal.aspx

2. The Guest Portal is the first view when accessing Ad Astra Application. This portal has links to all of UTHealth school homepages and some other helpful links.
Only Special Event Request Forms are available on the Guest Portal. These request forms are used for events that require prior approval submitted to Auxiliary Enterprises for permission to use State Property for their event. Examples: Non-UTHealth customers, Events that include vendors, Events that charge participants to attend, etc.

All other Event Request Forms are available to UTHealth Internal customers by logging into the application. These include Event Request Forms for UTHealth Schools, UTHealth Institutions and UTHealth Departments.

Guest Portal View of Event Request Forms with drop-down menu open:
3. UTHealth Internal users will log in using their LDAP uid and password issued by UTHealth. (This is the same user name and password used to access UTHealth email account.)

4. Click Log In button.
Internal Users’ Portal View after Logging In with UTHealth – Request an Event access option
The Internal Users’ Portal page also includes Featured Events’ List, UTHealth Holidays and Announcements
View for Internal Users after selecting the **Request an Event** option includes event request forms from various UTHealth institutions to enable internal users to request rooms at these locations.
Viewing Calendars for Room Availability

To prepare for requesting rooms, you can now check the Medical School room calendars for availability by performing the following steps:

1. Log in using your UTHealth LDAP UID and Password (same as used to access UTHealth email).
2. From the Astra Home screen, click on the CALENDARS tab.
3. Select **Scheduling Grids**.
4. Select **MSB Event Calendar** from the calendar drop down list on the upper right hand side of the calendar to view the MS rooms reserved by Conference Operations department that includes MSB, MSE and JLL buildings.
5. Select the date that a room is needed for your event, click the green arrow and the calendar will change to include the date selected.
When working in Ad Astra Schedule, there may be some time delays as the application contains large amounts of data to sort through. Please check to see if the application is processing a step before proceeding. In Internet Explorer, the icon next to the page name will spin when information is being gathered.

6. Repeat the steps above to complete all room availability checks as needed to prepare for your room request.
Select either Day or Week views of the calendar as alternate view options. In the example below, MSB G.100 availability was needed for a week in May. User selected MSB Event Calendar, a date in May, the Week View and the room MSB G.100.
Locating Event Request Forms

To schedule an event and reserve a room using the Ad Astra Scheduler, Event Request Forms are used to gather information on the event including resources needed. There are two options to provide UTHealth Internal Users access to the Request Event Forms located in Ad Astra Scheduler: Scheduling Grids and Astra Home Portal.

Scheduling Grids

This option is used most commonly when a user has already logged in to Ad Astra to perform other tasks. For example, the user wants to check calendars to see what other events are taking place at the same time as the event the user needs to schedule.

To locate the Internal Users’ event request forms using the Scheduling Grids page in Ad Astra Scheduler, perform the following steps:

1. Log in to Ad Astra and select the CALENDARS tab.
2. Click on the Scheduling Grids option.
3. Click on the **Request Event** button and follow the steps as outlined in the Requesting Events section of this guide.
Astra Home Portal

To locate the Internal Users’ event request forms using the Astra Home Portal of Ad Astra Scheduler, perform the following steps (Note: The event request forms located on the Guest Portal page is used by non-UTHealth external guests only.):

1. **Log in** to Ad Astra.

   View of Ad Astra Log in Page (UTHealth Astra users must log in to Request an Event)
2. Click on the **Request an Event** link and follow the steps as outlined in the Requesting Events section of this guide.
**Requesting Events**

To Request an Event in Ad Astra Scheduler, you must complete an Event Request Form for the building in which you choose to hold your event. The following steps will guide UTHealth Internal Users through the process of requesting an event to be held in internally shared areas within the Medical School buildings.

1. **Log in** to the Ad Astra Scheduler application.

2. Click on the **Request an Event** option.

3. Select the **MSB Event Request Form** from the Event Request Wizard pop-up window.
3. Click **Next**.

4. Fill in all blanks in the **Event Information** section.

5. Fill in all blanks in the **Event Meetings** section.
6. Select the tab for the type of meeting(s) you would like to create under **Meeting Recurrence**.

**Single Meeting(s)** allows you to create meetings on one or more independent meeting dates, or to create a meeting "group".

**Recurring** allows you to specify a recurring pattern to create a series.
**Spanning** allows you to create a single meeting that can span across midnight.
7. Select the date(s) and time(s) needed in the Meeting Recurrence box. Once you have finished selecting the date(s) and time(s), click the Create button at the top right hand corner of the Meeting Recurrence box. Dates can be selected individually or in a group in the Meeting Recurrence box.

If you do not click Create after choosing your date(s) and time(s), you will not be able to assign a room and may not show up on the submitted request.
8. If you select several individual dates in the Meeting Recurrence window, a **Meeting Group Name** option pop-up window will appear. The group name will default to match the meeting name, but you can enter the name of your choice to best describe the group of meetings. Click OK to continue.
9. In the **Meetings** box, select the dates that have been created by checking the boxes next to them on the left.

**HINTS & TIPS**

To select ALL dates and ALL meetings, click on the upper box located to the left of the Meetings’ Name column.
10. When multiple meetings are being scheduled in room(s) as a group, you can click on the ‘+/-’ expand feature to view the individual meetings.
11. Once all meetings needing a room have been selected, click the **Request Rooms** button at the top of this box to assign an available room.
12. The **Assign Room** pop-up window will open. The rooms are filtered to show all of the Medical School shared rooms.

If a number was entered in the *Max Attendance* field in the **Event Meetings** section, the room generator will show only the rooms that can accommodate the maximum number of attendees requested. The Capacity number can be changed in the Filter to allow for smaller rooms to be shown.
To view Room Details, hover over the envelope icon next to the room name and the Room Details pop-up window will open listing general information about the room including Features. For rooms with multiple setup options, click on the View Room Details link to view room configuration options. (See example screen shots on next page)
View of Room Details pop-up window:
To select a room for the meeting(s), click directly on the word ‘Available’ under the meeting date column(s) on the room choice line. The word will change to ‘Selected’ highlighted in green to let you know that it has been selected successfully.
To view individual meetings that have been grouped together, use the ‘+/-’ expand feature. This can assist you when conflicts occur for rooms you prefer to use.
To see what events have a conflicting time with your event, click directly on the word 'Conflicts' highlighted in yellow. The Resolve Conflicts pop-up window will open. You can see the Event Title and times of the conflicting events. Click OK to close window.

14. Once rooms have been selected for each meeting, click OK.
15. Review the dates, times and rooms selected. Click Submit to complete your request.
16. Click **Done**. You will receive two automated email responses. The first confirms that your event request was submitted successfully and will include a copy of your request. The second response will be sent after the Event Scheduler approves the request. Please allow 2 business days for the approval process.
Thank you for your request. Please wait for an approval email to confirm your reservations. If no response within 2 business days, please contact Conference Operations at 713/500-5048. Please visit https://med.uh.edu/soesrc to learn about our Policies & Procedures.
Available Rooms Search Tool

The Available Rooms section in Ad Astra Scheduler enables a user to search for rooms based on various filtering options to assist in finding an appropriate location for a specific event.

To use the Available Rooms Search Tool in Ad Astra Scheduler, perform the following steps:

1. Log in to Ad Astra and select the CALENDARS tab. Click on the Available Rooms option.
2. Click on the **Add New** button to begin using the search filters to locate available resources. Note: Using the required search tool button ‘**Add New**’ does not schedule a meeting but is required to help locate available rooms and resources based on search filter options selected by user.
3. Complete information on the **Add Meeting** pop up window and click **OK**.
4. Search dates will be added in Meeting(s) section. Click on the pencil icon to add items for the Search Filters section to use to refine your search as needed. Example below shows user adding the requirements of building location and room type to filter available rooms. Once all requirements have been entered, click the **Search** button.
5. Based on the search requirements entered, the Search Results section will display rooms that are available for the date and time selected.

6. Determine room choice and complete the appropriate Request an Event form to request the location for your event. (See the Locating Event Request Forms section of this guide for more information.)
Terms

Glossary

**Configuration** — The name and definition of a room’s physical arrangement used for scheduling purposes. A room may have one or more possible configurations.

**Customer** — A customer is a business, organization, department, clinic or other entity used in event scheduling to which one or more individual contacts are associated.

**Customer Contact** — A person that is associated with a customer. Customers may have multiple contacts, one of which is the primary contact. A Person may be a contact for multiple customers.

**Data** — Individual facts or items of information organized for analysis or used to reason or to make decisions. Numerical or other information represented in a form suitable for processing by computer.

**Descriptions** — Descriptions are statements or accounts intended to give a mental image of something. External descriptions of events will appear in the hover content on the calendars and list pages.

**Event** — Event is an activity which can last for one time period or for an extended length of time that can include single or multiple meetings with various times and/or dates. Example: Tradeshow = Event; Workshops during the tradeshow = Meetings

**Event Name** — The Event Name is the overall name given to one or more meetings. Examples include IM Grand Rounds, Morning Reports, Distinguished Lectures, etc...

**Event Type** — The Event Type is an event record field that describes the general category of event. The Event Type is used for grouping events, primarily for reporting purposes. Examples include Student, Community, Staff, Athletic, Corporate, or any other category that is important to your institution.
**Event Meeting Type** - The Event Meeting Type is similar to Event Type, but is specific to event meetings. This field provides a categorization for types of meetings within an event record.

**Facility Layout** – A Facility Layout is a standardized physical layout type that can be associated with the definition of a room’s configuration(s).

**Feature** - A permanent room resource or attribute that is significant from a scheduling perspective.

**Featured** - A visibility status setting that allows events and reports to be highlighted on the portal.

**Filter(s)** – Filters are data aspects used to narrow a selection. Filtering is used when a larger list exists and the user does not want or need to look at every item in the list to find their selection.

**Icon** – A graphic representation of something, a person or thing that is symbolic. Examples: 🖌 A pencil icon in Astra represents Edit and 📗 a small information icon represents more details.

**Incomplete** - An event scheduling status indicating that a room assignment is still required or that room or other resource approvals are pending.

**Meeting** – A meeting is an appointment where you invite people, select time(s) to meet and reserve needed resources. Example: Tradeshow = Event; Workshops during the tradeshow = Meetings

**Meeting Name** – The Meeting Name is given to that specific meeting or group of meetings. Examples include Exam I, Topic 101, Dr. Smith’s Lecture, Case Studies, etc...

**Meeting Type** - Meeting Types are a subdivision of courses, defining the instructional delivery type for a course section offering.

**MMS** – McGovern Medical School at UTHealth.

**Notes** – A brief record of something written down to assist the memory or for future reference. Example: Notes in Astra Event scheduling can include signed solicitation approval forms, alcohol permission forms, policy notifications, etc...

**People Record** – Astra Schedule users, instructors and customer contacts are listed as People Records in the application. Each person in Astra has the same basic contact information recorded. This information includes name, address, phone numbers, email and a primary responsibility along with other information that can be recorded.

**Permission** – Permission is a specific right within Astra Schedule to perform distinct actions; permissions include rights to view, edit or delete records and rights to request, schedule or approve various resources.

**Portal** – A central access point to information from various sources. The Astra Schedule portal is a gateway to the application and provided configurable views of various pieces of information, both internal and external.
Resource - Any schedulable item in the Astra Schedule system including rooms, equipment, food, people and services.

Room Type - Room Type is a descriptive field on a room record that defines the intended overall purpose or use for a room. Room Type is used as an academic scheduling preference.

Meeting Recurrence Types

There are three different types of meeting recurrence that can be defined: single meeting(s), recurring, or spanning. These are located in the Meeting Recurrence window by selecting Add Meeting.
To select a meeting recurrence type, click one of the **Meeting Recurrence** tabs. Here is an explanation of each recurrence type:

1. **Single Meeting(s)**

**Single Meeting(s)** is the default meeting option when creating meetings. Using this option you can enter a time, browse dates on the calendars and quickly select one or more meeting dates. You can create single date meetings or multi-select dates to create a meeting "group". Meeting groups are displayed as a single row in lists and can be expanded to view individual dates if desired. When creating multiple meeting dates as a group, the system will prompt you for a group name. This name is displayed for the roll-up event meeting row in lists.
In the example below there are 6 dates selected on the calendar, resulting in a meeting group that can be expanded to reveal the 6 instances.

Meeting groups can be edited and scheduled as a series.

If you only want single meeting instances, be sure to clear the calendar selection between meetings to avoid the creation of groups.

2. Recurring

The **Recurring** option allows you to define a pattern to create a recurring series of meetings. A recurring meeting will appear on lists as a single row that can be expanded to view its meeting dates, as shown below.
Recurring meetings can be edited and scheduled as a series.

3. Spanning

Spanning allows you to create a single meeting that occurs continuously from one day to another, across midnight. In the example below, the single meeting created begins at 8 AM on one day and ends at 5 PM two days later.
Use Spanning when an event has setups that need to remain intact for consecutive dates.  For example: If dummies are used for a CPR class and the class resumes the next morning, they can leave the dummies on the tables/floors.  By using the Spanning recurrence type to cover the overnight hours, the room will not be disturbed when not in use by CPR class.
FAQ

Q: What is the contact information for the current McGovern Medical School Ad Astra Administrator?
A: Valerie Buchanan, office: ph 713-500-5047 fax 713-500-0596, Valerie.A.Buchanan@uth.tmc.edu

Q: If an error is found while using the Ad Astra Application, how is this reported?
A: User will send a screenshot of the error along with details including what steps were taken prior to error occurrence, what browser was used when error occurred, what the user was attempting to do and note if the same error has occurred in the past to the MMS Ad Astra Administrator and MMS Ad Astra Administrator backup.

Q: What is the contact information for the current McGovern Medical School Ad Astra Administrator backup?
A: William Severson, office: 713-500-5045, William.B.Severson@uth.tmc.edu