



Everything, Events!

Agenda

- Astra Schedule 8 - Create Event Modal Best Practices
- The Flow of the Workflow
- The Workflow Setup
- Workflow Tips & Tricks
- Resource & Room Notifications Emails

Astra Schedule 8 – Create Event Modal Best Practices

Best Practices with the Create Event Modal

- Access from 4 places in the application:
 - Homepage with an Activity List
 - Scheduling Grid - click & drag and Add Event
 - Activity Calendar - click a date
 - Event List
- **Only 1 room can be added** - single, multiple, and recurring
- If more than 1 room is needed, leave room blank and click “More Options”
- Customer in version 8.8 is now a display field - GUID bug fixed!

Customer Field – Display Only

Create Event

Single Multiple Recurring

Start Time: 4:00 PM End Time: 4:00 PM

Start Date: 06/28/2019 End Date: 06/28/2019

Event Name: Not as Fun Event

Room: Adams Hall 130


Event Type: Conference Call

Contact: 69073b43-d993-11e5-9047-c96be34e7751

Customer: AmerisourceBergen

Create **Create**

More Options Save and Send Notification Save Ca



Create Event

Single Multiple Recurring

Start Time: 4:00 PM End Time: 4:00 PM

Start Date: 06/28/2019 End Date: 06/28/2019

Event Name: Best Day Ever!

Room: Sullivan Library 129


Event Type: Celebration

Contact: Sowels, Kelley

Customer: Hudson City Savings Bank

Create **Create**

More Options Save and Send Notification Save Cancel



The Flow of the Workflow

Workflow 1: Event Requested through Event Request Form

Event Requestor submits Event Request



A

Event Approval

Event Request Form Approved by Specific Approver Group

Important: This is the only time approval emails are sent.

B

Space Approval



Library Space Approver

Student Center Space Approver

President's Conference Room Space Approver

Note: Approval requests are sent to both B and C at the same time after a Request Form is approved.

C

Resource Approval



Facility Equipment Resource Approver

Public Safety Resource Approver

A/V Equipment Resource Approver

Event Notification Emails in 8.8



Event Approved

5/29/2019

11:29AM

Your event request is approved. Please find the event summary below.

This is an approved event.

Event Information:

Reservation #: 20190529-00002
Event Name: Test Event 2
Event Type: Administrative
Date: 6/6/19 - 6/6/19
Status: Scheduled
Est. Attendance:

Customer/Contact Information:

Maggie Roberts
mroberts@aais.com
Ad Astra

Event Notes:

| Meeting Name | Date(s) | Time | Meeting Status | Building | Room | Room Status |
|--------------|---------|------|----------------|----------|------|-------------|
|--------------|---------|------|----------------|----------|------|-------------|

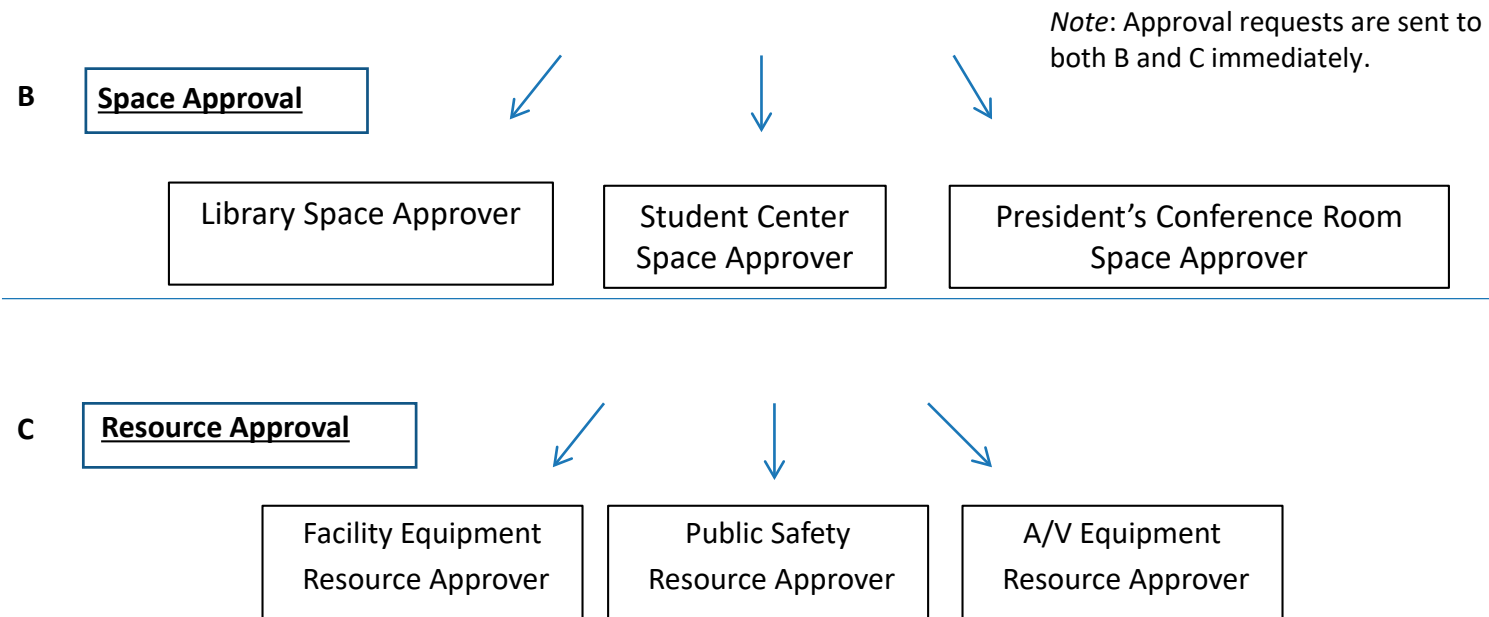
Scheduled

| | | | | | | |
|--------------|-----------------|-------------------|-----------|-------|-----|-----------|
| Test Event 2 | 6/6/19 - 6/6/19 | 11:30AM - 12:00PM | Scheduled | ADAMS | 115 | Scheduled |
|--------------|-----------------|-------------------|-----------|-------|-----|-----------|

- System generated emails are from noreply@aais.com
- User generated emails are from notifications@aais.com & reply to the user

Workflow 2

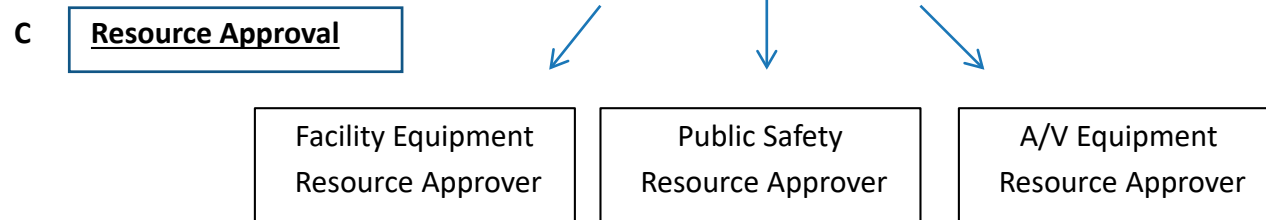
A user with Event Scheduling permissions creates a new event in Astra Schedule through the Advanced Event Form or through the Quick Event Add. The user creates their Event Meetings and adds a room(s) and resource(s) to the event.



Workflow 3: Resource (only) Requested through Event Form or Quick Add from Scheduling Grid

A user with Event Scheduling **and** Room Scheduling permissions creates a new event in Astra Schedule through the Advanced Event Form or through the Quick Event Add on the Scheduling Grid. The user creates their Event Meetings and **reserves (schedules)** room(s) to the event. (The room choice is limited to the rooms specified in their Role.) Then the user requests the appropriate resource(s) for their event.

Note: Approval requests are sent to C immediately.



Workflow Setup

Workflow Setup

- Centralized: Event Requests
 - Create Event Request Template(s)
 - Create Approval Group(s)
 - *Edit Role Permissions as needed*
 - Common Hiccup: My workflow isn't triggering, and my events are going straight to a scheduled status.
- Decentralized: Room OR Resource Requests
 - Create Approval Group(s)
 - *Edit Role Permissions as needed*
 - Common Hiccup: There's an event in an incomplete status, but no one has a notification for it.

Workflow Tips & Tricks

Workflow Tips & Tricks

- Event Request Forms
 - Assigned to roles (Guest, Faculty/Staff, Student, etc.)
 - Can link directly to form WITHOUT the user having to sign in for GUEST forms
 - Can break apart “Add a Meeting” - previously known as the meeting generator
 - Custom Display Content
 - Request meeting with only resources

Workflow Tips & Tricks

- Secondary Approval
 - Setup as equipment & services
 - *Resource Group*
- Tentative/Pending Events
 - After approving an event, if the event is saved in a pending/tentative status, the workflow does NOT trigger.
- Notification List: Filter Panel
 - *Is Notification - No, Is Active - Yes*
 - Save & Default
 - My Preferences - Emails

Resource & Room Notification Emails

Resource & Room Notification Emails

- Email specific people - not necessarily users! - when a room and/or resource has been scheduled
- Specify specific rooms, regions, buildings, etc. - no approval required
- Specify specific resource groups - no approval required
- Emails sent upon cancellations and changes

Approver Group

Group Information

* Name: Notification - IT Resources

Users

+ Add User

| Username |
|----------|
| mroberts |

Email Address

+ Add Email Address

| Email Address | Contact Name |
|-------------------|----------------|
| IT@adastra.edu | IT Department |
| mroberts@aais.com | Maggie Roberts |

Rooms

+ Add Rooms

| Name | Location Type |
|------------|---------------|
| No records | |

Event Form/Resource Group Assignments

| Event Form | Resource Group 2 | Clear + |
|------------|-------------------------|---------|
| None | Audio/Visual Department | ✕ |
| | Media Services Group | ✕ |

Resource Notification Email



Resource or Room Status Change

7/1/2019

2:58 pm

Resource or Rooms with Status Changes Are Highlighted in Red:

Event Information:

Reservation #: 20190701-00006
Event Name: Event with Microphone
Event Type: Administrative
Date: 7/1/19 - 7/1/19
Status: Scheduled
Est. Attendance: 0

Customer/Contact Information:

Albert Aasness
(115) 730-1218
testastrauser@aais.com
Bob Evans Farms, Inc.

| <u>Meeting Name</u> | <u>Date</u> | <u>Time</u> | <u>Meeting Status</u> | <u>Building</u> | <u>Room</u> | <u>Room Status</u> |
|---------------------|-------------|-------------|-----------------------|-----------------|-------------|--------------------|
|---------------------|-------------|-------------|-----------------------|-----------------|-------------|--------------------|

Scheduled

| | | | | | | |
|-----------------------|----------|--------------------|-----------|-------|-----|-----------|
| Event with Microphone | 7/1/2019 | 11:00 am - 2:00 pm | Scheduled | ADAMS | 109 | Scheduled |
|-----------------------|----------|--------------------|-----------|-------|-----|-----------|

| <u>Resource Name</u> | <u>Resource Type</u> | <u>Resource Date</u> | <u>Resource Time</u> | <u>Resource Status</u> |
|----------------------|----------------------|----------------------|----------------------|------------------------|
|----------------------|----------------------|----------------------|----------------------|------------------------|

Qty.

Setup - Media Services

Service

1

7/1/2019

11:00 am - 2:00 pm

Scheduled

Questions?

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