UNIVERSITY of HOUSTON

USER GUIDE

AD ASTRA PROCEDURE FOR PULLING PREFERENCES

Description: This user guide shall be used for navigation on how to pull a current preference list inside Ad Astra from the reports tab.

Please contact the Office of the University Registrar (OUR) at **832-842-5775** if you have any questions after reading this procedure and viewing the training videos.

This procedure will be located and continually updated for future reference on the Ad Astra web page within the "Written Procedures" section.

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PART 1: LEGEND OF EACH USED FIELD IN THE PREFERENCE EXCEL FILE FOR FUTURE REFERENCE

[PRINT this page for a handy reference]:

Column	Field Name	Description	
A	INSTITUTION	Always "University of Houston – Main".	
B	PREFERENCERULES_SEQUENCE	Represents the temporary rule number has been assigned. This number shifts when a preference rule is created above it and is never meant to be a permanent assignment. Once course could be a part of multiple preference rules. Several courses can be a part of one rule if they all have the same needs. Remember the order number is not important when it comes to finding room assignments during optimization. At the time this procedure was created, here is some logic to how rules are placed in order:	
		Rule numbers 1-22	Massive preferences based on region so courses not provided specific preferences at least stayed in your region. Example: Rule 1 currently takes up 61 lines in the excel file as it represents a broad preference for every course in the ARCH college, both lectures and seminar versions to keep all of these type of classes inside the Architecture building and in appropriate room types.
		Rule numbers 23-62	Broad subject preferences in alpha order submitted by schedulers.
		Rule numbers 63-377	Course preferences in alpha order submitted by schedulers.
C/D	PREFERENCESETS_NAME/ PREFERENCESETS_DESCRIPTION	These two fields will always be the same and always represent a specific rule set for a term and year of that term (IE, Spring 2015).	
E	CAMPUS_NAME	Field will always be null since everything is UH Main.	
F	MEETINGTYPES_NAME	Currently we have preferences for "LEC" Lecture, "LAB" Lab, and "SEM" Seminar.	
G	DELIVERYMETHOD_NAME	Currently, field is always null as we only create preferences for face to face classes.	
H	SUBJECTS_SUBJECTCODE	Field always populated whether the preference is for just a broad subject code or a specific course for easy filtering.	
I/J	COURSES_SUBJECT_SUBJECTCODE/ COURSES_COURSENUMBER	These two fields are tied to each other. When a scheduler submits a preference for GEOL 1102, fields H and I will say GEOL and field J will say 1102. To filter properly, it is recommended that you use file H to filter the subject and field J to filter the specific course number of that subject.	
M	ROOMTYPES_NAME	Used to build preferences including specific room type needs such as laboratory, special class lab, lecture classroom, seminar room, etc.	
N	FEATURES_NAME	Data projector, computer, etc. are features that are tracked and preferences can be built around.	
O	REGIONS_NAME	NSM, CLASS, TECH, etc. are all regions that preferences can be built around.	
P/Q	BUILDINGCODE/ BUILDINGS_NAME	Building's abbreviation code and long name used if a preference for an entire building (not specific rooms) was created.	
R/S	BUILDINGCODE(1)/ ROOMNUMBER	Building's abbreviation code and room number(s) specified if a preference for a specific building's room(s) was created.	
U	WEIGHT	Almost every preference you can ask for a subject/course can have a weight associated with it. For example, the use of an auditorium may be 10 (wanted to use the most for your course), lecture classroom 9 (a little less wanted), and seminar room 2 (wanted least).	
V	QTY	This field stands for the quantity of a feature preferred. We currently do not use this feature.	
W	ISREQUIRED	Most preferences are "required" or the class will not place during the initial optimization run. If you see a "1" here, that acts like a true or yes statement.	
X/Y	ISEXCLUDED/ ISBLOCKED	We do not use these features.	

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PART 2: AD ASTRA WEBSITE URL.

Open the following website to access Ad Astra and enter your login credentials.

Production- https://astraschedule.uh.edu/Astra00730/Portal/GuestPortal.aspx

You are able to access Ad Astra via this web address using any web browser, tablet (iPad), or smart phone that has access to the internet.

Note: If you do not remember your login information in the future, please contact **OUR** for assistance. Should you click on something that you do not have the security to view or if an error occurs, click on the "University of Houston" logo (as seen in the picture below) to get back to the home page.

PART 3: LOCATION OF THE PREFERENCES REPORT WITHIN AD ASTRA.

Now that you are logged in, *locate* the "Reporting" tab available for an UH faculty or staff member as shown below:

A. *Click* on the "Reporting" tab and "Reports" link.
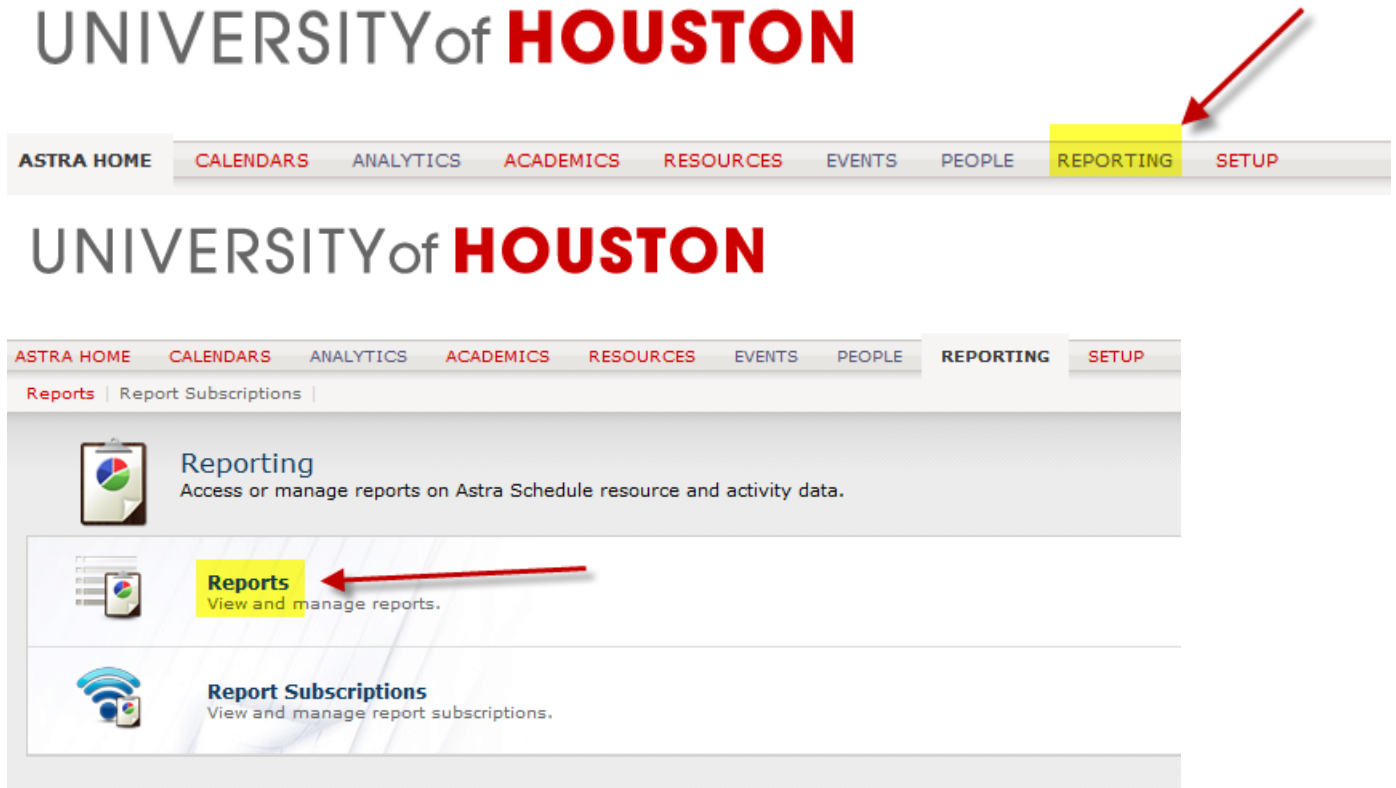
B. From the report list, *locate* and *click* the report link titled "UHS Preference Data".

PART 4: Exporting the data from Ad Astra into an Excel file.

Unlike all other reports in Astra, the preference report is not usable in regular report form within Ad Astra and **MUST** be exported into an Excel file. Take the following actions to export the data into an excel file:

A. *Locate* and *click* on the export icon (looks like a floppy disk on top left corner of report screen) highlighted below.
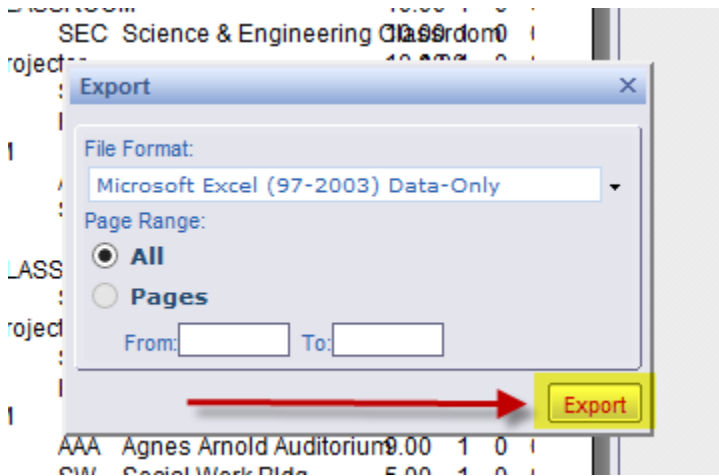

B. The export menu should have popped up.
    1. *click* the drop down arrow off the export menu.
2. *click* the file format of "Microsoft Excel (97-2003) Data-Only".
    note: If you do not select the Excel format with "Data-Only", then you will not receive a usable file.
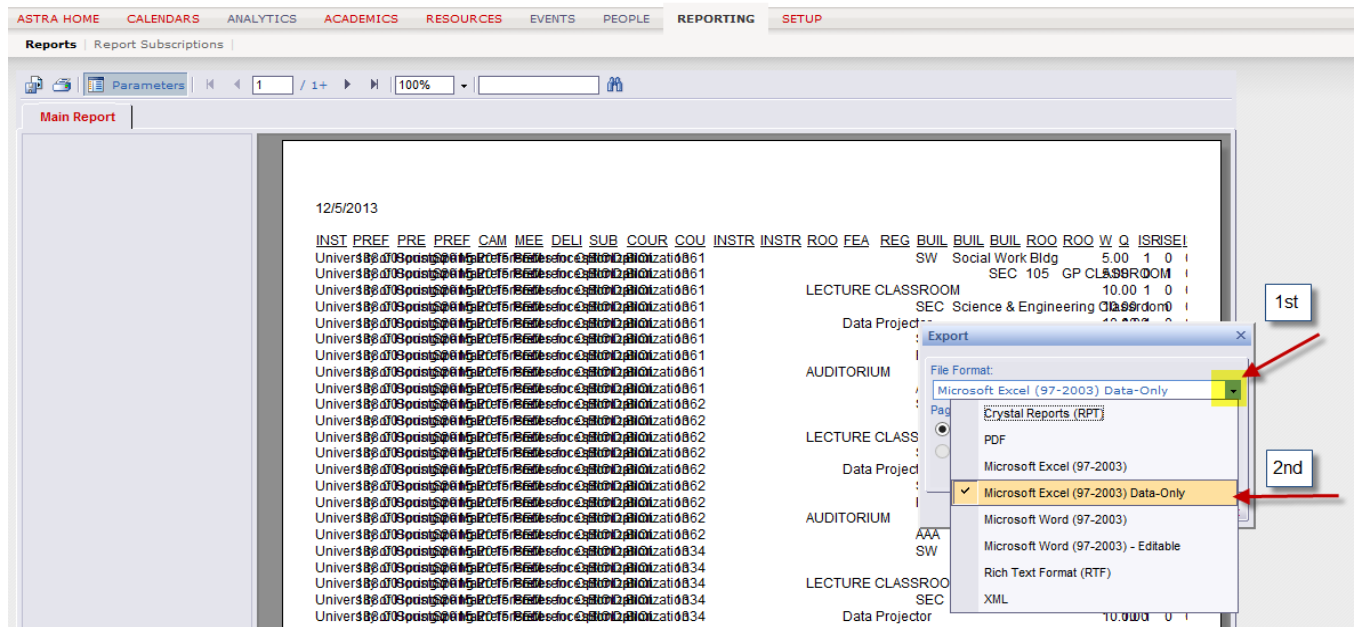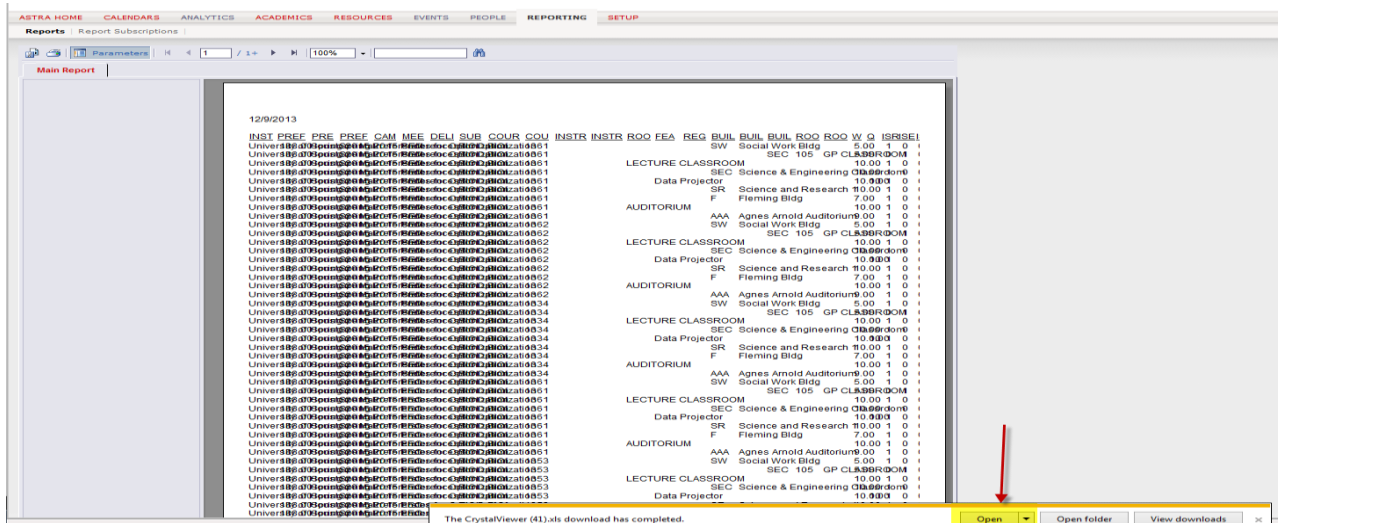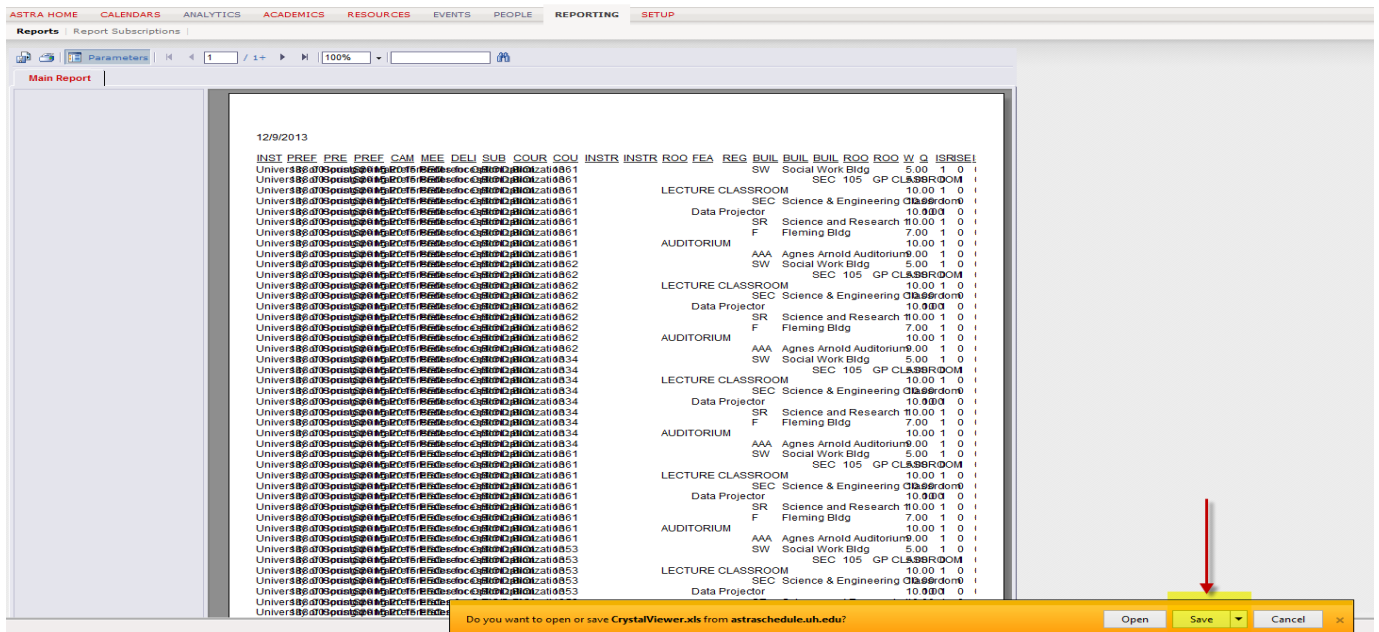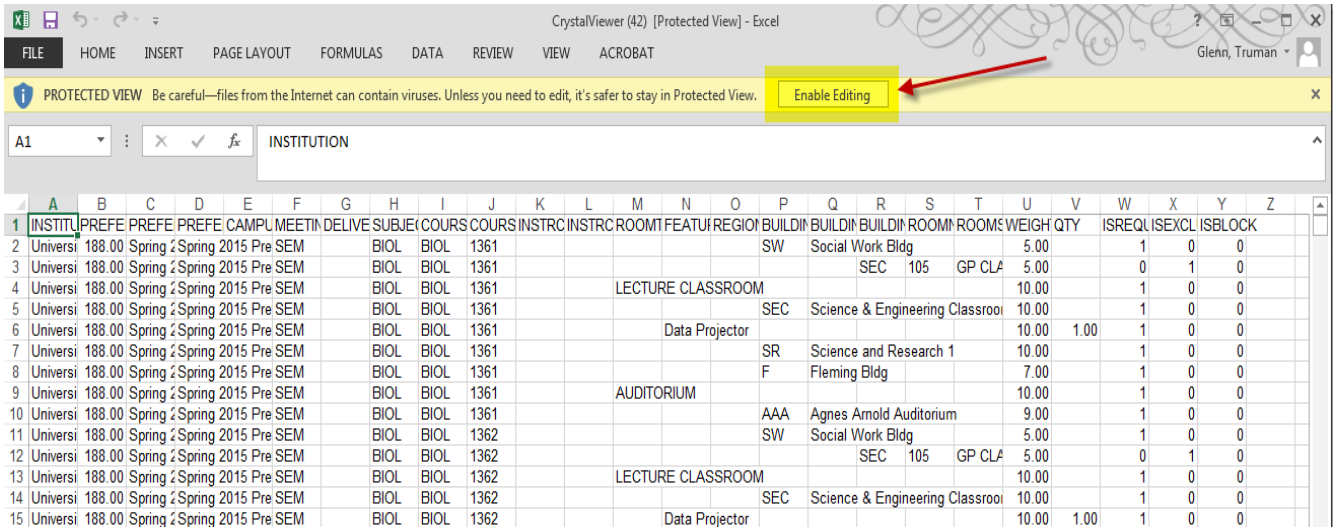
C. *Click* the "Export" button.

D. You may now *click* the "Save" first (for best results) and then "Open". Excel should now open up. (this may vary depending on your browser)
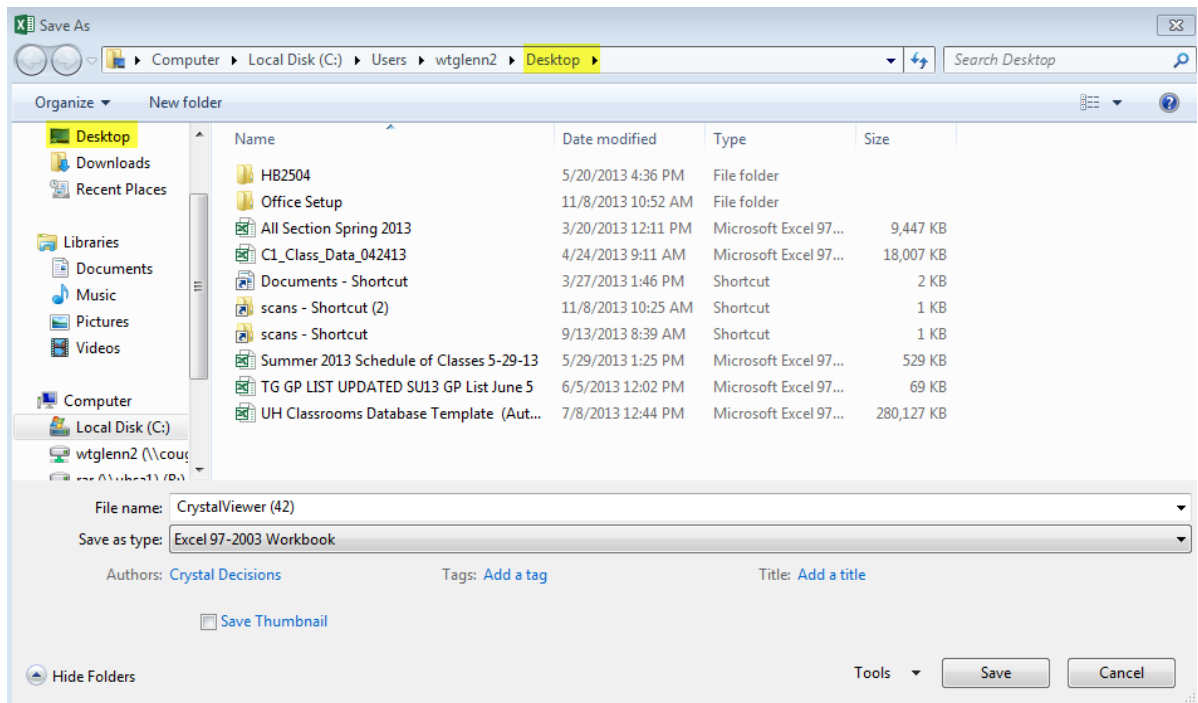
E. If your document opens in "Protected View," *Click* "Enable Editing".


F. Now it is time to save the file onto your desktop (or whatever file you choose). Take the following actions:
1. *Click "*File" from the Excel's top tool bar.
2. *Click "*Save As".
3. *Choose/click on* the folder you wish the file to be placed (suggested: create/use a folder to hold your preference file for quick retrieval).

4. Under the "Save as type:" menu, *click* the drop down menu and *select* "Excel Workbook" (specifically, change from "Excel 97-2003" to "Excel Workbook".
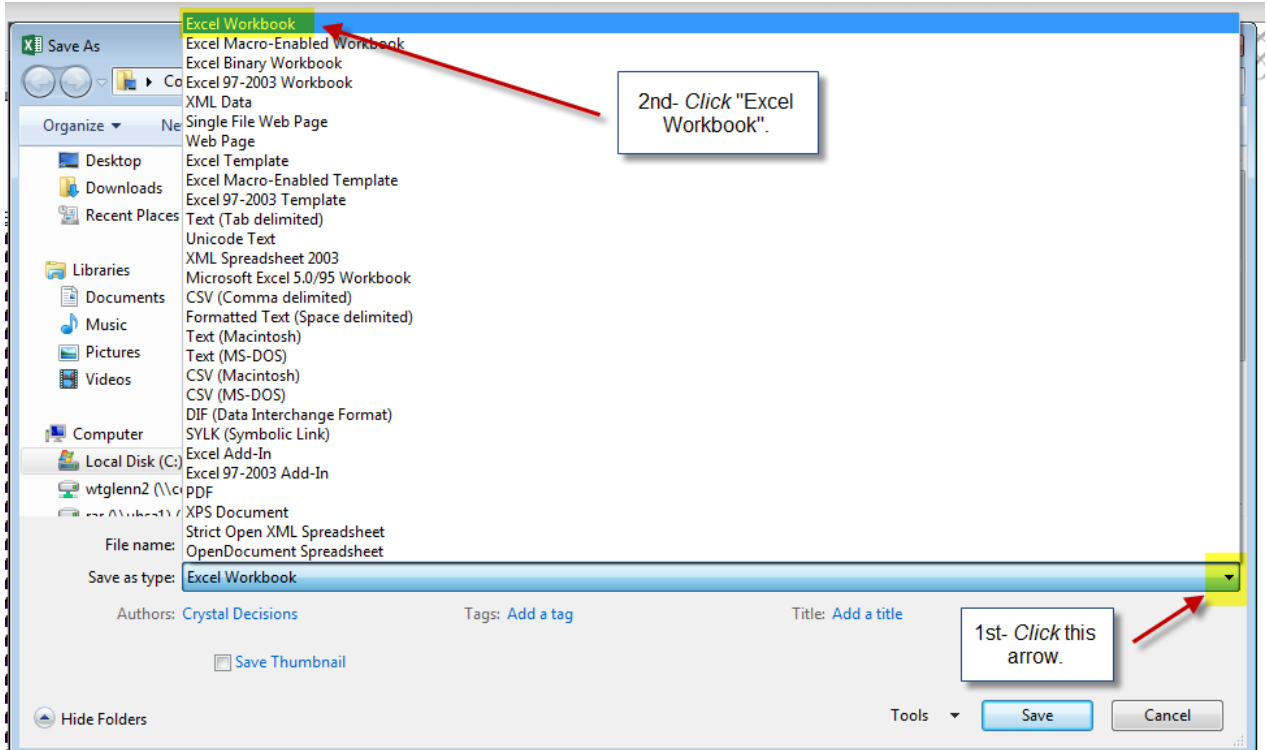
5. *Name* the file to your liking such as "Schedule Preferences Spring 2014 12-9-13 3pm" and *click* save.
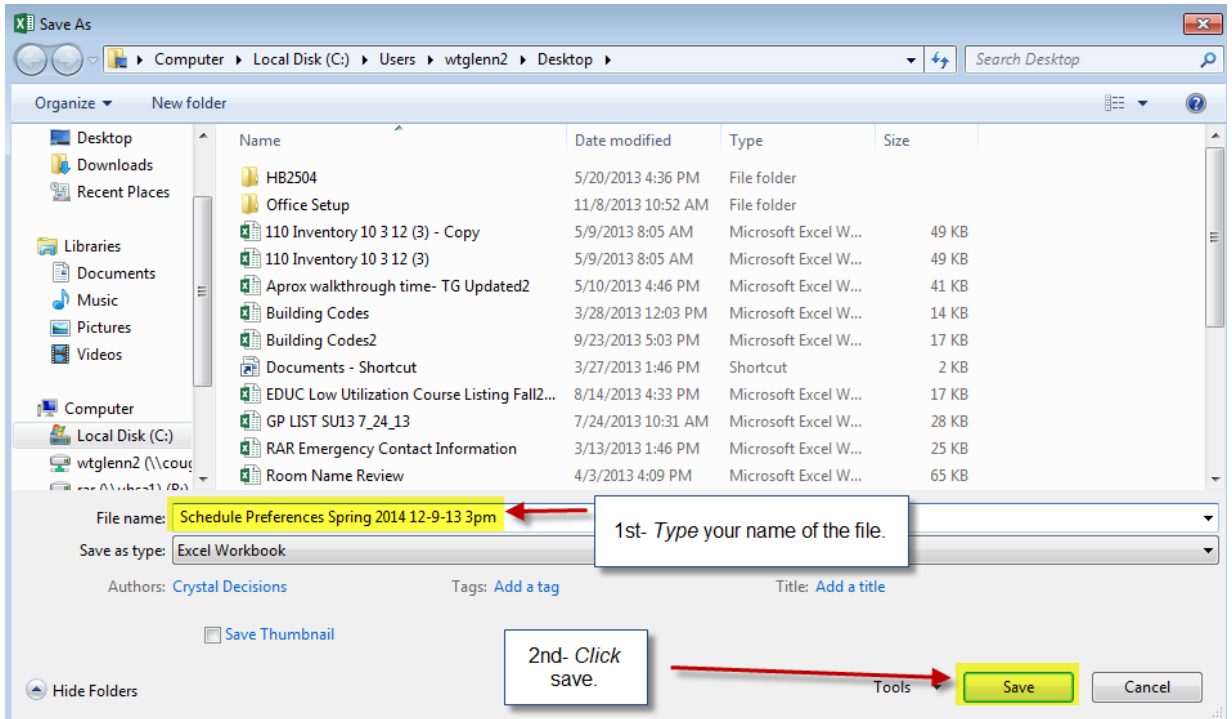
PART 5: FILTERING YOUR EXCEL PREFERENCE FILE.

Now that you have your preference file, it is critical that you know how to filter and review the specific pieces of information you wish to go over. Please take the following actions after you download and save it to your computer:

A. Let's set the most efficient layout view of your Excel file first.
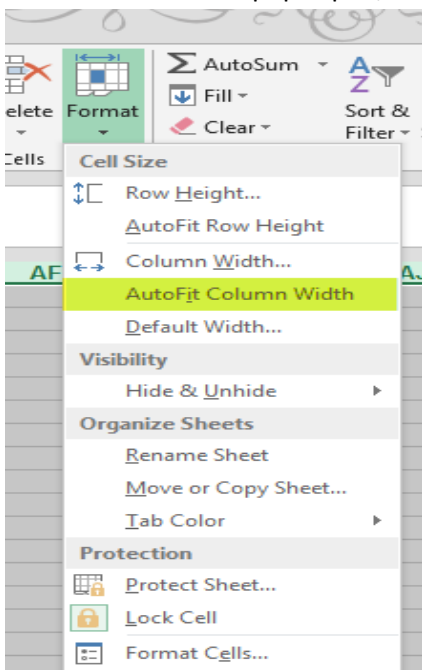
    1. *Click* the triangle in the picture below to highlight the entire Excel file (alternate keystroke: <CTRL> 'A').
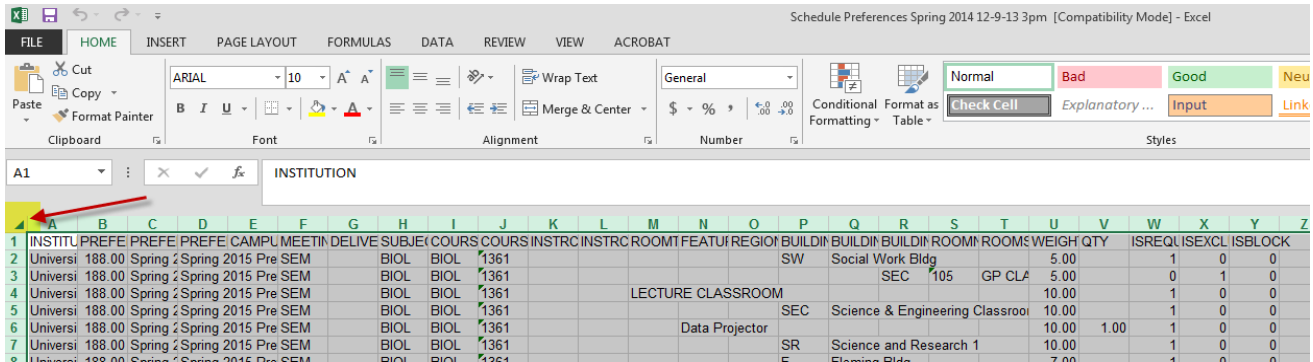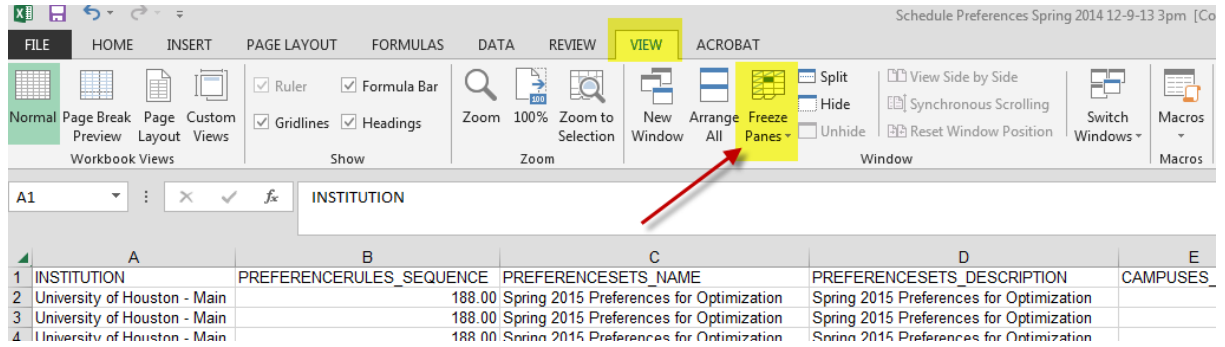

    2. From the "Home" tab, *click* the "Format" button.
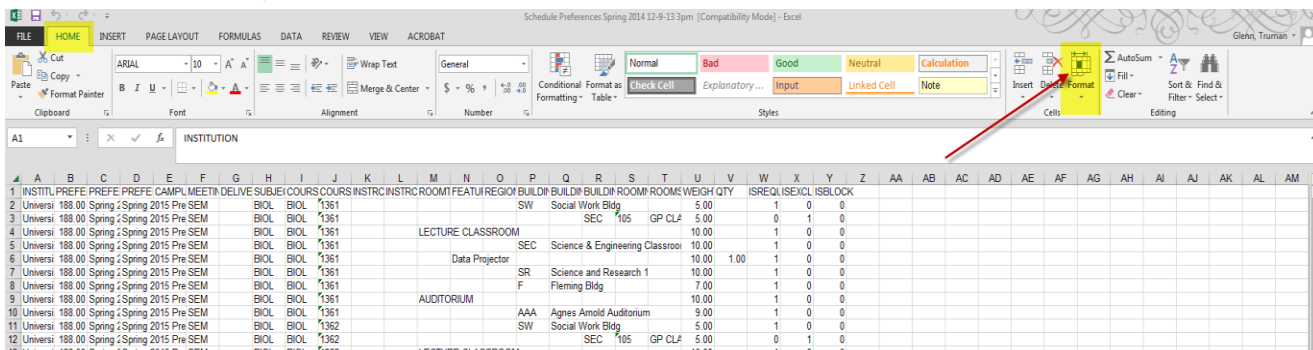
    3. From the menu that pops open, *click* "AutoFit Column Width".
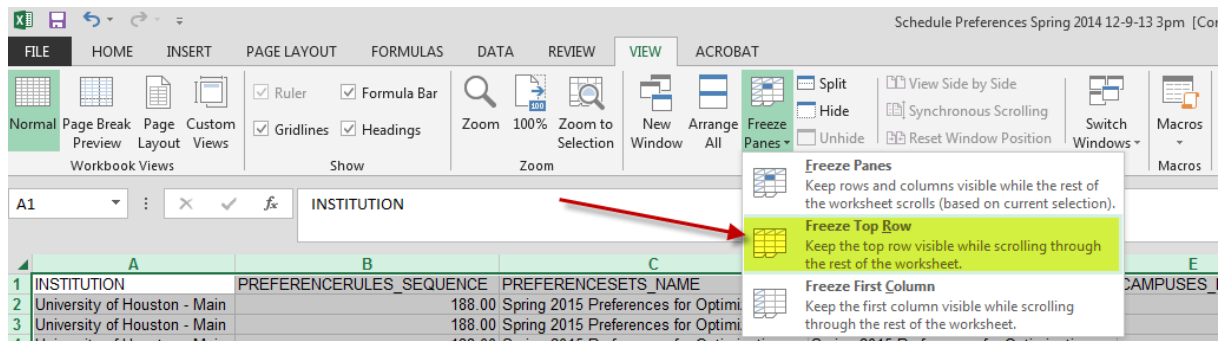
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4. Next lets freeze the top row so you can always see which field (column) you are looking at, regardless of how you filter or scroll the records by taking the following actions:

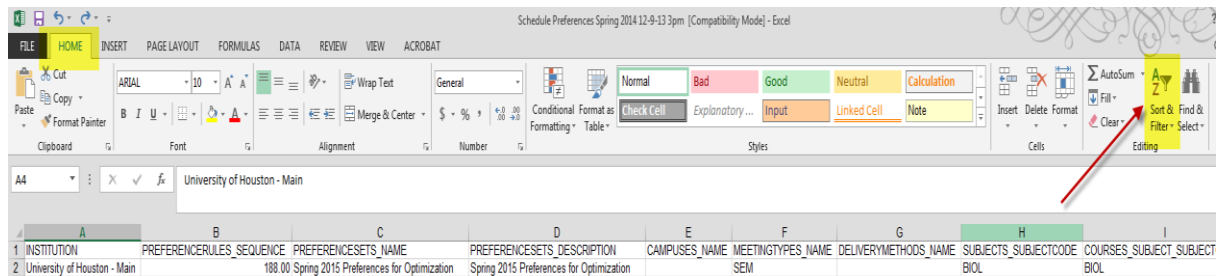a) From the "View" tab, click the "Freeze Panes" button.

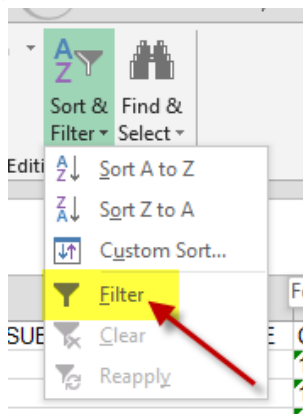b) From the menu that pops open, click "Freeze Top Row".

5. Filtering is the most critical part of the layout setup. To add filters, take the following actions:
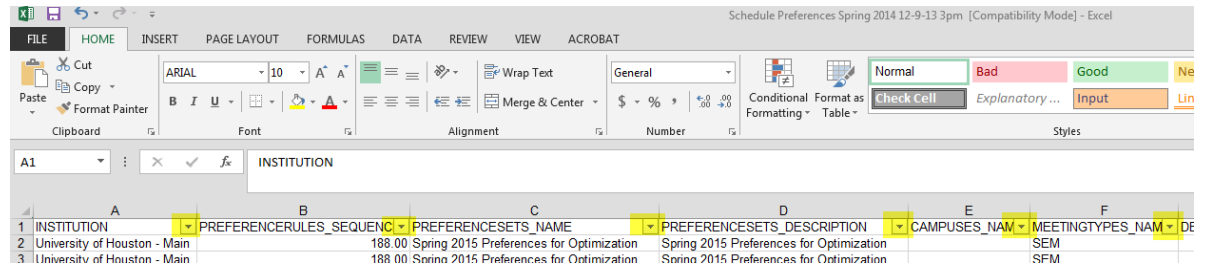
a) From the "Home" tab, *click* on the "Sort & Filter" button.

b)   From the menu that pops open, *click* "Filter".

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Note: Every field (column) should now have a triangle available for you to click on and filter what it is you wish to view (as shown highlighted).

6. *Click* the "Save" icon so you will not have to take these same action for this specific file again. If you accidently delete something or shift items out of order, you can always close the file and reopen to this point here if you take the time to complete this crucial step.
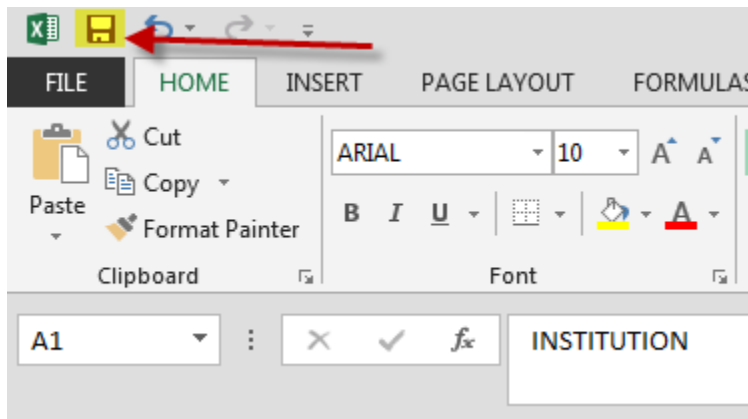
B. Now that the layout view of your file is ideal, let's filter out exactly what you want to see by choosing one of the following categories:

1. Preference Set Name
   There are multiple semester preference sets included in this one file and the file will only get larger as time goes on. We want to filter to be able to focus on the semester we are preparing to schedule or include other specific semesters as a reference/guide, if desired.
   a) *Locate* excel colum C titled "PREFERENCESETS_NAME".
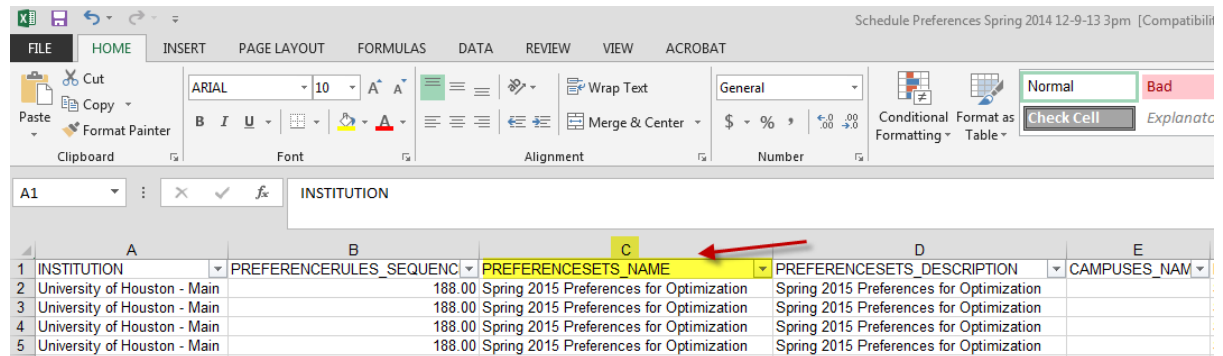
   b) *Click* on the filter triangle for this specific field.

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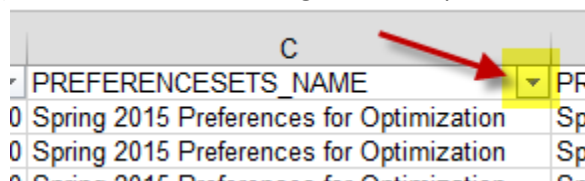
c) From the menu that pops open, make sure only the term you wish to view is selected/checked. You may either *click* "Select All" to uncheck all selected items and then click on the specific term you wish to view OR *unselect* individually all undesired terms.

FROM: TO:

d) *Click* "OK". Now only data from the preference set titled "Spring 2015 Preferences for Optimization" is selected.

2. Meeting Type

Lectures (LEC), Labs (LAB), and Seminars (SEM) are typically the only meeting types included in preferences we create. This is a great add-on filter, but can be difficult to use by itself since we have so many preferences.

   a) *Locate* Excel column F titled "MEETINGTYPES_NAME".
   b) *Click* on the filter triangle for this specific field.
   c) From the menu that pops open, make sure only the meeting type you wish to view is selected/checked. You may either *click* "Select All" to uncheck all selected items and then click on the specific meeting type you wish to view OR *unselect* individually all undesired meeting types.
   d) *Click* "OK". Now only data from the desired meeting type is selected.

3. Subjects

Many preferences are built off of the subject code (IE, BIOL, ECON, MATH, etc.) alone and the preference is built for all courses in that subject code.
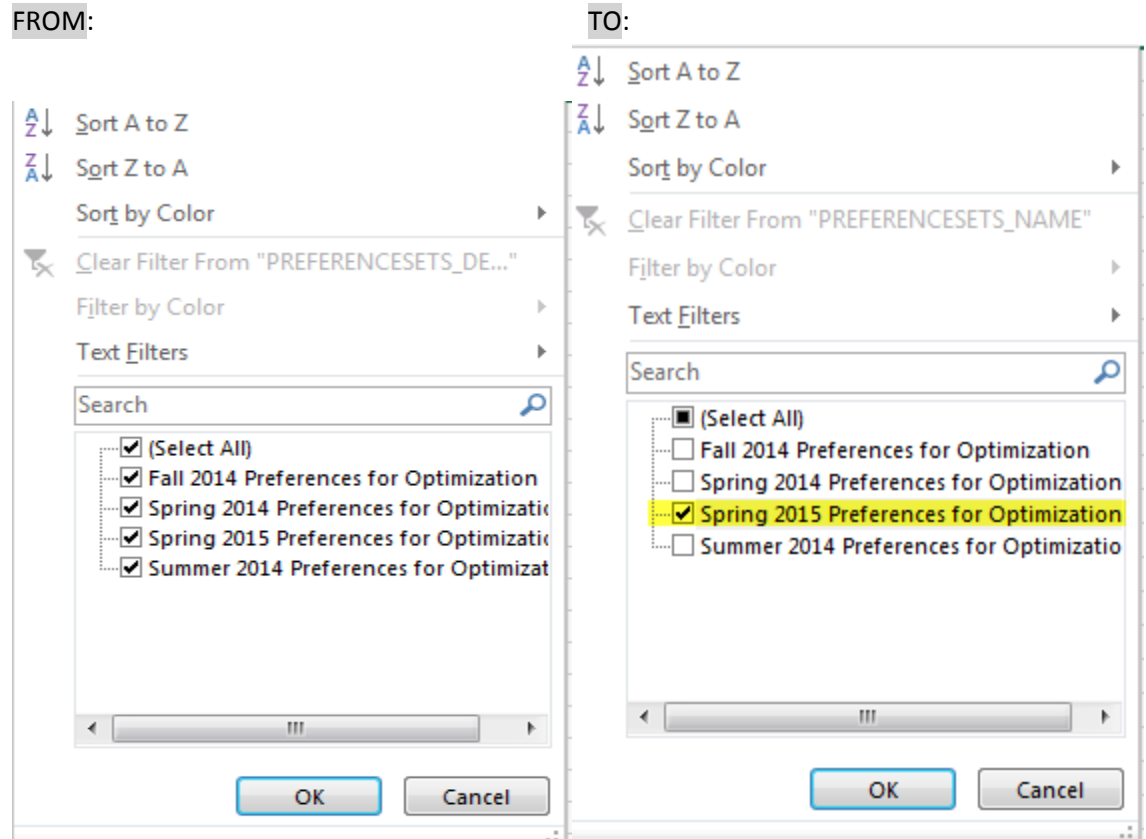
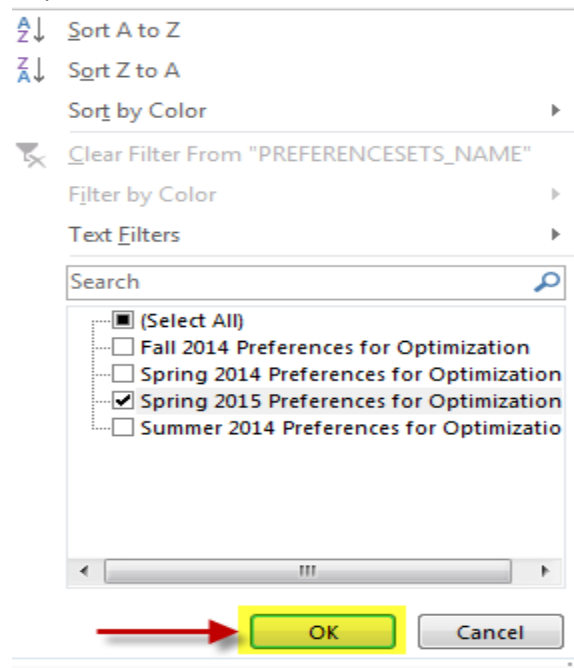   a) *Locate* Excel column H titled "SUBJECTS_SUBJECTCODE".
   b) *Click* on the filter triangle for this specific field.
   c) From the menu that pops open, make sure only the subject(s) you wish to view is selected/checked. You may either *click* "Select All" to uncheck all selected items and then click on the specific subject(s) you wish to view OR *unselect* individually all undesired subjects.
   d) *Click* "OK". Now only data from the desired subject(s) is selected.

4. Courses

The majority of preferences are built off of a specific subject's course number.
   a) *Locate* Excel columns I titled "COURSES_SUBJECT_SUBJECTCODE" and J titled "COURSES_COURSENUMBER".
   b) *Click* on the filter triangle for both of these specific fields.
   c) From the menu that pops open, make sure only the subject(s) and course number(s) you wish to view is selected/checked. You may either *click* "Select All" to uncheck all selected items and then click on the specific subject(s) and course number(s) you wish to view.
   d) *Click* "OK". Now only data from the desired subject(s) and course number(s) is selected.

Note: Room Type (column M), Features (column N), Regions (column O), Building Code (column P), and Room Number (column S). The preference requests submitted must have include information from these fields in Ad Astra in order for it to populate in this file.

PART 6: LOOKING UP PREFERENCE INFORMATION FOR A SPECIFIC COURSE AND UNDERSTANDING WHAT YOU ARE SEEING.

Now that you have some direction on how to filter your preference file, we will now look for an individual course and go over what each individual field means. Take the following action in looking up what the current preferences are listed for POLS 1333 (feel free to use whatever course you like).

A. Go to field "SUBJECTS_SUBJECTCODE" (column H), and filter the subject "POLS".
B. Go to field "COURSES_COURSENUMBER " (column J), and filter the course number "1333".

Note: Please notice that in the image of the excel file below, only one preference rule is created for POLS 1333 (field "PREFERENCERULES_SEQUENCE" (column B) says 367 for every row, but there are 10 individual Excel rows.

|	A	B	C	D	E	F	G	H	I	J
1	INSTITUTION	PREFERENCERULE	PREFERENCESETS_NAME	PREFERENCESETS_DESCRIPTION	CAN	MEETINGTYPES_NAM	D	SUBJECTS_SUBJECTCODE	COURSES_SUBJECT_SUBJECTCODI	COURSES_COURSENUMBE
2328	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2329	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2330	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2331	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2332	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2333	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2334	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2335	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2336	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333
2337	University of Houston	367.00	Fall 2014 Preferences for Optimization	Fall 2014 Preferences for Optimization		SEM		POLS	POLS	1333

Why are there 10 individual excel rows? Listed below is an image of all the preferences for POLS 1333. Each individual preference item receives their own excel row. In this example for this one class, the file shows you the preferences:

- Media Link – Weight 10
- McElhinney Hall – Weight 9 (since only 1 building listed the actual number used does not matter).
- Auditorium – Weight 10
- Lecture Classroom – Weight 9 (so the optimizer will try and place the class in an auditorium over a lecture classroom as long as basic utilization requirements are being met).
- And the rest of the feature (TV, Whiteboard, Computer, VCR/DVD, Data Port) – Weight 10

M	N	O	P	Q	R	S	T	U	V	W	
ROOMTYPES_NAME	FEATURES_NAME	REGIONS_NAM	BUILDINGCODE	BUILDINGS_NAME	BUILDIN(	ROO(	ROOMS_NAN	WEIGHT	QTY	ISREQUIRE	ISE
	Media Link							10.00	1.00	0	
			M	McElhinney Hall				9.00		1	
LECTURE CLASSROOM								9.00		1	
AUDITORIUM								10.00		1	
	TV							10.00	1.00	0	
	Whiteboard							10.00	1.00	1	
	Computer							10.00	1.00	1	
	Sound System							10.00	1.00	1	
	VCR\DVD							10.00	1.00	0	
	Data Port							10.00	1.00	0	

C. To begin another search for another subject or course simply clear your previously used filter by taking the following actions:
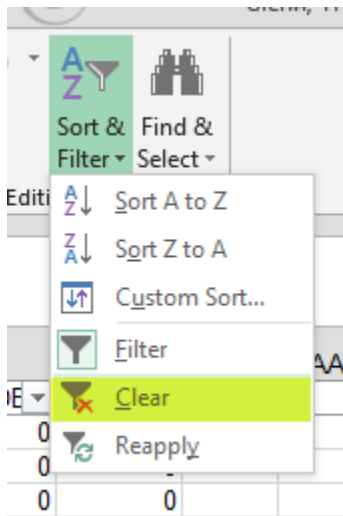
    a. *Click* on the "Home" tab or *verify* it is already selected.
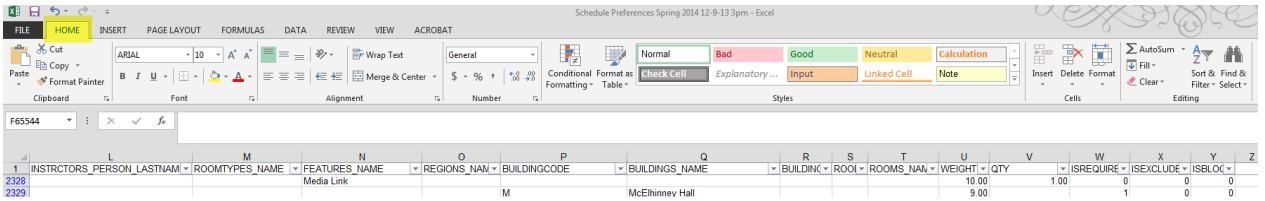
    b. *Click* the "Sort & Filter" icon.
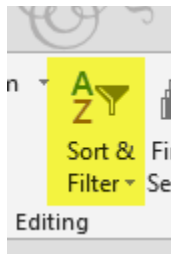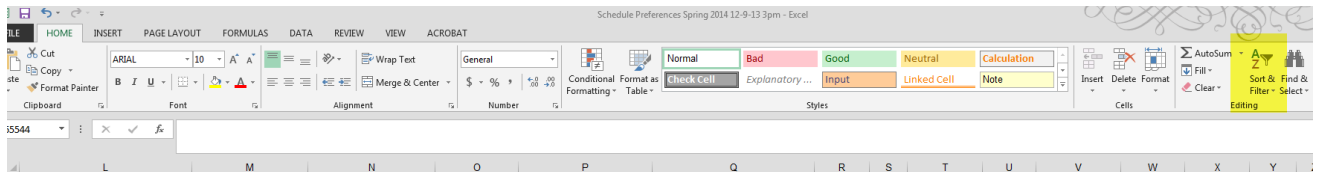
    c. *Click* "Clear".

Your list of preferences will now be a complete list. If you did not cut out the data for the specific term you are needing, be sure to filter field "C" again to select the appropriate term. You are now ready to begin your next search by repeating actions found in "**PART 6**".