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Welcome to UTHealth Resource Scheduler, Astra Cloud, Training for UTHealth Resource Schedulers

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 - New Web Page; External/Internal Guest Home Page Views
 - New Layout & Functions
 - Event Scheduling for Special Events (Solicitation Form)
- Session II - Solicitation
 - Why is there a Solicitation Process?
 - Why Scheduling Platform for Solicitation Process & Documentation?
 - AE Process Before Scheduler Sees Event Approval
- Session III – Demo followed by Q & A
 - Demo of Solicitation Process: Form Approval, Scheduling and Billing

...to there!



Session I – Scheduling Training Highlights

Page 1

Short link redirect: Schedule.uth.tmc.edu will now go to web page – <https://med.uth.edu/cops/uthealth-resource-scheduler-astra-cloud/>. There are two 'Sign On' link options. UTHealth Internal Users will access the Single Sign On (SSO) and use their LDAP credentials for logging in (same credentials for UT email) which will open the Astra Cloud internal users Homepage. The Non-UTHealth External Users link directs our external guests straight to the Guest Solicitation Form. This is NOT to be used by internal users. Internal users MUST log in using the SSO and then select the Solicitation form from the drop down menu of the Event Request Forms in order for the internal user's credentials to be entered allowing for appropriate processing of the internal user's solicitation event request.

Non-UTHealth external users can view the Guest Home page created for non-UTHealth external users from the Guest Solicitation Form page by selecting Home in the upper left-hand corner, selecting Homepage, and then clicking on 'Leave' in the Confirm window.

External customers can view all listed Policies & Procedures plus more while on the Guest Homepage.

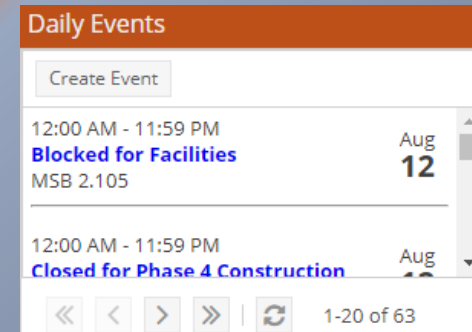


External customer can return to Solicitation Form by using the 'Request an Event' options located in several areas on Homepage.

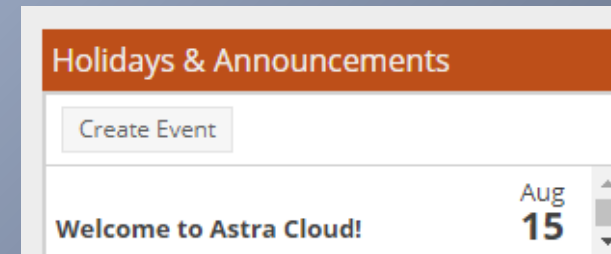
Session I – Scheduling Training Highlights

Page 2

Daily Events section on the Internal Homepage shows all of our approved events for that date. These are not shown to external non-UTHealth guests. Internal access only.



Holidays/Announcements section – Internal & External access. These appear up to 31 days prior to date and expire the day after event ends.



Rules/Guidelines section – Schools are encouraged to add to this area. Send a request to Valerie.A.Buchanan@uth.tmc.edu or William.B.Severson@uth.tmc.edu with details including document or link to rules and/or guidelines.

Schools are also encouraged to add information to the Guides & Procedures section and add any public Announcements. Send request to Valerie.A.Buchanan@uth.tmc.edu or William.B.Severson@uth.tmc.edu All of these sections are both Internal & External access.

Session I – Scheduling Training Highlights

Page 3

The application can now send an email reminder associated with an event. The Add Reminder option is a great new feature that allows a scheduler to set up automated notifications to be sent to attendees, reminder to self, technical support, setup team and any other Ad Hoc contact the scheduler would like a reminder to be sent to.

The 'Add Reminder' dialog box contains the following fields and options:

- Subject:** Don't forget to set up the tables
- Description:** (Empty text area)
- Due Date:** Thu 07/27/2017 at 8:00 AM
- Send reminder:** Wed 07/26/2017 at 5:00 PM
- Add Recipient:** Select... (Dropdown menu)
- Add:** (Blue button)

Filters have several upgrades. One feature is the new 'clear all' buttons. Filters in older versions would show a populated list of options for user to make a selection. The cloud versions use a search function to select options.

The 'Event List' interface includes a 'Filters' sidebar on the left and an 'Event List' table on the right. A 'Select Items' dialog box is overlaid on the event list.

Filters Sidebar:

- Clear All (Link)
- Search (Input field)
- Custom (Dropdown)
- Keyword: (Input field)
- Time Period: Next 31 Days (Dropdown)
- From: 08/12/2020 (Calendar icon)
- To: 09/12/2020 (Calendar icon)
- Day Met: U, M, T, W, R, F, S (Buttons)
- Is Private:
- Is Featured:
- My Events:
- Event Status: + ⊗
- Event Meeting Status: + ⊗
- Campus: + ⊗
- Building: + ⊗
- Room: + ⊗
- Customer Group: + ⊗
- Customer: + ⊗
- Customer Contact: + ⊗
- Event Type: + ⊗
- Event Meeting Type: + ⊗
- Approver: + ⊗
- Scheduler: + ⊗

Event List Table:

Event Name ^1	Reservation
⊗ Curriculum Committee	20190911-00049
⊗ CVS Conferences	20190628-00008
⊗ CVS Grand Rounds	20190628-00006
⊗ CVS Journal Club	20190628-00009
⊗ Data Center Team Meeting/...	20190919-00005
⊗ De Lay Lab Meeting	20190128-00015
⊗ Department of Pediatrics Re...	20200326-00007
⊗ Development/Public Affairs ...	20190816-00013
⊗ DI Workshop / Jeanne Piga-P...	20200728-00022
⊗ DI Workshop / Jeanne Piga-P...	20200810-00032
⊗ DI Workshop / Jeanne Piga-P...	20200810-00033
⊗ DI Workshop / Jeanne Piga-P...	20200810-00038
⊗ DI Workshop / Jeanne Piga-P...	20200810-00012
⊗ DI Workshop / Jeanne Piga-P...	20200810-00009
⊗ DI Workshop / Jeanne Piga-P...	20200810-00001
⊗ DI Workshop / Jeanne Piga-P...	20200810-00077
⊗ DI Workshop / Jeanne Piga-P...	20200810-00083
⊗ DI Workshop / Jeanne Piga-P...	20200810-00057
⊗ DI Workshop / Jeanne Piga-P...	20200810-00007
⊗ DI Workshop / Jeanne Piga-P...	20200810-00004
⊗ DI Workshop / Jeanne Piga-P...	20200810-00070
⊗ DI Workshop / Jeanne Piga-P...	20200810-00000
⊗ DI Workshop / Jeanne Piga-P...	20200810-00000

Select Items Dialog:

- Enter search text (Input field)
- 3SCR (CABIR)
- Behavioral and Biomedical Sciences
- CAMP
- Cizik School of Nursing
- DAHS
- Fayez S. Sarofim Research Building (IMM)
- HSA
- Jesse Jones Library
- LBJ UT Annex

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Session II – Solicitation

UTHealth Resource Scheduler, Astra Schedule migration to Astra Cloud training introduces schedulers to the new layout and some new features. Training will cover Event Process and Solicitation Process for experienced schedulers. Training demonstrations will show the correct way to schedule events in Astra Cloud.

The Solicitation Process is mandatory at UTHealth for Special Events. This process is subject to audits. In order to maintain as much as possible within one database, Astra Schedule is the platform that UTHealth uses to gather information needed to track and produce invoices for resources.

It is extremely important that all schedulers use the appropriate scheduling processes for Special Events. If you are in question of this process, please reach out to Bill Severson or Forrest Johnson for assistance.

Session III – Questions & Answers

Page 1

Information shown on video demonstrations and on PPT is old data used for training purposes only.

Question: Have all rooms been updated to be COVID compliance? Room capacity.

- COVID compliance information along with any other updates of information on behalf of the schools, falls on the responsibility of the schools. Schools can request for their maximum occupancy & Social Distancing room images to be updated in Astra by sending an email request to Valerie.A.Buchanan@uth.tmc.edu. Be sure to include exact information needed with details.

Question: Are we going to lose our filters that we have setup once the new Astra rolls out? Will our current customized filters migrate?

- During testing Astra cloud, some lost their filters and other did not. We suggested taking a screen shot of filters prior to migration just in case you need to set them back up. If this is not done and your saved filter customizations are lost during migration, please reach out to William.B.Severson@uth.tmc.edu and he will assist you in setting up custom filters to fit your specific needs.

Question: Where can we find the new version?

- The quick link: schedule.uth.tmc.edu will be redirected to web page for UTHHealth Resource Scheduler, Astra Cloud. Links for both Internal and External Users are on this page.

Session III – Questions & Answers

Page 2

Question: What new functions are in Astra Cloud?

Question: Is there an official user guide that we can access? I know that there are many functions that I don't know about.

- Not specific to UTHealth processes at this time. Coming into the migration, there is clearly a need to bring all institutions into at least one central scheduling process due to the UTHealth Solicitation Process mandating all event schedulers to adhere to a singular process for 'Special Events'. I will share some more information with the schedulers as we move forward on various functions. As time allows, I hope to have at the very least, a user guide for 'Special Events & Basic Event Scheduling' at UTHealth.
- We recommend you explore the functional areas and you will find more updates in Astra Schedule v8.9.1. (*Homepage, Page Navigation/Recents menu, Filter Panel, Making changes to events times, rooms, etc., Event Requests, Section Edit/Schedule, Calendars, Notifications/Approvals, Room Optimization, Instructor Optimization*)
- When a basic event is created (use the "More options" link from the basic event form) or when editing an existing event, there are several advanced features you can add to your event. (*Add multiple rooms, Select different meeting times, Add a meeting description, Send event summaries, Add additional contacts, Add event attachments, Create event reminders and View the event notification history*)

Session III – Questions & Answers

Page 3

Question: We use different event types that have specific colors assigned so they show up with different colors on the calendar. Will this stay the same?

- Yes. And you have options to add new colors for other events types that you use. Currently, the only time you are unable to manage what Event Type to use is during the “Special Events” process. The Event Type field is used by the Accounting Team to track management of Special Event workflows that may be subject to audits. The event type is NOT to be changed from what our Accounting team selects based on the “Special Events” approval status. Keep in mind that this is not a new process. Remember that these are “Special Events” that fall under the policies based on Solicitation Processes. If you have an example of a conflicting Special Event that is also a regularly scheduled event that you use a special Event Type on, let us know and we will review case by case.

Question: We want exams to be a different color on the calendar. It is an Event Type that we have selected.

- If NOT a Special Events request, schedulers can assign whatever Event Type they typically use at their locations. Exams do not fall under Special Events rules or processes unless you host exams for non-UT attendees. Again, let us know and we will work with your team on a case by case situation.

Question: And, McCombs event?

- If this is also set up with a specific Event Type color code and also falls under the Special Events policies, we will look at this event, too. Just send us a request and we will schedule time to review.

Question: Will the colors that we currently have assigned migrate?

- To Event Types and Usage Types? I believe they will but it is very easy to reset colors on Event types and Usage Types.

Session III – Questions & Answers

Page 4

Question: If this just creates an invoice, it doesn't tie back to FMS correct? I often invoice McCombs for non-contract events and I manually do the calculations. So, I could use this?

- On the security roles, Invoicing does not have breakdowns to separate institutions to work independent of each other. You would have to share the same security role as the Accounting Team. Until that changes, manual invoicing to a few customers would be the best option. Send me a copy of an invoice you have created and it's possible we can share something similar to what our Accounting Team uses in Astra. MMS also manually invoices similar events.

Question: Can I create an invoice that is not a solicitation request i.e. for McCombs non-contract events?

- Although the answer to 'is it possible?', Yes. Unfortunately, the security roles will not allow for anyone outside of the Accounting Role to utilize Invoices. We also do not have the ability to use more than one Invoice Report which is customized for the Accounting Team. See our suggestions above.

Question: Will there be university wide communication about the change?

- Migration to Astra Cloud? No. UTHHealth and our schools have limited emails during the pandemic to those needed for announcements concerning larger groups. This is why the schedulers should always keep their institutions updated. I know that CSON and MMS send out announcements to their users whenever we have major changes to the application such as upgrades, migration, etc.

Session III – Questions & Answers

Page 5

Question: We have lots of people that can “view” the calendar to check for availability. Will there be some kind of cheat sheet for this? Should include building specific user guides.

- We encourage our institutions to work within their areas to create user guides, cheat sheets, etc. for their customers. We have provided a great platform to share this information using spaces already created on Astra Homepages. The ability to view the Calendar Grids remains the same. Once they use their same Login Credentials as used in older versions (LDAP) via the SSO, they will have the same security access as they had prior to migration.

Question: How does the guest function work?

- External Guests are limited to Solicitation Form and non-UTHealth Guest Homepage information. Step by step instructions are included on Slide 2.

Question: The way I schedule is manual, is the add new event feature still the same? I have to enter each one. Will that be the same or different?

- There is a new tool to use in the Add event feature which allows for easy scheduling of multiple meetings in an event.

Question: Will all data migrate over?

- Some customizations will not migrate (Homepages for example). I recreated these items in the Test Cloud environment and I will recreate into the Cloud Production environment prior to Monday ‘Go Live’. I encourage you to verify and confirm that all of your data as well as functionality on processes moves over during the monitoring week following ‘Go Live’ morning.

Session III – Questions & Answers

Page 6

Question: Everything for Calendar year 2021 is not there in older version. Will there be any problems for 2021?

- This was one of the very critical reasons for migrating to Astra Cloud as soon as possible. We do not anticipate any issues concerning scheduling resources in 2021. You will be able to confirm as soon as we 'Go Live' on Monday, but this was successfully tested in Test Cloud environment.

Question: : Will there be a test site to use to check processes?

- The Cloud Test environment was set up, shared and tested by all schedulers back in 2018. Due to an accounting module issue, we set up a later release of v8 that included fix to accounting issue. We have worked with our Migration Team since 2019 preparing for final migration to Astra Cloud. The test site of v8.9.1 that was approved and signed off on becomes our new production site. In other words, there is now only our Production Astra Cloud environment. Should we have a larger project needing us to “test” a process on, the vendor can set up a temporary test environment for those special projects. We would only have the site available for a very limited amount of time to prevent additional costs to our university.

Contact Information

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The screenshot shows the user interface of the 'UTHealth's Academic & Event Resource Scheduler'. At the top, there is a navigation bar with icons and labels for 'Home', 'Calendars', 'Analytics', 'Academics', 'Events', 'Reporting', and 'Settings'. The user's name 'vbuchanan' and a help icon are visible in the top right corner. The main content area is divided into three columns:

- Left Column: UTHealth - Our Schools**
 - UTHealth at Houston**
 - CSON - Cizik School of Nursing
 - GSBS - Graduate School of Biomedical Sciences
 - MMS - McGovern Medical School
 - SBMI - School of Biomedical Informatics
 - SOD- School of Dentistry
 - SPH - School of Public Health
- Middle Column: Welcome UTHealth Users**
 - UTHealth logo: **UTHealth**
The University of Texas
Health Science Center at Houston
 - Welcome to UTHealth's Resource Scheduler!
- Right Column: COVID-19 Information for UTHealth**
 - Returning to Campus Guidelines
 - UTHealth COVID-19 Resources
 - MMS Social Distancing Room Use
 - Conference Operations | COVID-19
 - Please Wear a Mask
 - Keep at Least 6' from Others
 - Wash Hands Frequently

At the bottom right, there is a section for 'Holidays & Announcements' with a 'Create Event' button.