TIMETABLING TRAINING MANUAL

[Using Scientia Enterprise Course Planner and Enterprise Timetabler]
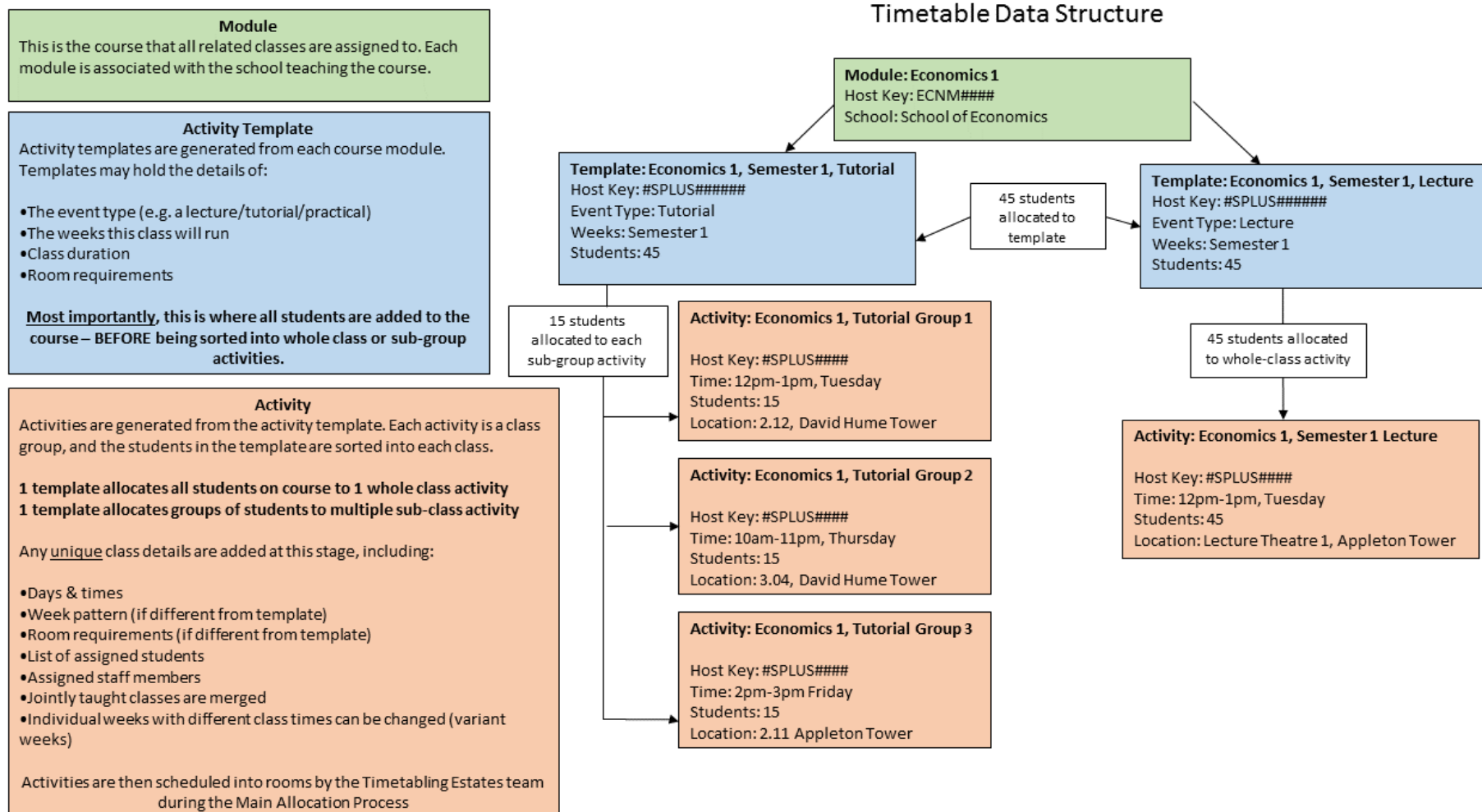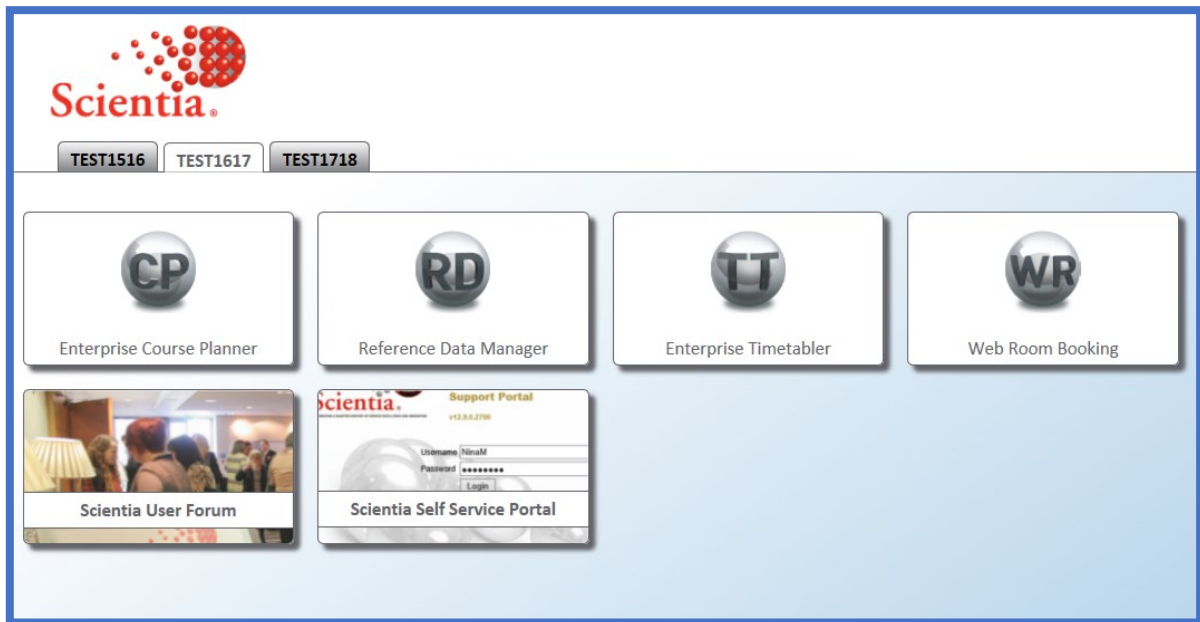
Contents

1. Overview

Module — Modules (courses) are automatically imported into Scientia Enterprise from EUCLID. New Modules and Module changes are made in EUCLID.

Activity Template — Activity Templates are created from Modules. One Activity Template for each discrete type of event involved in delivering the Module e.g. recurring lectures, tutorials, labs etc. Activity Templates are used to create Activities.

Activity — An Activity is an event or set of identical events. Activities are what appear on the timetable, what students sign up to, rooms are allocated to.

Timetable Data Structure

Module
This is the course that all related classes are assigned to. Each module is associated with the school teaching the course.

Activity Template
Activity templates are generated from each course module. Templates may hold the details of:

- The event type (e.g. a lecture/tutorial/practical)
- The weeks this class will run
- Class duration
- Room requirements

Most importantly, this is where all students are added to the course – BEFORE being sorted into whole class or sub-group activities.

Activity
Activities are generated from the activity template. Each activity is a class group, and the students in the template are sorted into each class.

1 template allocates all students on course to 1 whole class activity
1 template allocates groups of students to multiple sub-class activity

Any *unique* class details are added at this stage, including:

- Days & times
- Week pattern (if different from template)
- Room requirements (if different from template)
- List of assigned students
- Assigned staff members
- Jointly taught classes are merged
- Individual weeks with different class times can be changed (variant weeks)

Activities are then scheduled into rooms by the Timetabling Estates team during the Main Allocation Process

Module: Economics 1
Host Key: ECNM####
School: School of Economics

Template: Economics 1, Semester 1, Tutorial
Host Key: #SPLUS######
Event Type: Tutorial
Weeks: Semester 1
Students: 45

45 students allocated to template

Template: Economics 1, Semester 1, Lecture
Host Key: #SPLUS######
Event Type: Lecture
Weeks: Semester 1
Students: 45

15 students allocated to each sub-group activity

Activity: Economics 1, Tutorial Group 1

Host Key: #SPLUS####
Time: 12pm-1pm, Tuesday
Students: 15
Location: 2.12, David Hume Tower

Activity: Economics 1, Tutorial Group 2

Host Key: #SPLUS####
Time: 10am-11pm, Thursday
Students: 15
Location: 3.04, David Hume Tower

Activity: Economics 1, Tutorial Group 3

Host Key: #SPLUS####
Time: 2pm-3pm Friday
Students: 15
Location: 2.11 Appleton Tower

45 students allocated to whole-class activity

Activity: Economics 1, Semester 1 Lecture

Host Key: #SPLUS####
Time: 12pm-1pm, Tuesday
Students: 45
Location: Lecture Theatre 1, Appleton Tower

2. Launching the TED Portal

Log into MyEd and then access the Test Portal by using this link:

3. Working in Enterprise Course Planner

3.1 Creating Activity Templates

Step 1.   Launch Enterprise Course Planner (ECP) from the Portal page. From the ECP dashboard, select the department drop-down selection view shown in *Figure 1.*
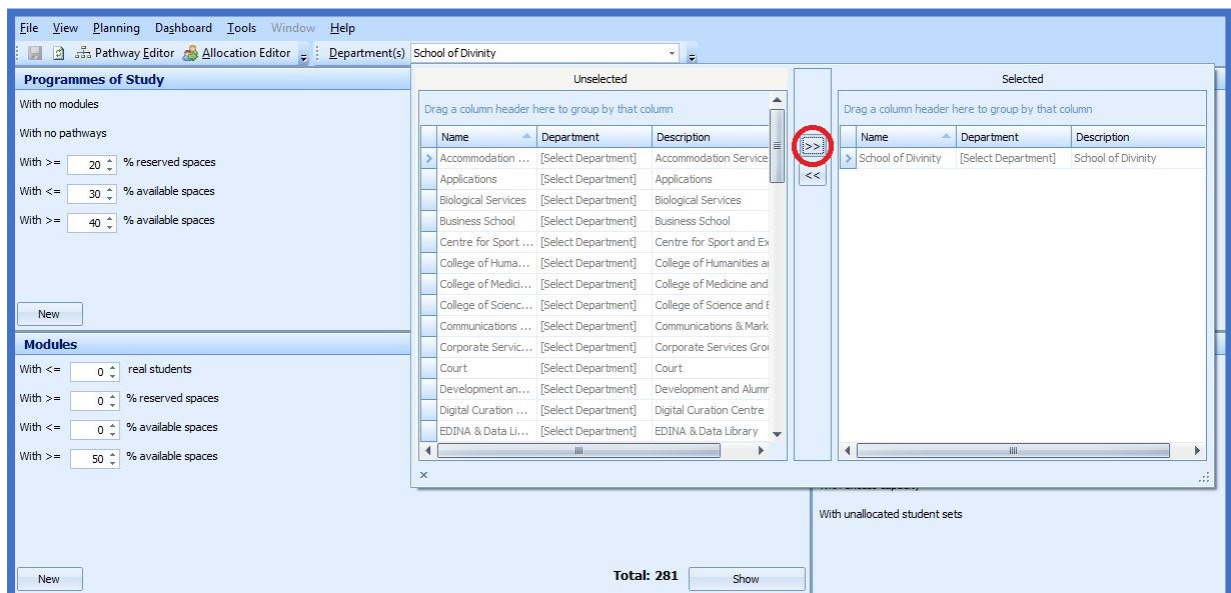

Figure 1

Step 2.   Select your School and use the [>>] arrow symbol to move your selected School from the **'Unselected'** view to the **'Selected'** view. Click the cross to close the Department Selection view. The dashboard will now display information relating to your School.

Step 3.   From the ECP dashboard, move to the **'Modules'** section and click the **'Show'** button highlighted in *Figure 2.* This will now display a full list of courses owned by your School.
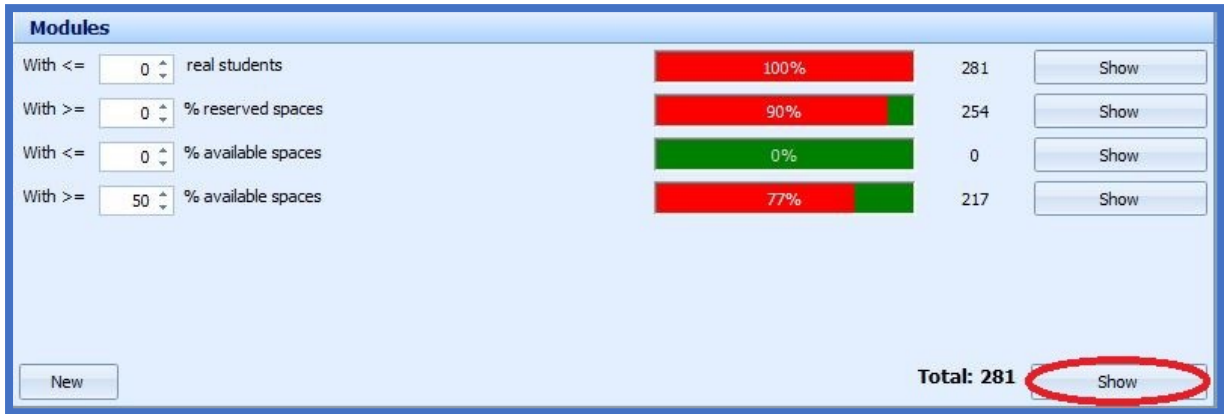
Figure 2

Step 4. You can use the autofilter row to search for the specific module you're looking for. Enable this by right-clicking the top row and selecting 'show autofilter row'.
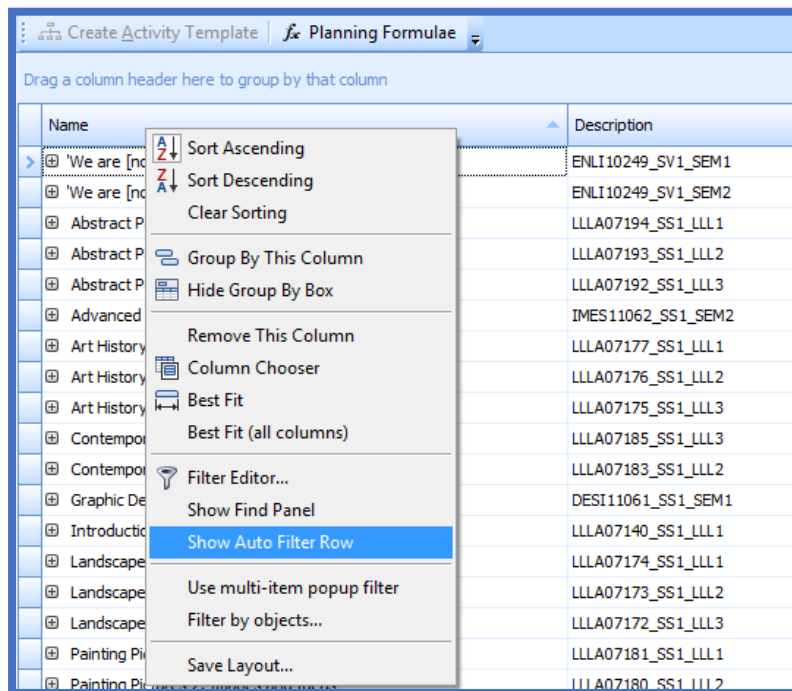
Figure 3

Step 5. Select a course by clicking on the Blue cell to the left of the course name – doing so will highlight the course record. After highlighting the course record, click the **'Create Activity Template'** button as shown in *Figure 3.* You will now have generated an **'Activity Template'** which is attached to the parent course that it was generated from.
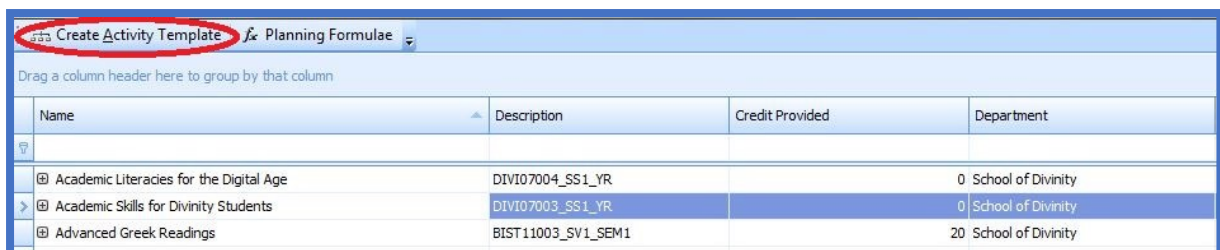
Figure 4

Step 6. Click the **'Apply'** button situated at the bottom right-hand corner of the screen, as shown in *Figure 5.* Then click OK to close the Module Window.
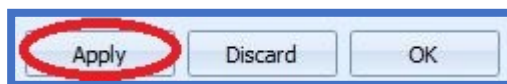
Figure 5

(Repeat Step 4 for other courses you need to create templates for. You can create more than one template against a course. For example; you might wish to create a template for the Lecture session, and another for the Tutorial sessions.)

Having closed the Module window, you may need to refresh the data in your dashboard view. You can do this by selecting **'Dashboard'** from the drop-down menu bar and selecting **'Refresh All'** as shown in *Figure 5.* It is recommended to also do a **Writeback** (save) at this time. You do this by clicking on the Disc image that is highlighted in *Figure 6.*
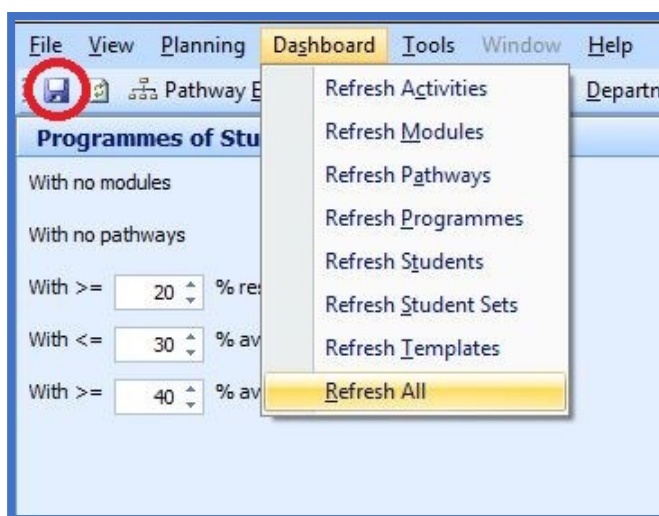
Figure 6

3.2   Working with Activity Templates

An Activity Template is where you can set common properties that will apply to all the individual activities you generate from them. There can be as many, or as few, common properties as you deem necessary; e.g. you may wish to determine that all activities will be 1 hour in duration, and that all will have the same teaching week span; add most common zone.

Step 1.   From the ECP dashboard, move to the '**Templates'** section and click the **'Show'** button highlighted in *Figure 7.* This will now display a full list of templates generated against courses owned by your School.
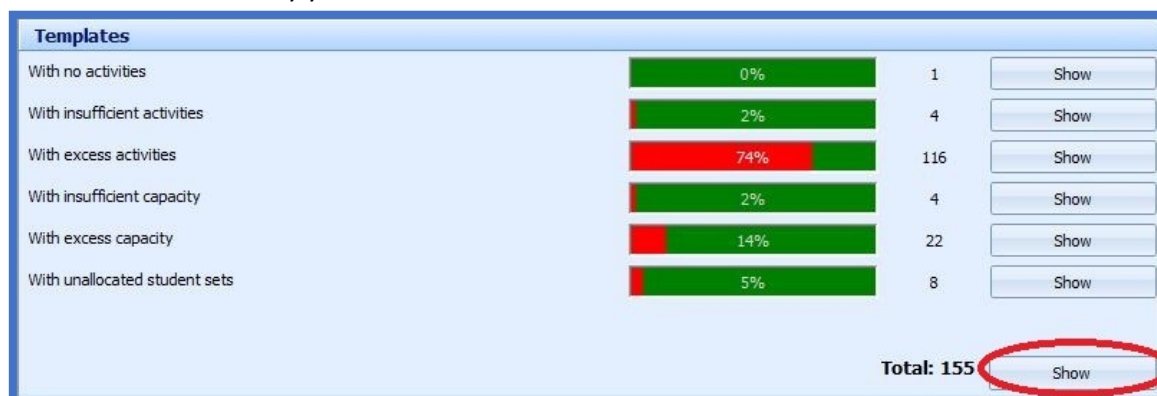

Figure 7

Step 2. Select a template by clicking on the blue cell to the left of the course name – doing so will highlight the template record. Clicking the '+' will show any activities already added to this template, and clicking '-' will minimise this. You are now ready to start confirming the properties which will be common to all activities generated from this template.

We will now work through some of the key template column categories in the template example shown in *Figure 7*

1. **Name:** the Name field inherits the properties of the equivalent field at Course level. The contents of this field can be changed to whatever description is appropriate to the template. The key thing to bear in mind is that all the activities generated from this template will inherit the details from this field.

2. **Activity Type:** Click on the right-hand side of the highlighted cell to activate a list of pre-loaded Activity Types. In this example the associated Activity Type is **Lecture**

3. **Duration:** Click on the right-hand side of the highlighted cell to activate a list of available duration slots. The timetabling system is set to operate with 30min booking periods, so you need to select multiples of this duration to achieve the necessary duration.

4. **Planned Size:** Click in this cell to amend the numerical value to reflect the size of each individual activity to be generated from this template. Which will be the size of each activity generated from this template.

5. **Zone:** Click on the right-hand side of the highlighted cell to activate a list of pre-loaded Zones. In most cases the Zone is the equivalent of a building. From this list you can select a Zone (in this example: **New College**) which will be applied as a scheduling requirement against all activities generated.

| Name	Activity Type	Duration	Planned Size	Module Size	Existing Activities	Zone	Need To Generate	Required Activities
⊞ Advanced Greek Rea...	*Lecture	02:00	15	13	1			1
⊞ Advanced Greek Text...	*Lecture	02:00	15	3	1			1
⊞ Advanced Hebrew Te...	*Lecture	02:00	20	9	1	Name		1
⊞ Approaches to Resea...	*Lecture	03:00	80	0	1	*Central		0
⊞ Approaches to Resea...	*Lecture	00:30	0	0	1	*Easter Bush		0
⊞ Approaches to Resea...	*Lecture	00:30	7	0	1	*George Sq...		0
⊞ Approaches to Resea...	*Lecture	00:30	0	0	1	*Holyrood		0
⊞ Approaches to Resea...	*Lecture	00:30	0	0	1	*Kennedy T...		0
⊞ Approaches to Resea...	*Lecture	02:00	10	0	1	*King's Buil...		0
⊞ Atheism in Debate: D...	*Lecture	01:00	140	0	1	*Lauriston		0
⊞ Atheism in Debate: D...	*Tutorial	01:00	12	0	12	*Little France		0
⊞ Augustine in his Age ...	*Lecture	02:00	32	10	1	*New College		1
⊞ Augustine: Confessio...	*Lecture	02:00	36	2	1	*RHSC Aca...		1

Figure 8

3.3   Adding Columns

We are now going to look at how you can activate additional columns within the template view and subsequently apply a pre-loaded week span against the chosen template.

Step 1.   Hover your mouse cursor over any of the existing column headings. Then right click and select **Column Chooser** to activate a Customization list of available, additional column heading, as shown in *Figure 9*
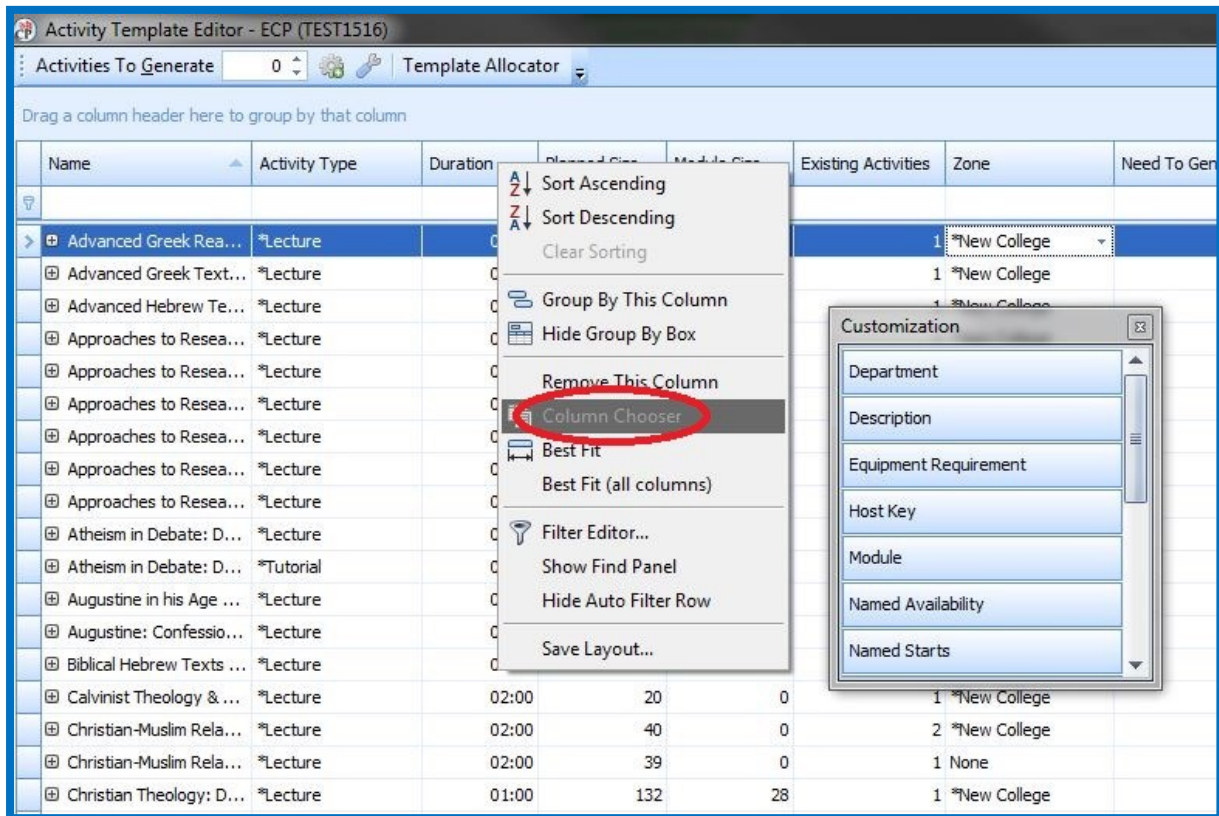
Figure 9

Step 2.   From the Customization column list, double click the column titled **Named Availability** this will add the column to the end of your existing columns. Any number of additional columns can be added to the view in this way. You can click and drag the column to a more preferred location.

Step 3.   Click on the right-hand side of this cell to activate the Named Availability window. From this window you have the ability to set week spans against your template.
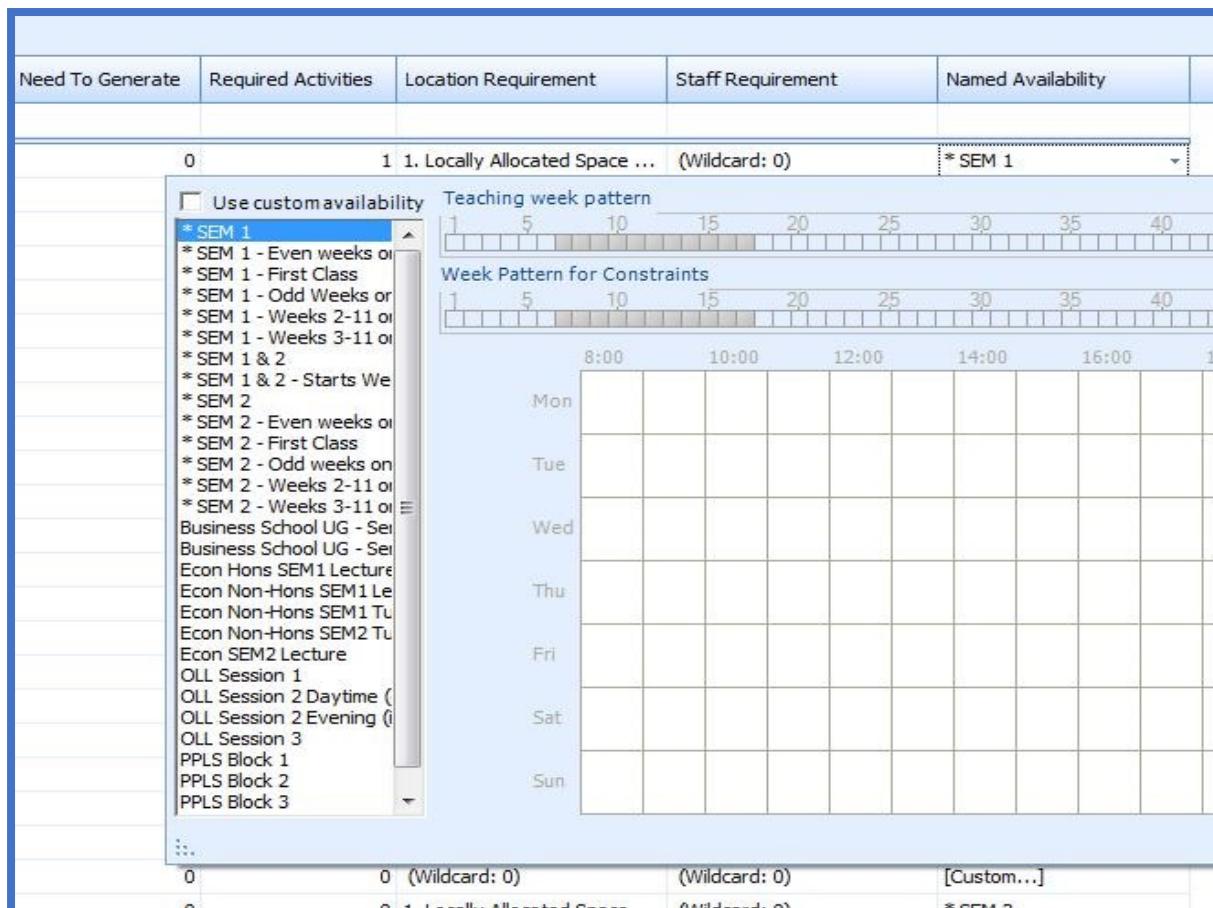
Figure 10

Having opened the Named Availability constraint window, you will see a short list of pre-loaded semester-based availabilities, as shown in *Figure 10*

> **Step 4.** First un-tick the box, located in the top left-hand corner, labelled **Use custom availability**

> **Step 5.** Next, select one of the pre-set semester labels. In *Figure 10,* **Sem 1** is selected as an example. This will automatically set the correct recurring week span for the semester, which will be applied to all activities generated from the template.

> **Step 6.** Finally, click the **x** to close the Named Availability window. The selected week span will now be displayed in the **Named Availability** column.

> **Step 7.** By this step you have confirmed all the common properties relating to the template. Before proceeding, you should now click the **Apply** button, found towards the bottom right-hand corner of the template editor window, as shown in *Figure 11,* to save these changes.
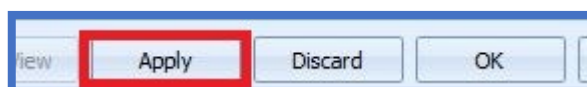
Figure 11

NB. If you want to set a custom week availability for your activities, leave the availability set to 'Custom' and apply. Custom weeks can be edited in Enterprise Timetabler as explained in 4.1.

3.4   Generating Activities

Having created an Activity Template, you are now in a position to generate a number of activities against it.

Step 1.   From with the Activity Template Editor, highlight the individual template you have created as an example.

Step 2.   In the top left-hand corner is an option labelled **Activities to Generate**. In the adjacent box, you can stipulate the number of individual activities required against the template, as shown in *Figure 12.* You can set a numerical value as required.

Step 3.   After setting the number of required activities, click the **Generate Activities** icon, situated to the right, to enable the template editor to generate the required activities.
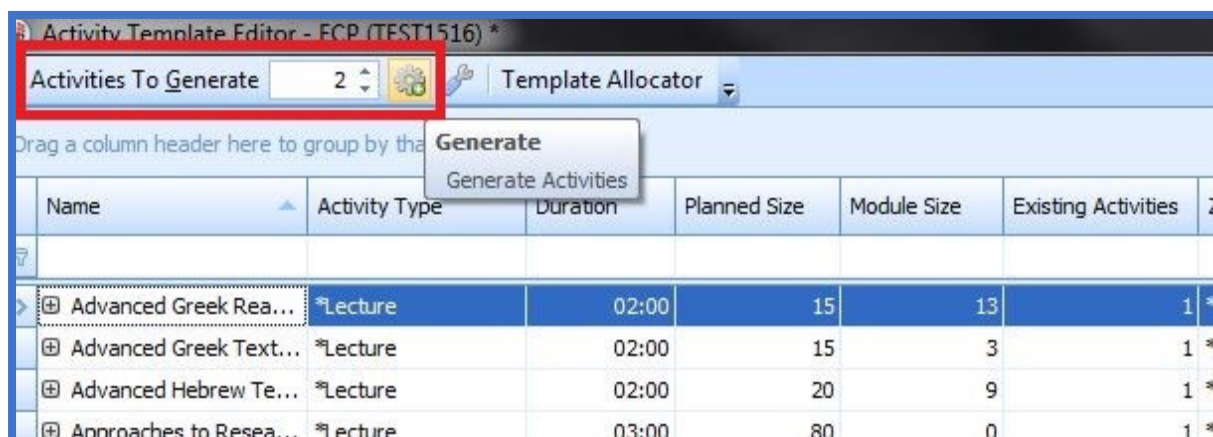
Figure 12

Step 4.   Having generated the activities, click the **Apply** button

Once you have generated the requisite number of activities and clicked **Apply** the existing activities column will increase to show the new total activities generated to this template shown in *Figure 13*. In this example we added 2 activities so the new total of existing activities is now 3.

Figure 13

You have now completed the process of generating both templates and activities. You are now ready to begin working with these activities in **Enterprise Timetabler.** You can now close the template editor and return to the main ECP dashboard.

The final task is to **Writeback** your data to the database as shown in *Figure 14.* The **Writeback** symbol will be blue if you have made any changes and will be greyed out if you have no changes to **Writeback**.
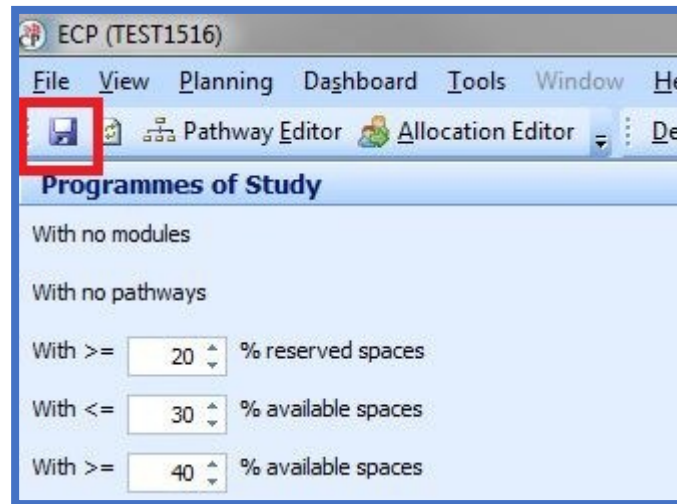
Figure 14

4. Working in Enterprise Timetabler

4.1 Preparing Activities for Scheduling

Having generated your activities in **ECP**, you are now ready to work with the activities to ensure they are ready for scheduling. You will need to Launch Enterprise Timetabler from the Ted Portal.

Step 1.   From the drop-down selection directly beneath the **Views** bar, select the option **Modules**. This will activate all the courses associated with your School.

Step 2.   In the views section do a right click on the name column and then click on show Auto Filter Row. This gives you a free type search bar. You will also need to add this to the activities section if required.

Step 3.   You can click the **Name** column header to rank the list alphabetically. You also right-hand click, select **Column Chooser** and drag-and-drop additional column headers from the **Customization** window covered earlier in *Figure 9.*

Step 4.   Select the course from which you generated the template and activities. By selecting the course, you will activate all the activities associated with it in the **Activities** view, situated to the right of the screen, as shown in *Figure 14.*
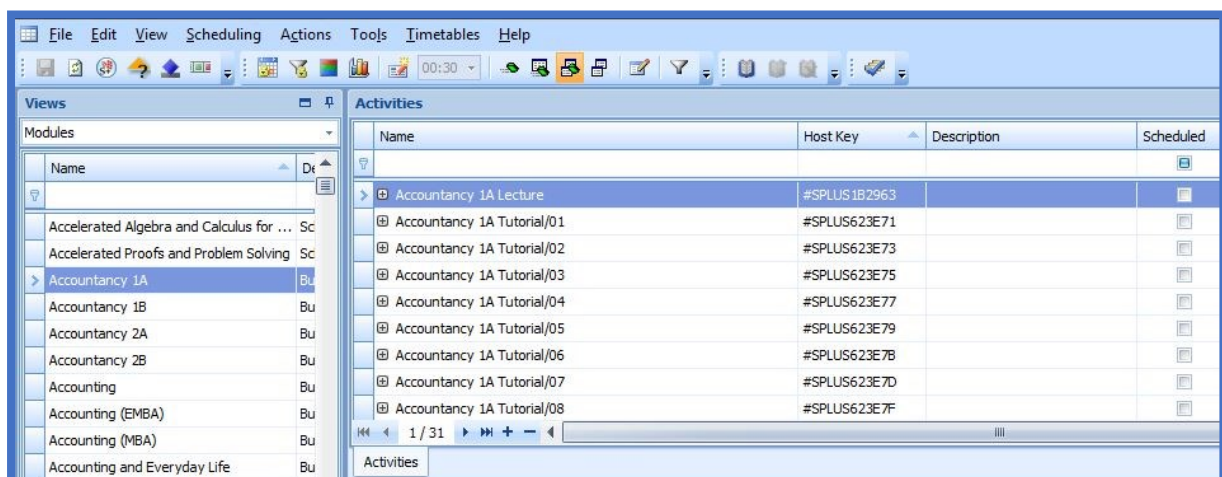

Figure 15

8

Before you start to confirm the resource requirements for each activity, it is worth activating some key columns of information within the Activities spreadsheet view. This view will play a pivotal role in your ongoing use of **Enterprise Timetabler (ET)** so it is worth spending a bit of time experimenting with the various column options.

The suggested column layout can be found in Appendix 2.

NB. If you wish to add custom week patterns to activities: Right-click on the activity to change then select the option, 'Edit weeks'.
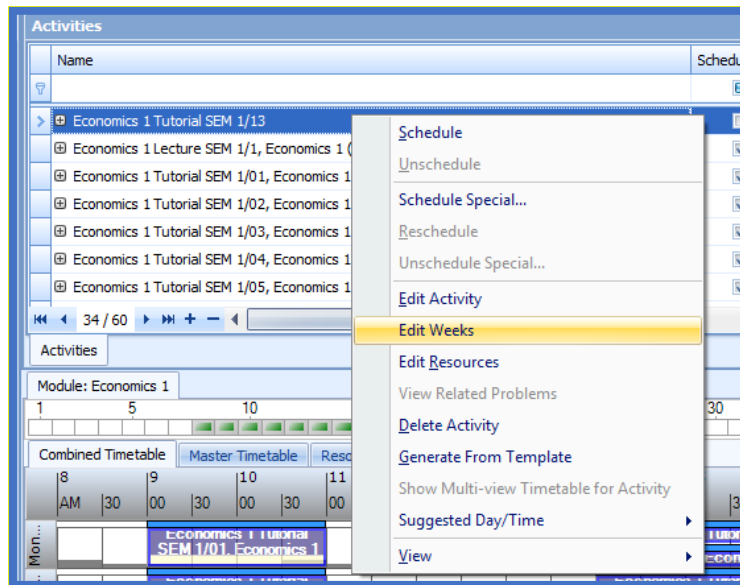
Figure 16

This will show you a timeline of weeks as seen below. Click to select and deselect weeks, holding the 'Crtl' key to select multiple weeks.
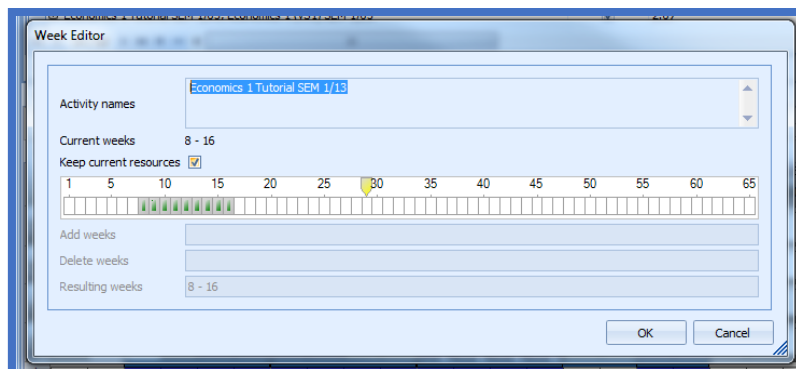
Figure 17

Otherwise, the pre-selected patterns should remain selected from ECP.

Your activities are now ready to have required days and times set against them.

Step 1. Highlight one of the activities in your view. From the timetable grid view, directly beneath the activity spreadsheet view, select the tab labelled **Resources**

Step 2. Select the **+** symbol directly adjacent to the category labelled **Day/Time**.

Step 3. From the options provided, select the **Day** and the **Start Time** that will apply to the activity in question.

Step 4. You can now confirm this requirement by clicking the **Change Requirement** button highlighted in *Figure 18.* You can select multiple days as a requirement against an activity.
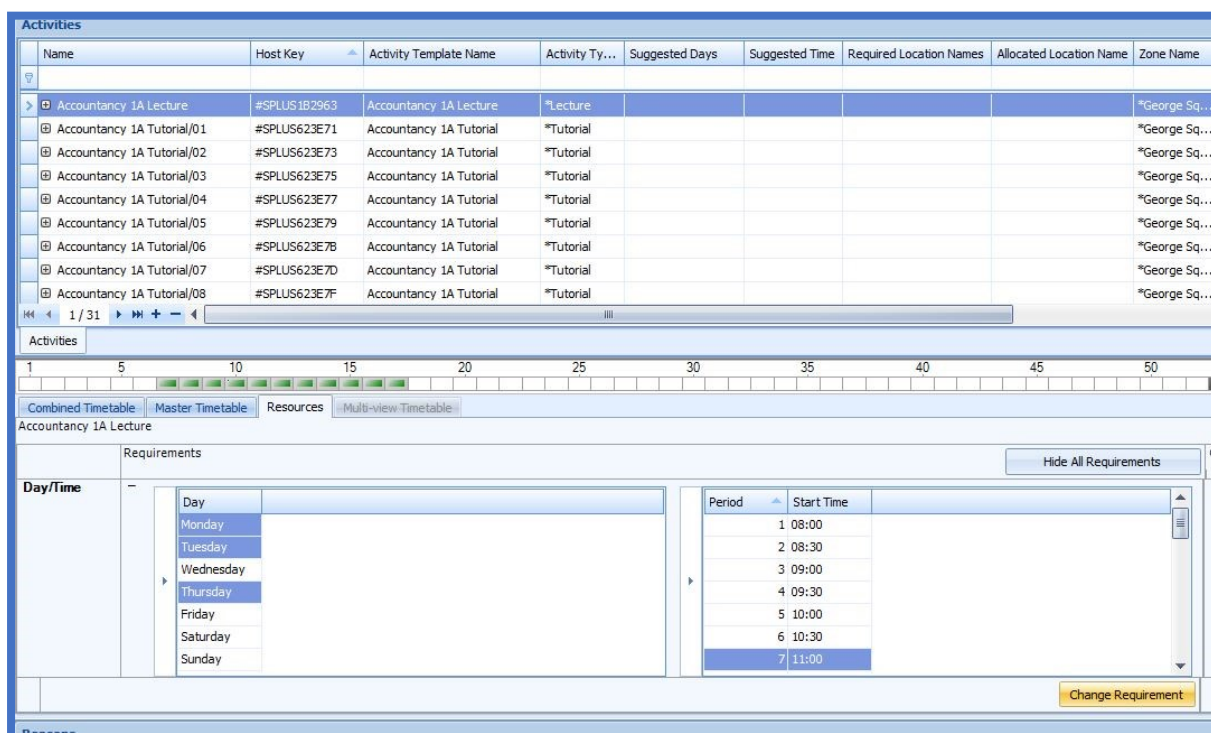
Figure 18

By confirming this requirement you will notice that the **Suggested Days** and **Suggested Time** columns (in the activity spreadsheet view) now display confirmation of this requirement, as shown in *Figure 18*.
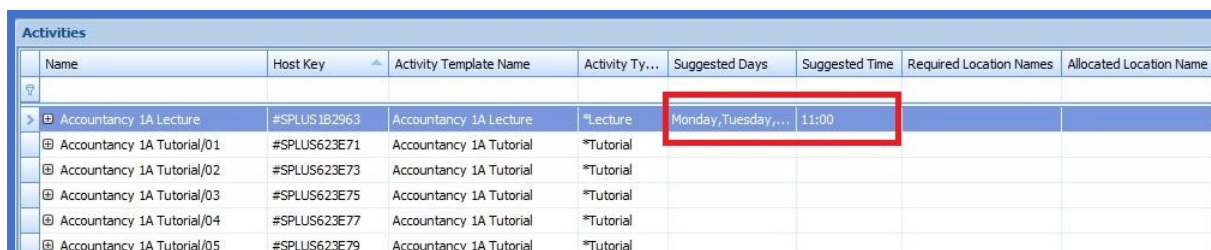

Figure 19

You can also bulk-edit activities when setting requirements against them. It may be that a number of activities will run on the same day and time, or it may be they will all require the same room.

Step 5. From the activity spreadsheet view, you can bulk-select activities by using **CTRL+mouse-click,** to select the number of activities that you need. As shown in *Figure 20*

Step 6. You can now set the necessary requirements within the Resource tab, which will be applied to all highlighted activities. As per steps 2-4 above.
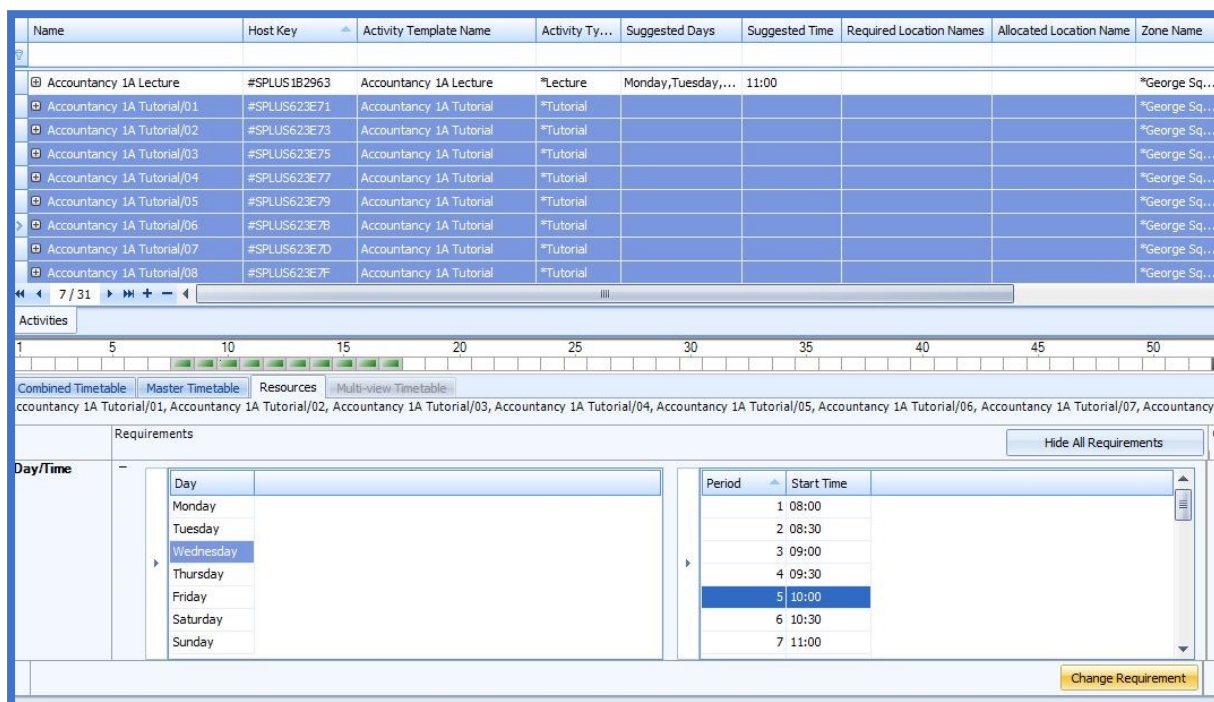

Figure 20

4.2 Working in Request Mode

Your activities are now in a position to be allocated rooms, or **Locations** as they are referred to in Scientia Enterprise. Locations are requested for an external location controller to approve. We will now look at how the request process works.

From the main toolbar select **Request Mode,** as shown in *Figure 21*
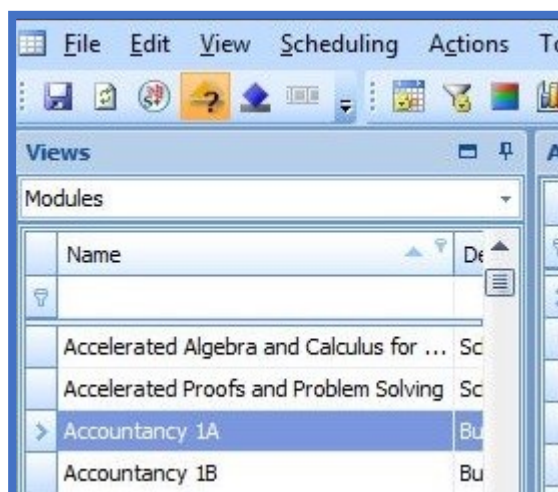

Figure 21

Once you have entered **Request Mode**, this status is confirmed by way of a symbol in ET's bottom menu bar, directly adjacent to confirmation of your UUN, as shown in *Figure 22*

Figure 22

Step 1.   Click on the **Resources** tab directly above the timetable grid view.

Step 2.   Click on the **+** symbol to activate the **Locations** section, as shown in *Figure 20*

Step 3.   Now change the numerical value in the **Number** box from 0 to 1

Step 4.   Now expand the side-arrow of the **Suitabilities** box to activate a list of available options. Now select the suitability requirements for your activity. At least suitability categories 1 & 2 must be selected. Remember that the more suitabilities are added, the narrower the scope of your search will become.
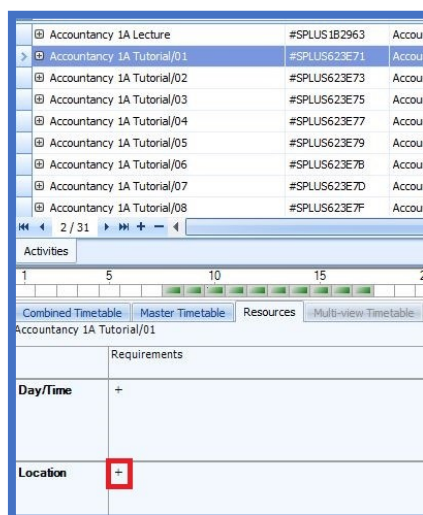

Figure 23

Step 5.   Once you have selected your suitabilities, move them across from the **Available** to the **Selected** section, as shown in *Figure 23.*
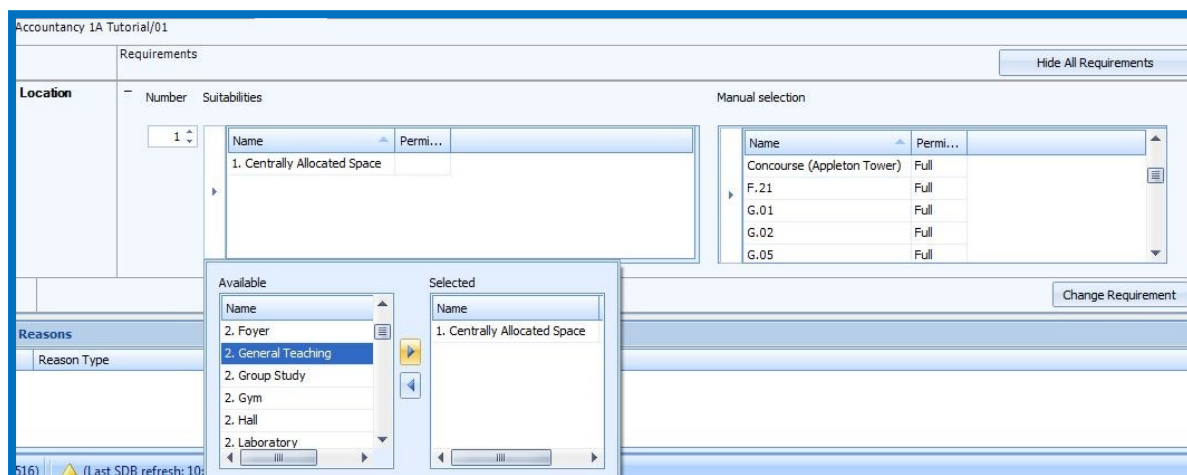

Figure 24

Step 6. Now close the suitabilities list and select the **Change Requirement** button to confirm your selections.

Step 7. To Request without a specific location you need to only put in suitabilities and click change requirement. Then click search in Location and accept this will then become a Pending Request out, and you will be assigned a room that meets these suitabilities.

NB. When you search for a location there will be no rooms appearing that are centrally allocated as they have been constrained.
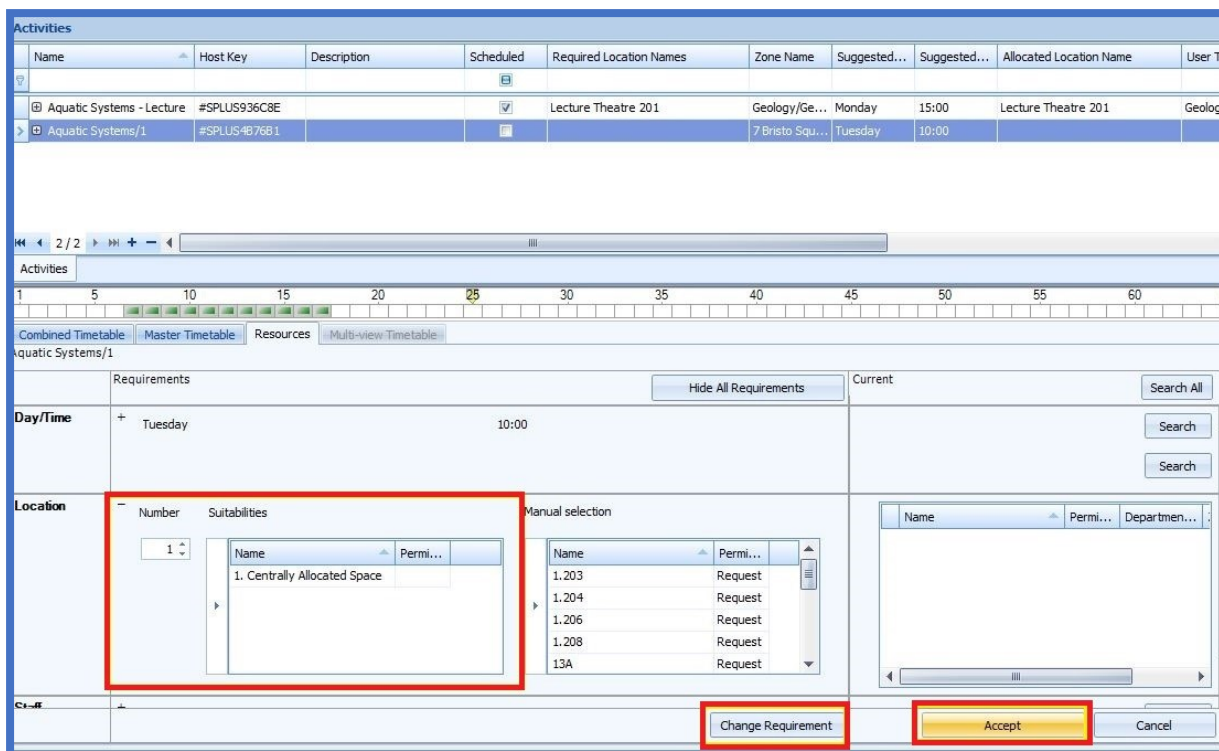

Figure 25

Step 8. If you need a specific location, this will mean that during the allocation process it will only look for this one room. To select the room in manual selection highlight the required location and then click search in Location and accept** this will then become a Pending Request out for this specific location.
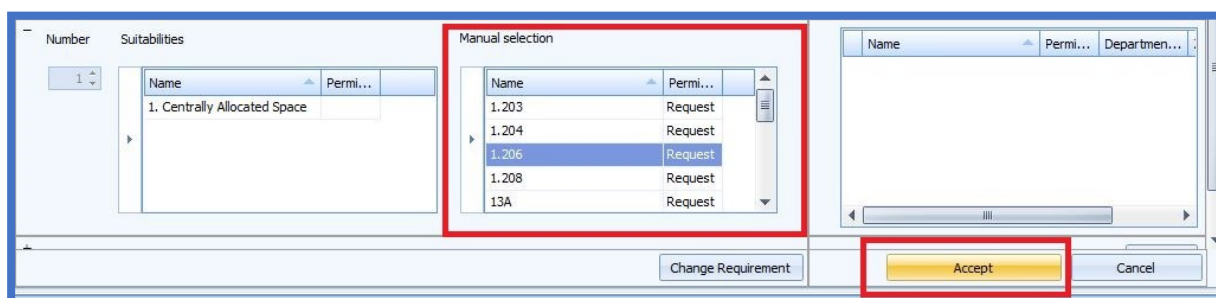

Figure 26

NB. If you click change requirement when manually selecting a location you will get the following error message.
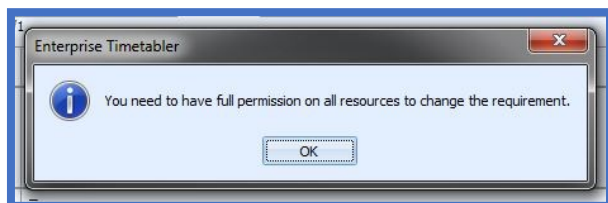

Figure 27

Click OK and then click search and accept, and the location will be requested. If there are locations appearing in the location search box if you have manually selected a room this will supersede the options that are free.

Step 9. Within the list of displayed locations you can use the **Column Chooser** and **Customization** functionality, covered earlier, to activate additional, useful columns related to **Zones** (confirmation of building) and **Department Name** (confirmation of owning dept) to help you decide which location to request.

By clicking back on the **Combined Timetable** tab, you will now see that the activity is scheduled, with two key additional pieces of information on display, as shown in *Figure 28*:
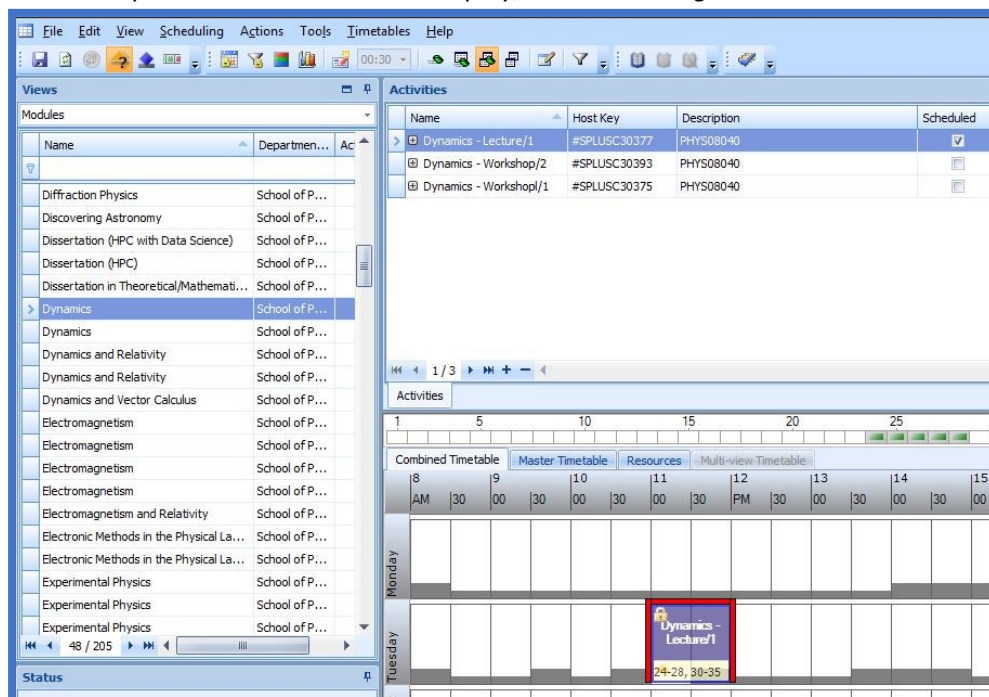

Figure 28

Step 10. The activity has a padlock symbol which indicates is locked by a resource request that requires intervention and confirmation by the resource owner.

Step 11. The activity also contains an amber triangle, which is a visual confirmation that the activity exists in **Request Mode.**

Step 12. Requestors are also advised to activate the **Request Deny Text** column within their activity spreadsheet view, in order to monitor reasons for any requests denied by a location 'Gatekeeper'.

Once the activity is confirmed as a request, the **Pending Requests (out)** filter, situated in the **Status** view will increase in value by one, as shown in *Figure 29.* You can click on this button to instantly filter to all requests for which you are awaiting confirmation by the location controller.

Figure 29

The "Allocated Location Name" will remain empty until the TTU/Gatekeeper has allocated a location to your activity
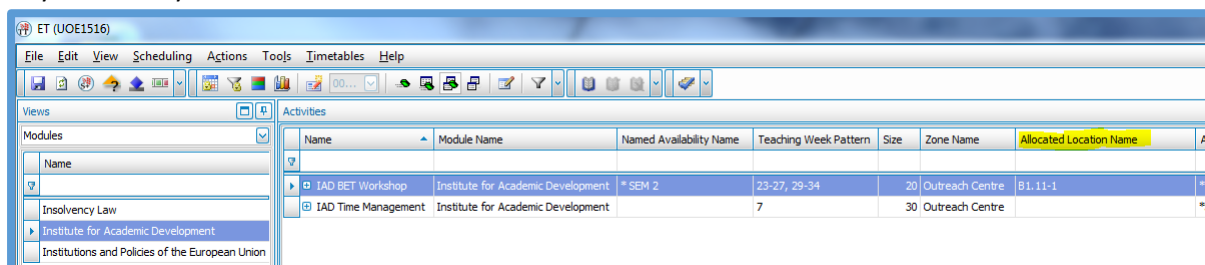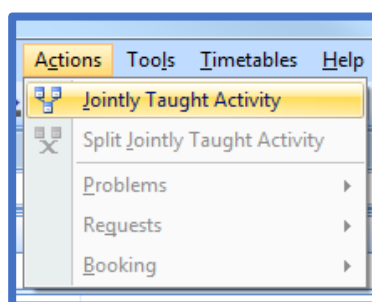

Figure 30

5. Jointly Taught Activities

Occasionally, some courses will be taught in the same class. To create a Jointly Taught activity, the process is the same as creating a regular activity as above. Activities are Jointly Taught when two activities are linked together to be taught simultaneously.

To link together two jointly taught courses go to **Enterprise Timetabler.**

Step 1.   In the modules view, search the module and then highlight the activity which you wish to join.

Step 2.   From the main drop-down menu labelled **Actions** select the option labelled **Jointly Taught Activity.** This will open the Jointly Taught activities window.

Figure 31

Step 3.   In the **Candidates for Sharing** section, select the module which contains the activities you wish to join. Right-click the module drop-down to select 'auto-filter row' to search more quickly. The options available to be joined will be displayed below. Only activities with a matching week pattern and duration will be displayed.
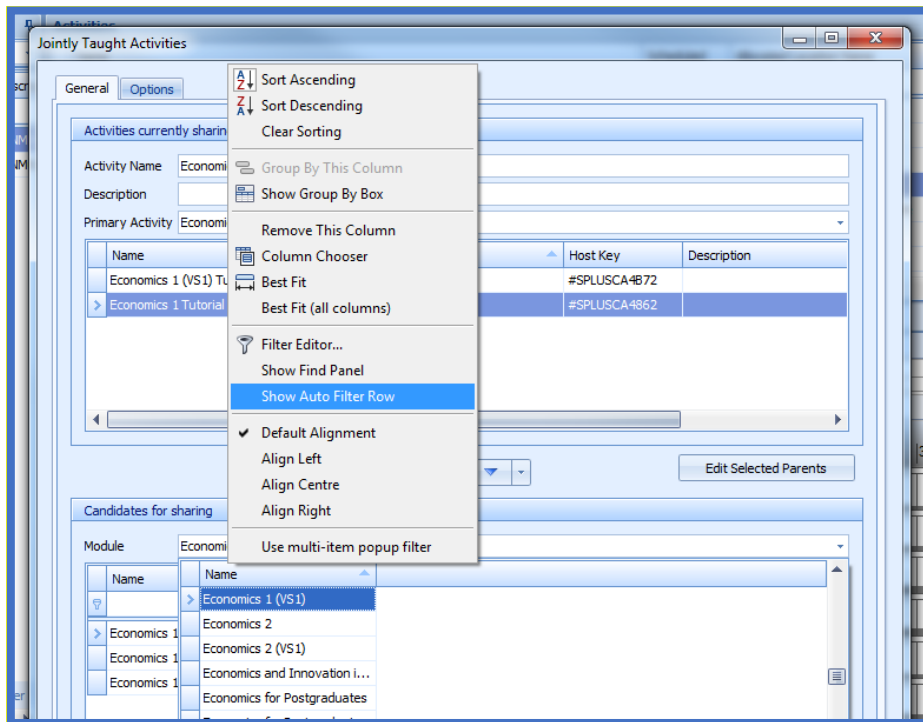
Figure 32

Step 4. Select the correct activity and click the blue 'up' arrow to join the activities together. Additional activities can be added by following the same process.
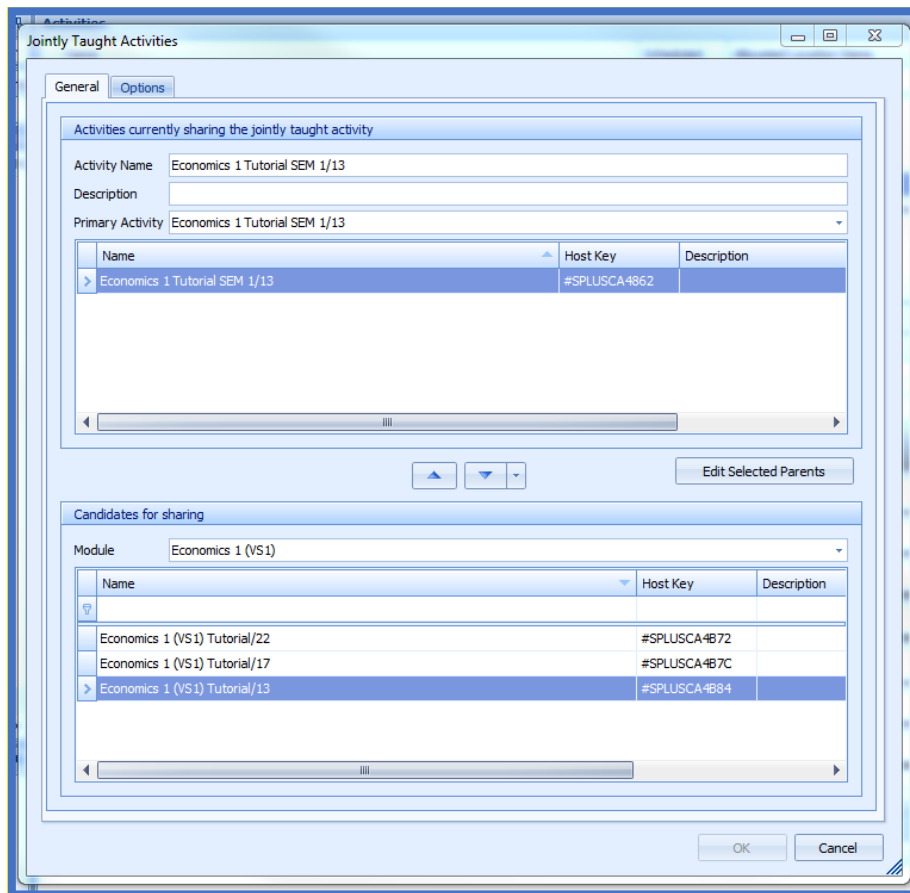

Figure 33

Step 5. Once all the activities required have been added to the jointly taught activity select the **Options** tab at the top of the jointly taught activities window.

Step 6.   Using the Options tab, you can edit what information the created activity will inherit from its parent activities.

Click **ALL** for name, size, location and staff. This will merge the two activity names, the group size, locations, and required staff in the Jointly Taught activity created.

If you do not click **ALL,** the Jointly Taught activity will inherit the name, size, etc, of *one* of the parent activities.
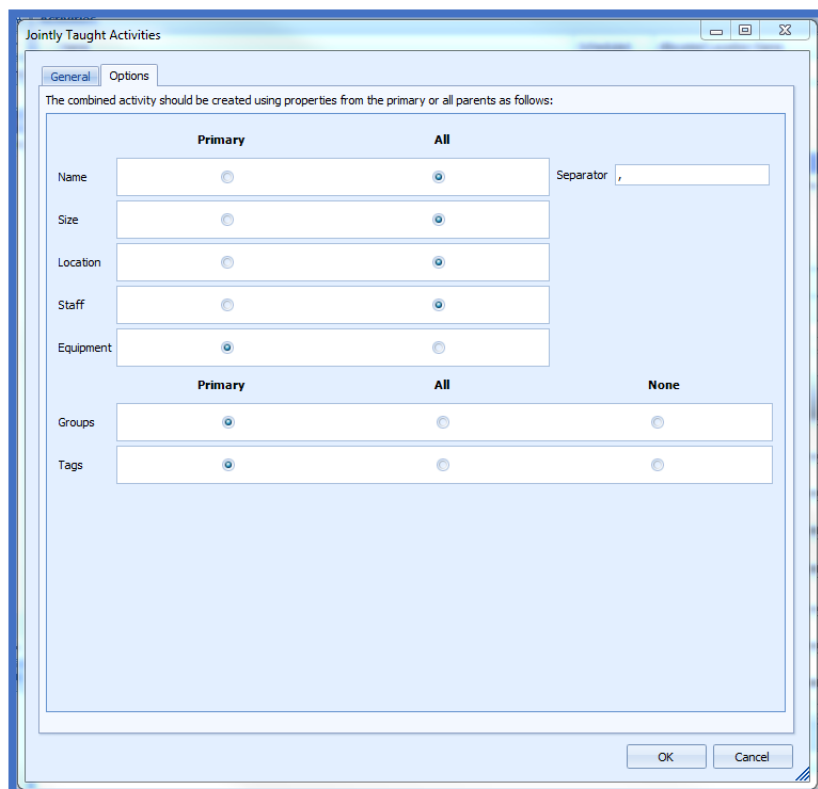
Figure 34

Step 7.   Click **OK** to confirm your changes.

Step 8.   A new joint activity will be created that will share the properties of the parents.

To see whether an activity is jointly taught, it's helpful to use the **Jointly Taught Parents** column on Timetabler. This will allow you to see which activities make up the Joint activity.

Figure 35

NB. Jointly taught activities' days and times cannot be edited even when unscheduled. To edit, the activity must be split, edited in its separate parts, and joined again.

Figure 36

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6.1   Appendix 1 – Glossary of Terms

Enterprise – The timetabling system (contains ECP and ET)

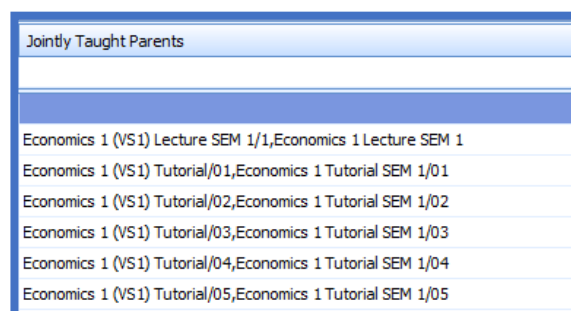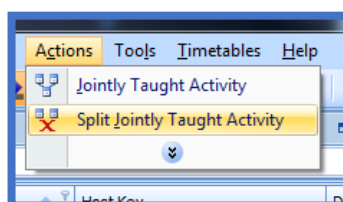**TED Portal** – This is the portal where you can launch the suite of Enterprise packages you will need to do your timetabling work

Department – This denotes the School, Unit or College your user profile is attributed to

Module – Enterprise's word for "Course"

Activity Template – This is the building block for each discrete type of event that will happen in each module

Activity – This is an event or set of identical events, generated out of the over-arching Activity Template (e.g. a group of tutorials that each student has to attend one of). Activities are what appear on the web timetables for all to see

Activity Type – This is a label for an activity which can be used to highlight what type of event the activity is e.g. *Lecture, *Tutorial, *Workshop, *Meeting

Planned Size –This is number of students you expect to have in a room for an activity. This helps Enterprise allocate locations accurately to activities.

Location – Enterprise's word for "Room"

Zone – This is Enterprise's word for a building (or collection of buildings)

Named Availability – This is the term used to denote a collection of weeks in the database (e.g. SEM1, SEM2)

Suitabilities – These are the parameters that each location contains which clarify who controls it, what its purpose is, the default layout and what Audio Visual kit it contains.

6.2 Appendix 2 – Database Week Key

DATABASE WEEK NO	w/c	VACATION PERIOD 3	DATABASE WEEK NO	w/c	VACATION PERIOD 2	DATABASE WEEK NO	w/c	VACATION PERIOD 3
1	23/07/2018	VAC3 - 9	23	24/12/2018	VAC1 - 2	45	27/05/2019	VAC3 - 1
2	30/07/2018	VAC3 - 10	24	31/12/2018	VAC1 - 3	46	03/06/2019	VAC3 - 2
3	06/08/2018	VAC3 - 11	25	07/01/2019	VAC1 - 4	47	10/06/2019	VAC3 - 3
4	13/08/2018	VAC3 - 12	DATABASE WEEK NO	w/c	SEMESTER 2	48	17/06/2019	VAC3 - 4
5	20/08/2018	VAC3 - 13	26	14/01/2019	SEM2 - 1	49	24/06/2019	VAC3 - 5
6	27/08/2018	VAC3 - 14	27	21/01/2019	SEM2 - 2	50	01/07/2019	VAC3 - 2
7	03/09/2018	VAC3 - 15	28	28/01/2019	SEM2 - 3	51	08/07/2019	VAC3 - 3
DATABASE WEEK NO	w/c	WELCOME WEEK	29	04/02/2019	SEM2 - 4	52	15/07/2019	VAC3 - 4
8	10/09/2018	WELCOME - 1	30	11/02/2019	SEM2 - 5	DATABASE WEEK NO	w/c	Not part of database
DATABASE WEEK NO	w/c	SEMESTER 1	DATABASE WEEK NO	w/c	FLEXIBLE LEARNING WEEK	53	22/07/2019	n/a - unbookable
9	17/09/2018	SEM1 - 1	31	18/02/2019	SEM 2 - FLEX	54	29/07/2019	n/a - unbookable
10	24/09/2018	SEM1 - 2	DATABASE WEEK NO	w/c	SEMESTER 2 (continued)	55	05/08/2019	n/a - unbookable
11	01/10/2018	SEM1 - 3	32	25/02/2019	SEM2 - 6	56	12/08/2019	n/a - unbookable
12	08/10/2018	SEM1 - 4	33	04/03/2019	SEM2 - 7	57	19/08/2019	n/a - unbookable
13	15/10/2018	SEM1 - 5	34	11/03/2019	SEM2 - 8	58	26/08/2019	n/a - unbookable
14	22/10/2018	SEM1 - 6	35	18/03/2019	SEM2 - 9	59	02/09/2019	n/a - unbookable
15	29/10/2018	SEM1 - 7	36	25/03/2019	SEM2 - 10	60	09/09/2019	n/a - unbookable
16	05/11/2018	SEM1 - 8	37	01/04/2019	SEM2 - 11	61	16/09/2019	n/a - unbookable
17	12/11/2018	SEM1 - 9	DATABASE WEEK NO	w/c	VACATION PERIOD 2	62	23/09/2019	n/a - unbookable
18	19/11/2018	SEM1 - 10	38	08/04/2019	VAC2 - 1	63	30/09/2019	n/a - unbookable
19	26/11/2018	SEM1 - 11	39	15/04/2019	VAC2 - 2	64	07/10/2019	n/a - unbookable
DATABASE WEEK NO	w/c	REVISION PERIOD 1	DATABASE WEEK NO	w/c	REVISION PERIOD 2	65	14/10/2019	n/a - unbookable
20	03/12/2018	REV1 - 1 / EXAM1 -1	40	22/04/2019	REV2 - 1			
DATABASE WEEK NO	w/c	EXAM PERIOD 1	DATABASE WEEK NO	w/c	EXAM PERIOD 2			
21	10/12/2018	EXAM1 - 2	41	29/04/2019	EXAM2 - 1			
22	17/12/2018	EXAM1 - 3 / VAC1 - 1	42	06/05/2019	EXAM2 - 2			
			43	13/05/2019	EXAM2 - 3			
			44	20/05/2019	EXAM2 - 4			

VACATIONS	FRESHERS	SEMESTERS	EXAMS	FLEXIBLE	REVISION

6.3 Appendix 3- Suggested Enterprise Timetabler Activity Column Layout

Right-hand click on the column headers, select **Column Chooser** to activate the **Customization window.** Drag and drop into the Activities view the following column headers:

Name
Activity Template Name
Activity Type Name
Host Key
Teaching Week Pattern
Suggested Days
Suggested Time
Duration
Planned Size
Real Size
Named Availability Name
Required Location Names
Allocated Location Name
User Text 5
Zone Name

Optional:
Jointly Taught Parents
Activity Dates (Range)

Activities

	Name		Host Key	Scheduled	Activity Type Name	Allocated Location Name	Activity Template Name	Named Availability Name	Required Location Names	Size	Suggested Days	Suggested Time	User Text 5	Zone Name
>	⊞ Youth Culture, Medi…	▲	#SPLUSA2…	☑	*Seminar	LG.11	Youth Culture, Media a…	* SEM 2		60	Thursday	11:00	David Hume …	*Central
	⊞ Youth Culture, Medi…		#SPLUS3C…	☑	*Seminar	Meeting Room 1	Youth Culture, Media a…		Meeting Room 1	12	Thursday	14:00	Chrystal Ma…	Chrystal Ma…

Columns can also be re-arranged in any order by clicking and dragging a column header and releasing it in a newly preferred position.