

Queen Mary University of London

Training guide for departmental administrators:

Creating and amending teaching activities in Enterprise Timetabler (ET)

1. Introduction

This training guide is intended for department administrators to work through the teaching activity review, amendment, creation and requirement specification process in Enterprise Timetabler (ET), in a simple, step-by-step manner from which the underlying principles of ET that were explained and demonstrated in the introductory training session should be reviewed and practiced. It assumes that users are familiar with the basic concepts outlined in the introductory training session, and have been set up appropriately in Authorisation Manager. It is designed to supplement the existing Enterprise user and training documentation.

In Enterprise Timetabler (ET) you will need to review the existing (1213 rolled forward) timetable activities (classes, lectures, tutorials, labs etc) for all of the modules your school, department or institute are running in 2013-2014, performing the following four key tasks:

1. Amending the existing teaching activities as necessary to reflect changes in 1314 teaching delivery by specifying the teaching requirements for the 1314 timetable.
2. Creating new activities for all academic modules taught by your department and defining the teaching requirements of each activity that delivers the teaching for the module.
3. If your school, department or institute owns the teaching location you wish to schedule a teaching activity into you can directly schedule these activities yourself –booking the room.
4. You will also need to delete obsolete activity records for the modules belonging to your department.

Note: You will not be able to amend, create or delete activities that are taught by another school, department or institute. All centrally owned teaching space will be allocated based on the teaching activity requirements specified by you in this system in accordance with the agreed deadlines.

Key Definitions

A number of key Scientia timetabling definitions are listed in the table below and are referred to throughout this guide:

Table 1: Key Definitions

| Scientia Term | Explanation |
|----------------------|--|
| Activity | A discrete room booking or teaching event. |
| Teaching Activity | A teaching event that students attend as part of a module, such as Lecture, lab, tutorial or practical. All teaching activities that students are required to attend must be created from and linked to a genuine SITS module. |
| Suitability | The features and attributes of a resource. For example a teaching location may have data projection, be in the Art's One building, on the Mile End Campus. This location would have all three of these suitabilities. |
| Named Availability | A pre saved availability pattern that can be used to define the teaching weeks and the day time an activity can be scheduled on. |
| Teaching Weeks | The weeks of the year that the activity needs to be scheduled on. |
| Scheduled Weeks | The weeks of the year that the activity has been scheduled on |
| Resource Requirement | The resources that are required by the activity. |
| Allocated Resource | The resources that have been allocated to the activity, based on the requirements. |

2. Key Concepts

Teaching activities need to be created for every academic module that will be delivered for the 1314 academic year. The teaching activities should reflect/detail all of the teaching required for the module. All activities should be created from an academic module in the Scientia timetabling system.

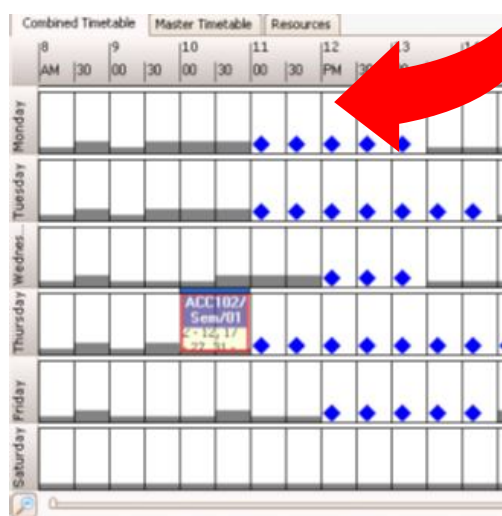
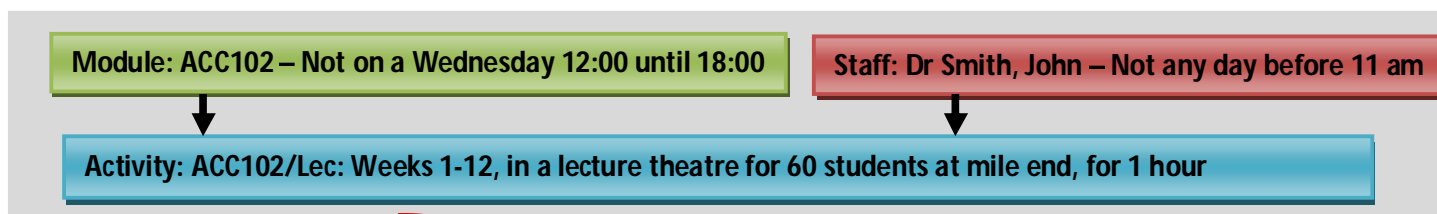
Table 2: Defining the timetable requirements of module using activities

| Module | Activity Name | Size | Teaching Weeks | Duration | Suggested Day and Time | Location Requirements (Suitabilities) | Zone | Staff Requirement |
|--------|---------------|------|----------------|----------|------------------------|---------------------------------------|----------|-------------------|
| ACC102 | ACC102/Lec | 100 | 1-12 | 1 hour | Monday 9am | Lecture Theatre | Mile End | Dr Smith, John |
| ACC102 | ACC102/Sem1 | 60 | 2-12 | 2 hours | Tuesday 3pm | Seminar Room | Mile End | Dr Smith, John |
| ACC102 | ACC102/Sem2 | 40 | 2-12 | 2 hours | Tuesday 3pm | Seminar Room | Mile End | Dr Smith, John |

Understanding Constraints and Scheduling Requirements

A number of key pieces of information need to be connected to the teaching activities in order to produce a meaningful timetable. Figure 1 below explains the interaction of staff and module constraints and activity level requirements that will influence where and when a teaching activity can be scheduled. Scheduling requirements can be inherited from the objects linked to the activity such as modules and required staff and are also specified against the activity itself.

Figure 1: Inheritance of constraints and defining activity level requirements



With the above example the activity ACC102 lecture will be scheduled in weeks 1-12 in a Lecture Theatre at Mile End for 1 hour and not on a Wednesday afternoon (according to the module constraint) or before 11am on any day (according to the staff constraint).

A blue diamond will appear on the timetable grid view for all of the constraint free start times where a Lecture Theatre for 60 students is available and the staff member is clash free (does not have any other teaching commitments during that timeslot).

Write Back and Refresh



As you make any changes in ET you will need to write them back to the database to commit them to the server by pressing the write back button.

If the Write back icon is greyed out there are no changes to save and send to the server.



To view the changes that your colleagues have made and written back to the shared database you must refresh your view of the system by pressing this button

Note: Changes are not safe until they have been written back to the server. If you want to discard the changes you have been making do not write them back, exit the application and do not save the image file if prompted.

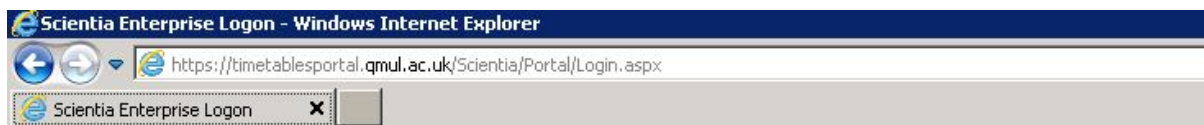
3. Getting Started

Follow the steps below to log in to the system.

- a. Log into your Virtual Machine and then open up your internet explorer web browser and enter the link below as illustrated in figure 2 below. Or click on the Scientia shortcut on the VM desktop.

<https://timetablesportal.qmul.ac.uk/Scientia/Portal/Main.aspx>

Figure 2: Scientia Enterprise link



- b. The Scientia Enterprise Timetabling system's log in screen will then load and prompt you to log in. Enter your University user Id and password and press enter or click the logon button, as illustrated in figure 3 below:

Figure 3: Scientia Enterprise login



Enterprise Foundation

A screenshot of the login form for the Scientia Enterprise system. On the left is a red, reflective sphere. To the right is a white rectangular box containing two input fields: "User" and "Password". Below the "Password" field is a grey button labeled "logon".

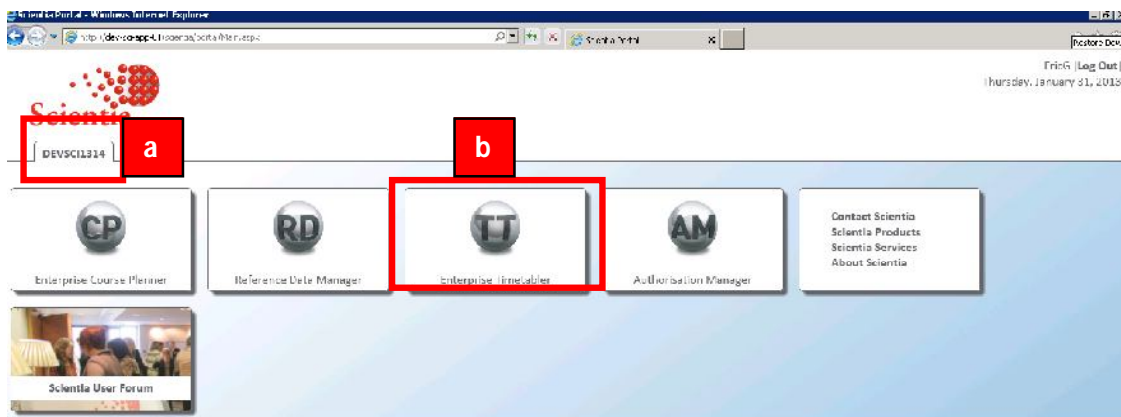
If you cannot log in to the Enterprise screen then contact: The IT helpdesk on: ext 8888, its-helpdesk@qmul.ac.uk

4. Loading the Enterprise Timetabler (ET) application

After logging in successfully, the Enterprise Portal screen illustrated in figure 4 below will become visible. Follow the steps below to open the ET application.

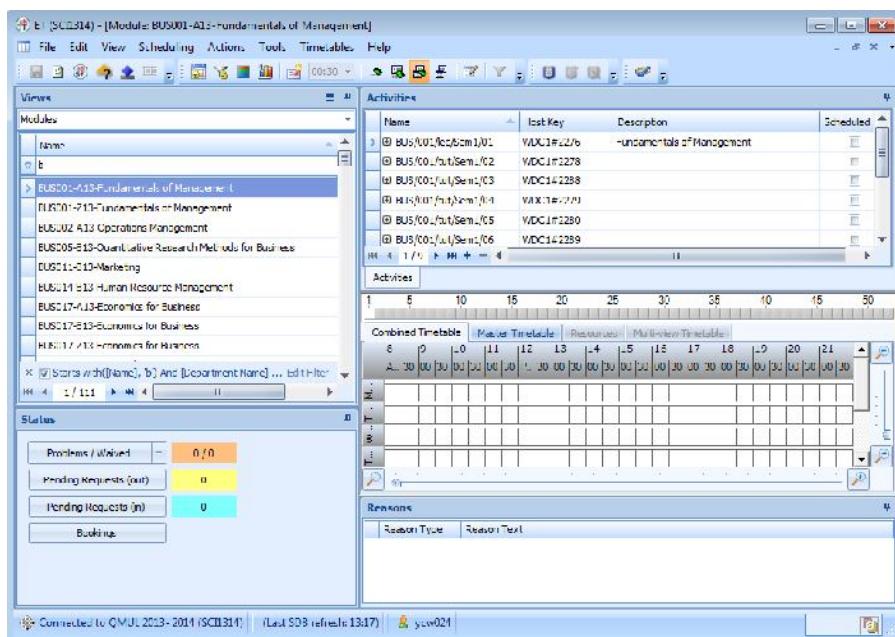
- Ensure you have selected the correct database/academic year by single left clicking on the 'SCI1314' tab at the top of the screen. The name of the selected database will turn white after it has been selected.
- To load ET single left click on the ET icon as illustrated in figure 4 below. If you double left click the ET application will launch twice.

Figure 4: The Enterprise portal



- If the ET application is being run for the first time the software will need to be installed on your machine, click install if needed.
- A series of loading screens will then appear and after a few minutes ET will load as illustrated in figure 5 below.

Figure 5: The main ET screen

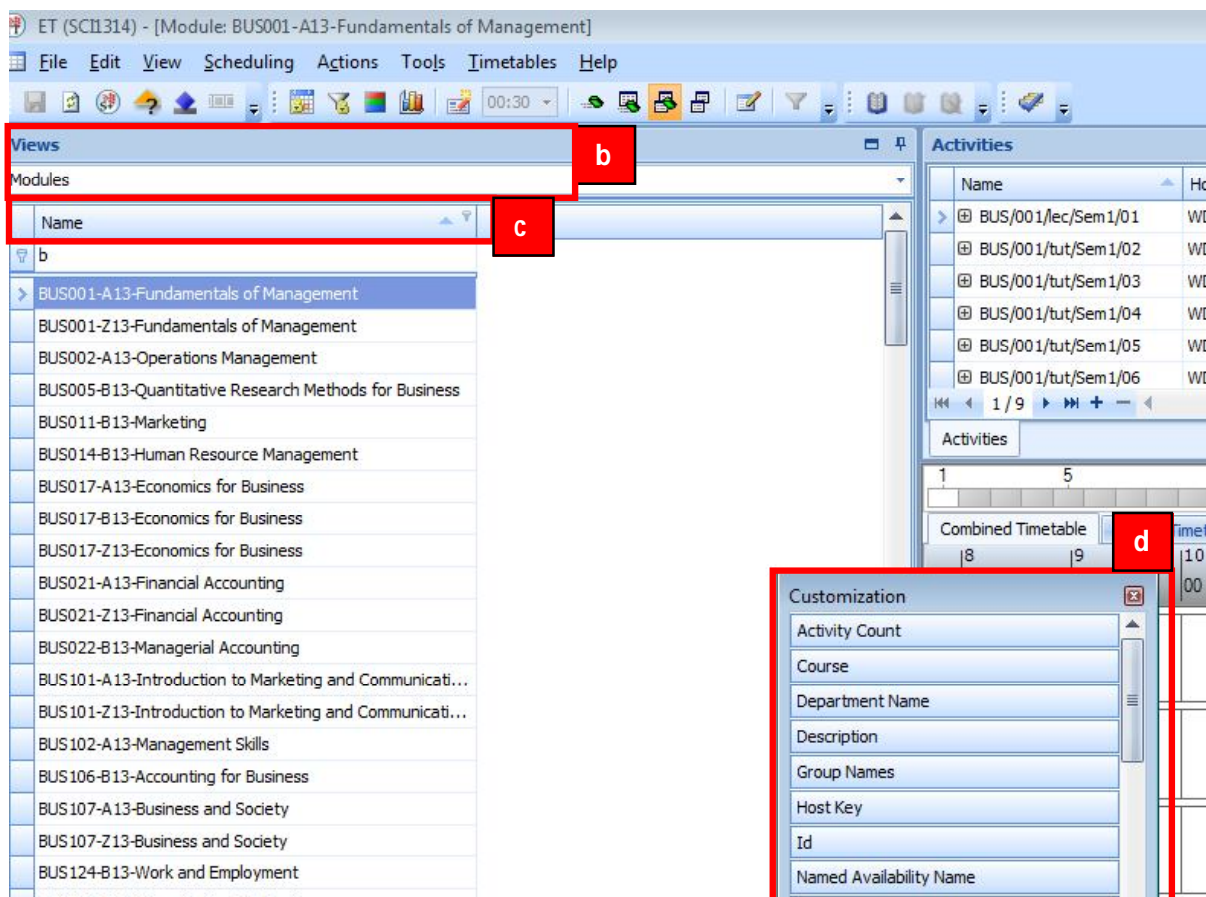


5. Finding and viewing your department's modules in ET

To view and edit your department's teaching activity information follow the steps detailed in this section.

- Maximise the main ET screen by clicking on the maximise icon in the top right hand corner of the ET screen.
- In the Views pane select 'Modules'
- To customise your Modules screen in the Views pane right mouse click on the Name column header to activate the customisation pallet,
- From the customisation palette double left click on the following attributes: Activity Count, Department Name and User Text 5 (this will indicate the cloned module code associated with this module if there is one).

Figure 6: Customising the Views pane



- e. The activity count (number of activities linked to the module), Department Name (the owning department of the module and in turn the teaching activities) and User Text 5 (Cloned module) will appear in the views pane. Filter to the modules for your department(s), school(s) , Centre(s) or Institute by left clicking on the filter icon in the top right hand corner of the Department Name column header and selecting your department.

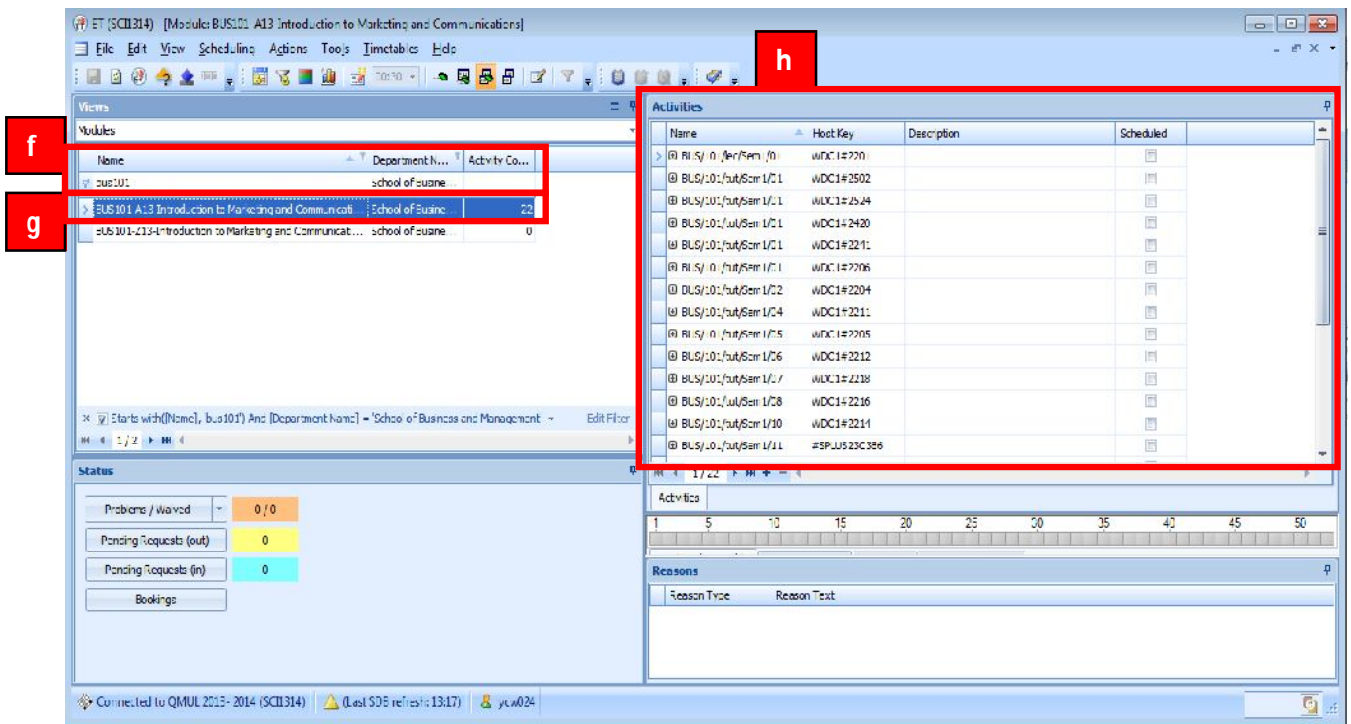
Figure 7: Customising the Views pane

| Name | Department Name | Activity Co... |
|---|---------------------|----------------|
| b | School of Busine... | |
| > BUS001-A13-Fundamentals of Management | School of Busine... | 9 |
| BUS001-Z13-Fundamentals of Management | School of Busine... | 0 |
| BUS002-A13-Operations Management | School of Busine... | 11 |
| BUS005-B13-Quantitative Research Methods for Business | School of Busine... | 10 |
| BUS011-B13-Marketing | School of Busine... | 14 |
| BUS014-B13-Human Resource Management | School of Busine... | 13 |
| BUS017-A13-Economics for Business | School of Busine... | 18 |
| BUS017-B13-Economics for Business | School of Busine... | 12 |
| BUS017-Z13-Economics for Business | School of Busine... | 0 |
| BUS021-A13-Financial Accounting | School of Busine... | 13 |
| BUS021-Z13-Financial Accounting | School of Busine... | 0 |
| BUS022-B13-Managerial Accounting | School of Busine... | 8 |
| BUS101-A13-Introduction to Marketing and Communicati... | School of Busine... | 22 |
| BUS101-Z13-Introduction to Marketing and Communicati... | School of Busine... | 0 |
| BUS102-A13-Management Skills | School of Busine... | 0 |
| BUS106-B13-Accounting for Business | School of Busine... | 0 |
| BUS107-A13-Business and Society | School of Busine... | 16 |
| BUS107-Z13-Business and Society | School of Busine... | 0 |
| BUS124-B13-Work and Employment | School of Busine... | 13 |

Note: You will need to check that all your 1314 modules are listed under the modules views pane.

- f. You can further filter this list to find a particular module by clicking and typing the first few characters of the module's code in the Name column filter input box.
- g. Select the module you want to work with by left clicking on the appropriate module record in the views pane.
- h. The activities that deliver the teaching for the selected module or modules are displayed in the 'Activities' details pane to the right of the Module.

Figure 8: Filtering to Modules in the Views pane

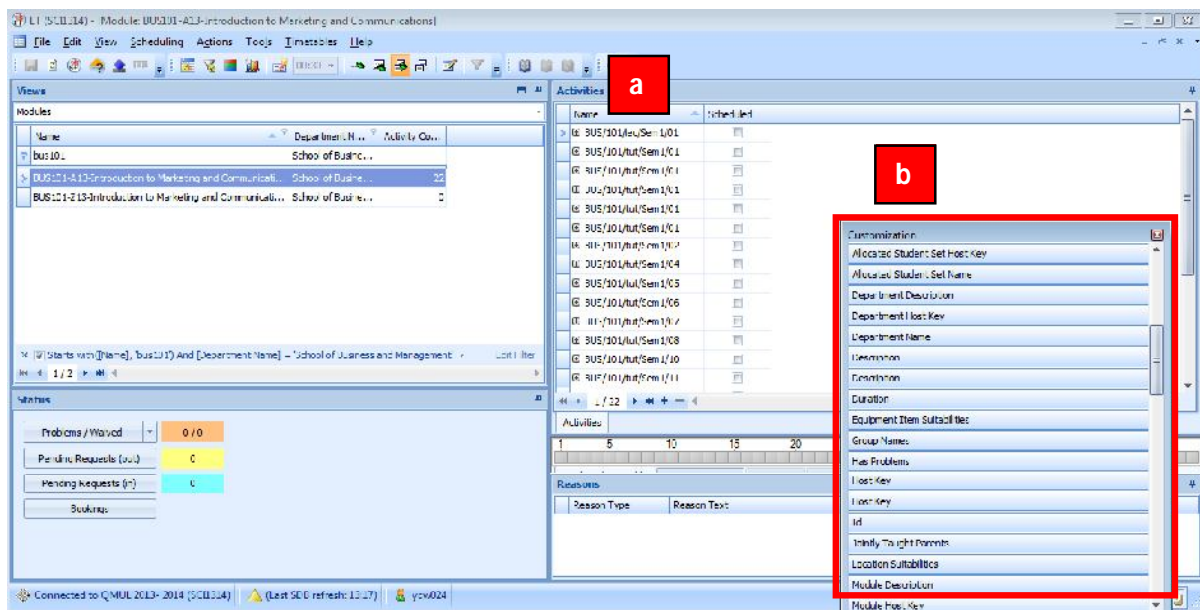


6. Finding and reviewing your activities in ET

To find and review your activity information for any selected module or modules follow the steps outlined below as illustrated in figure 9 below.

- a. Right click on the 'Name' column header in the Activities details pane and select the 'Column Chooser' option.
- b. Drag and drop the columns from the 'Customisation palette' and onto the Activities details pane one by one.
 1. Name
 2. Suggested Days
 3. Suggested Time
 4. Duration
 5. Teaching Week pattern
 6. Location Suitabilities
 7. Required Location Names
 8. Size
 9. Required Staff Names

Figure 9: Customising the activity details pane



- c. Remove any unwanted columns of information by right clicking on the relevant column header (such as HostKey) in the Activities pane.
- d. Then select the “Remove This Column” option

Figure 10: Customising the activity details pane



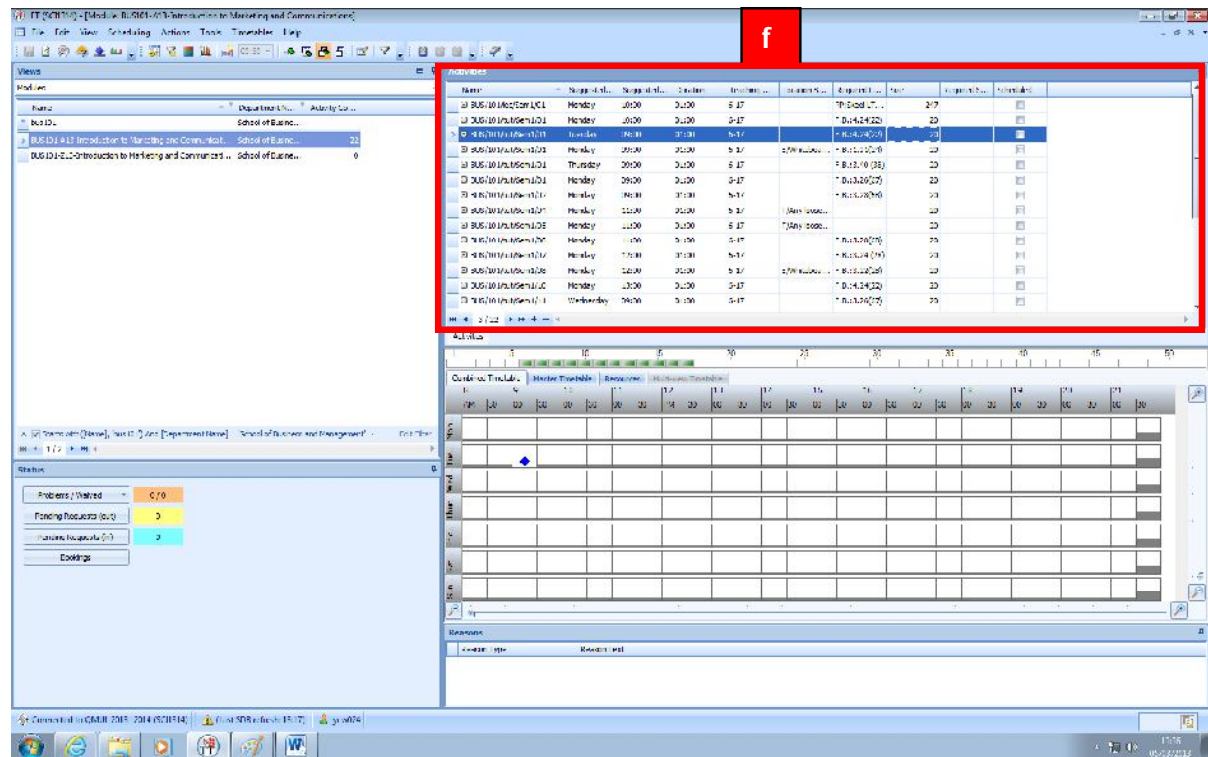
- e. Your screen should now match the information listed in the table directly below

Table 3: Timetable Requirements data

| Activity Attribute Name | Explanation |
|----------------------------|--|
| 1. Name | The name of the teaching activity, this should be prefixed by its module code followed by the activity type. |
| 2. Suggested Days | If the activity needs to be taught on a particular day it will require a Suggested Day |
| 3. Suggested Time | If the activity needs to be taught at a particular start time it will require a Suggested Time |
| 4. Duration | This is the length of time the activity will be taught for. The system sees time in period lengths of 30 minutes. So two duration periods will be 1 hour. |
| 5. Teaching week pattern | The weeks of the year the activity will be taught for. |
| 6. Location suitability | The features and attribute that your teaching activity requires. Such as C/Mile End Campus and B/ Arts One Building and T/Fixed seating and E/Data Projector |
| 7. Required Location Names | If a particular teaching room is required then it can be selected. This should only be set in exceptional circumstances where for example a specific room has a unique combination of equipment or if it is a departmentally owned room. |
| 8. Size | The number of students that are anticipated to attend the teaching activity. |
| 9. Required Staff Names | The staff member or members that are delivering the teaching activity |
| 10. Scheduled | This is the scheduling status of the activity. If this is ticked then it indicates that the activity has been scheduled, meeting all the requirements you have specified. Un-ticked means it is unscheduled and requires review. |

f. Your screen should now resemble figure 11 below

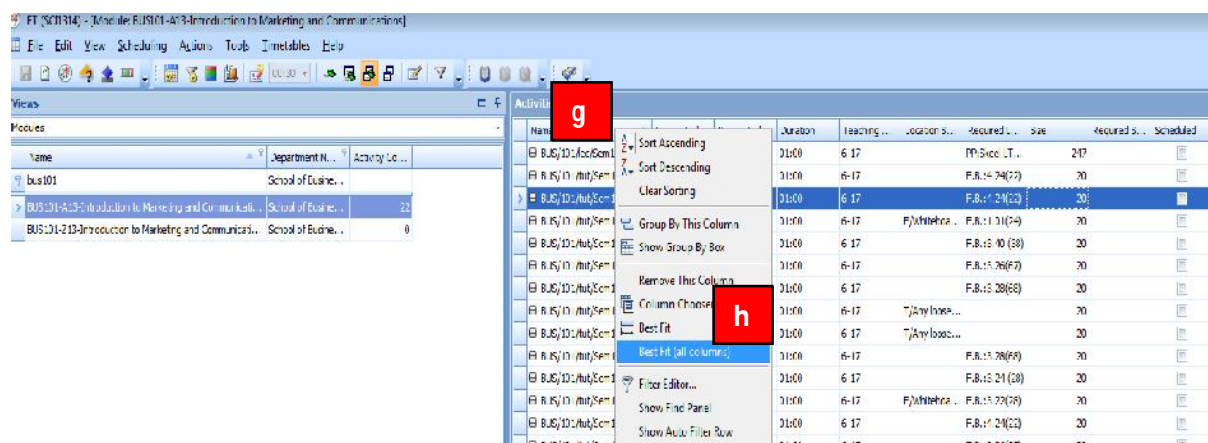
Figure 11: Customised Activity details screen



g. To fully view the names of the columns and all the detail in them you can expand the width of all the visible columns by right clicking on any column header.

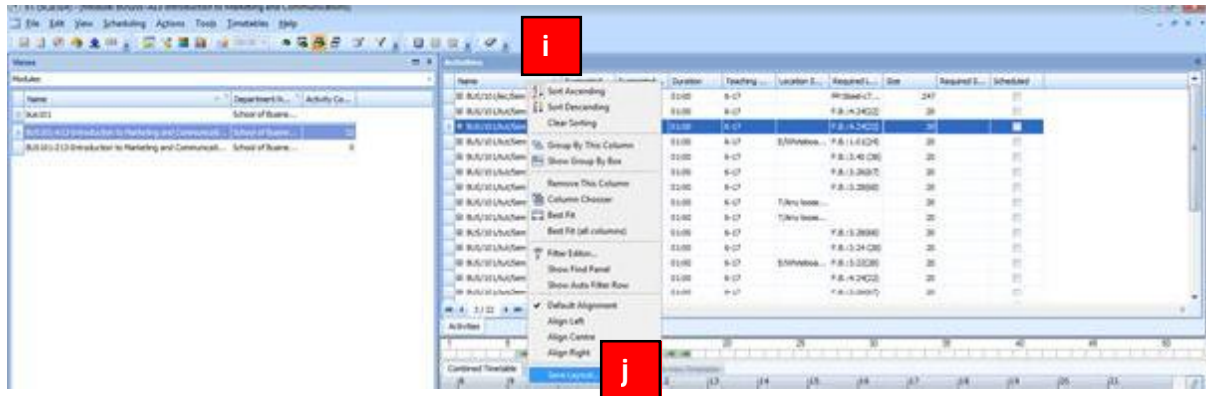
h. Then select the “Best Fit all Columns” option.

Figure 12: Adjusting Column widths



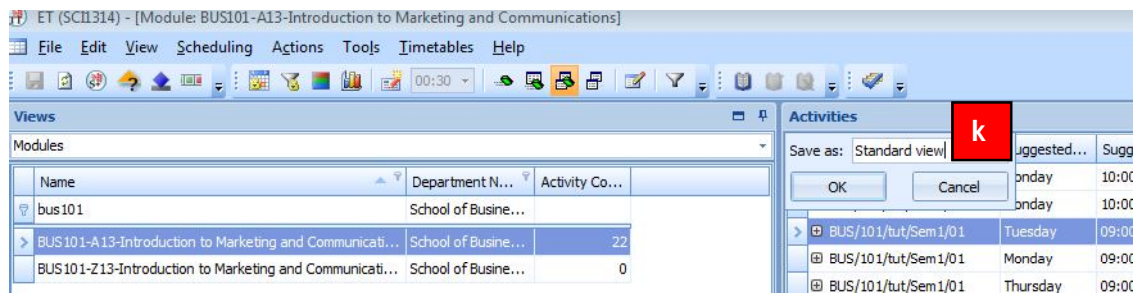
- i. Once you have customised your view of the Activity details pane the column layout you have just established can be saved by right clicking on one of the activity column headers.
- j. Then select the “Save Layout” option. **Remember** you can remove columns by right clicking on the relevant column header and selecting the remove column option.

Figure 13: Saving Custom Layouts



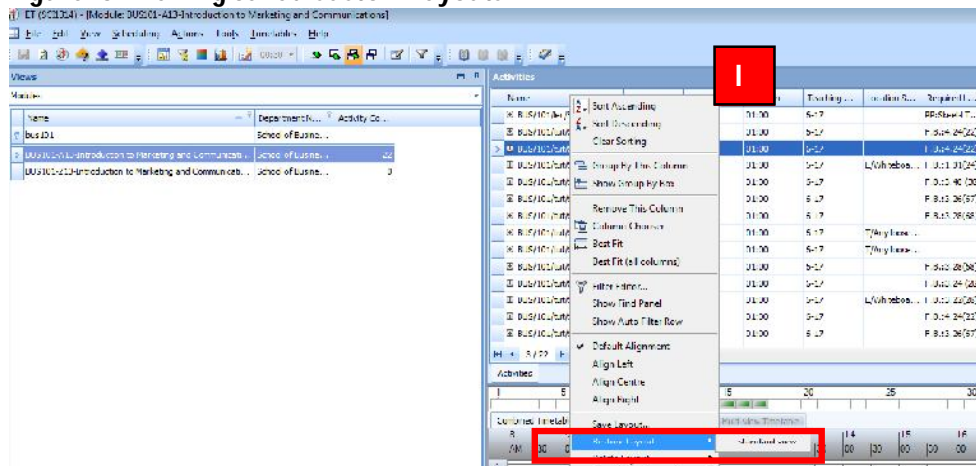
- k. In the resulting “Save As” input box give the column layout a meaningful name and then click OK

Figure 14: Saving Custom Layouts



- l. Another right click on one of the column headers and selecting the restore layout option will show you the layouts you have created and saved. You can create and save multiple layouts to reflect the different ways you work.

Figure 15: Viewing Saved Custom Layouts



7. Introduction to reviewing basic activity information in ET

You will need to review the teaching activities for all of the modules for your department in the system using the filtering and customisation options outlined in the previous sections of this guide. If the teaching requirements for your modules have changed since last year you will need to perform the tasks outlined below:

- 1) **Delete** obsolete activities
- 2) **Create** new activities for new modules or where the student numbers have increased on existing modules.
- 3) **Amend** the existing activity information for your School's modules

Note: It is crucial that you Write back your changes regularly and refresh the changes of other users regularly during this stage of the process.

8. Amending basic activity information in ET

To amend the details of an activity follow the steps outlined below as illustrated in figures 16 to 18.

- a. With the desired module selected.
- b. Single left click on the activity you wish to modify.
- c. Right mouse click on the activity you have selected.
- d. From the 'Context List' that opens select the 'Edit Activity' option.

Figure16: Editing activities step 1 of 3

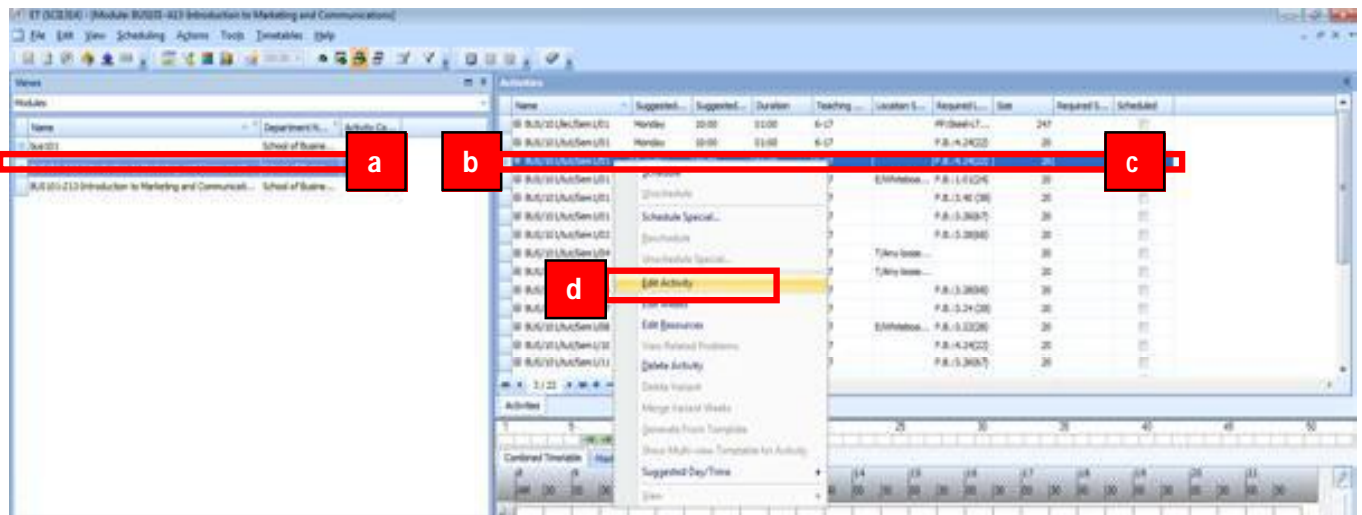


Figure 17: Editing activities step 2 of 3

The screenshot shows the 'Activity Editor' window with the 'Sequencing' tab selected. The 'Details' section is highlighted with a red box and contains the following fields:

- Name: BUS/101/tut/Sem1/01
- Host Key: WDC1#2524
- Description: (empty)
- Duration: 2, 01:00
- Activity Type: Z/Tutorial
- Planned Size: 20, Use Planned Size (checked)
- Zone: Mile End Campus

The 'User Text' section is also highlighted with a red box and contains five text input fields labeled 'User Text 1' through 'User Text 5'.

The 'Delivery' section at the bottom includes the following fields:

- Module: BUS101-A13-Introduction to Marketi...
- Department: School of Business and Management
- Course: [None]
- Programmes: (empty)
- Template: (empty)
- Real Size: 0
- Availability: ME-Sem1

The 'OK' and 'Cancel' buttons are located at the bottom right of the window.

- e. Amend the activity details by clicking and typing in the relevant fields as detailed and explained in table 4 overleaf. Note the grey fields such as Module and Department are not editable. Click ok when you are finished editing.

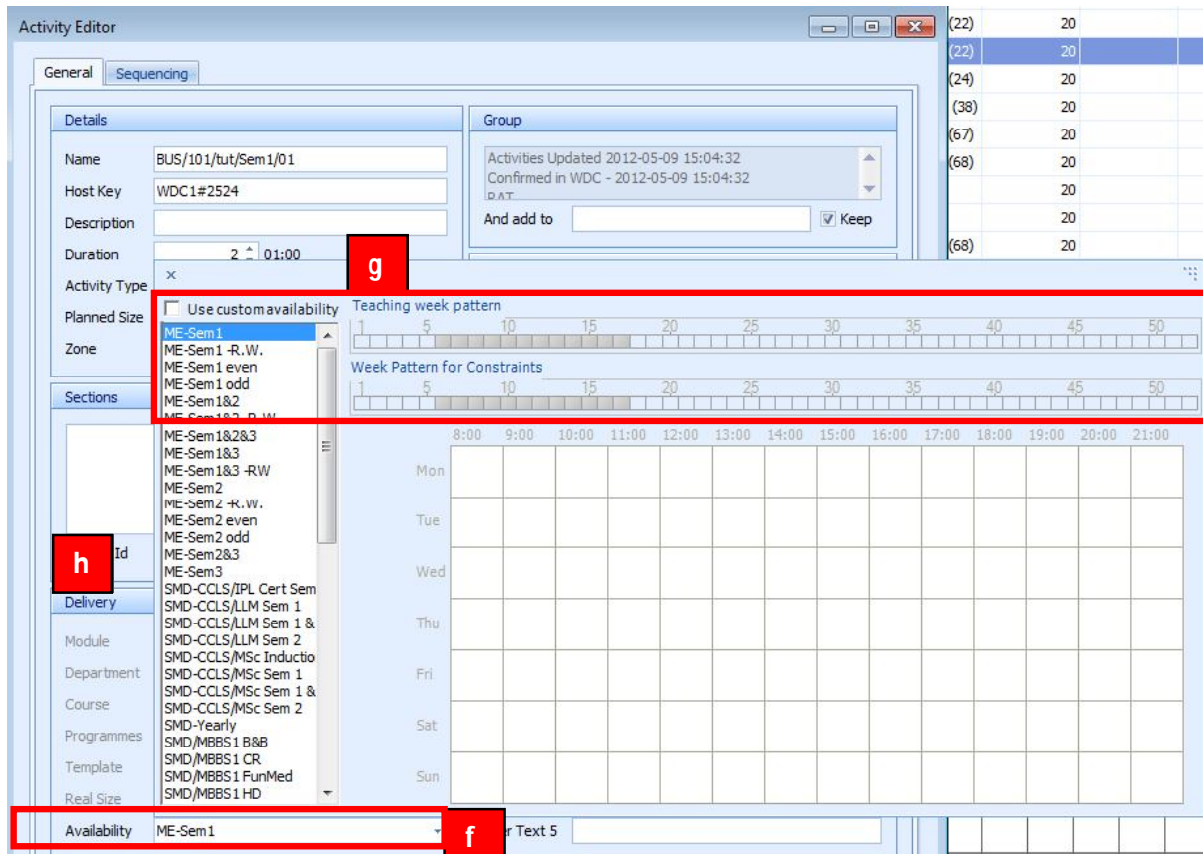
Table 4: Rules and data naming conventions for entering and amending activity details

| Activity data attribute | Example data convention | Explanation |
|---|---|--|
| Name | BUS101/Tut/01 | The module code then the activity type then a number if there are activity groups. This makes it easy to find activities using the name content matching filter. This should be a unique name. |
| Host Key | BUS101/Tut/01 | The same as the name or will be a system generated hostkey. This must uniquely define the activity. So no duplication of activity names and hostkeys. |
| Description | Introduction to Marketing | This could be the short module name linked to the activity |
| Duration | 2 (30 minute periods) is 1 hour | The length of time the activity needs to be scheduled for |
| Activity Type | Tutorial | The type of teaching activity such as Lecture Lab, or Tutorial. This should match the activity type in the name of the activity |
| Planned Size | 45 | The estimated number of students that will attend the teaching activity |
| Zone | Mile End Campus | Select the campus that the activity should be taught at |
| Availability | ME- Sem 1 | Select the "Teaching Weeks" the activity should be scheduled on and make days or the week unavailable as required. Note if you are specifying a set day and time for the activity you do not need to make timeslots unavailable here. This is explained in the defining activity resource requirements section of the guide. |
| User Text 1 | General scheduling notes such as: new module or co taught with. | This is a user defined text field that has been used to capture general scheduling notes specified by departments. |
| User Text 2 | Dr Jones, Phil | This is used to record the name of the module convenor (the member of staff delivering the teaching event is specified in the resource requirement section of the guide. |
| User Text 5 | Yes or No | This is used to flag all activities that need to be published to students during the On-line Module Pre-Selection process. |
| Uneditable activity details- these are inherited from the curriculum structure from SITS | | |
| Module | | The module code the activity has been linked to/ created from |
| Department | | The department the associated module is linked to. |
| Programme | | The programme of study the associated module is linked to. |

Note: These data conventions detailed above need to be adhered to in order to ensure data consistency and provide the information needed to construct the 1314 timetable and support the room allocation process.

- f. Click on the Availability attribute to open the availability window.
- g. Add the activity's "Teaching week pattern" either by creating a custom availability or using a 'Named Availability'.
- h. Click off the Availability window and onto the Activity Editor Form to apply the change.

Figure 18: Editing activities step 3 of 3



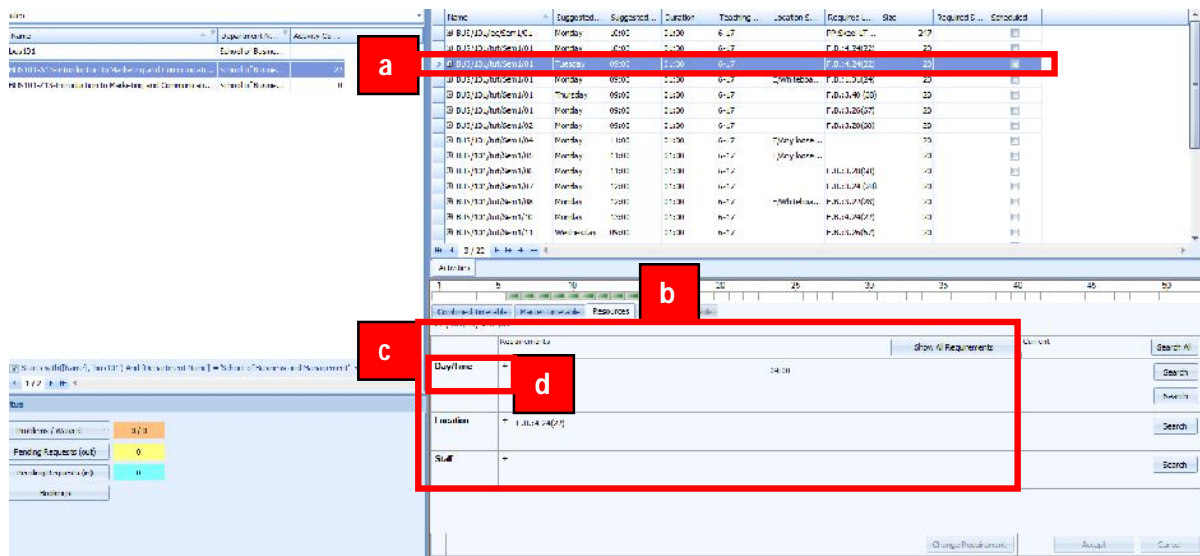
- i. Click Ok to confirm the change and close the Activity Editor Form or Cancel to close the form and undo the changes.
- j. Remember if you make a change write the change back to the database.

9. Adding /Amending activity resource requirements

To add resource requirements to your activities or amend their existing resource requirements follow the steps outlined below as illustrated in figures 19 to 22.

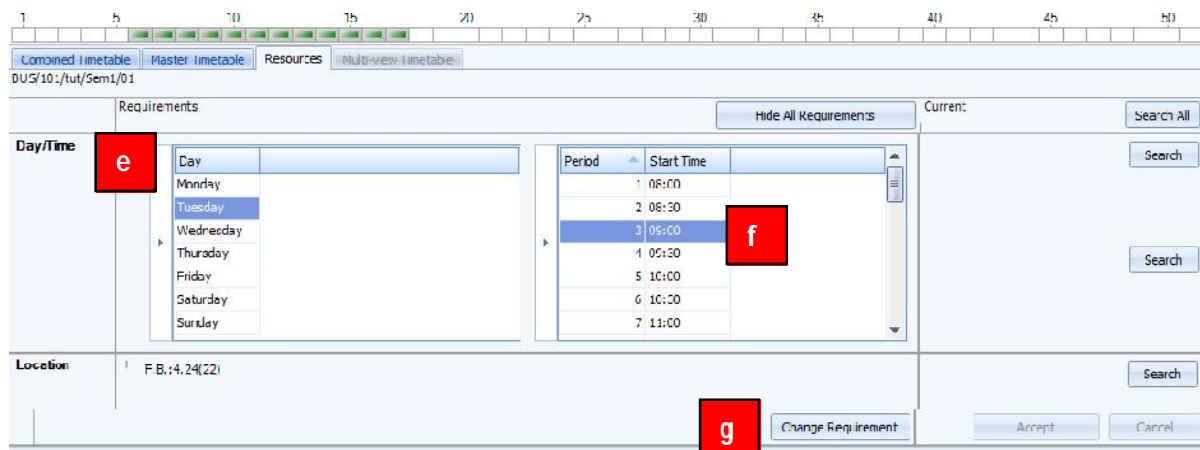
- Select the activity you wish to edit in the 'Activities' pane
- Click on the 'Resources' tab
- The activity's requirements for Days and Times, Locations and Staff will be displayed in the 'Requirements' box
- To open the requirement information for Days and start times and specify a precise start time and day for your activity click on the + icon next to Day/Time.

Figure 19: Adding or Amending resource requirements of activities - step 1 of 4



- Clicking on the + adjacent to the Day/Time label will open the Day/Time requirement window as illustrated in figure 20 below.

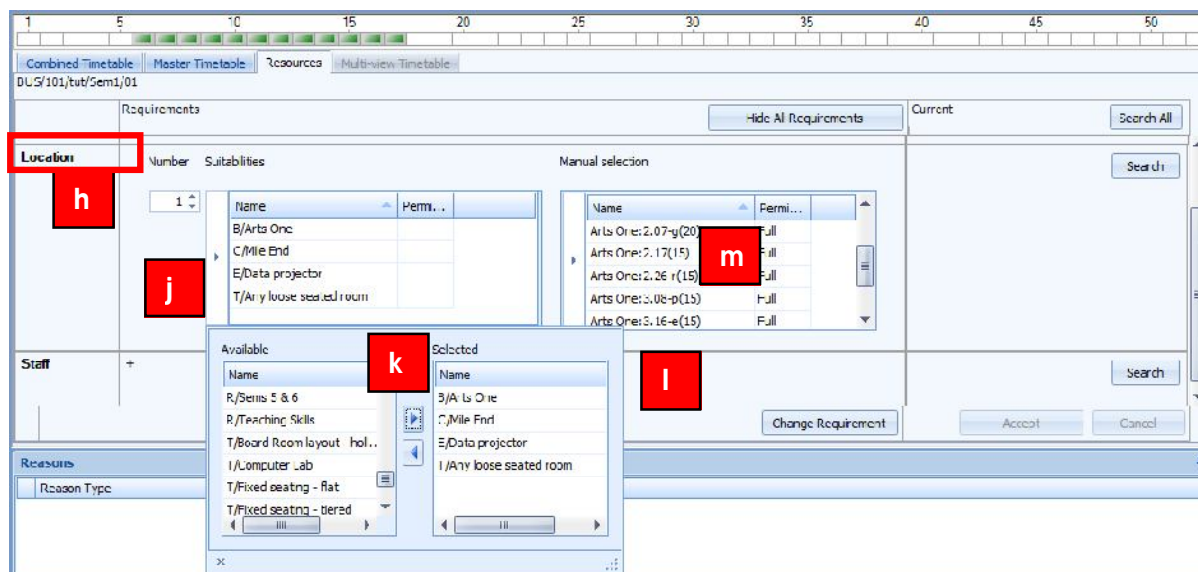
Figure 20: Adding or Amending resource requirements of activities - step 2 of 4



- Select the day and time the activity is required to start on by left clicking on the day and start time.
- Then press "Change Requirement" to confirm the change or move on to set the Staff and Location requirements as detailed in the steps overleaf starting from step (h).

h. Clicking on the + next to Location will open the Location requirement window.

Figure 21: Adding or Amending Location resource requirements of an activity - step 3 of 4



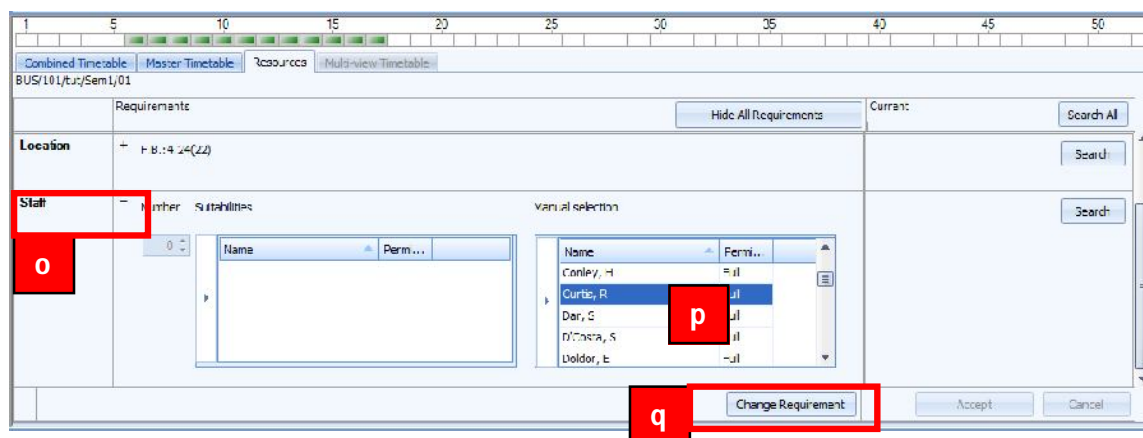
- i. In the number box enter the number of Locations required to schedule this activity. This will usually be 1.
- j. Then click on the suitabilities 'play' button to open the suitability allocation window. These help you to specify the type of room the activity requires. Such as Campus, Building and equipment items required. See the notes below for further information.
- k. Select one or multiple suitabilities to add to your activity by left clicking on them (highlighting them) and then click the right facing squirt arrow. This will move the suitability from the 'Available' box to the 'Selected' box.
- l. Close the suitability allocation window by clicking off of it and onto the requirements box behind it.
- m. You can select the precise room required, if appropriate from the manual selection box by left clicking on it. This should only be selected if it's a departmentally owned space or in exceptional circumstances for centrally owned rooms. To deselect a location press the control key (Ctrl) and left mouse click.
- n. Press the 'Change Requirement' button to apply the requirement changes or move onto step (o) to set the staff requirements for your activity.

Note: You will need to add at least 3 suitabilities to define the location requirement for your teaching activities: A campus suitability should be added, for example C/Mile End, a building suitability should be added, for example B/Arts One and a room type suitability should be added, for example T/Fixed Seating Flat.

Note: As you add the suitabilities to the activity the number of rooms in the "Manual Selection Box (m)" will reduce ensuring that only the locations that match your requirement will be considered during the central room allocation process. Therefore only teaching locations that are large enough (according to the activity size and the location capacity) and that are suitable will appear in the manual selection box. If no locations appear there is an error in the data.

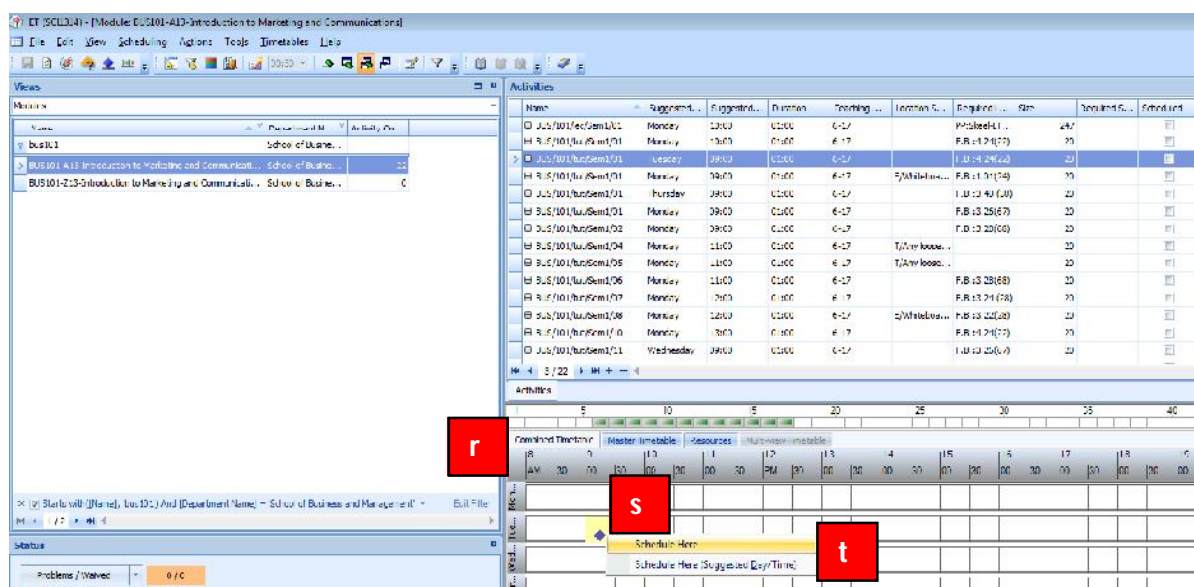
- o. Clicking on the + next to staff will open the Staff requirement window

Figure 22: Adding or Amending Staff resource requirements of an activity Adding step 4 of 4



- p. Move across to the 'Manual Selection' box and select the required staff member(s) from this list. The manual selection of staff from this box will automatically increment the number of staff required.
- q. As before press the "Change Requirement" button when you are ready to apply the change(s). **Note:** If your department owns the Location that your activities need to be scheduled into you will need to schedule these activities directly yourself, by following steps r to t as illustrated in figure 23 below. If you require a centrally owned space this part of the process ends here.

Figure 23: Scheduling teaching activities in departmentally owned space



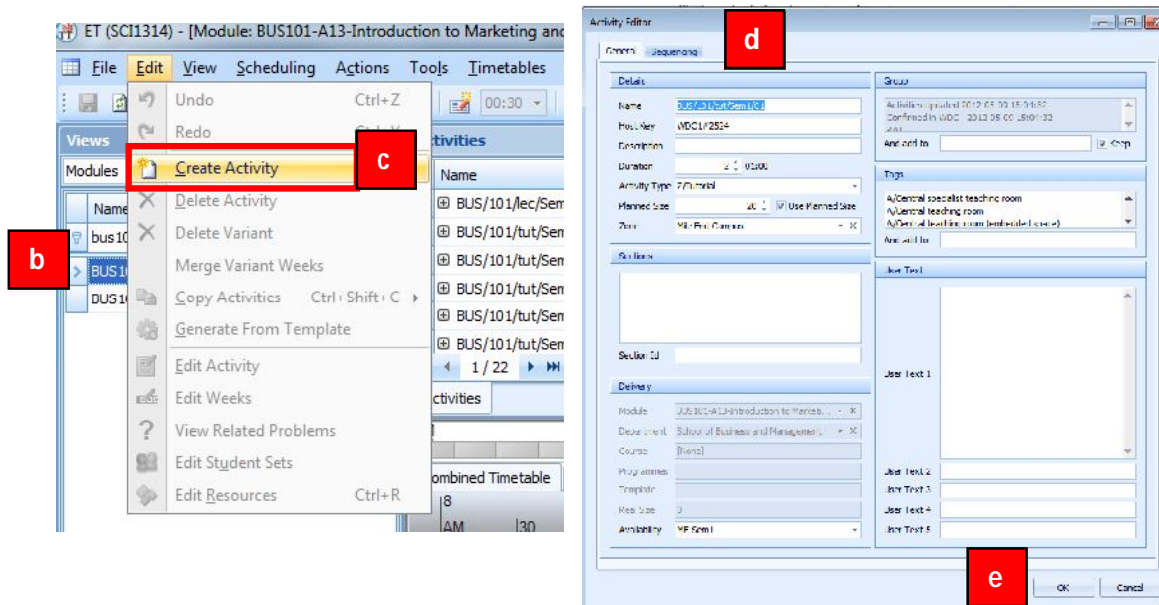
- r. Move from the "Resources" tab to the "Combined" timetable tab
- s. Right click on the blue diamond on the scheduling grid. This represents a clash free start time for your activity for all of the connected staff, location and module requirements/constraints.
- t. Select the schedule here (Suggested Day Time) option, the activity will schedule and be represented by a box on the scheduling grid. Write back your change to the database.

10. Creating academic teaching activities from modules

All academic teaching activities should be created from a genuine (SITS) module code. Follow the steps outlined below to create activities from a Module.

- Filter to the correct module in the 'Views' pane
- Select the module
- Go to Edit | Create Activity

Figure 43: Creating activities from a module



- The Activity Editor will then open. Enter the activity information as specified in the earlier sections of the guide.
- Click Ok to apply the changes to the Activity and close the 'Activity Editor'
- Enter the resource requirements of the activity as illustrated in the earlier sections of the guide on the resources tab.
- Write back the change to the database

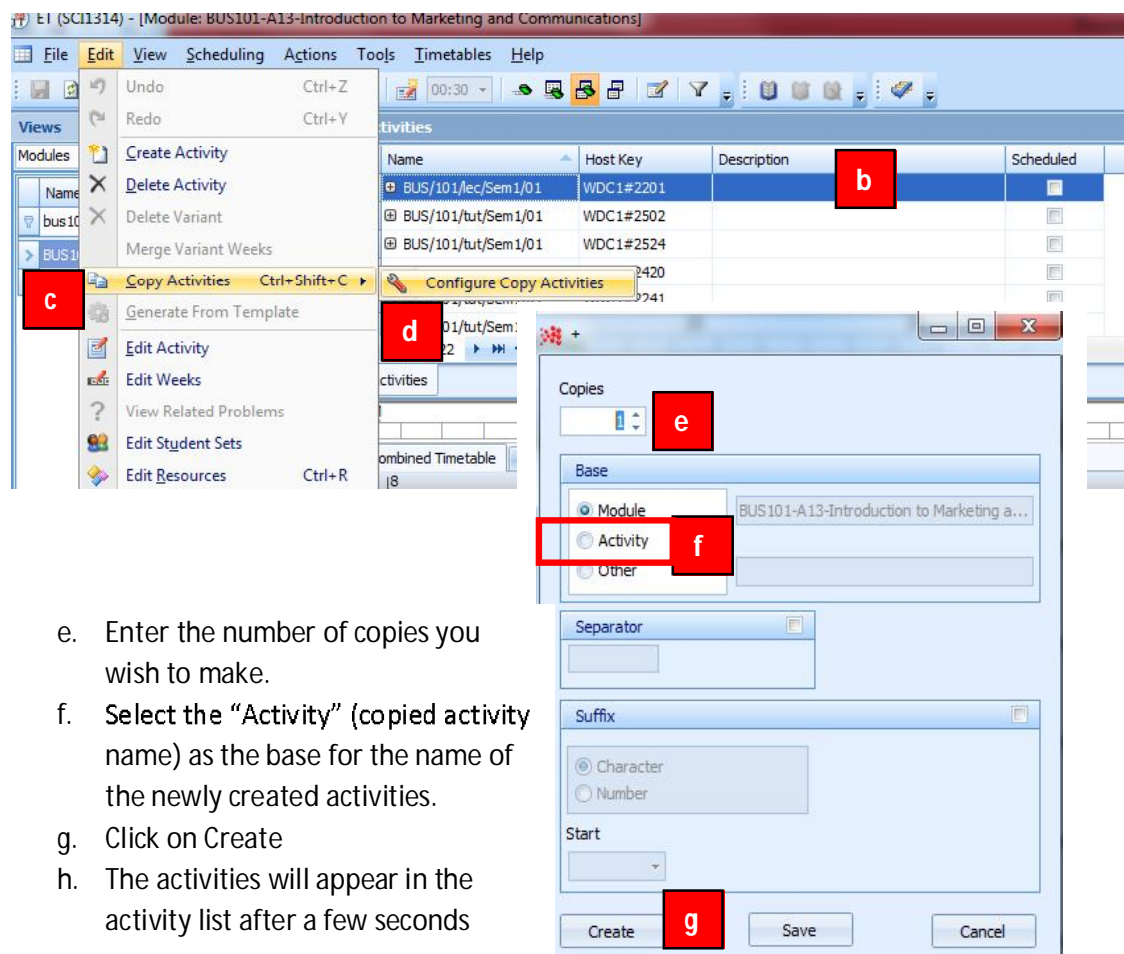
Note: You can also copy existing activities as a starting point for creating your new activity. By selecting the activity and then going to Edit and Copy or Configure Activities. The guide now moves on to detail how this works.

11. Creating activities from existing teaching activities

To create a copy or a number of copies from an existing activity (saving data entry time) follow the steps detailed below:

- Filter to the correct module in the 'Views' pane
- Select the Module and then the activity you wish to copy
- To create 1 copy of the selected activity, Go to Edit and click on Copy Activities
- To create multiple copies of an activity go to Edit move across the Copy Activities option and then click on "Configure Copy Activities" option.

Figure 44: Creating activities from a copy



- Enter the number of copies you wish to make.
- Select the "Activity" (copied activity name) as the base for the name of the newly created activities.
- Click on Create
- The activities will appear in the activity list after a few seconds
- Edit the details of newly created activities as necessary in the activity Editor form and on the resource tab.

12. Deleting teaching activities

To delete obsolete activities follow the steps detailed below:


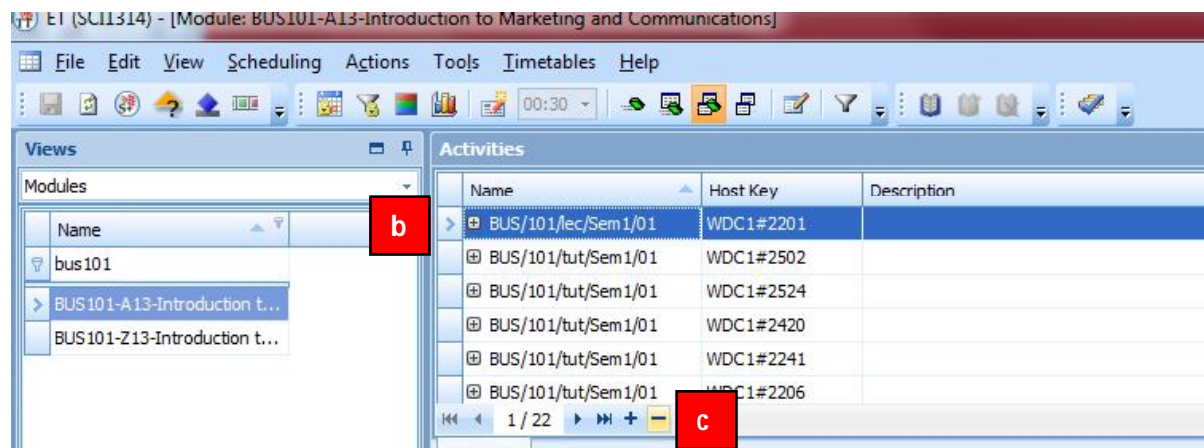
- Filter to the correct module in the 'Views' pane
- Select the Module and then select the activity or activities you wish to delete
- Press the  button to delete the activity it will then vanish from the screen
- Write back the change to the database to confirm the deletion.

Figure 45: Deleting activities



13. Creating Jointly Taught activities

Where two or more modules have activities where students are taught together (they are in the same location, taught by the same person but are attending different modules) the user can create a single jointly-taught activity. A jointly-taught activity can be created either by selecting all the activities the user wishes to join or by selecting a primary activity and then selecting other activities to join to it.

To create a Jointly-Taught Activity from a Primary Activity follow the steps detailed in this section. The jointly-taught activity about to be created will inherit its name, day / time and resource requirements from the primary activity.

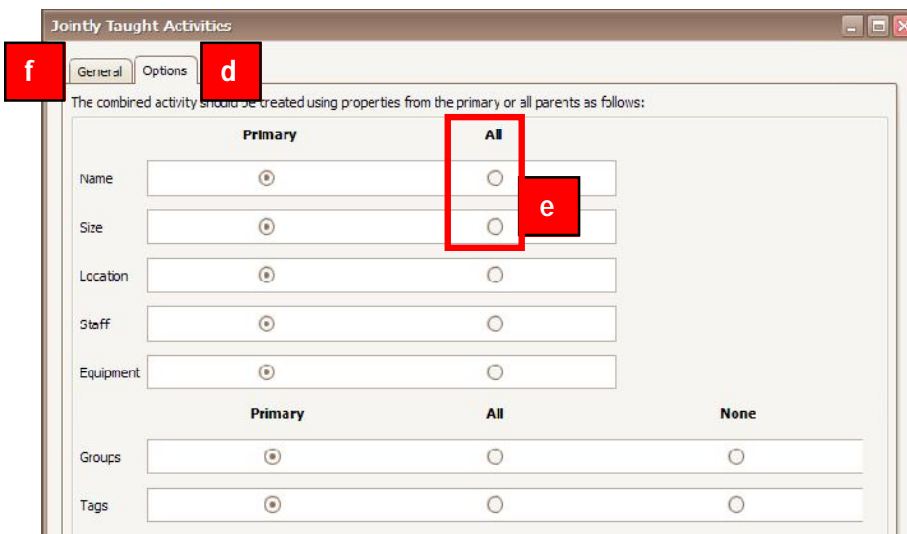
- a. Filter to the relevant module in the 'Views' pane
- b. Select the Module and then select the primary activity
- c. With the activity selected go to Actions and select the "Jointly Taught Activity" option

Figure 46: Creating a Jointly Taught Activity



- d. This selection opens the **Jointly Taught Activity** window. Move to the *Options* tab of this window.

Figure 47: Creating a Jointly Taught Activity

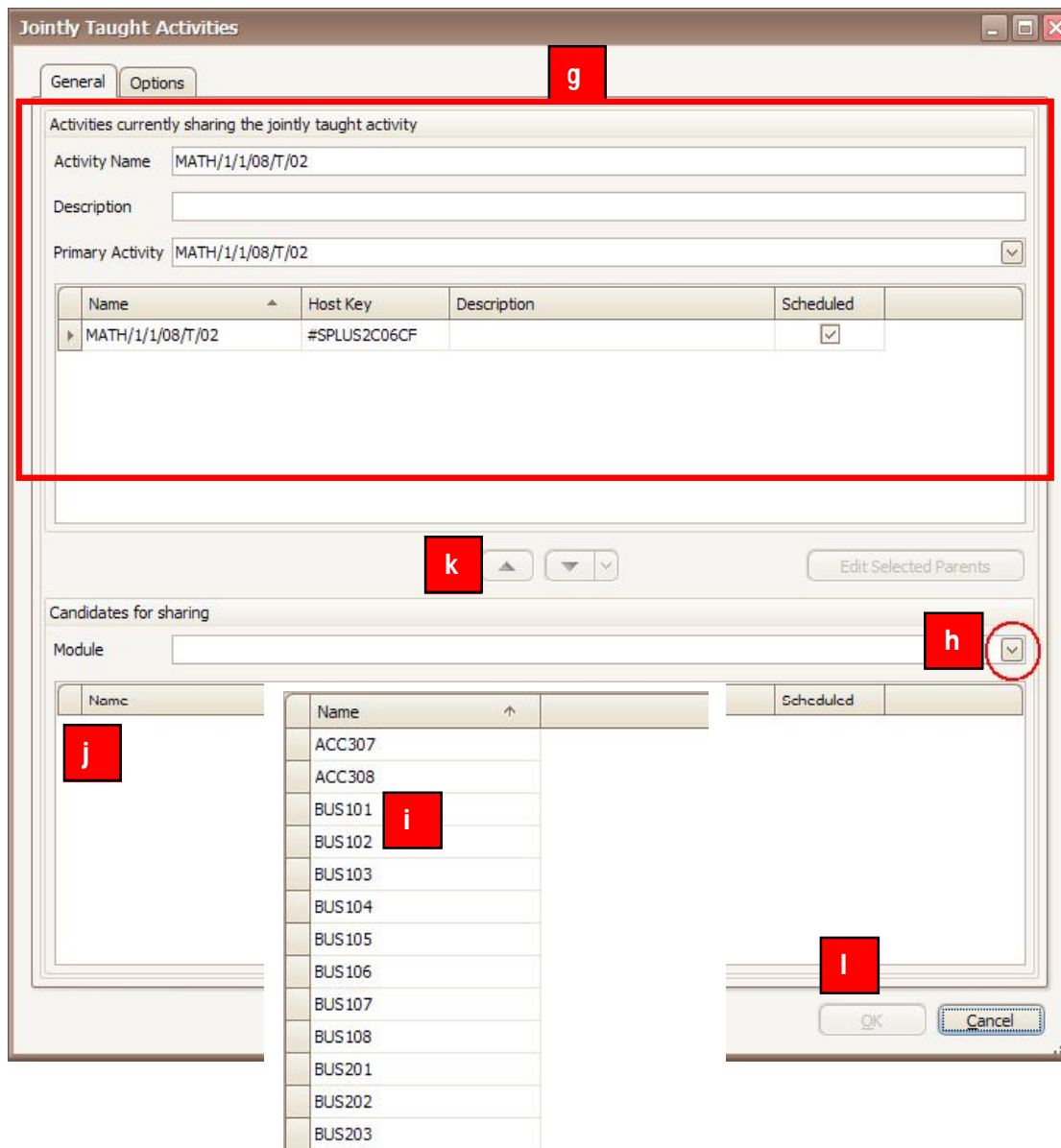


- e. Choose "All" for the Name and Size option. This will name and size the jointly taught option based on the name and size of the two original activities

- f. Move back to the General Tab.

- g. The Primary activity is visible in the in the top half of the Jointly Taught Activities screen.
- h. In the *Candidates for sharing* section of the window, click on the button in the Module field to open a window containing a list of modules.
- i. Select the Module which owns the activity that is to be jointly taught with the *Primary Activity*. Selecting the Module will populate the *Candidates for sharing* section with the all of the activities belonging to the selected Module with the same teaching week pattern being displayed.

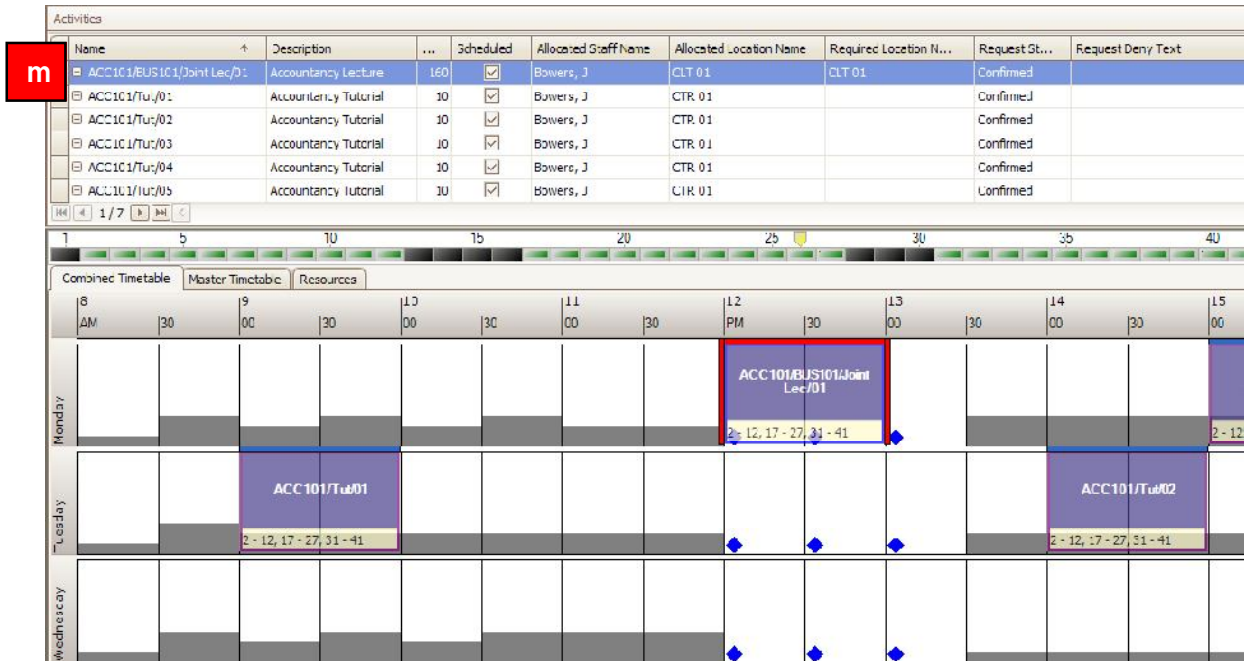
Figure 48: Creating a Jointly Taught Activity



- j. Select the activity you wish to share with the *Primary Activity* from this list. Any number of activities from different modules can be added to the jointly-taught relationship in this way.
- k. Click the transfer button to move the activity from the *Candidates for sharing* section to the *Jointly Taught Activities* section above. Joining the two activities up on the top part of the screen.

- l. Finally click on the OK button to create you're jointly Taught activity.
- m. Check the details viewing the activity from the perspective of both modules
- n. Write back the change to the database

Figure 49: Viewing a Jointly Taught Activity



Note: If the user chooses to inherit size from all of the parent activities then the size of the jointly-taught child activity will be the sum of the sizes of the parent activities being joined. The jointly-taught child activity will therefore require a location of sufficient capacity to accommodate all of the original activities being joined.

Note: The jointly-taught activity will appear in the timetable for all of the modules with which the parent activities are associated.

Note: To Split a jointly taught activity up and revert to the original two separate activities, select the activity and go to Actions | Split Jointly Taught Activity.