Enterprise Interface User Guide

ISO 9001:2000 / TickIT certified

Document Summary

Written by	Date	Release	Status	History
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1 Introduction

The Enterprise Interface User Guide is designed to be used in conjunction with all the Enterprise applications listed below, and provides a generic guide to the functionality of common tools which are to be found in all the applications. The document should be used in conjunction with the user guides that are provided for each application.

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2 Software Overview

The Enterprise Interface user Guide can be used in conjunction with the applications listed below:

2.1 Enterprise Course Planner (ECP)

Enterprise Course Planner allows the user to describe the opportunities for study being offered by the institution. The user may create Modules (individual units of study) and these may be combined to form Programmes of Study that can be offered to students.
In addition, the software allows the user to describe how each module is delivered in terms of the activities that each student must attend to complete the module. Based on the student demand, ECP will automatically generate the required number of activities to accommodate the number of students on each Module.
ECP tracks student demand as more data becomes available and flags to the user any discrepancies between the planned delivery and the demand.

2.2 Enterprise Timetabler (ET)

Enterprise Timetabler is a graphical interface for Syllabus Plus that enables the viewing and editing of timetables from a single comprehensive screen. The user is provided with a set of interactive panes which enable simple scheduling changes, information searches, and the provision of timetabling solutions.
Users that are authorised to do so may switch to the Syllabus Plus image whenever they wish to use the functionality that is not available in Enterprise Timetabler. Conversely, a user may be restricted to using the Enterprise Timetabler interface only, thus preventing them from making changes to the underlying reference data. Any changes made in Enterprise Timetabler automatically update the underlying Syllabus Plus image. Write back to the Scientia database is under user control.

2.3 Enterprise Desktop Reference Data Manager (EDRDM)

Enterprise Desktop Reference Data Manager enables the editing of data upon which timetabling decisions are based. The availability of resources and any time-based constraints that apply to those resources as well as soft constraints are all maintained using this software.

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3 Menu Bar and Status Bar Elements

Various commands can be selected using both the *Drop-Down Menus*, and the *Toolbar* buttons which appear in the **Header Bar.** In addition, information may be contained in the **Footer Bar**

3.1 Drop-down Menus

The Drop-down Menu bars, located at the top of the screen, contain various menus which allow the user to undertake actions within Enterprise applications. Menu items can be accessed by selection with the mouse or other pointing device, or by using keyboard shortcuts. *Hotkeys* are indicated by underlining.
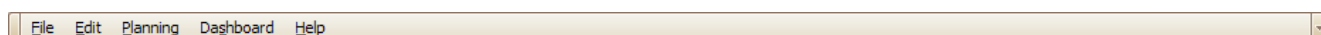
Figure 1 ECP drop-down menu
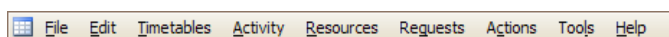
Figure 2 Cropped ET drop-down menu
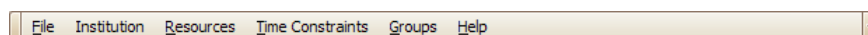
Figure 3 EDRDM drop-down menu

Clicking on the down arrow at the right-hand end of each Drop-down Menu opens a series of sub-menus allowing the user to add or remove buttons from the main menu or customize both the main menu and the toolbars. Customizing the toolbars will be dealt with in the next section.
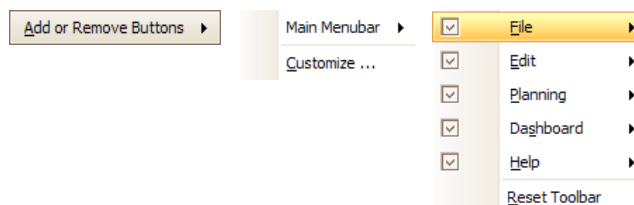
Figure 4 Add or remove sub-menus

3.2 Toolbars

Toolbar facilities are available within Enterprise applications allowing the user to access frequently used functions quickly and easily. A *tooltip* describing each function is revealed by hovering over the selected button with the mouse. Multiple toolbars may appear alongside each other and the default toolbars will appear on initially opening the applications. The user has the option to customise toolbars if required by adding and removing buttons or creating new toolbars.
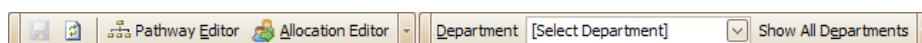
Figure 5 ECP toolbars

Figure 6 ET Toolbars

Figure 7 EDRDM toolbar

Customization can be accessed in the same way as illustrated above (Figure 4 Add or remove sub-menus), selecting *Customize…* from the sub-menu. This opens the Customization window:
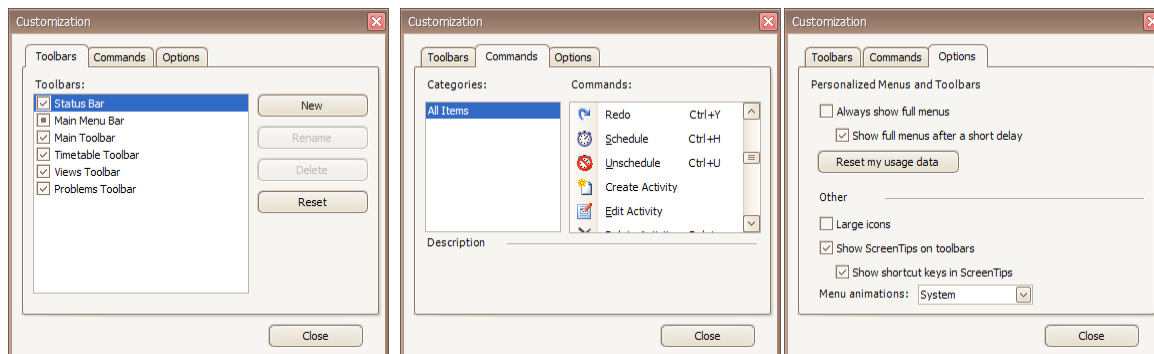

Figure 8 The tabs of the Customization window

Using the *Toolbars* tab new toolbars can be created, and existing toolbars can be toggled on and off using the tickboxes. The *Customization* tab can be used to drag & drop buttons onto existing or new toolbars, and the *Options* tab makes available additional customization options.

Note that in the *Toolbars* tab, the *Status Bar* refers to the footer bar illustrated below. Buttons can also be placed in the footer bar if required:
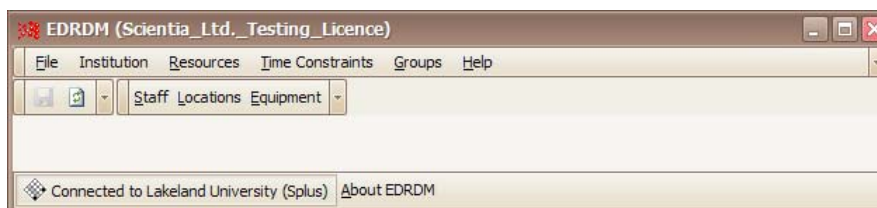
Figure 9 EDRDM with resources toolbar

In the example illustrated above, a *Resources* toolbar has been created with the *Staff, Locations* & *Equipment* buttons added. In the footer bar, the *About EDRDM* button has also been added.

To undertake this process, the user must click on the [New] button on the *Toolbars* tab, and in the *New Toolbar* window insert a Name.
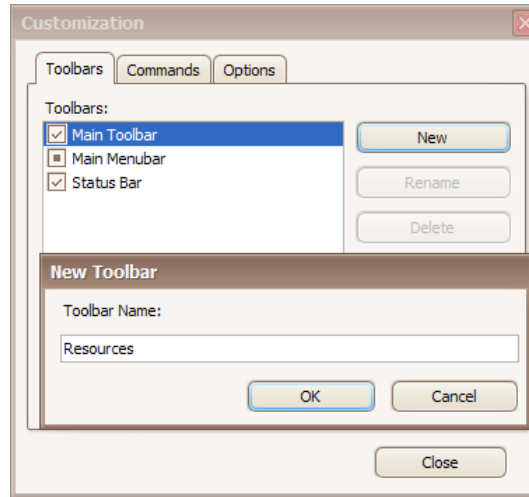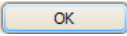
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Figure 10 Creating a new toolbar

Clicking on the [OK] button will create the new toolbar which will appear as an empty toolbar box within the Enterprise application. Buttons can then be dragged & dropped from the *Commands* tab and deposited into the new toolbar.

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4 Personalising the View of Data

Within the Enterprise applications, data appears in a variety of windows which are too numerous to mention by name in this document. However, some of the more obvious examples are the curriculum data windows obtained by clicking on the [Show] buttons in ECP, the Activities Spreadsheet and Views Pane in ET, and the Resources windows in EDRDM.

The user can personalise the view of the data shown in these windows by adding and removing columns, amending the appearance of the data in each column, and also changing the order in which those columns appear. Data can also be sorted, grouped and filtered. A detailed description of how to undertake each of these actions is given below.

Right clicking on the column header of the data windows invokes a speed menu from which a variety of actions can be selected.
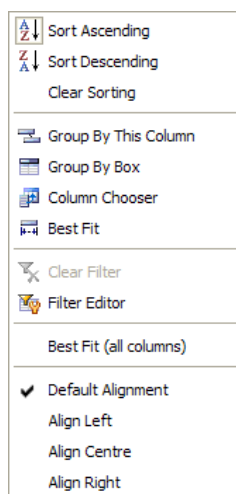
Figure 11 Personalisation speed menu

4.1 Changing the Data Sort Order within Columns

The order in which data objects are listed in the various columns can be changed either by selecting the relevant action from the speed menu (*Sort Ascending, Sort Descending, Clear Sorting*), or by clicking once on the header of the desired column. A second click on the same column header will sort on the same column but in the reverse order.

Holding down the Shift key and clicking on the header of a different column will apply a secondary sort based on the data in that column. Each additional column added in this way will apply an additional level of sorting.

4.2 Adding & Removing Columns

Columns are added and removed using the *Column Chooser* which, when selected opens a Customization window. The Customization window shows all of the additional information that can be displayed for the data object type currently selected.

Additional columns can then be dragged and dropped into the header row of the data window as required. Columns can be removed by dragging the column header to the Customization window or by dragging it away from the header position until a cross appears. In the illustration shown below, the *Department* column is being added to the right of the *Name* column simply by dragging & dropping from the *Customization* window.
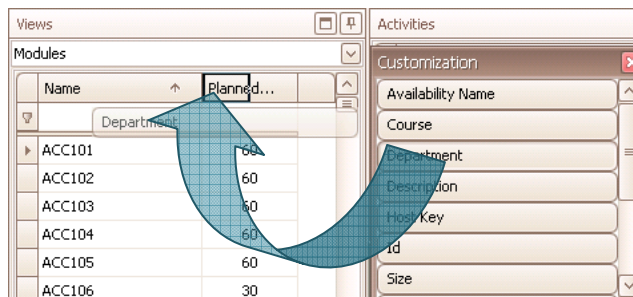

Figure 12 Drag and drop to add a column

4.3 Viewing Data by Groups

Single level and complex grouping can be achieved by right-clicking on the column header of a desired column and selecting *Group By This Column*. This allows the user to group the data objects by the selected column or by additional columns if the process is extended.

The example below shows the ET Activities Spreadsheet grouped by *Department* and the *Allocated Staff Name*.
Clicking on the ⊞ & ⊟ symbols will expand and contract the groups as required.

Figure 13 ET activities pane grouped by columns

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Right-clicking on a column header and enabling *Group By Box* from the speed menu allows the user to create complex groupings by dragging & dropping column headers into the area above the column headers.

Figure 14 ET activities pane showing "Group by" box

Column headers can be dragged and dropped to create multiple levels of grouping. The illustration below shows the *Allocated Staff Name* column being dragged to become a sub-group of the *Department*.
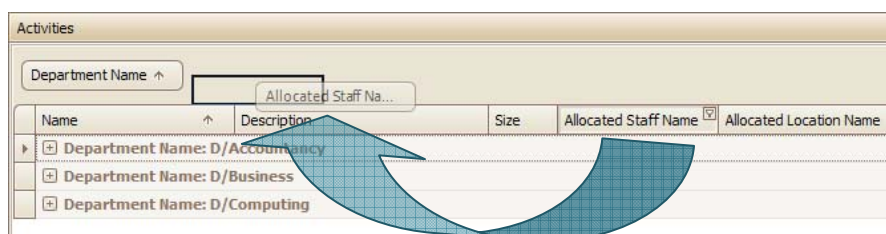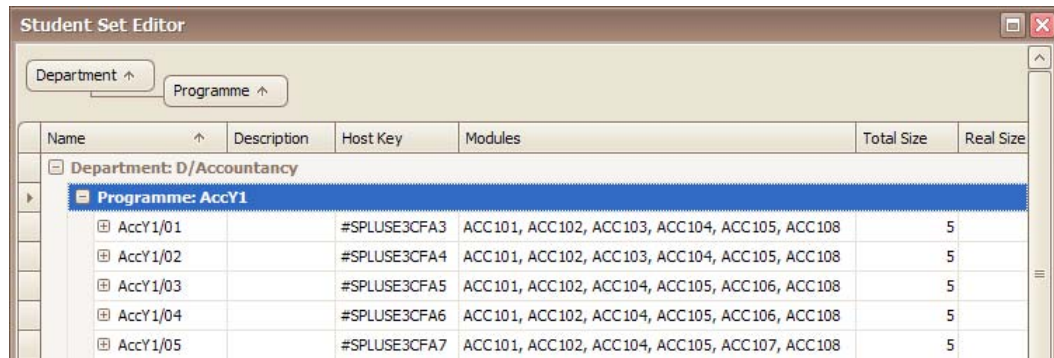

Figure 15 Drag and drop column headers to "Group by" box

Group headers shown in the *Group by Box* area can be dragged back to the column header row of the Activities Spreadsheet to undo the groupings. The *Group by Box* area can be toggled off from the speed menu.
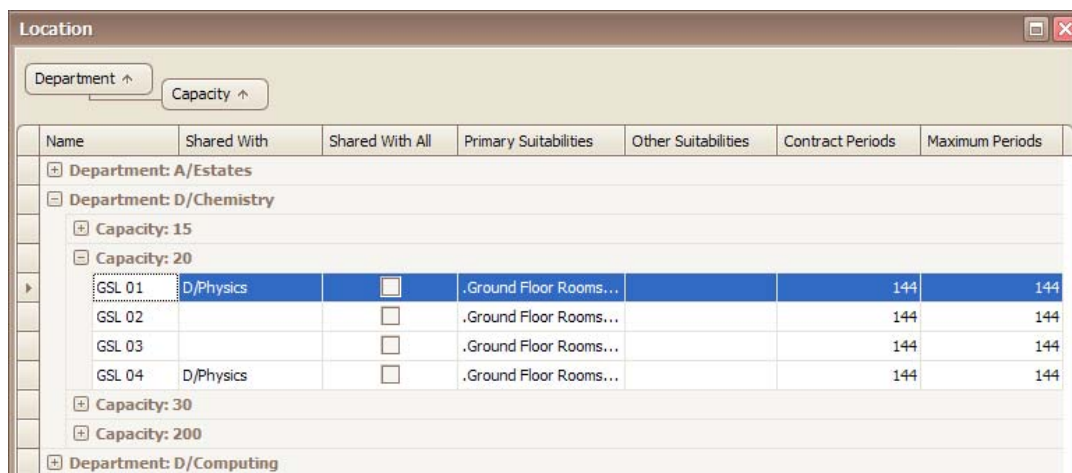
Examples of grouping in ECP and EDRDM are illustrated below:

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Figure 16 Student sets grouped by Department and Programme in ECP

Figure 17 Locations grouped by Department and Capacity in EDRDM

4.4 Filtering Data Objects Using the Filter Editor

Clicking on *Filter Editor* in the speed menu opens the *Filter Builder* window illustrated below. Complex filters can be built using this window.
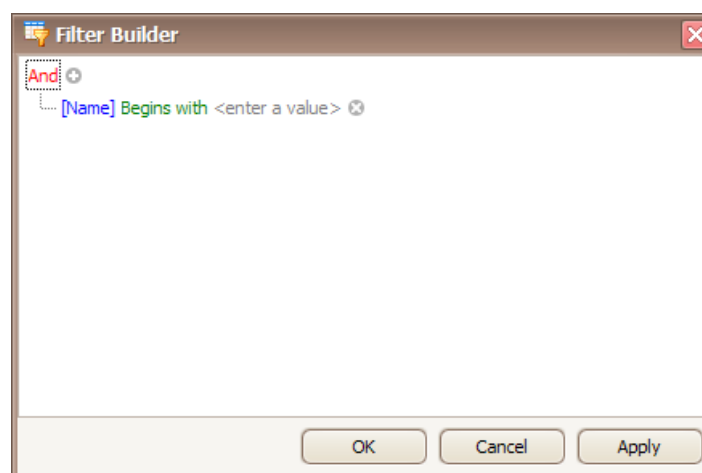

Figure 18 Filter builder

Clicking on [Name] opens up a list showing the properties of the object that could be used as a filter criterion such as *Description, Hostkey, Department* etc.

Clicking on Begins with opens a list of comparison methods such as *Equals, Is greater than, Contains* etc.

Clicking on <enter a value> allows the user to enter a value against which the property will be compared. In some cases a drop down list of values will appear.

Clicking on the ⊕ symbol alongside And allows the user to add further conditions to the filter

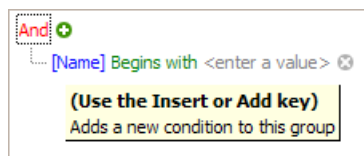Figure 19 Add new filtering conditions

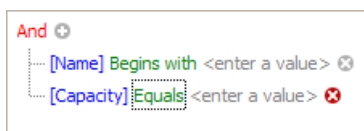The outcome will be the addition of a new filtering condition:

Figure 20 Two conditions applied

Clicking on And will open up an additional menu allowing the user to select the way in which the multiple conditions will be applied. Choosing And, for example means that only rows that match all of the conditions will be returned by the filter. Choosing Or means that rows that match any one or more of the conditions will be returned.
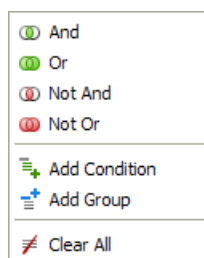

Figure 21 Multiple conditions menu

Selecting *Add Condition* from this menu will add a further condition to the selected group (the same function as performed by clicking the ⊕ symbol).

Selecting *Add Group* will add a further group of conditions. The user then has the additional option of how the results of the two groups are to be combined.

The outcome of entering values under both illustrated conditions is shown below:
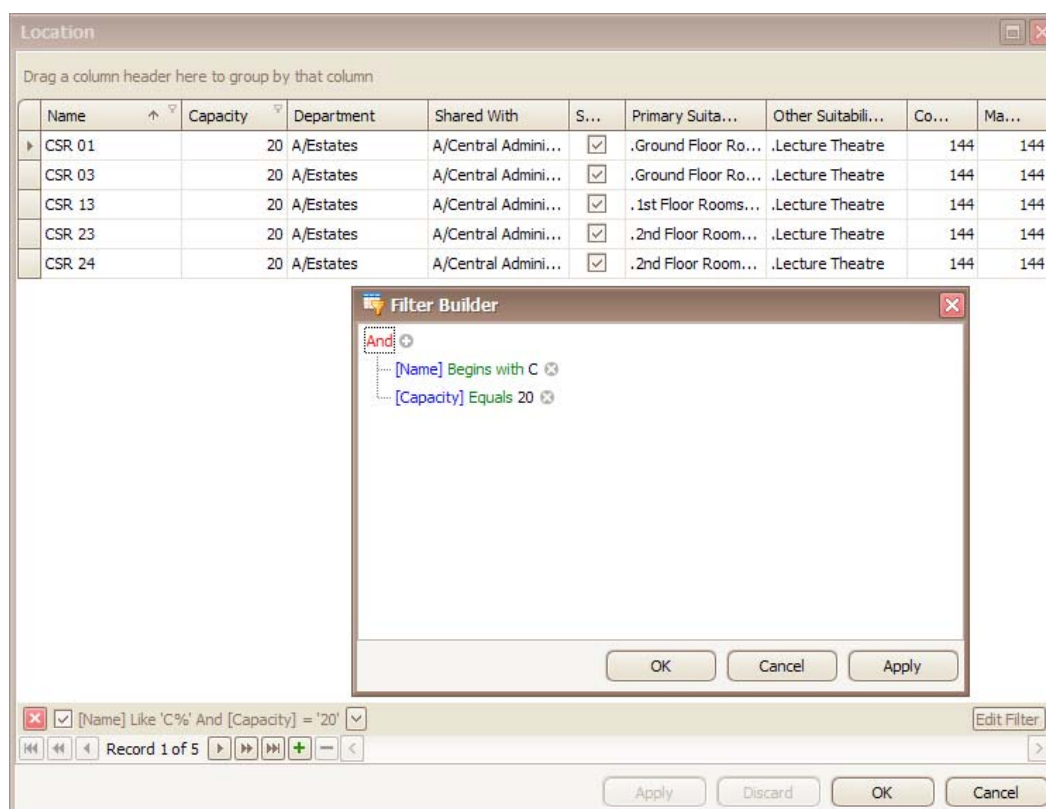
Figure 22 Location editor with filtering conditions applied

The EDRDM Locations window has been filtered by rooms with a *Name* beginning with C and a *Capacity* which equals 20.

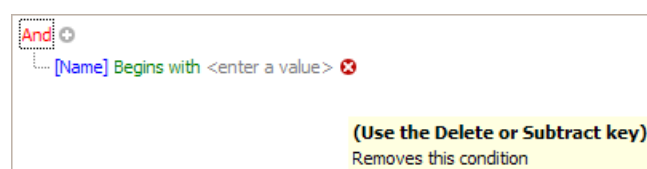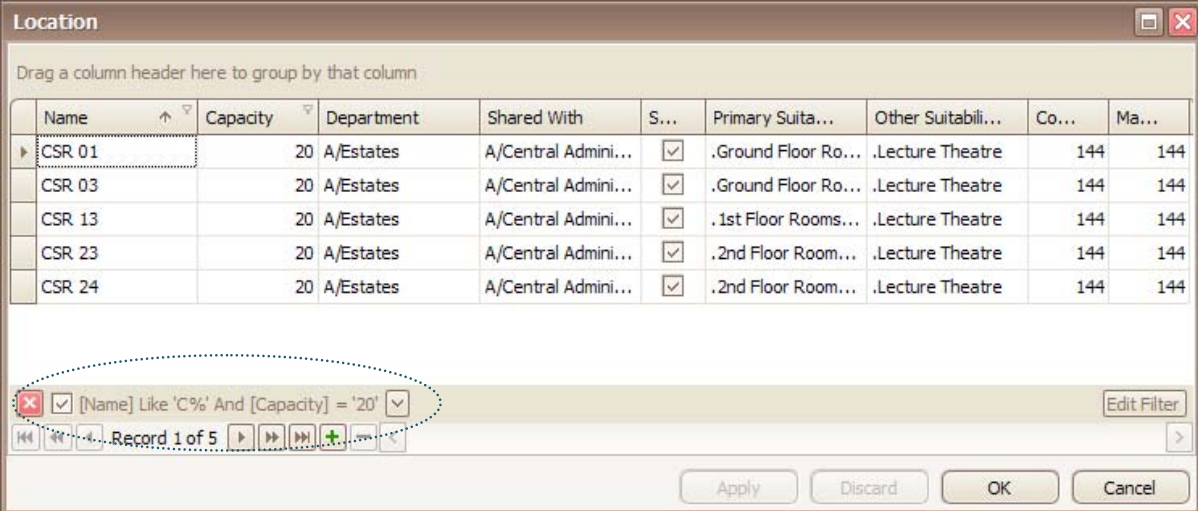Clicking on the ⊗ symbol removes the relevant filtering condition.

Figure 23 Removing a filtering condition

If a filter is already in place, clicking on the Edit Filter button will re-open the *Filter Builder* to allow conditions to be added or removed.

Unchecking the check box in the bottom left-hand corner of the filtered editor will temporarily remove the filtering conditions while remembering what they are. Checking the box will reapply the conditions.

Clicking on the ☒ in the bottom left-hand corner of the filtered window will remove the applied filter conditions permanently.

The currently applied filter conditions are summarised in the bottom left-hand corner of the filtered window.

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Figure 24 Summary of currently applied filter conditions

4.5 Additional Speed Menu Elements

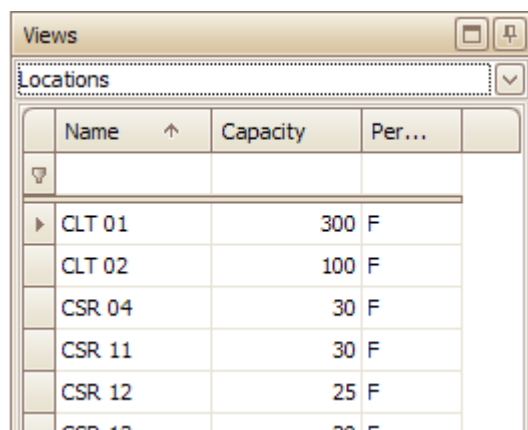In addition to the speed menu items outlined above, the user is also able to use:

- *Best Fit* to change the column width to accommodate the data contained in any *selected* column.

- *Best Fit (all columns)* will adjust the width of *all* data columns.

- Alignment options allowing the data contained in each column to be set in the *Default* arrangement, to the *Left*, *Centre* or to the *Right*.
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5 Using Editors

5.1 Search by typing

In some contexts, an editor will be displayed with a blank row at the top of the editor, as shown below.

Figure 25 Editor with filter row

By typing characters in this row the list of objects displayed will be filtered to find rows where the content matches the typed characters.

Where it is considered likely that such filtering will be used, the additional row is displayed. Where such filtering is considered less likely or screen estate is at a premium, the filter row is not displayed. Similar functionality can be obtained by clicking on the filter icon that appears when you hover above the header of a column. When the icon is clicked a list of unique entries is displayed and you can search the list by typing.

5.2 Editing properties

The properties of each object are edited in different ways depending on the content of the field; some can be edited "in line" by typing into the appropriate field, others must be edited using a selection list or custom controls.

When the value may be a selection of only one from the predetermined list then a single selection list is displayed as shown below. The example shows a list of departments.
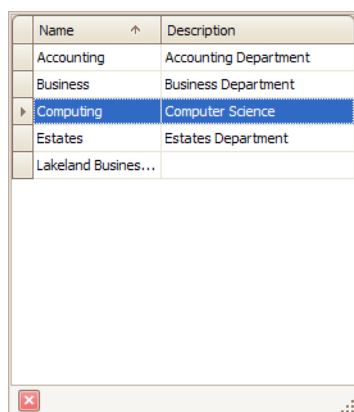
Figure 26 Single selection list

Select an item from the list by clicking on the box at the left hand side of the appropriate row. When the value may be a multiple selection from a predetermined list then a multiple selection tool is displayed as shown below. The example shows the tool for selecting the optional modules of a Programme of Study.
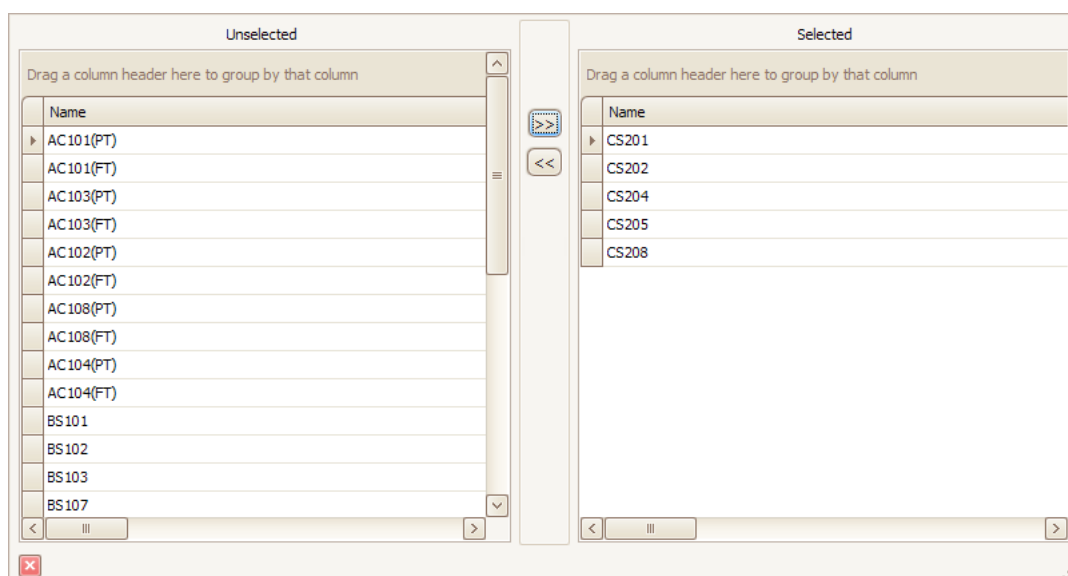

Figure 27 Multiple selection list

The same tool will appear in all cases where you are selecting a small number of items from a list that contains many items. The list from which the selection is made will appear on the left. Items that are currently selected are shown in a list on the right. The buttons between the two lists can be used to move selected items from one list to the other.

5.3 Adding and deleting objects

If you are authorised to do so, you may add new objects to the list using the ➕➖ buttons. The buttons will be present but greyed when you are not authorised to create new objects of the selected type.

There are some exceptions to this rule. Notably, the Activity list in ET does not use the ➕➖ buttons. Other commands on the menu are used to create and delete activities. Also, the Activity Template Editor in ECP does not allow the addition of new Templates since these are generated from a selected Module in the Module Editor.

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5.4 Apply or discard

Changes made to the data are confirmed or cancelled using the buttons at the bottom of the object window:

Figure 28: Action Buttons

- *Apply* confirms the change but keeps the window open.
- *Discard* cancels the change and keeps the window open.
- *OK* confirms the change and closes the window.
- *Cancel* cancels the change and closes the window.
- Closing the editor (using the cross in the top right hand corner) is equivalent to pressing *Cancel*.

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6 Tooltips

Tooltips are available throughout all the Enterprise applications and are obtained by hovering over toolbar buttons, parts of the screen, and data boxes where the default column width is such that there may be hidden data. Some example are illustrated below:

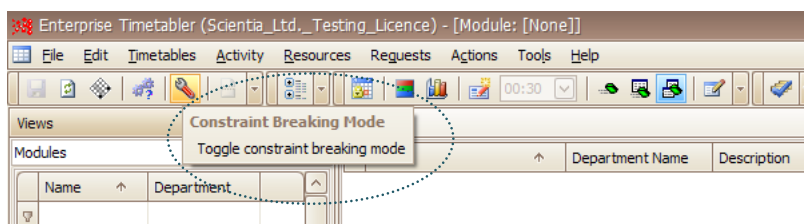Hovering over a button on the toolbar shows a tooltip that explains the function of the button.

Figure 29 ET toolbar tooltip

Hovering over the week selector in ET shows a textual reminder of the weeks that are currently in view and the weeks of the current activity.
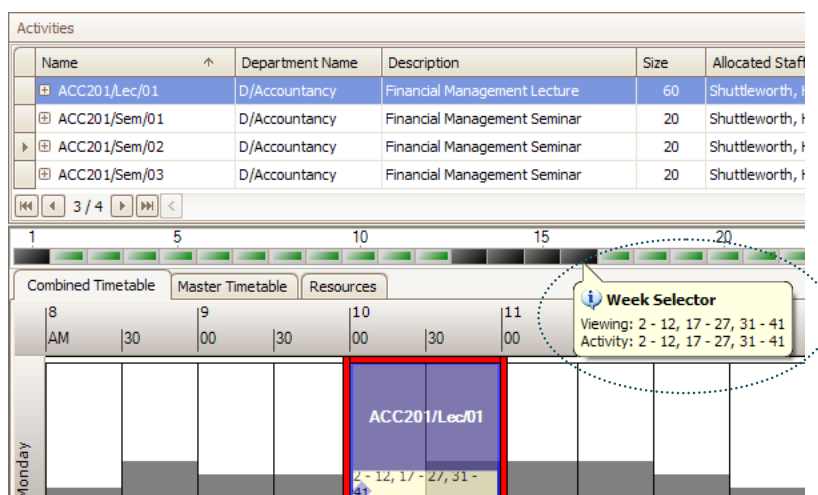

Figure 30 ET week pattern tooltip

Hovering over a cell where the width is such that all the data cannot be seen displays a tooltip showing the entire contents of the cell.

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Figure 31 Tooltip showing cell contents

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7 Week Patterns

Week Patterns occur throughout the Enterprise applications in various guises and performing different functions. These functions are described in the individual application user guides. This document describes how weeks patterns are displayed and edited.

7.1 Named Availability Week Patterns

In the ECP and EDRDM applications, Week Patterns occur in conjunction with Named Availability requirements against curriculum data (Modules, Student Sets etc.), and against resource data (Staff, Locations etc.). An example is illustrated below.
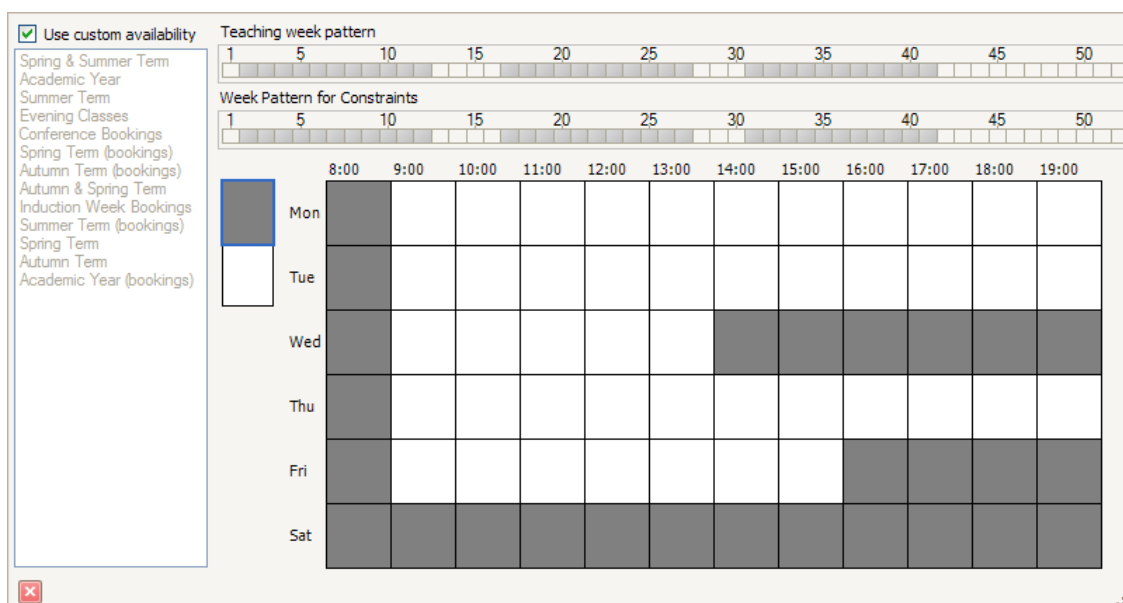

Figure 32 Named availability for a module in ECP

A week that is selected will be shaded in light grey. Weeks can be deselected by left-clicking on them with the mouse. When a week is deselected the grey shading disappears.

If the mouse pointer is dragged across multiple selected weeks, while clicked, then all those weeks will be deselected.
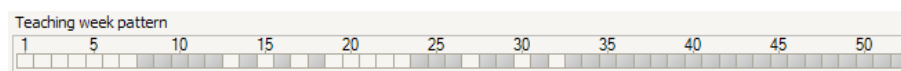

Figure 33 Weeks deselected by click or click and drag

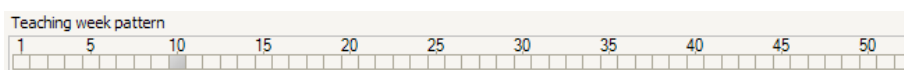To select a single week, right-click with the mouse on the required week.

Figure 254 Single week selected with right click

A left-click on a week that is not currently selected will select that week (in addition to any weeks already selected). Clicking and dragging over multiple unselected weeks will select all of those weeks.

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In addition, by unticking the *Use Custom Availability* box, pre-prepared Named Availability Week Patterns can be applied by selecting from the list.
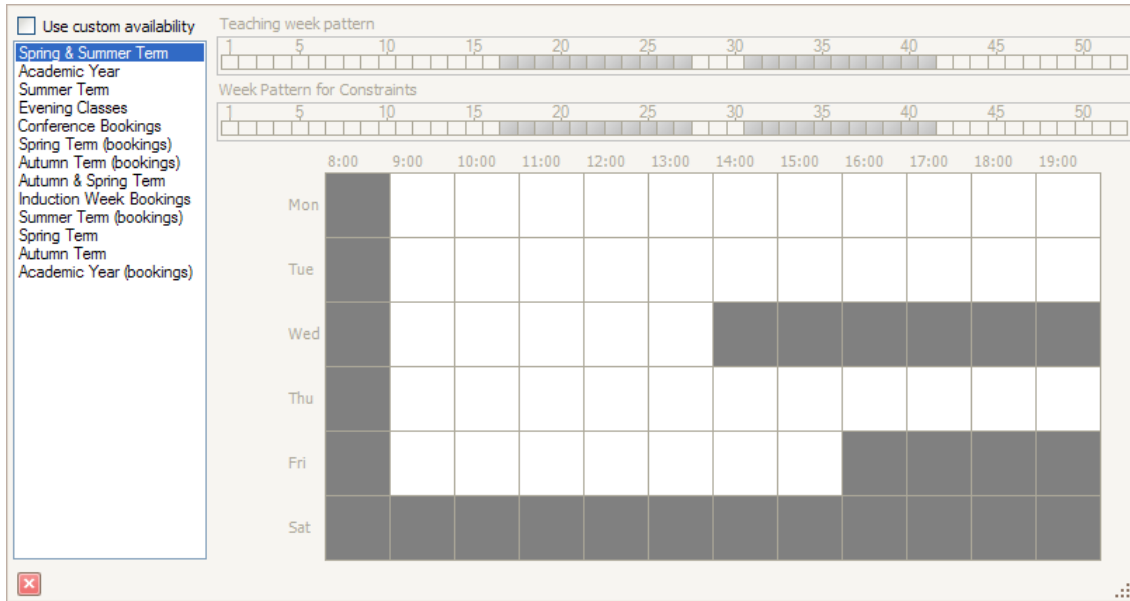

Figure 265 Selecting a named availability pattern

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