STUDENT ALLOCATION MANUAL

[Using Scientia Enterprise Course Planner and Enterprise Timetabler]

[June 2017]
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1. Student allocation tools and how to access them

Before you start allocating students using either of the applications outlined below, you’ll need to have the ‘student allocator’ role. If you haven’t already got that, please ask your line manager to email timetabling@ed.ac.uk with your name and UUN.

There are two applications that can be used for student allocations:

- Enterprise Course Planner (ECP)
- Classic, opened via Enterprise Timetabler (ET)

Each application has different strengths, though you can use both to allocate students.

<table>
<thead>
<tr>
<th>Course Planner (ECP)</th>
<th>Classic via Enterprise Timetabler (ET)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulk allocation from one template</td>
<td>Bulk allocation from multiple templates</td>
</tr>
<tr>
<td>Slower than ET</td>
<td>Faster than ECP</td>
</tr>
<tr>
<td>Copy pattern function</td>
<td>Cannot copy pattern</td>
</tr>
<tr>
<td>Better reporting and filtering</td>
<td>Some reporting and filtering only</td>
</tr>
<tr>
<td>Programme information available to guide manual allocation</td>
<td>Windows to view multiple templates and activities at once</td>
</tr>
</tbody>
</table>

Both of these are launched via the Timetabling@Ed (TED) Portal on MyEd. Add the shortcut to your homepage (Customise > Add Stuff > TED Portal) or use the link below:

https://www.portal.ted.is.ed.ac.uk/Scientia/Portal/Main.aspx

Please note: the TED Portal must be launched using Internet Explorer. It is not supported by other browsers, including Chrome, Firefox and Safari.

When you have launched the TED Portal, click on the application icon to open the programme you’d like to use (Figure 1).

![Figure 1](image1.png)

A box will appear (Figure 2) giving you 3 options and you should always select ‘reload data from server’ to get the most up to date timetabling information.

You have limited time to choose this option so be aware of this when you click the icon you need. It may take up to 15 minutes to retrieve the data and launch the application.
2. Allocating using Enterprise Course Planner (ECP)

You can use ECP to bulk allocate to one template at a time, allocate individual students and to copy pattern allocations.

2.1. Bulk allocation

1. On the ECP dashboard, select your School from the Department menu at the top of the screen (Figure 3). This will retrieve all data relevant to your School.

2. Student allocations take place within the Templates area of the dashboard. You can view all templates by selecting Show or view only templates which have unallocated students by selecting Show With Unallocated Student Sets (Figure 3).

![Figure 3: ECP Dashboard](image)

3. From the ECP Dashboard, select Show Templates ‘With Unallocated Student Sets.’ This will bring up all templates for your School as shown in Figure 4.

4. Sub-group templates have more than one existing activity (e.g. multiple tutorials). Highlight the template which you are looking to interact with, and select Template Allocator.
5. The Activity Template Allocator is where student allocations are made. This will be displayed as in Figure 5, with unallocated students highlighted in bold font, and activities listed across the horizontal axis.

Figure 5: Activity Template Allocator pre-allocation

6. To bulk allocate the students, select ‘Allocate’ from the options in the upper right-hand side of the Activity Template Allocator as shown in Figure 6. You will then be asked to choose your preferred method of allocation. When selected, click ‘Allocate’ to allocate the students by this method.
NB: There are 4 methods of bulk allocation in Enterprise, depending on preference:

<table>
<thead>
<tr>
<th>Allocate by</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module choice</td>
<td>Allocates students with similar modules to the same activities</td>
</tr>
<tr>
<td>Name</td>
<td>Allocates students alphabetically by surname</td>
</tr>
<tr>
<td>Evenly</td>
<td>Allocates students in an even distribution across available activities</td>
</tr>
<tr>
<td>Randomly</td>
<td>Allocates students randomly</td>
</tr>
</tbody>
</table>

7. It may take several minutes for the students to be allocated. Each student now has a tick in a group, and a tick in the column which says ‘Allocated’. At the bottom of the window you will see that the numbers (indicating the space available in the group or ‘total size’) show the group has been filled by a number of students (the ‘real size’). When the process has completed, select ‘Apply’ at the bottom right hand corner of the allocator to confirm. To abandon the allocation, click ‘Discard’.

Figure 7: Confirm your allocation
8. After applying the change, you can now exit the allocator window and **Save (Writeback)** allocations on the top-right corner of the main ECP Dashboard. It should take a few seconds to save your changes.

Allocations will appear on the student timetables in near real time after a Writeback has been performed.

*Figure 8: Writeback*

...But some of my students haven’t allocated!

- Students which have not been allocated will remain in **bold font** and the Allocated box will remain unticked on the allocator (see Figure 7 – there is one unallocated student whose name is in bold). This can occur due to a timetable clash, or a lack of space in the activities.
- **Clashes** are identified by a greyed-out box within the activity column. This means the student cannot be allocated to this activity because of a timetabling commitment elsewhere
- If there is a **lack of space** – e.g., the planned size your group is 12, but you have 13 students – one student will not allocate. The planned size cannot be exceeded during bulk allocation, but can be manually amended.

**Remember:** The Timetabling Unit will allocate students to all templates which have one activity (Whole Class Allocation).

Student Allocators only need to allocate student on templates with multiple activities – for example, lab groups, or tutorial groups.
2.2. Individual Student Allocation

1. Open the Activity Template Allocator in ECP as in bulk allocation. As before, students who are unallocated will appear in bold font, and clashes will be greyed-out.

2. **Click once** in the relevant activity cell to manually add a student to a group. Click Apply to save the allocation.

3. To allocate students manually by Programme Name, right click on the Name column and select **Column Chooser**. This will bring up the Customization window. Double Click on **Programme Name**. The students’ programme name will then appear alongside the students name.

   *Figure 9: Column Chooser*  
   *Figure 10: Sort by Programme Name*

2.3. Amending Allocated Students

<table>
<thead>
<tr>
<th>Amendment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unallocate individual student set</td>
<td>Click once on Activity cell. Student name will become <strong>bold</strong></td>
</tr>
<tr>
<td>Unallocate all student sets</td>
<td>Select all students (Ctrl+A) and Click <strong>Unallocate</strong></td>
</tr>
<tr>
<td>Move student to new activity</td>
<td>Click once on new activity cell. Student will be unallocated from the old activity automatically.</td>
</tr>
</tbody>
</table>

To secure these changes, click **Apply**, then **Writeback (Save)** on the main ECP dashboard.
2.4. Copy Pattern

Copy pattern allows student allocations from one template to be copied onto another identical template – so student groups remain the same. E.g., consistent group allocations across whole year courses which have been split into Semester 1 and Semester 2.

**Remember:** For the Copy Pattern function to work there must be an identical list of students on each template and an identical number of activities on each template.

1. Allocate students sets in the first template as explained in 2.1. Apply and Writeback (Save) changes.

2. Select the Copy Pattern button at the upper left-hand side of the student allocator window for your chosen template (Figure 11). This will copy your allocations onto the clipboard.

   **Figure 11: Copy Pattern (First Template)**

3. The template you are currently working on is displayed at the top of the allocation window. Click on the template name to open a drop down menu listing all Activity Templates. Select the template that you want to copy the allocation to.

4. The new template will now be available. Select Paste Pattern from the top menu (Figure 12). Your allocations will then be copied. Note that the ‘real size’ information will not update until you have applied the changes, and relaunched the Activity Template Allocator.

   **Figure 12: Copy Pattern (Second Template)**

If a student has a clash in the second template they **will not be allocated to any group.** Following pasting the allocation, it is important to check for unallocated students.
2.5. Exceptions

Groups can be overloaded but where there are multiple students unallocated, it may be necessary to create extra activities.

To overload groups, allocate students manually. This will turn the Total Size/Real Size figure red (Figure 13).

*Figure 13 (below): ‘Overloading’ activities*

| Total Size / Real Size | 10/5 | 10/7 | 10/7 | 10/11 |

It is recommended that this is only used for adding **1 additional student** to a group. If the number of unallocated students is greater than 1, the total size must be amended.

Where there are many more students than can be accommodated within the existing activities, it may be necessary to generate new activities.

To create additional activities, and amend existing activities using ECP or ET guidance can be found in our Data Creation Manual, found here: [web page](#)

It is also possible to amend Total Size using ET/Classic, which is explained in Part 3 of this document.

School allocators are not able to override timetabling clashes within student timetables.

In cases where a student should legitimately be allocated to two concurrent activities, users should contact the Timetabling Unit [timetabling@ed.ac.uk](mailto:timetabling@ed.ac.uk).
3. Allocating using Classic via Enterprise Timetabler (ET)
Classic can also be used to allocate students. It’s often quicker than using ECP and there’s also the ability to allocate to multiple templates at the same time.

3.1. Beginning allocation in Classic
1. Launch Classic by selecting the S+ icon from the ET toolbar, as in Figure 14.

2. This will open a new window (Figure 15). Note that while this window is open you will be unable to interact with ET.

3. From the options across the top toolbar, select Timetabler, and then Activity Templates (Figure 15).

*Figure 14 (below left): Launching Classic Figure 15 (below right): Classic*

4. This will load all Activity Templates from all departments. To filter to your department, select View from the top toolbar, and then Filter.

5. Within the Filter box, select Filter Activity Templates by Department (Figure 16). You can then select your own department from the list on the right. Select Filter to retrieve the templates relevant to your department.
6. Activity Templates are listed down the left side of the window. Highlight a template and move to the **Allocate tab** (Figure 17). This is where allocations take place. Students enrolled on the course will be listed down the left hand column, and Activities from the template are listed along the horizontal axis.

*Figure 17: Viewing templates within Classic*
3.2. Bulk allocating students to a single template

Students can be allocated in bulk across the activities attached to the template. Students cannot be allocated to greyed-out boxes as these represent timetable clashes.

1. **Select Allocate** from the bottom right hand corner of the window. This will ask you to select your allocation method. In Classic it is recommended to allocate:
   - By name
   - Evenly
   - Randomly

2. **Select Allocate**. Classic will then process this allocation by putting ticks into the activity boxes. Unallocated students will remain in bold font. The real size figure will update with the number of students now allocated to each activity (Figure 18)

![Figure 18: Template Post Allocation](image)

Remember: After making your changes and exiting Classic, **Writeback** by clicking on the save icon in ET. All changes made in Classic must be saved in this way.
3.3. Allocating multiple students to multiple templates

In Classic it is possible to allocate students to multiple templates at the same time.

1. To select multiple templates, select the templates while holding down the Ctrl button. There will be no student sets visible in the Allocate tab when multiple templates are selected.
2. Select the Allocate tab, and choose method of allocation. Students will be allocated across the selected templates.

   Figure 19: Selecting Multiple Templates

Remember: It is important following the allocation to go through the templates individually to ensure all students have been allocated.

3.4. Individual student allocation

It’s sometimes necessary to allocate or unallocate a student or move a student from one group to another.

| Allocate student individually | Double-click in the box corresponding to the correct activity. This will produce a tick to show the student has been allocated |
| Move student to new group | Double-click in new activity box. The student will be automatically removed from the old activity. |
| Unallocate student | Double-click on the ticked box. When unallocated the student will appear in bold |
3.5 Exceptions

If a group is overloaded the size column will highlight this with a yellow exclamation mark.

To overload groups, allocate students manually. It is recommended that this is only used for adding **1 additional student** to a group. If the number of unallocated students is greater than 1, amend the activity size.

The planned size of a group can be amended by selected the specific activity as follows:

1. Double click on the activity from column headings (e.g. 01, 02 etc)
2. Amend the size (Figure 20) and click Modify to apply this change
3. Click ‘x’ to exit the activity window – the planned size in the allocation tab will update

![Figure 20: Amending Activity Size in Classic](image)

You may need to increase the size of **all** your activities and this is done at Template level:

1. Navigate to the **Planning** tab (Figure 21)
2. Amend the Planned Size as required and click Modify to apply changes

![Figure 21: Amending Activity Size at Template Level](image)

**Remember:** Check each activity size on the Allocate tab after modifying the template to make sure the change has correctly fed through.

If you find you are unable to change a planned size, please contact **timetabling@ed.ac.uk**
4. Viewing student timetables

The easiest way to view a students’ timetable is through ET:

1. Launch ET and select **Student Sets** from the dropdown menu in **Views**. All students belonging to your department will be listed (see Figure 22).

2. Right-click on **Name** and select **Column Chooser**. You can then drag over additional columns, such as **Host Key** (student UUN) and **Activity Count** (number of activities associated with the student). Double click on options in the Column chooser to add them. You can then drag the icons to rearrange to the required order.

3. Right click on the database week bar to look at the student timetable by week.

   *Figure 22: Student Sets in Enterprise*

5. Allocating to jointly taught activities

Students should be allocated at Template level when you’re allocating to jointly taught activities. This can be done by using ECP or Classic via ET, as per the instructions above.

If you need any help with student allocation on jointly taught activities, get in touch with the Timetabling Unit (**timetabling@ed.ac.uk**)
## Appendix A: Terminology

<table>
<thead>
<tr>
<th>Term/Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned Size/Total Size</td>
<td>The estimated size of the activity, as set by the School</td>
</tr>
<tr>
<td>Real Size</td>
<td>The real number of students allocated to the activity</td>
</tr>
<tr>
<td>Writeback (ECP/ET)</td>
<td>Saves any changes made within the timetabling application. Student allocations will not show on student timetables until this icon has been selected</td>
</tr>
<tr>
<td>Refresh (ECP/ET)</td>
<td>Refreshes data to ensure that the most up-to-date student information is available</td>
</tr>
<tr>
<td>Modify/Refresh (Classic)</td>
<td>Modify: Confirms changes made within Classic. Ref: Refreshes data to ensure the most up-to-date student information is available</td>
</tr>
</tbody>
</table>

*Remember when exiting Classic you must click Writeback in ET!*
Appendix B: Student allocation end to end

**Step 1: Data Feed**

Course enrolments are fed from EUCLID to Timetabling once a day, in an overnight data feed. School users should select ‘reload data from server’ when launching Enterprise each day to ensure they have the most current enrolment data available.

**Step 2: Whole-Class Allocation**

At the beginning of each working day, the Timetabling Unit will do the daily whole class allocation process. All Activity Templates which have only one Activity will be allocated to in this process, unless informed otherwise by the relevant School.

**Step 3: Exception Reporting**

Constraints, such as double booked students and room size, will be overridden in the whole class allocation process. The Timetabling Unit will run a daily report to identify instances where this occurs and these will be available on the Timetabling Website.

**Step 4a: Sub-Group Allocation (CAHSS)**

The Timetabling Unit will carry out the sub-group allocation process on behalf of participating CAHSS Schools. This process will capture new enrolments each day and allocate them to groups within a ‘sub-group’ Activity Template.

**Step 4b: School Sub-Group Allocation (Locally-managed)**

Schools who are carrying out sub-group allocation locally can do so at any time of day. School allocators should ensure that data is refreshed and up to date before doing any sub group allocation to ensure student availability is up to date.

**Step 5: Group feed to LEARN**

Sub-group activities can be fed through to LEARN following the allocation of students. This data flows once a day, in an overnight feed. To ensure groups will be fed to LEARN, School allocators must remove the ‘Not for VLE’ text from User Text 5 at Template level.

**Step 6: Student Timetables**

Any allocations made, and written-back, by the Timetabling Unit or the School will update onto the students’ timetable in near real time.

**Step 7: On-going Management**

The Timetabling Unit will ensure that whole-class allocations and exception reports are updated daily throughout the academic year. Due to the volume of changes to student course selection, School allocators should also ensure that sub group allocations are kept up-to-date, particularly in the early weeks of each semester.