How to use this guide:

This guide is organized to introduce the Scientia applications based on their use in the UBC scheduling process.

Users can read the guide through or can use the table of contents below to hyperlink to points in the manual for the stage of the process they are in and looking for information.

This document aims to provide users with a step by step process while also providing information on why the recommended process should be followed and tips for efficiently and effectively using the system.

It is highly recommended that users review the Glossary of Terms on the connect course before reading the User Guide.

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Course Scheduling Overview

The course scheduling process involves two systems:

1. **Scientia**
   - Scientia is the **scheduling system** where days, times, locations, and teaching instructors are assigned

2. **SISC**
   - SISC receives a transfer of the section information from Scientia and populates the course domain for users to complete the **required registration data**
     - Released Seats
     - Permission to Register
     - Publish Yes or No to the online schedule
     - Section Type, Activity Level, Required Activities, Activity Links
     - Section Publish Notes

It is recommended to users to have both the SISC and Scientia launched when doing course scheduling to make it more efficient to move between the systems.

The below workflow outlines how the systems interact. This image is available in a larger version on the Connect course.
Scientia – Logging In

You must use Internet Explorer and launch using the Scheduling link from the FSC (SCMC).

Mac User? Contact scheduling services and use a VDI to access Scientia.

Upon successful log in:

A. Select the correct database tab –
   - Database Tab will be named the Academic Year (ex. 201415)
B. Click Enterprise Course Planner (ECP) to open
C. Click on Enterprise Timetabler (TT) to open

Select - Install Local Copy as this is the quickest loading option
- If first time using Scientia on this machine, you will only have one option to recreate from the database. This will take a couple minutes to install.

Why open CP and TT at log in?
You will be using both the Course Planner and Timetabler to complete your scheduling tasks. The Scientia Portal page will time out after 5 minutes without use. By opening both at first log in, you will not have to re-login to open the applications when you need to use them.
Database Set Up

**Academic Year – New Database**

- Academic Year databases in Scientia are set up to match the academic year (September to August)
- Scheduling for Winter and Summer (ex. 14W, 15S) will happen in one database
- We know that some courses start before September, therefore the database will start approx. 2 weeks before September 1 and end approximately at the end of the Summer session Term 2 period

**What does this mean for your scheduling process?**
- For courses and events that bridge two databases, you may have to make the booking twice in order for activity and resources to be scheduled correctly.
- Space booking is the primary concern to make sure that double booking does not happen

**Locations, Suitabilities and Permissions**

- Locations tables will be reviewed and populated at the start of each new database
  - Facilities Planning and Infrastructure Development will manage the list of teaching space and ownership that is transferred to Scientia for the purposes of scheduling

**Don’t see the location you are looking for?**  Contact Enrolment Services. They will investigate and determine if the room should be scheduled in Scientia

- Suitabilities will be managed by Enrolment Services
  - Enrolment Services will attach and update suitabilities for locations and resources as new information becomes available

**How will you know what suitabilities are available for you to select?**
- Suitabilities will be available for you to select when you are assigning resources to your activities
- If it is not listed, it is not a suitability in our list

**Can new suitabilities be added to the list?**
- We do not want Scientia to become the room amenity inventory, but we know that needs for suitabilities will change over time
If there is a new suitability, or a request to change a current suitability, that would be a benefit to the scheduling process, please contact Enrolment Services. We will review the request.

Database Set Up

Revisions to Patterns and Preferences

- **Named Availability Patterns**
  - Pre-defined week patterns to apply to activity templates or to individual activities
    - For example: Winter Term 1, Winter Term 2, Winter Term 1 Odd Weeks, Winter Term 1 Even Weeks
  - Named availability patterns are created and maintained by Enrolment Services
  - Users select a pattern when creating activity templates to specify the term and weeks the activities are to be scheduled for

  **What if there is not a pattern that fits what you are trying to schedule?**
  Users can create a custom pattern to adjust the scheduling weeks to reflect the weeks the activity must be scheduled

- **Preferred Start Pattern**
  - Start patterns are created and maintained by Enrolment Services and are set up to match the scheduling sequence/pattern (ex. MWF starting on the hour, TR, starting every 1.5 hours)
  - Preferred start patterns must be attached to each module. This will ensure all activities are scheduled for the campus preferred start pattern when the ‘Auto Schedule’ is run by Enrolment Services.

- **Usage Preferences**
  - A Usage Preference is attached to Modules to ensure that, when the auto schedule is run, all activities are scheduled based on the preferred usage.
  - The Usage Preference will, almost always, be a standard preference for each campus. Prior to the Auto Schedule, Enrolment Services will ensure the standard preference for each campus has been applied correctly and consistently
Course Planner (ECP)- Introduction

Users will use Enterprise Course Planner (ECP) to complete the following steps in the scheduling process:

- Finding and setting up available modules
- Creating Activity Templates and applying Named Availability Patterns
- Generating Activities

What are modules, activity templates and activities? See the Glossary of Terms

Course Planner opens as a dashboard view. The 4 main areas users will use on the Dashboard are:

A. Department(s) Filter – use the drop down beside departments to input your department filter
B. Modules – automatically populated from an interface with SIS Curriculum Management
C. Activity Templates – created and edited by users, apply named availability patterns
D. Activities – the list of activities that have been created

Important Icons - Write Back (disk) and Refresh (paper w. arrows) – Write Back your changes to commit them to the database, Refresh your view with what others have written back while you are working/planning. If you don’t hit write back, your changes will not be committed.

TIP: Use the SHOW buttons beside Total in each area of the dashboard to quickly see the details. Maximize your screen to see all the buttons and data synch field.
ECP – Modules – Set Up

Open Module Editor by clicking <Show> next to the Total in the Modules area on the dashboard. Customise the modules screen layout to only show the data columns relevant to you.

**Actions to be completed in Module Editor**

1. Finding available modules to schedule
2. Adding Module Size
3. Creating Activity Templates

**Recommended column layout**

- Name, Description, Credit Provided, Department, Total Size, Named Availability Pattern, Weeks, Named Starts, Named Usage

**Removing Columns**: Click on the name of the column you want to remove, hold down and drag up to a blank area of the screen. An X will appear as you drag. Let go and column will be removed.

**Adding Columns**: Right click on any column name and select Colum Chooser. A pop up will appear. Click on the column name to add from the pop up and drag it on the existing Modules column names.

**Add Auto Filter Row** as your first row in the modules page

- The auto filter row will allow you to type and have the column auto filter.
- Click on the name column, right click, select ‘Show Auto Filter Row’ from the list

**Remove Planning Formulae** from the tool bar as Planning Formulae is not being used by UBC at this time, therefore you can remove it from your view

**TIP** – The columns will display most of the module information, but users can see the full details by clicking on the module and selecting **FORM VIEW** at the bottom of the screen.

**TIP** – Users must select **APPLY** after making any changes. The data synch will start and an icon will appear in the bottom left of the screen (beside print) showing the data synch is happening.
ECP – Modules & Activity Templates

When a new course is approved by Senate OR a new detail version is added a user will have to:

1. Find the module
2. Add details to the module (ex. Size, named availability pattern)
3. Create activity template(s); and
4. Generate activities

Steps to follow:

1. **Find a Module:**
   a. Find the module by using the Auto Filter Row and typing in the subject or select using the filter options available in the column name

2. **Add details to the module**
   a. Click Form View at the bottom of the Modules window
   b. Add the Total Size
   c. Click OK on the Form View window and the APPLY on the Module Editor window

3. **Create activity template(s)**
   a. Highlight the module you need to create templates for
   b. Click “Create Activity Template” at the top of module screen
   c. A row appears below the module that has inherited the details of the module
4. Define the template requirements
   a. /Activity Type (ex. LEC) to the Name
   b. Select Activity Type
   c. Duration of each meeting
   d. Planned size
   e. Zone (campus)
   f. Location Requirement
   g. Staff Requirement (if any)
   h. Named Availability*
      
      • To add Named Availability:
        1. Right click on the column header for Staff Requirement
           a. Select Column Chooser
           b. In the Customization pop up window, double click on Named Availability
           c. This field is now inserted into the template in Module Editor for completion
        2. OR
           a. Go To Activity Template Editor after they are created
           b. Find the template and click “Form View”
           c. Add Named Availability
      
      • Repeat steps 3 & 4 to make a template for each activity type

5. Apply and click back to ECP Dashboard to Write back changes to the database

Creating more than one activity template? Make sure the icon beside the module name is showing as >. Click directly on the icon field to change from a pencil to an arrow (>)

Why add /LEC to the Template Name? This helps easily differentiate templates created for a module

Existing Activities and Need to generate? “Existing Activities” refers to the number of activities already created, “Need to Generate” displays the number of activities that are still needed based on a calculation of the Module size minus the planned size of the activity template.
ECP - Generate Activities

Why generate activities from templates?

Generating activities from templates ensures that the activities inherit the details from the activity template, such as the named availability pattern. We recommend users always create activities using the activity template. Generate from template is also available from Timetabler

d. Open the Activity Template Editor
   a. From the CP Dashboard, click <Show> beside the Total in the “Templates” Section

e. Find the Activity Templates that activities need to have generated

f. Highlight the template
   a. The Activities to Generate will automatically populate the number from “Need to Generate” of the highlighted template (see below)
   b. Only need to generate a specific number (ex. One more)? Change the number.

g. To generate all needed activities, click on the cog/wheel icon
   a. The data synch will begin and the Existing Activities and Need to Generate columns will be updated when complete

4. APPLY and close window. WRITE BACK changes on the CP Dashboard.

How do you find/confirm the activities you have just created? Two options
1. On the CP Dashboard in the Activities area, click on SHOW beside the total. The new window is the list of all activities existing. Filter to find the activities you are looking for.
2. Find your generated activities for each module in Enterprise Timetabler (TT)
ECP – Activity Editor

When to use:
The Activity Editor is used after activities are generated in the Template Editor and a user needs to adjust the named availability patterns and/or planned size for one or more activities before beginning the timetabling process.

- Changes made to the Template, in Template Editor, will be updated on the Activities showing in Activity Editor (ex. Planned size change to a template will change all associated activities)
- Changes can be made in activity editor after scheduling has started, however making changes may increase the problem count. Consider unscheduling prior to making changes.

Actions completed in Activity Editor

- Editing Named Availability Pattern for one or multiple activities
- Viewing and editing Activity details (Form View) for one or multiple activities

How to

1. Click on <show>
2. Select the Activity – highlighting the row
   a. Use Shift and Ctrl Shift to select multiple activities at once to make the same change to all
3. Open Form View and change the applicable fields
4. Click Apply and close the window
5. Write Back your changes to commit them to the database
Enterprise Timetabler (TT) – Introduction

Users will use Enterprise Timetabler (TT) to complete the following steps in the scheduling process:

- Viewing and modifying activities
- Assigning and editing activity resources & requirements
- Building timetables; and
- Scheduling activities

The 5 main areas of Timetabler are:

A. Icons and Tool Bar – Write Back and Refresh
B. Views – A drop down menu for users to select what information they want to see in the Activities pane. Primary views Locations, Staff, Modules, Activity Templates.
C. Activities – packed with information this view shows users a detailed view that can be exported to excel, a visual for scheduled weeks, multiple timetable grid views showing scheduling options, a resources tab for assigning suitabilities, and a section where users can see reasons related to the grid view
D. Status – A quick way to reference problems to fix or waive
E. Refresh – Alerts users to write back to the database and the time of the last refresh
Enterprise Timetabler (TT) – Set Up

Customise the modules screen layout to only show the data columns relevant to you

1. **Column Layout - View Panel**
   - Change the views to Module, Activity Template, Locations and Staff
   - Using Column Chooser, drag in the preferred columns for each of these different views

2. **Recommended column layout – Activities Panel**
   - Name, Activity Type, Section ID, Size, Duration, Scheduled flag, Scheduled Days, Scheduled Start Time, Scheduled End Time, Scheduled Weeks, Allocated Location, Allocated Staff, Jointly Taught, Named Availability Pattern, Tag Name
   - Right Click on a column name in the Activities view
   - Select Column Chooser and pick the preferred columns – drag and drop to where you want them saved
   - Save Column Layouts – users can define the layout names

Why is Tag Name included as a preferred column? If you work with Arranged sections, the Tag Name field is where the ARRANGED tag will be entered.

Removing Columns: Click on the name of the column you want to remove, hold down and drag up to a blank area of the screen. An X will appear as you drag. Let go and column will be removed.
**Adding Columns**: Right click on any column name and select Column Chooser. A pop up will appear. Click on the column name to add from the pop up and drag it on the existing Modules column names.

**TIP** – You can have multiple layouts saved. You can move columns and change the layout while working. If you don’t like the way you have changed the columns and layout you can revert back by resetting both the layout and columns.
TT – Set Up (Continued)

Activity Layout

Customize the activity detail to set preferences for what and how much information should be viewable in the timetable grid.

Click the Activity Layout icon. The Activity Layout Editor window will appear to select the preferred layout.

Show Scores and Show Violations Colours

To display the scores (how well an activity fits in the timetable based on constraints) and violation colours (reasons why an activity cannot be scheduled in a specific place in the timetable) in the grid, turn on or off two tool bar icons (highlighted opposite).

🌟 Looking to view more or less?

A. Use the “Pin” icons in the corner of each pane. By pinning and unpinning the views will hide the unpinned panes as tabs on the screen, enlarging the view of the remaining areas.
TT – Finding Activities & Defining Requirements

**When:** After activities are generated in Course Planner, users will find the created activities and define the scheduling requirements.

**How to edit activity details:**

**There are three different ways you can edit activities:**
1. Double click on the activity in the Activity pane
2. Highlight the activity in the Activity pane, right click, Edit Activity
3. Menu Bar – Edit – Edit Activity

**TIP:** Select multiple activities to apply the same edit by highlighting and using CRTL or Shift

Many of the fields required for scheduling an activity will be inherited from the module and/or created from the activity template at the time the activities are generated.

The remaining fields must be completed by editing one or more activities using TT Activity Editor.

**Required Activity Field**

**Section ID**

- All activities must have a section ID entered
  - Activities *without* a section ID will not be passed over to the SISC
- To change a section ID once created, an activity must be deleted and a new one created.
• Activities with the same section ID (duplicates):
  o Will be passed to the SISC but the meetings of both activities will be brought together under the one section number

Defining Resource Requirements

Resource requirements can be defined on the “Resources” tab (see below)

A. Days and Times
  ▪ The duration of the activity is set at the template, but a user can set more specific requirements for the days of the week the meetings must take place
  ▪ Recommended that users do not pick a specific start time
    • Why? The Preferred Start Pattern that is applied at the Module level will support the scheduling pattern. By not indicating ‘times’ as a required resource the system will have more options to schedule

B. Locations Suitabilities
  ▪ B = Building, F = Feature, S = Subject
  ▪ Suitabilities work with an “AND” logic so it’s best to use a less is more perspective for finding space
  ▪ If an on campus space is required, users must ensure that the Required Resource is set to 1 or greater
  C. Off campus or no physical location required? Set the Required Resources to 0
    • Users will need to use SISC Section Publish Notes or another mechanism to communicate any location details to students

B. Staff
  ▪ If an instructor is required for the section, increase the staff requirement to 1 or more
  ▪ If no instructor is required, such as Exchange, Work Placement, Practicum, Wait List, set the staff requirement to 0

What rooms will be visible? Only rooms you have access to book or request. (ex. Tier permission or restricted access)

What staff will be visible? All available instructors will be visible, similar to the instructor list in SISC for Duty Assignments. Apply an “S” (subject) suitability to reduce staff results.
TT – Editing Resources & Scheduling

When to edit resources

- Assign Resource Requirements at the start of the timetabling and scheduling process
- Activities will inherit any requirements specified on the Activity Template
- Users can change the resource requirements for one or more activities at the same time (use Shift and Ctrl Shift to select multiple)
  - To unselect a highlighted resource – hold down Ctrl and click on the highlighted selection

**What you need to know:** Location suitabilities include **Buildings**, **Room Types**, and **Room Features**. To help with easy searching they are grouped with prefixes **B** = Building, **F** = Feature, **RT** = Room Types.

If needed, a manual preference of a specific room based on the suitability can be selected.

Use the arrow to select suitabilities:
- B/ = Building
- F/ = Feature
- RT/ = Room Type

*users will only see locations they have permission to book*

Search will show the locations that are available based on all requirements and suitabilities. **Do not select a room here at this stage.**

Change the requirements for the activity(ies)
TT – Schedule Activities

Once an activity has a section ID and resource requirements specified, with the exception of arranged, you are probably ready to schedule.

An activity can be scheduled by highlighting in the Activity Pane of TT and:

1. Right clicking and choosing Schedule; OR
2. Finding a blue diamond in the timetable grid, right clicking, and choosing Schedule Here; OR
3. Using the menu bar along the top, under Scheduling, and choosing Schedule

You can highlight one or multiple activities in the activities pane by using CRTL and Shift to schedule more than one activity at a time.

When an activity is scheduled:

1. The scheduled tick box will display a check mark in the Activities Pane
2. The scheduled activity(ies) will appear in the combined timetable grid for the days, times and term schedule
3. Recommended to add in the columns for Allocation Location Name, Allocated Staff Name, Schedule Days, Scheduled Start Time, Scheduled End Time, Scheduled Weeks in to the Activities Pane view

To re-schedule or adjust an already scheduled activity (days/times/locations):

1. Move the activity in the grid view
   a. Highlight the activity in the Activities Pane. It should now highlight with a red outline in the grid view
   b. Click on to the red outlined activity and drag it to another blue diamond to reschedule
2. Change the current scheduled information in the Resources tab by using the Search buttons to find available days, times, locations and staff and clicking Accept
How to...

Create new activities (sections)

The easiest, quickest and preferred way to create a new section is to generate another activity from the template.

Two ways to generate from template:

1. In Timetabler, find the module and the activity that you want to make another one of
   - Highlight the activity in the Activity Pane and right click
   - Select Generate from Template in the drop down menu
   - This will create a new activity in Timetabler ready for scheduling.
     i. Remember, generating from template means the activity will inherit all of the details set up at the template.

2. In Course Planner – see Generate Activities
How to...

Create Jointly Taught Activities

**When:** Create jointly taught activities when you need two or more activities to meet at the same days, same times, same location. We commonly call these activities “cross listed”.

It is recommended to create jointly taught activities with activities in an unscheduled status.

**Steps:**

1. In Timetabler, find and highlight one of the activities that needs to be jointly taught in the Activities pane

2. Go to Actions in the tool bar – Create Jointly Taught Activity

3. In the Jointly Taught Activities pop up window, find the other module that needs to be connected

4. Find the activities available for Sharing and use the radio buttons to move the activity up to the top box. **TIP:** Activities for sharing must have the same resource requirements. If they do not, they will not appear as candidates for sharing in the jointly taught activities window.

5. Click on the Options tab and ensure the radio buttons for Name and Size are set to all. This will combine the two activity names and also combined the activities planned sizes.

6. **Click OK.** In the Timetabler Activities Pane, the new activity will show with a combined name and is ready to be have resource requirements defined (if needed) and be scheduled.
How to...

Delete

Activity Templates

- Templates can only be deleted in the Template Editor
- If you accidentally create too many templates in Module Editor, cancel your edits and re-start your template creation in module editor
  - If you have gone too far – deletion of templates can only happen in template editor

⚠️ CAUTION – if you delete a template, ALL activities associated with the template with also be deleted!

- Highlight the template row in Template Editor
- Click the – (minus sign) icon in the bottom of the window to complete the deletion

- If you delete in error, you will need to create a new template in the Module Editor for the specific module

🌟 TIP: *You cannot delete if you are in edit more –when the pencil icon is in the side bar. You can only delete if the chevron/arrow is showing in the side bar*

Activities

- Activities can be deleted in Activity Editor in ECP or in the Activities view pane in TT
- Highlight the activity or activities that need to be deleted and use the same icon shown above to delete
- If you delete in error, you must create a new activity using the Template Editor to generate more activities

Modules

- Users cannot delete modules
- If there is an error in a Module, please contact Enrolment Services with the issue for it to be investigated in the Curriculum Management applications
Create waitlist sections

1. Create a new activity

2. Edit the Activity to adjust:
   a. Name
   b. Activity Type
   c. Planned size
   d. Section ID

How to edit activity?
- Double click on the activity in Timetabler, OR
- Right click on the highlighted activity in Timetabler and go to “edit activity”
3. **Edit Resources**
   a. Attach the days and times the waitlist is being scheduled for
      - If no days and times yet determine – edit the activity and attach the **Arranged Tag**
   b. Set the **location requirement** on the Resources tab to 0
   c. Set the **staff requirement** to 0 or leave 1 and attach TBA
   d. **Click Change Requirement**

4. **Schedule** (if not Arranged) and **Write Back**
   a. Right click on the activity and schedule
   b. Write Back and go to SISC to complete the section details required for registration
Create Arranged Activities
(EX. GIS, Practicums, Exchange, Directed Studies)

Arranged activities are created the same way as all other activities, with the major exception that they are not scheduled.

An arranged activity is an activity that does not have any days and times to be scheduled.

Examples:
   a. An activity meets MWF from 10-11am but does not need a room scheduled – NOT AN ARRANGED
   b. An activity meets MWF but the time is not determined – ARRANGED ACTIVITY
   c. An activity meets online only, does not have days or times – ARRANGED ACTIVITY

For an arranged activity to be complete in the scheduling process using Scientia, it requires:

1. Section ID
2. Arranged tag
3. Write back to the database

To add the tag for a single activity:
   - Edit the Activity
   - Attach the Arranged tag
   - Click OK

To add the tag to multiple activities at the same time
(ex. All Activities with the type GIS or EXC)
   - Go to Course Planner – Activity area.
     Click Show beside the Total.
   - Filter for the activities to have the Arranged Tag applied
   - Highlight multiple by using Ctrl and Ctrl Shift to select rows
   - Click Form View
   - Click into the Tags field and select Arranged
   - Click OK and Write Back
How to…

Add or Change Instructors
1. Find the module and related activity that needs to be worked on
2. Are you working with an Arranged Activity or a Scheduled activity?

Arranged & Unscheduled Activities:
1. You will work in the Requirements area of the screen
2. Open up the staff area
3. Find and highlight the staff name to add
   - To remove – hold CTRL and click the highlighted name to remove highlighting
4. Hit – CHANGE REQUIREMENT
   If you are going to schedule this activity, not arranged, you can schedule now
5. WRITE BACK

Why is the name not appearing the Allocated Staff Name field?
Arranged activities are not “scheduled” in Scientia – so the staff name will not appear as an allocated name

Recommendation – add the Suggested Staff Name column to your Activities pane and put it beside the Tags column
This way, you can see the staff name for arranged activities in the Activity view at a glance

Scheduled Activities:
1. Using the Current pane of the Resources tab, click search in the Staff area
2. This will show you available staff
3. Highlight a staff name
4. Click ACCEPT
5. WRITE BACK

The ACCEPT button automatically reschedules the activity with the new resources – the new or changed staff name will now appear in the ALLOCATED STAFF NAME column
How to...

Create a standard column layout in Timetabler

1. **Right click** in the Name column header in Timetabler

2. In the drop down menu, select **Column Chooser**

3. Drag out the bottom corner of the **Customization pop up window** to see a larger list of available columns to choose

4. **Double Click** on the following Columns names in the Customization window to have them added to your default view

   **TIP** – Always pick the column name ending in “NAME” if there is more than one option.

   **Columns to add:**
   - Scheduled (already included in default view)
   - Name (already included in default view)
   - Activity Type Name
   - Section ID
   - Duration
   - Size
   - Scheduled Days
   - Tag Names
   - Allocated Location Name
   - Allocated Staff Name
   - Named Availability Name
   - Scheduled Start Time
   - Scheduled End Time
   - Scheduled Days
   - Scheduled Weeks

5. **Re-organize the columns to meet your preferences by dragging and dropping**
   - Left click on the column name in the Activities Pane of Timetabler, hold down and drag the column header to the preferred location in the order v
How to... 

Use Reference Data Manager (RDM)

Who uses Reference Data Manager?

- **Scheduling and Student Records Management staff**
  - Creation and maintenance of availability patterns, usage patterns and start preferences
  - Managing location availability and institutional scheduling constraints

- **Timetable Representatives**
  - Assigning subject suitabilities to instructors to enable the successful assignment of the instructor onto an activity in Scientia Timetabler

This “How To” will focus on Timetable Representatives will use RDM for adding subject suitabilities

1. **Launch “RD” – Reference Data Manager** from the Scientia portal page for the database year that is being worked on

2. **Under Resources**, beside Staff, click Show
3. **Type in the last name** of the staff member

4. Click in **“Shared With”** and **select the subject codes** for the instructor. Click the arrow to select the subject code.

5. **Click Ok** and **Write Back** changes
   a. Refresh data in Timetabler. Instructor will appear in Timetabler and can be assigned to a course.