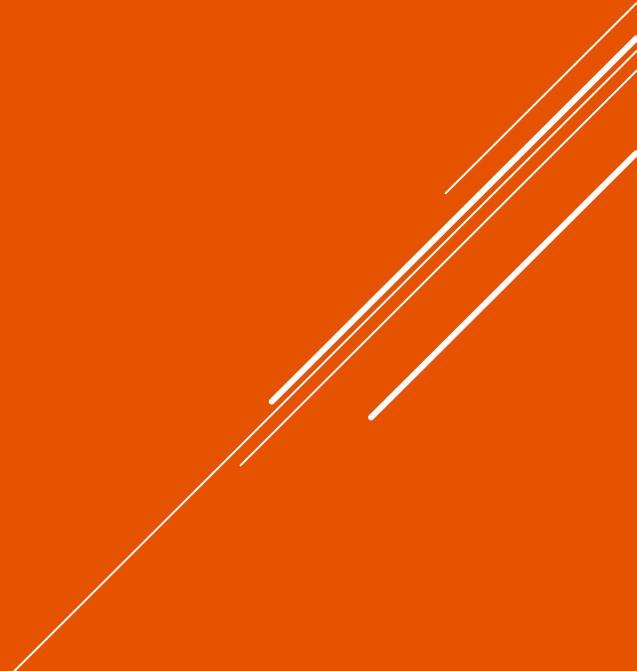


ASTRA SCHEDULER / APPROVER TRAINING

Scheduling & Conference Services
eventmgmt@uttyler.edu

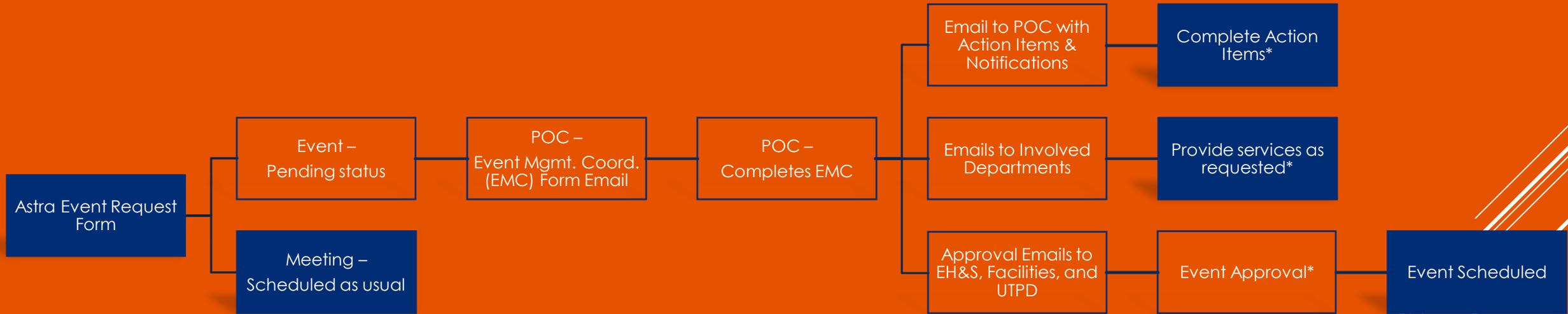
WHAT IS A SCHEDULER?

- Person who has rights to schedule an event without receiving approval first
 - Person who has rights to schedule specific
 - Location(s)
 - Resources
 - Equipment
 - Services
 - A Scheduler may not be an Approver
- 

WHAT IS AN APPROVER?

- Through the Notification List, a person who
 - Determines an event can be held on campus **AND/OR**
 - Approves requests for specific
 - Location(s)
 - Resources
 - ❖ Equipment
 - ❖ Services
- An Approver is not always a scheduler

WHAT IS THE NEW SCHEDULING PROCESS?



*Depending upon the size and complexity of the event, status-update meetings may be scheduled.

WHICH REQUESTS GO THROUGH THIS PROCESS?

- Requests classified as EVENTS – NEW PROCESS
 - 49+ attendees **OR**
 - Setup/Teardown* needed **OR**
 - Food/Beverages served **OR**
 - Minors in attendance (specifically for minors) **OR**
 - Joint Sponsored (email approved by Community Engagement prior to event in Astra)
- Requests classified as MEETINGS – NO CHANGE

*Any table, chair, audio visual, maintenance, etc. needs required

WHY ANOTHER FORM?

- Replaces three (3) other forms
 - Replaces multiple back-and-forth emails
 - More information gathered up front
 - Eliminates number of surprises
 - Fewer status-update meetings
 - Point of Contact instantly receives Action Items and Notifications
- 

WHAT'S YOUR RESPONSIBILITY?

- Correctly enter event/meeting information in Astra
 - Event Information
 - Customer Contact → Event Point of Contact (POC) → Complete Event Management Coordination Form
 - Max Attendance
 - User Information
 - Meetings
 - Setup(s)
 - Event
 - Teardown
- Pending status for requests classified as EVENTS

SCHEDULER: STEP-BY-STEP PROCESS

1. Enter request into Astra*
 - a. Event information

APPROVER: STEP-BY-STEP PROCESS

1. Notification List – set preferences
 - a. Event information

**Student Organizations must use their request forms and cannot be scheduled by advisor or you.*

SCHEDULER/APPROVER: STEP-BY-STEP PROCESS

1. Enter request into Astra / Event request into Astra
 - a. Event information
 - b. User fields (new)

SCHEDULER/APPROVER: STEP-BY-STEP PROCESS

1. Enter request into Astra / Event request into Astra
 - a. Event information
 - b. User fields
 - c. Meeting(s) information
 - i. Setups/Teardowns
 - ii. Event

SCHEDULER/APPROVER: STEP-BY-STEP PROCESS

1. Enter request into Astra / Event request into Astra
 - a. Event information
 - b. User fields
 - c. Meeting(s) information
 - i. Setups/Teardowns
 - ii. Event
 - d. Resources
 - e. Notes

SCHEDULER/APPROVER: STEP-BY-STEP PROCESS

1. Enter request into Astra / Event request into Astra
 - a. Event information
 - b. User fields
 - c. Meeting(s) information
 - i. Setups/Teardowns
 - ii. Event
 - d. Resources
 - e. Notes
2. Update Status in Astra
 - a. SCHEDULED status if MEETING
 - b. PENDING status if EVENT
 - c. INCOMPLETE status if requested resources

LET'S LOOK AT THE EMC FORM

- Event Management Coordination (EMC) form is sent to the Customer Contact = Point of Contact (POC)
 - Event Management Coordination Form
- 
- A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.

EVENT PROCESS

1. Astra Event Request Form
 2. Scheduler/Approver
 - a. Reviews
 - b. Completes User fields
 - c. Adds meetings, resources, and notes
 - d. Places event record in PENDING status
 3. POC receives email with EMC form link and completes form
 4. POC and departments review notification emails received
- 

POC NOTIFICATION EMAIL

From: eventmgmt@uttyler.edu <eventmgmt@uttyler.edu>
Sent: Thursday, February 27, 2020 11:10 AM
To: Vicky Bond <VBond@uttyler.edu>
Subject: EVENT IN PENDING STATUS - FAKE EVENT FOR TESTING PURPOSES

Hello!

You are receiving this email because **Vicky Bond** completed the Event Management Coordination form for their upcoming event: **FAKE EVENT FOR TESTING PURPOSES**.

This event is currently in a PENDING status.

In order for this event to be final approved, please see the list of Action items below as well as the Notifications section, which provides additional information.

Action Items

- **Outdoors and Greater than 100 Attendees:** Please contact Emergency Management (Randal Duke at rduke@uttyler.edu) as an Emergency Plan may be needed.
- **250+ Attendees:** Determine who will serve as your Certified Crowd Manager, have them take the recommended course (www.crowdmanagers.com/training), and send completed certification email to eventmgmt@uttyler.edu.
- **500+ Attendees:** Police presence required. For a quote, please contact Sgt. Olimpia Morales at omorales@uttyler.edu at least one (1) month prior to the date of the event.
- **Setup/Teardown Needed:** Provide a layout of your event to Event Management. If a blank layout of your location is needed, Event Management can provide one as a starting point.
- **Additional Audio Visual Equipment:** Please contact eventmgmt@uttyler.edu with a list of audio visual items that may be needed. There is the possibility that these items will need to be rented from an external vendor at the cost of the event.
- **Deliveries on Campus:** Please email Rich Legler at rlegler@uttyler.edu (copying Andrew Krouse at akrouse@uttyler.edu) with the date and exact time the delivery will be made as well as the the size of the delivery vehicle.

DEPARTMENT NOTIFICATION EMAIL

From: eventmgmt@uttyler.edu <eventmgmt@uttyler.edu>
Sent: Wednesday, May 27, 2020 1:59 PM
To: Grace Coleman <gcoleman@uttyler.edu>; Olimpia Morales <omorales@uttyler.edu>
Subject: EVENT IN PENDING STATUS - 2020 Top 25% Celebration

Hello Event Team!

Your department is receiving this email because **Ramirez, Kathryn** completed the Event Management Coordination form for their upcoming event: **2020 Top 25% Celebration**.

This event is currently in a PENDING status until Action items have been completed by the event contact. A link is provided below in case you want to view the entire Event Management Coordination Form.

Please feel free to reach out to the event contact with any questions you may have.

Please [click here](#) to review the Event Management Coordination Form's questions and answers.

Action Items

- **Outdoors and Greater than 100 Attenees:** Please contact Emergency Management (Randal Duke at rduke@uttyler.edu as an Emergency Plan may be needed.
- **250+ Attendees:** Determine who will serve as your Certified Crowd Manager, have them take the recommended course (www.crowdmanagers.com/training), and send completed certification email to eventmgmt@uttyler.edu.
- **500+ Attendees:** Police presence required. For a quote, please contact Sgt. Olimpia Morales at omorales@uttyler.edu at least one (1) month prior to the date of the event.

UTPD,
EH&S, and
Facilities

DEPARTMENT NOTIFICATION EMAIL

From: eventmgmt@uttyler.edu <eventmgmt@uttyler.edu>
Sent: Wednesday, February 19, 2020 3:09 PM
To: Vicky Bond <VBond@uttyler.edu>
Subject: EVENT IN PENDING STATUS - FAKE EVENT FOR TESTING PURPOSES

Hello Event Team!

Your department is receiving this email because **Vicky Bond** completed the Event Management Coordination form for their upcoming event: **FAKE EVENT FOR TESTING PURPOSES**.

This event is currently in a PENDING status until Action items have been completed by the event contact. A link is provided below in case you want to view the entire Event Management Coordination Form.

Please feel free to reach out to the event contact with any questions you may have.

Joint Sponsor Information

University Sponsor Information

- Is this a joint-sponsored event?: Yes
- College/Department who is joint sponsoring this event: JOINT SPONSOR COLLEGE
- College/Department Point of Contact name (responsibilities will be listed in follow-up email): Mr. Joint Sponsor
- Point of Contact cell number: 999.999.9999
- Point of Contact University extension: 9999

External Organization Information

- Name of external organization: VICKY'S GROUP

Specialized Departments

EVENT PROCESS

1. Astra Event Request Form
 2. Scheduler/Approver
 - a. Reviews
 - b. Completes User fields
 - c. Adds meetings, resources, and notes
 - d. Places event record in PENDING status
 3. POC receives email with EMC form link and completes form
 4. POC and departments review notification emails received
 5. Approval from Facilities, EH&S, and UTPD
- 

DEPARTMENT APPROVAL EMAIL*

UTPD Approval needed for 2020 Top 25% Celebration

Link: [Event Management Coordination Form for 2020 Top 25% Celebration](#)

Date Created: Wednesday, May 27, 2020 6:59 PM GMT

Approve

Reject

*Approval by all needed – UTPD, Facilities, and EH&S

EVENT PROCESS

1. Astra Event Request Form
2. Scheduler/Approver
 - a. Reviews
 - b. Completes User fields
 - c. Adds meetings, resources, and notes
 - d. Places event record in PENDING status
3. POC receives email with EMC form link and completes form
4. POC and departments review notification emails received
5. Approval from Facilities, EH&S, and UTPD
6. Event Management lets Scheduler know event is approved
7. Scheduler changes status to SCHEDULED
8. **SUCCESSFUL** event, in compliance with no surprises

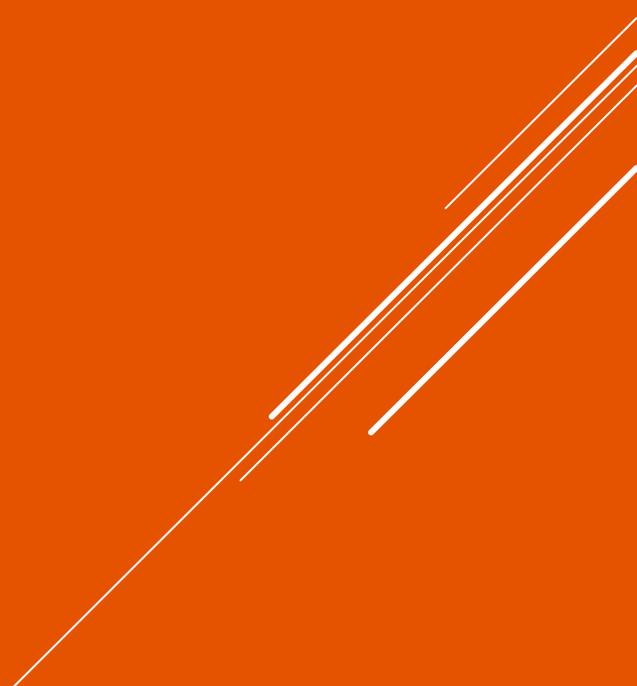


ADDITIONAL RESOURCES & NOTES

www.uttyler.edu/events

- Video Tutorials
 - Event Procedures Manual
 - Event Request Forms

 - Campus Venues Pictures / Layouts
 - Scheduling Guidelines
 - Venue Fees and Support Services
 - Parking and Shuttle Bus Information

 - Event Management Department Information
- 

For additional assistance,

eventmgmt@uttyler.edu