

Enterprise Timetabler

Beginners' Training Worksheet 2

Aim of this worksheet: At the end of this worksheet you will be able to:

- *Create and Schedule* an activity directly onto the **Timetable Grid**.
- Add *Resources* to the *Scheduled* activity using the **Resources Tab**.
- Create an *Unscheduled* activity using the **Activity Editor**.
- Add *Resources* to the *Unscheduled* activity using the **Resources Tab**.
- *Schedule* the activity on the **Timetable Grid**.
- *Duplicate* an existing activity and *Schedule* it on the **Timetable Grid** using drag & drop.
- *Amend* the copy using the **Activity Editor**.
- *Duplicate* an activity in the **Activities Spreadsheet**, *Amend* and *Schedule* the activity.

1. Creating and Scheduling an Activity

Within Enterprise Timetabler, the user can create and schedule a new activity directly onto the **Timetable Grid** as a *single* operation, or the user can create the activity in the **Activities Spreadsheet** and then schedule it as a *separate* operation.

The method used to create and schedule the activity will be determined by the *outcome* the user wishes to achieve. For example, if the *day/time* of scheduling the activity is a priority, the user may wish to schedule directly onto the **Timetable Grid** and then go through the process of selecting available resources. If the availability of *resources* is the priority, the user may decide to create the activity in the **Activities Spreadsheet**, add the required resources, and then schedule the new activity at an available time. Additionally, a user may *duplicate* an existing activity and drag and drop the copy to the required timeslot. The copy will include both the resources and the student sets allocated to the original activity.

To undertake this process, the user must first select the *object* they wish the activity to be associated with from the **Views Pane**. For example, if the object selected is a *Location*, then a new activity will be created for that location, (e.g. an *ad-hoc* booking that only needs a room), if the selected object is a *Staff Member*, then a new activity will be created for that member of staff, (the staff member may want to show an *ad hoc* meeting on his timetable that doesn't require any other resources).

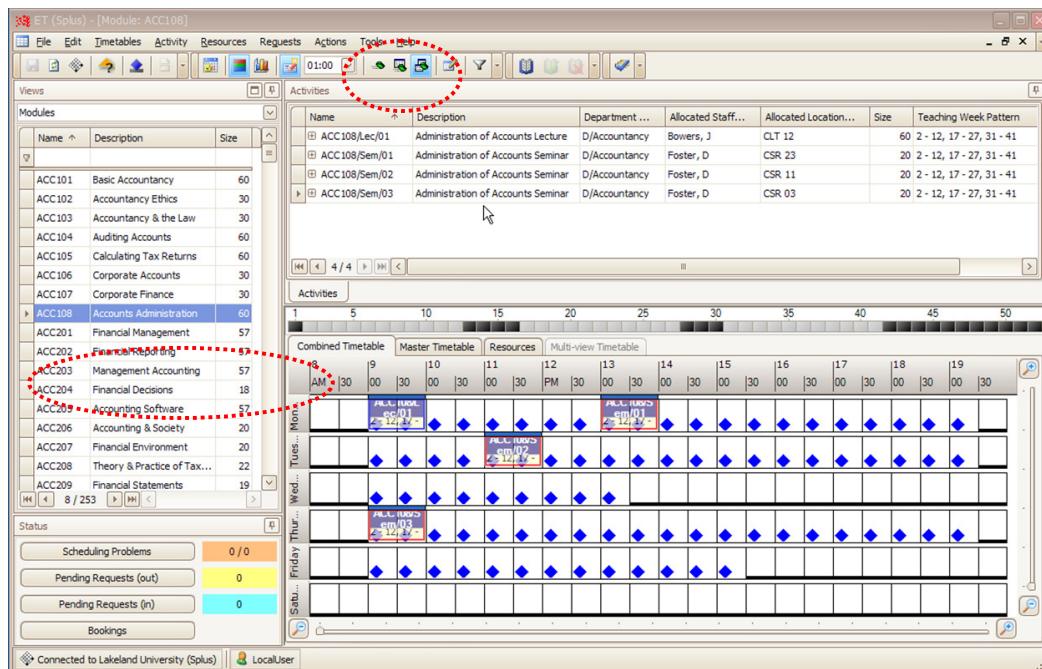
Note that some objects do not allow the creation of new activities. For example, the user can not create a new activity for a *Programme of Study* because the association of an activity with a *PoS* is not direct, it is via a *Module*.

In the examples illustrated below, the Module ACC108 has been selected in the Views Pane and additional Practical activities are created and scheduled.

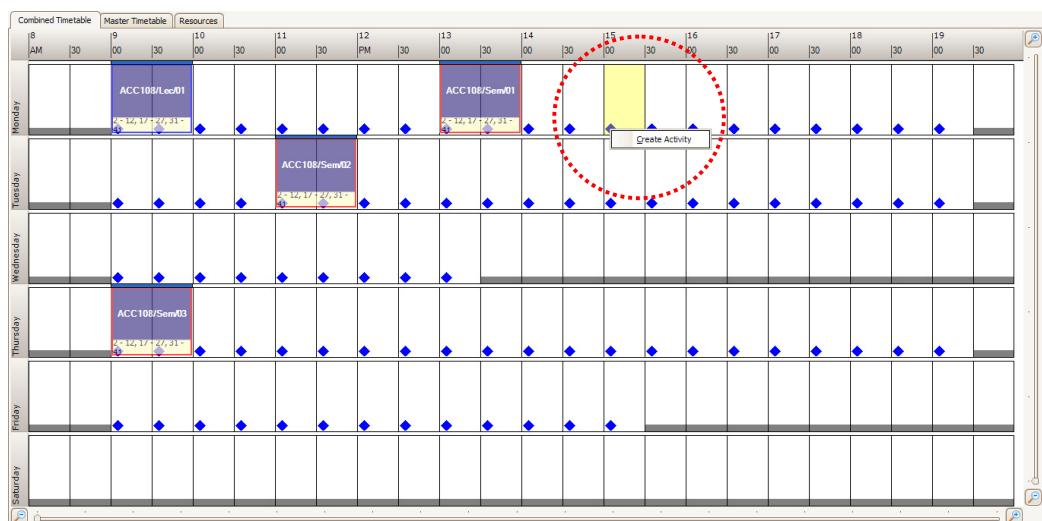
1.1. Exercise 1 - Creating and Scheduling an Activity as a Single Operation

The first Practical activity is created and scheduled directly onto the **Timetable Grid** and then available resources are selected.

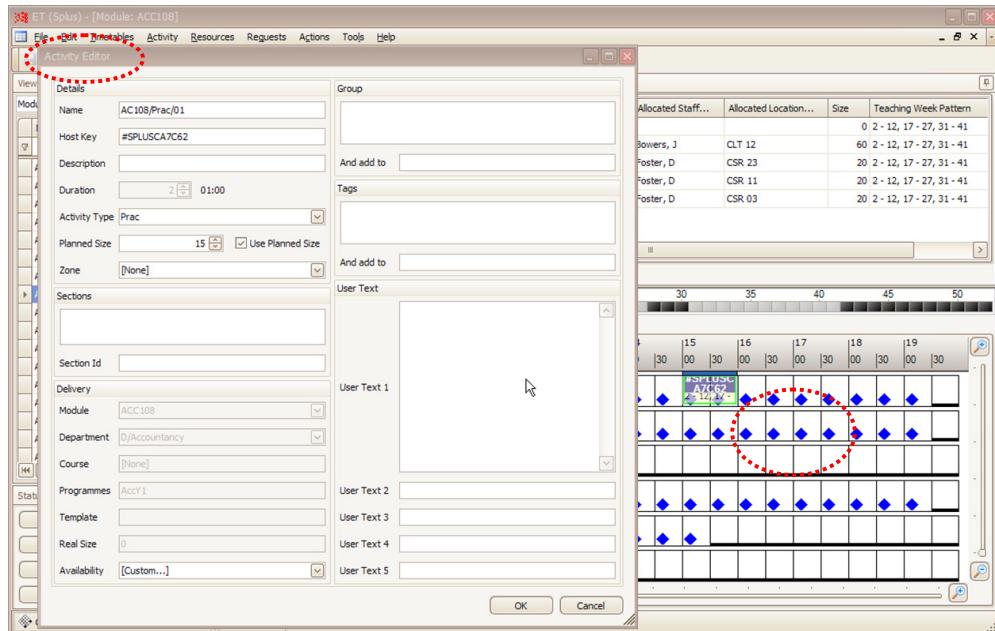
The user, having selected the object they wish the activity to be associated with, must also select the **Show Start Times** icon  from the toolbar. This enables the blue diamonds on the **Timetable Grid**, thereby giving the user information about where any new activity could be scheduled.



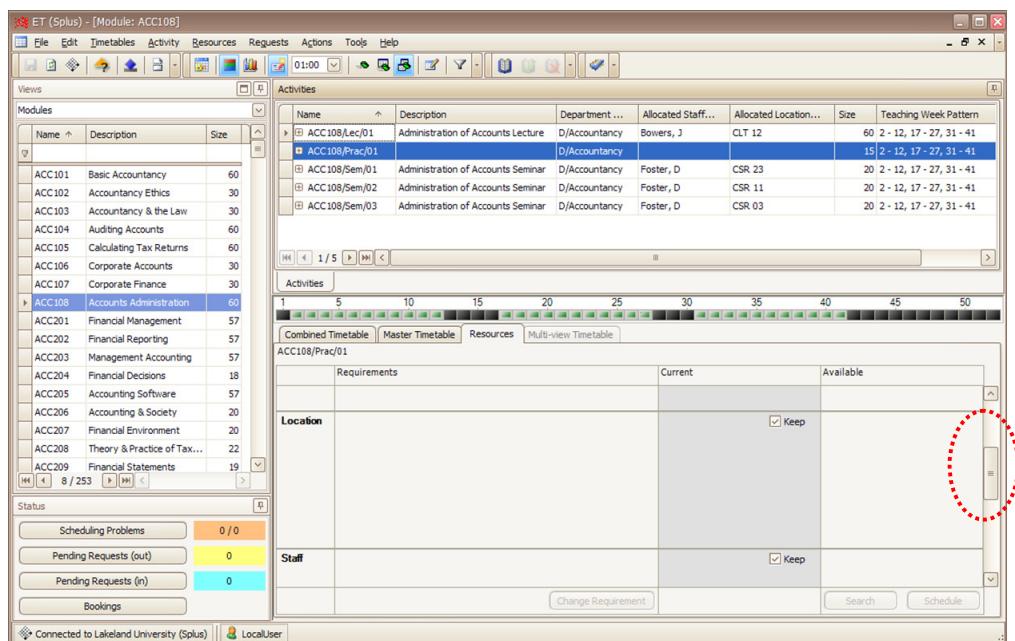
It is also useful at this stage to set the **Default Period Length**  from the toolbar, as the required duration of the new activity may have an effect on the position of any blue diamonds on the **Timetable Grid**. Right-clicking on the blue diamond, on the **Timetable Grid** where the new activity is to be scheduled, will change the colour of the timeslot and open a single action menu; *Create Activity*.



Selecting **Create Activity** will open the **Activity Editor** window and a new activity, using the default period length, will be created at the selected blue diamond on the **Timetable Grid**. The new activity is also listed in the **Activities Spreadsheet**. When using the **Module** object, the new activity will automatically assume the *Department*, associated with the selected module. In addition, the new activity will be constrained by the weeks of when the Module is available: the Named Availability pattern that may be applied to the selected Module.



Within the **Activity Editor**, details of the new activity can be inserted into the relevant fields. Clicking on the **Ok** button will close the **Activity Editor** and add the activity on the **Timetable Grid** and in the **Activities Spreadsheet**. The required resources can then be added selecting the **Resources** tab on the **Timetable Grid**. Note: ensure that the activity is selected. Scroll down to find the Location and Staff Rows:



Deselect the Keep check boxes on the Location row to set the room requirements and to open the search function to find free rooms.

The screenshot shows the Resources tab of a software interface. At the top, there are tabs: Combined Timetable, Master Timetable, Resources (which is selected), and Multi-view Timetable. Below the tabs is a header bar with numerical buttons from 1 to 50. The main area has three columns: Requirements, Current, and Available. The Requirements section contains a 'Location' row with a dropdown menu 'In these groups' set to '1' and a 'Keep' checkbox. A red circle highlights the 'Keep' checkbox. The 'Current' column shows a list of rooms: BLT 03, BLT 02, BLT 01, BSR 01. The 'Available' column is empty. At the bottom are buttons for 'Change Requirement', 'Search', and 'Schedule'.

The Resources Tab now shows a list of rooms that are suitable for the activity (e.g. the user is allowed to use the room and they are big enough for the activity). Note that this list does not mean the rooms are free at the activity's currently scheduled day and time.

A list of available rooms that the user is allowed to use for the activity can be found by clicking on the **Search** button.

This screenshot shows the same Resources tab after the 'Search' button was clicked. The 'Available' column now displays a list of rooms: BLT 01, BLT 03, BSR 01, BSR 02, and BSR 03. A red circle highlights the 'Search' button. The other interface elements remain the same as in the previous screenshot.

Select a location from the list and click on **Schedule** to allocate the location to the Activity.

The name of the location will now show in the Current column. Note: Multiple locations can be selected by holding down the Ctrl-key on the keyboard and selecting multiple locations after pressing **Search**.

Resources can be found individually by category e.g. for locations or for staff or for equipment. The process for allocating staff or equipment is the same as for locations. In addition, it is possible to search for combinations of resources in one operation. Deselect the Keep checkboxes against both Locations and Staff:

Press the **Search** button, select the required location and staff from the Available lists and then press **Schedule**. The activity is now timetabled with a staff member and into a room for all of the teaching weeks of the Module.

The following points should be noted by the user in relation to this operation:

- The activity is scheduled on the day and at the time selected. **The day and time in this instance becomes the Suggested Day and Suggested Time for the activity.**

The screenshot shows the 'Resources' tab of a software interface for managing timetables. At the top, there is a horizontal timeline with numerical markers from 1 to 50. Below the timeline, a navigation bar includes tabs for 'Combined Timetable', 'Master Timetable', 'Resources' (which is selected), and 'Multi-view Timetable'. A course code 'ACC108/Prac/01' is displayed. The main area is divided into three columns: 'Requirements', 'Current', and 'Available'. The 'Requirements' column contains three rows: 'Day' (with dropdown menus for Monday, Tuesday, and Wednesday), 'Time' (with dropdown menus for Period 14 (14:30), Period 15 (15:00), Period 16 (15:30), and Period 17 (16:00)), and 'Location' (set to '10'). The 'Current' column shows the scheduled day as 'Monday', time as '15:00', and location as 'BLT 03'. The 'Available' column shows dropdown menus for 'Day', 'Period', and 'Start Time'. There are also checkboxes labeled 'Keep' next to each row.

Removing this restriction (by deselecting the day and/or time using Ctrl-click, pressing [Change Requirement](#)) and scheduling at a different time may change the list of available resources.

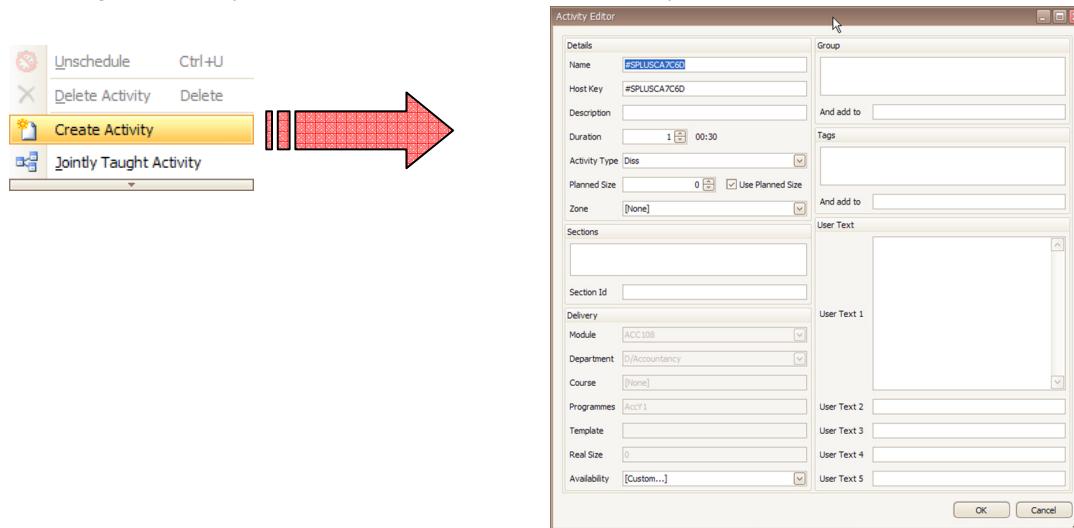
- The activity is initially scheduled *without* resources (*Location, Staff and Equipment*). The user will need to use the **Resources** tab to allocate the appropriate resources. Remember, some resources may not be available on the scheduled day or at the scheduled time.
- The activity is also scheduled without *Student Sets*. The user will need to allocate sets using the **Student Set Editor**. Again, some sets may not be available on the scheduled day or at the scheduled time.

1.2. Exercise 2 - Creating and Scheduling an Activity as Separate Operations

The second Practical activity is created in the **Activities Spreadsheet**, resources added, and then the activity is scheduled into an available timeslot.

Instead of creating and scheduling a new activity in one single operation, the user may choose to create a new activity, attach the relevant resources, and then schedule the activity into a suitable timeslot based on the availability of the resources. In this case, the process requires three separate operations.

Having selected an object or combination of objects from the **Views Pane**, a new activity can be created by selecting the *Activity* drop-down menu, and *Create Activity*. This will open the **Activity Editor** window.



Using the **Activity Editor**, the user can add additional details before creating the new activity. The newly created activity will appear in the **Activities Spreadsheet** but *will not* appear in the **Timetable Grid** as it has not yet been scheduled.

Selecting the activity in the **Activities Spreadsheet** enables the user to add resources using the **Resources** tab on the **Timetable Grid**. And as above deselect the Keep checkboxes for Locations and Staff:

	Requirements	Current	Available
Location	In these groups 1 and in this list Name BLT 02 BLT 03 BSR 01 BSR 02	<input type="checkbox"/> Keep	Name BLT 02 BLT 03 BSR 01 BSR 02
Staff	In these groups 1 and in this list Name Black, I Bowers, J Bunting, P Conway, K	<input type="checkbox"/> Keep	Name Black, I Bowers, J Bunting, P Conway, K

Buttons: Change Requirement, Search, Schedule.

The resources can be selected by clicking on the required lists and pressing [Change Requirement](#). Return to the combined timetable tab:

	8 AM	9 00	9 30	10 00	10 30	11 00	11 30	12 PM	12 30	13 00	13 30	14 00	14 30	15 00	15 30	16 00	16 30	17 00	17 30	18 00	18 30	19 00	19 30
Monday		ACC108L ec/01 2 - 12; 17 - 27 - 31 - 41								ACC108S em/01 2 - 12; 17 - 27 - 31 - 41			ACC108P rad/01 2 - 12; 17 - 27 - 31 - 41										
Tuesday										ACC108S em/02 2 - 12; 17 - 27 - 31 - 41													
Wednesday																							
Thursday											ACC108S em/03 2 - 12; 17 - 27 - 31 - 41												
Friday																							

Buttons: Schedule here.

The grid will display a blue diamond at any timeslot that the activity can start where the required location and staff are available. Manually schedule the activity by Right-clicking on the start time and clicking [Schedule here](#). To schedule the activity automatically, (allowing the scheduling engine to determine the best time using scheduling preferences), select the *Activity* drop-down menu and choose *Schedule*. Alternatively, use the keyboard shortcut Ctrl-H.

Student Sets can be allocated using the **Student Set Editor** which is available from the *Resources* drop-down menu, and *Edit Student Sets*. This process is the subject of a separate worksheet.

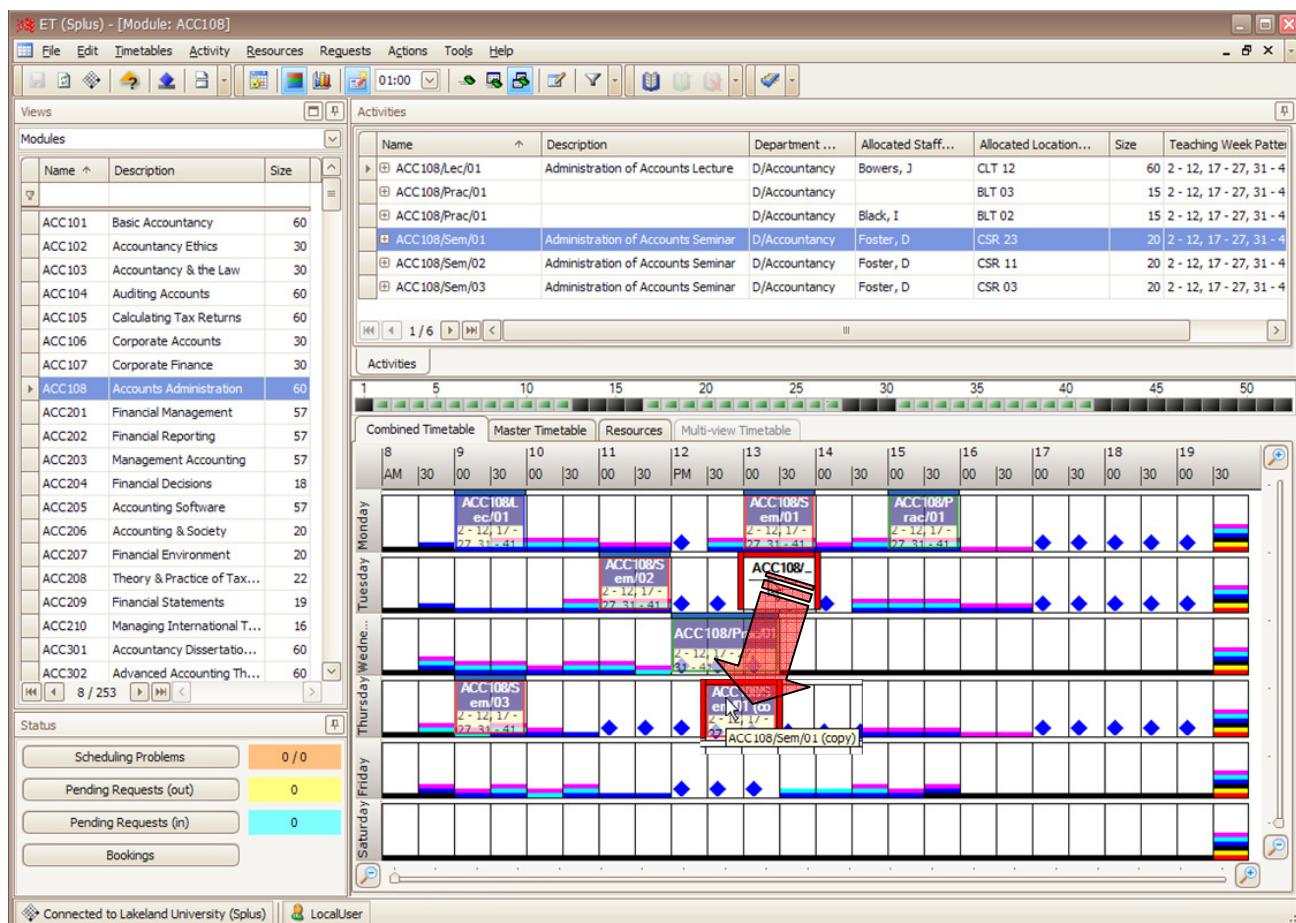
Note 1: The object or objects selected from the **Views Pane** will be automatically associated with the newly created activity. For example, if the user is viewing a *Module* when the activity is created, the activity will be linked to that *Module*, will have the same *Department* as the *Module* and will be associated with any *Programme(s) of Study* to which the *Module* is linked. If the activity is created whilst viewing *Locations* with two rooms selected, then **both rooms will be linked to the activity as Preset resources**.

Note 2: Setting suitabilities for locations and staff in the resources tab is covered in more detail in the Working with Resources worksheet.

1.3. Exercise 3 - Copying/Duplicating an Activity and Scheduling.

The third Practical activity is duplicated and then scheduled using the drag & drop technique.

Holding down the **Shift** key on the keyboard, and then clicking with the mouse on an activity and dragging & dropping it into an available timeslot, (indicated by the blue diamonds on the **Timetable Grid**), duplicates that activity and schedules the copy. Because the copy represents an addition to the timetable rather than a change it may not always be possible to schedule the copy in a slot where the original could have been moved. The blue diamonds will update to indicate this. To illustrate: It may be possible to move an hour long activity from 12:00 to 13:00 but creating a copy at 13:00 would leave the member of staff no time for a lunch break.



Double-clicking on the new activity opens the **Activity Editor** and allows the *Name* and any other details to be changed. Note that the activity duplicates with the same resources (*Staff* and *Location*), as well as the same *Student Sets*.

The user may wish to change the staff member, and/or the location – this would be undertaken in the *Resources* tab of the **Timetable Grid**. To undertake changes to the *Student Sets*, the user would need to use the **Student Set Editor**.

Alternatively, the activity could be selected in the **Activities Spreadsheet**, copied using **Copy Activity** from the **Activity** drop-down menu, changed using the **Activity Editor**, and then scheduled on the **Timetable Grid** using the *Schedule here* technique outlined above.