INFOSILEM EXAM™ 12.0

USER GUIDE

INFOSILEM
SCHEDULING SOLUTIONS BY BERGER-LEVRAULT

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INTRODUCTION

DOCUMENT SCOPE AND PURPOSE

- The purpose of this guide is to introduce the reader (the user) to *Infosilem Exam*. It describes its appearance and specific uses as well as elaborates briefly on ideas and concepts behind this system. This document also discusses the tools used in the scheduling process and explains how they can be configured to meet your timetabling requirements.

TARGET AUDIENCE

- This guide is intended for users responsible for preparing, creating and/or modifying the master exam timetable.

PART 1 – FUNDAMENTALS

CHAPTER 1 – GETTING STARTED

To login:

(1) Navigate to the «Start» menu.

(2) Select «Exam» — to open the login screen.

(3) In the «User Name» field, enter your user name.

(4) In the «Password» field, enter your password.

(5) In the «Server» drop- down list, select the appropriate server to connect to.

(6) In the «Database» drop- down list, select the appropriate database to be used.

(7) Click on «Login».

Field Description ____

Login Name

- The user login name

Password

- The user password

Module List

- This field displays the modules that have been licensed by your institution.
- The module selection must be done prior to the server and database selection.

Server List

- Lists the available database servers
- The appropriate server must be selected to ensure a successful login.

Database List

- Lists the databases that reside on the selected server
- The appropriate database must be selected to ensure a successful login.

LOGGING OFF

Follow these steps to log off

(1) Select «File» from the Main Menu.

(2) Select «Close Session» from the Sub-Menu.

(3) The START-UP screen will appear. You are now logged of.

EXITING THE APPLICATION

Follow these steps to exit the application:

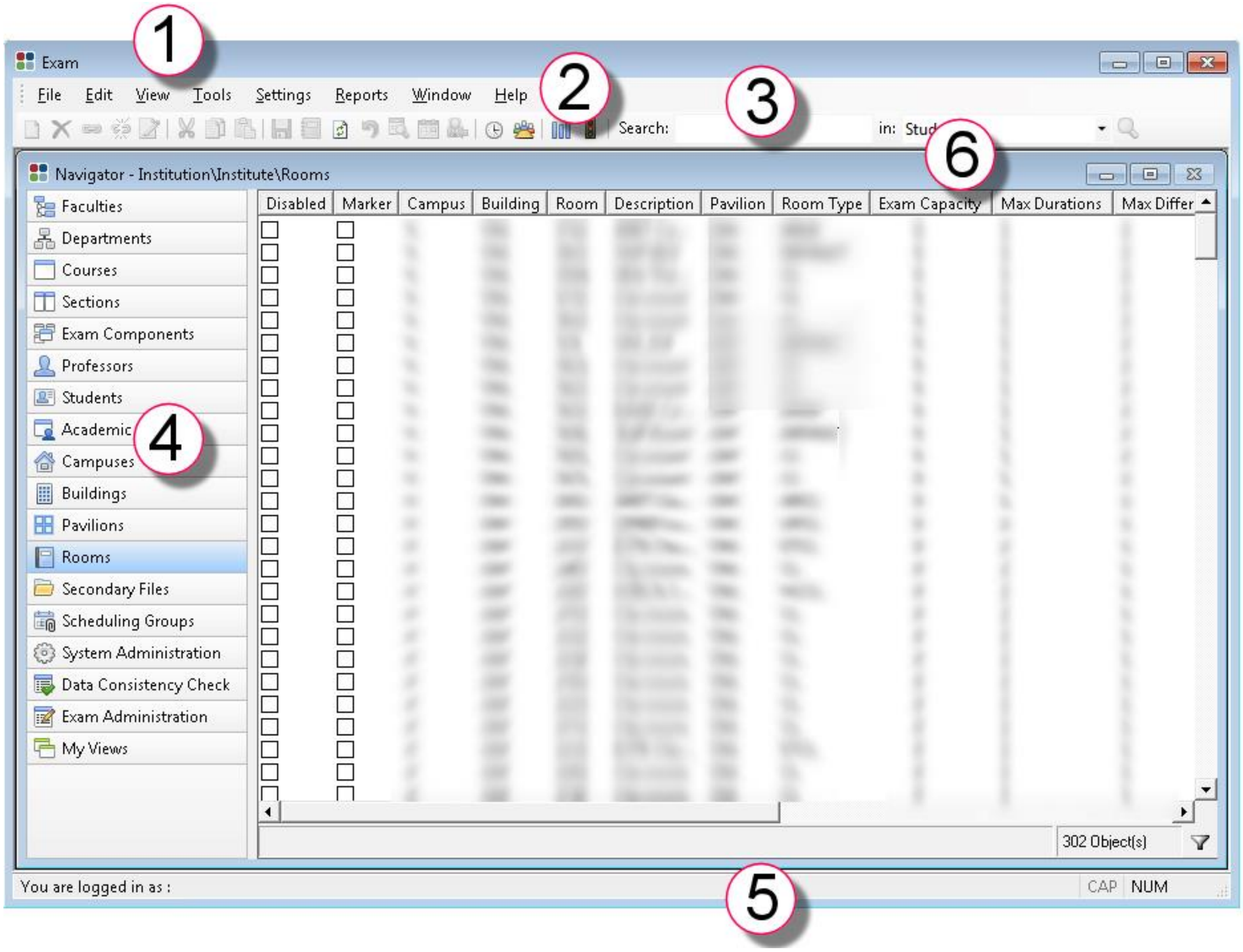
(1) Select «File» from the Main Menu.

(2) Select «Exit» from the Sub-Menu.

OR

(3) Click on the ☒ button located on the upper right corner of your screen.

NAVIGATING WITHIN THE APPLICATION



Interface Structure

(1) Title Bar

- The Title Bar displays the product name, module name and version number.
- Use the minimize, maximize and exit buttons to minimize, maximize and exit the application.

(2) Main Menu

- Similar to most main menu's in Window applications.
- The Main Menu provides access to the system functions.
- Select any of the menu headings to access the submenus.
- Please refer to section «*Using the Main Menu*« of this chapter for an in-depth explanation on how to use the main menu.

(3) Toolbar

- Allows access to application specific functions through command buttons.
- Please refer to section «*Using the Toolbar*« of this chapter for an in-depth explanation of all the available functions.

(4) Navigator

- Allows access to data elements within the application.
- Please refer to section «*Using the Navigator*« of this chapter for an in- depth explanation of the Navigator's structure and functionality.

(5) Information Bar

- Displays connectivity information (login ID, server and database).

(6) Search Bar

- The Search bar allows users to search within Exam Components, Rooms, Courses, Professors, Academic Blocks and Students for the character string the user entered in the Search field.
- Users can click within the Search field or can simply press CTRL + F on the keyboard to enter the string to search.
- From the drop-down menu located within the In field, select the element in which the system must search. Please note that the search is not case sensitive.
- The maximum length users can enter in the search field is 30 characters.

USING THE MAIN MENU

- The Main Menu allows access to system specific functions.

To select an option from the Main Menu, do one of the following:

(1) Navigate to the desired menu option.

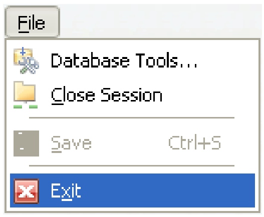
(2) Click on the option’s name to access its submenus.

OR

(3) Simultaneously press the <ALT> key with the first letter in the menu option's name.

USING THE SUB-MENUS

- Once you select an option from the Main Menu, its Sub-Menu will appear:



- Sub-Menu options displaying arrowheads allow access to a set of Side Menu options:
- To select an option from the Sub-Menu, do one of the following:

(1) Navigate to the desired menu option.

(2) Click on the option's name.

(3) The submenu will appear.

(4) Click on the desired option.

(5) The submenu screen will appear.

OR

(6) In the submenu, use the up and down arrows to navigate to the desired option.

(7) Hit the <ENTER> key to select it.

(8) The submenu screen will appear.

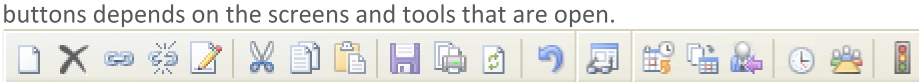
OR

(9) In the submenu, press the first letter in the submenu option's name.

The submenu screen will appear.

USING THE TOOLBAR

The Toolbar provides access to application specific functions through command buttons. The availability of these buttons depends on the screens and tools that are open.



COMMAND BUTTONS

Delete
Deletes the selected item.

Detach
Removes an attachment.

Cut
Cuts the selected item.

Paste
Pastes the previously cut or copied item.

Report
Generates reports for the selected list or list items.

Undo
Undoes the latest change since the your last save.

Lookup
Look's up existing values for a selected field. This button will only appear in fields where you can choose existing elements in the database.

Room Timetable
Click on this icon to proceed to the Room Timetables.

Scheduling Groups Validation
Provides Access to the Scheduling Groups Validation screen.

New
Creates a new record.

Attach
Attaches an item.

Edit
Allows you to edit the selected item.

Copy
Copies the selected item.

Save
Saves changes.

Refresh
Refreshes the current screen. Pressing the <F5> key will also refresh the current screen.

Move Screen
Only enabled when the edit window for a selected exam component is open.
The move screen is used to move or assign the selected exam component.

Scheduler
Provides access to the Timetabler.

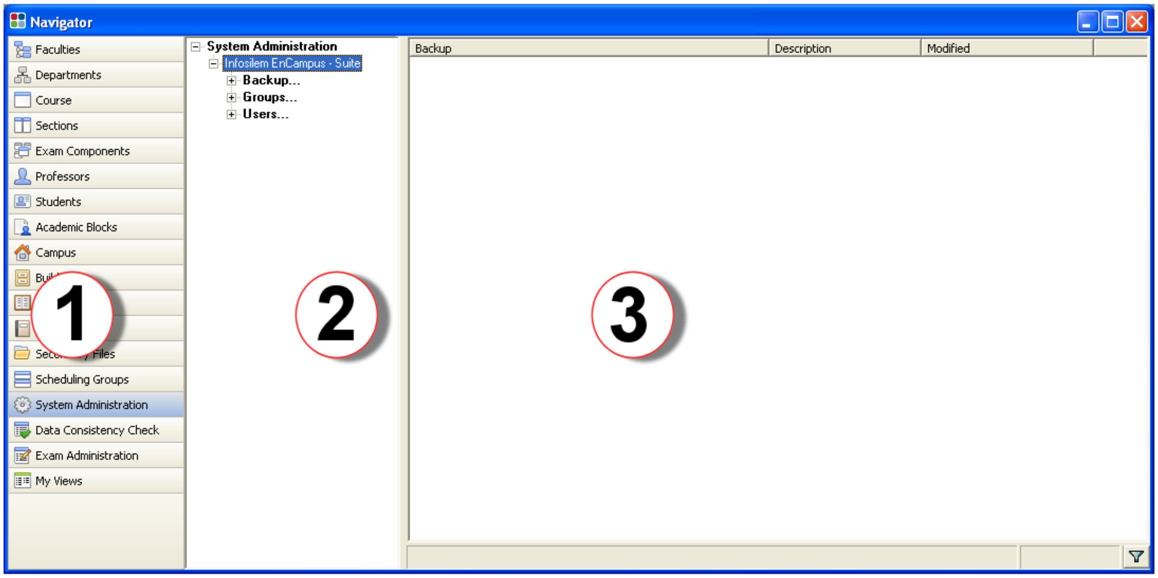
Batch Student Seating
Provides access to the batch student seating.

Backup Restore

Administrative Tools
Only accessible to users with administrator rights.
Allow users to create, restore and delete backups

NOTE:	By placing your cursor over any command button, a pop-up will appear indicating the button's functionality.

USING THE NAVIGATOR



Navigator Structure

The navigator consists of three sections:

- Data Element Button List
- Directory Tree Pane (not available with all data elements)
- List Pane

(1) Data Element Button List

- The Data Element Button List is located on the left- hand side of the Navigator.
- Clicking on any of these buttons will display information pertaining to the selected data element in the directory tree.

(2) Directory Tree Pane

- The Directory Tree Pane is in the middle section of the Navigator and graphically displays the hierarchical relationship between data elements. Once having reached the last level for a given data element, the Directory Tree Pane is not displayed (example: Deliveries, Professors, Students, etc.)
- Click on the «+» to view all information associated to the selected data element appearing in bolded text.

(3) List Pane

- The List Pane is located on the right-hand side of the Navigator and lists all information associated to the selected data element within the directory tree pane.

Columns within the List pane can be:

- Resized
- Sorted
- Moved

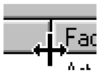
A list pane can be:

- Filtered

HOW TO RESIZE A COLUMN

To resize the width of columns within a list:

(1) Place the cursor at the end of the column to be resized — the cursor will appear as such:



(2) Hold the mouse key down.

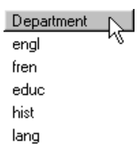
(3) Drag the column to the left or right until the column is of the desired width.

(4) Release the mouse button — the column will now be resized.

HOW TO SORT DATA WITHIN A COLUMN

- The data within a list can be sorted in ascending or descending order.
- Text fields will sort alphabetically (A-Z or Z-A) and numeric fields will sort numerically (0-999 or 999-0).

(1) Place the cursor over the column header that you wish to sort on.



(2) Click once to sort the column in ascending order. An ascending arrow will appear on the column header.

(3) Click again to sort in descending order. A descending arrow will appear on the column header.

(4) To remove the sort, hold the <CTRL> key and click again on the sorted column. The arrow will be removed — the List will be updated to reflect the sort.

To sort a list based on more than one column (multi-sort):

(1) Place the cursor over the column header that you wish to sort on.

(2) Click once or twice depending if the sort is to be ascending or descending. The appropriate arrow will appear on the column header.

(3) While holding the <CTRL> key, click on the next column header that you want to sort on.

(4) Again, click once or twice depending if sort is to be ascending or descending. A number «1» will appear in the column header of the first column sorted on. A number «2» will appear in the column header of the second column sorted on.

(5) Repeat steps 3 and 4 as many times as necessary.

To clear a multi-sort:

- Release the <CTRL> key and click on a column header.

HOW TO MOVE COLUMNS

(1) With the left mouse button, click and hold the column header that you want to move.

(2) Drag the column header to the desired position. The column header will become transparent during the move.

(3) Release the mouse button to drop it in the desired location on the list header.

HOW TO SELECT COLUMNS

Users will be able to customize most list by selecting the columns to display within a given list.

(1) To do so, simply right-click within the list and select the «Select Columns» option — the Select Columns screen opens.

(2) From within the Select Columns screen, select the columns to display. To remove a column from a list, simply deselect the column.

(3) Select the OK button once the selection is complete. The list will now display only the selected columns.

HOW TO FILTER A LIST

At the bottom of each list there is a filter button: 

(1) Click on the filter button.

- A drop-down list will appear containing all the column headings of the list.
- An edit box will also appear next to the drop-down list.

(2) In the drop-down list, select the appropriate field to filter on.

(3) Enter the filter criteria in the edit box and press the <ENTER> key.

- The list will then reflect your filter choice.

(4) To remove your filter, click on the filter button.

NOTE:	Wild card characters can be used in the searching field.

- Use the <*> to substitute a part of a word or a string of numbers.
- Use the <?> to substitute a single letter or number.

Example:	*If your filter criteria= «ab*», all records within the desired field that begin with «ab» will appear.* *If your filter criteria= «a? » all records within the desired field that contain 2 characters and begin with «a» will appear.*

USING THE LOOKUP LIST

- Lookup list displays all possible values for a selected field.

Can I use the lookup function on every field?

- The Lookup function cannot be used for fields that require unique values (Identification fields).
- The Lookup function can be used for fields where their values have been defined within the database.

How do I know when I can use the Lookup function?

- The «Lookup» option will be active once you right click in a selected field, or;
- The lookup command button in the toolbar will be active, or;
- There will be a "…" button next to fields when the lookup function is available.

How do I use the lookup function?

- Open the desired element's edit window by double clicking on the appropriate record in the list pane.
  - Right click in the selected field and select «Lookup» or;
  - click on the ellipsis (…) button next to the desired field or;
  - press the F9 key in the selected field.
- The Lookup List will appear.

How do I select an item in the lookup screen?

- In the Lookup list, double click on the desired value or select the desired value and close the lookup list.

MANIPULATING DATA

The following section will describe basic manipulations such as how to Add, Edit, Copy, Paste, etc. data elements within the application.

HOW TO ADD AN ITEM

- The application follows a hierarchical structure.
- To add an element, it must be associated to its parent.

Example: *A course can only be added if it is associated to a department.*

To add an item:

(1) Highlight the item title in the directory tree pane and do one of the following:

- Press the <INSERT> key.
- Click on the «New» command button in the toolbar.
- Click on «Edit» in the main menu and select «Add» from the sub-menu.
- Press the <CTRL>+<N> keys simultaneously.

(2) Highlight an item in the list pane and do one of the following:

- Press the <INSERT> key.
- Right click anywhere inside the list pane and select «Add New».
- Click on the «New» command button in the toolbar.
- Click on «Edit» in the main menu and select «Add» from the sub-menu.
- Press the <CTRL>+<N> keys simultaneously.

(3) An edit window will appear. Enter all the appropriate information.

(4) Save the item by:

- Clicking on the «Save» command button in the toolbar.
- Pressing the <CTRL>+<S> key simultaneously.
- Clicking on «File» in the main menu and selecting «Save» from the sub-menu.

- If the item was not saved and you attempt to close the edit window, you will be prompted to save your changes.

HOW TO EDIT AN ITEM

- All changes to an item must be made within its respected edit window.

To edit an item:

(1) Highlight the desired item in the tree pane and do one of the following:

(2) Double click on the desired item in the directory tree pane.

- Click on the «Edit» command button in the toolbar.
- Click on «Edit» in the main menu and select «Edit» from the sub-menu.
- Press the <F2> function key.

(3) Highlight the desired item in the list pane and do one of the following:

- Double click on the desired item in the list pane.
- Right click on the desired item and select «Edit».
- Right click on the desired item in the list pane and select open viewer.
- Click on the «Edit» command button in the toolbar.
- Click on «Edit» in the main menu and select «Edit» from the sub-menu.
- Press the <F2> function key.

(4) Make all necessary changes in the edit window.

(5) Save the item by:

- Clicking on the «Save» command button in the toolbar.
- Pressing the <CTRL>+<S> keys simultaneously.
- Clicking on «File» in the main menu and select «Save» from the sub-menu.

- If the item was not saved and you attempt to close the edit window, you will be prompted to save your changes.

HOW TO EDIT MULTIPLE ITEMS

- The batch edit function allows a user to simultaneously update multiple records.

NOTE:	The modification(s) will be applied to all records selected.

(1) Make sure that the list pane is populated with the desired records

(2) Select the records using the <Ctrl> keys or <Shift> key

(3) Right click and select «Batch Edit»

- One edit window will appear
- The number of selected records will appear in the title bar of the edit window
- Fields with common values will appear in one color
- Field containing different values amongst the selected records will appear highlighted in another color

(4) Make the necessary modifications

(5) Save the item by:

- Clicking on the «Save» command button in the toolbar.
- Pressing the <CTRL>+<S> keys simultaneously.
- Clicking on «File» in the main menu and select «Save» from the sub-menu.
- Click on the «Save» command button in the tool bar to save the modifications

- All selected records will be updated with the modification(s)

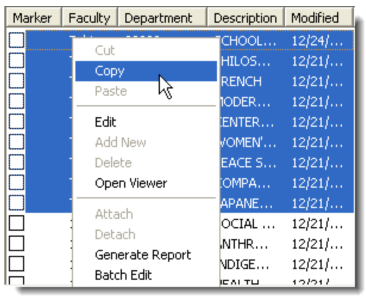
NOTE:	If the item was not saved and you attempt to close the edit window, you will be prompted to save your changes.

HOW TO COPY AND PASTE A LIST

- You can copy and paste any list that is displayed in the list pane and paste it in a text editor or a spreadsheet such as MS Word, or MS Excel.

To copy elements from a list pane:

- Select the elements inside the list pane that you want to copy. Once those elements are highlighted, right click and select «Copy» from the context menu.



To paste the copied elements:

- If it is not already done, open the text editor or the spreadsheet application.
- You can now paste the data inside the application with a right click on the location where the content is to be pasted and selecting «paste» from the context menu.

BATCH EDIT WINDOW EXPLANATION

- The Batch Edit window allows a user to simultaneously edit multiple records within the working database.
- Any changes made to the applicable fields within the batch edit window will be applied to all the selected records.

Example: *The batch edit window is opened for five course records. The description field is changed to «DUMMY COURSES». «DUMMY COURSES» will now appear in the description field for all five course records.*

NOTE: Fields containing the same value for the selected records will appear in white. Fields containing different values (i.e. ID fields) will appear highlighted in color.

Example: *Referring to the following screen shot, the batch edit window was selected for two scheduling type objects (two records). The ID value differs between the two records, thus appearing highlighted in color. The Description field value is common amongst the two selected fields, thus appearing in white.*

NOTE: All fields can be edited within the batch edit window

THE BATCH EDIT COLOR OPTIONS

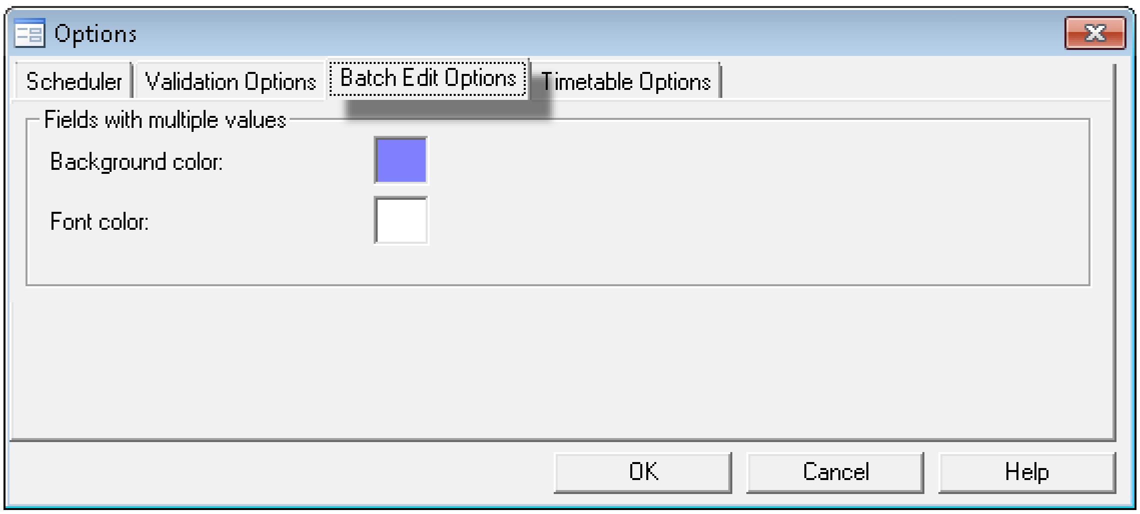
- The batch edit option form is accessible via the «Options» submenu under the «Tools» menu in the main menu.

Multiple values field color

- Select the color to be displayed for fields that differ amongst records selected in the batch edit window.

Multiple values font color

- Select the font color to be displayed for fields that differ amongst records selected in the batch edit window.



Multiple values field color

- Select the color to be displayed for fields that differ amongst records selected in the batch edit window.

Multiple values font color

- Select the font color to be displayed for fields that differ amongst records selected in the batch edit window.

HOW TO DELETE AN ITEM

- The application follows a hierarchical structure.
- An item can only be deleted by doing so in its parent.

Example: *A course can only be deleted from its department.*

To delete an item:

(1) Highlight the desired item in the directory tree pane and do one of the following:

- Press the <DELETE> key.
- Click on the «Delete» command button in the toolbar.
- Click on «Edit» in the main menu and select «Delete» from the sub-menu.

(2) Highlight the desired item in the list pane and do one of the following:

- Right click on the desired item and select «Delete».
- Press the <DELETE> key.
- Click on the «Delete» command button in the toolbar.
- Click on «Edit» in the main menu and select «Delete» from the sub-menu.

- A pop-up message will appear to confirm the delete command.

(3) Click on Yes to delete this record or click on No to cancel this command.

NOTE: Cascading deletions are possible.

- Cascading deletions will delete the selected item, all its children elements and related links. For example, if you delete a component, all the children elements and links related to that component (deliveries, links to academic blocks, links to professors, etc.) will also be deleted.

HOW TO ATTACH OR DETACH AN ITEM

- Items that were previously defined in the database can be attached to selected items.

Example:	*A blockoff can be attached to a professor. Blockoffs have to be defined within the selected database before they can be attached to a professor.*

(1) Navigate to the appropriate item.

(2) Open the selected item's edit window.

(3) Navigate to the appropriate tab within the edit window.

(4) To attach an item, do one of the following:

- Right click in the appropriate tab and select «Attach» or «Detach».
- Click on the «Attach» or «Detach» command button in the toolbar.
- Click on «Edit» in the main menu and select «Attach» or «Detach» from the sub-menu — the «Attachment» list will appear listing all the items that can be attached.

(5) Select the appropriate item(s).

(6) Close the «Attachment» list.

NOTE:	Multiple items can be attached at once.

- In the «Attachment» list, hold the <CTRL> key down and select the appropriate items to attach.
- Close the «Attachment» list. All selected items will be attached.

HOW TO CUT AN ITEM

The application follows a hierarchical structure. An item can only be cut from its parent object.

Example:	*A course can only be cut from a department.*

To cut an item:

(1) Highlight the desired item in the directory three pane and do one of the following:

- Press the <SHIFT> + <DELETE> keys.
- Press the <CTRL> + <X> keys.
- Click on the «Cut» command button in the toolbar.

(2) Highlight the desired item in the list pane and do one of the following:

- Right click on the desired item and select «Cut».
- Press the <SHIFT> + <DELETE> keys.
- Press the <CTRL> + <X> keys.
- Click on the «Cut» command button in the toolbar.
- Click on «Edit» in the main menu and select «Cut» from the sub-menu.

- In the List pane, the «Disabled» and «Marker» checkboxes will become gray.
- The cut item will remain in its original location until it is pasted.

HOW TO COPY AN ITEM

- An item can be copied in any list allowing additions and deletions.
- This action can be performed via
  - The right click of the mouse,
  - The toolbar buttons or,
  - By pressing <CTRL>+<INS> or <CTRL>+<C> on the keyboard.
- Certain items, when copied and pasted, will lose their linked elements.

HOW TO PASTE AN ITEM

- The application follows a hierarchical structure.
- An item can only be pasted by associating it to a parent object (unless there are no parent objects).

Example:	*A course can only be pasted in a department.*

To paste an item:

(1) Highlight the desired item in the directory tree pane and do one of the following:

- Press the <SHIFT> + <INS> keys.
- Press the <CTRL> + <V> keys.
- Click on the «Paste» command button in the toolbar.

(2) In the list pane:

    - Right click on the desired item and select «Paste».
    - Press the <SHIFT> + <INS> keys.
    - Press the <CTRL> + <V> keys.
    - Click on the «Paste» command button in the toolbar.
    - Click on «Edit» in the main menu and from the sub-menu select «Paste».
  - A pop-up message will appear to confirm the paste command.
  - The edit window for the pasted item will appear.

(3) Save the item to complete the paste command.

HOW TO USE THE DISABLED CHECK BOX

- The disabled check box is located on the bottom left hand corner of most edit windows.
- Use the disabled checkbox to identify the data elements that the system should ignore while scheduling.
- Marking an item as disabled is equivalent to deleting the item.
- Cascading disablement is possible.
- When an item is marked as disabled, all its child elements are also disabled.

HOW TO ENABLE/DISABLE OR MARK/UNMARK ELEMENTS FROM A LIST

- In applicable lists, selected records can have their Marker or Disabled checkboxes activated or deactivated by using a right-click on the desired record(s) and selecting from the context menu the option «Enable», «Disable», «Mark», «Unmark». Please note that the options made available to the user depend on the current state of the selected record(s).

WORKING WITH THE EDIT WINDOW

- An edit window can be opened for any data element in (i.e. course, department or exam component).
- The edit window displays all information pertaining to the selected data element. Wherever possible, this information can be edited, added or deleted.

To access the edit window, do one of the following:

- Double click on the desired item in the list pane.
- Right click on the desired item and select «Edit».
- Right click on the desired item in the list pane and from select open viewer.
- Click on the «Edit» command button in the toolbar.
- Click on «Edit» in the main menu and from the sub-menu select «Edit».
- Press the <F2> function key.
- The screens contain one or more of the following field types:
  - Data Input Fields
  - System-disabled fields
  - User permission-disabled fields
  - Grids
  - Date and Time Fields

DATA INPUT FIELDS

- Use data input fields to input the appropriate data for new or existing records.

NOTE:	Use the <TAB> key to move the cursor from one active field to the next. Use the <SHIFT> + <TAB> return to the previous field.

SYSTEM-DISABLED FIELDS

- The application follows a hierarchical structure, which implies that an item must be associated to a parent item.
- The inactive fields represent the parent items associated to the item.
- These values cannot be changed via the child element.

NOTE:	Open the inactive field's edit window by double clicking on the inactive field. By changing the value of the inactive field through its edit window, all related child elements will be affected.

USER PERMISSION-DISABLED FIELDS

- Permissions assigned to a specific user dictate what viewing rights the user possesses.

Example:	*With «Read- only» permissions, all fields will appear inactive thus preventing the user from making any data modifications.*

DATA INPUT GRID

- Data Input Grid's allow you to input data in a grid format.
- To enter values in a data input grid:

(1) Click in the field where you want to input data.

(2) Input the desired data.

(3) Hit the «Enter» key.

(4) Use the arrow keys to navigate to the next field.

(5) Repeat this process until all the desired fields are filled.

NOTE:	Some fields allow you to choose a value from a drop-down list. (Ex. Day).

DATE AND TIME FIELDS

- The date format reflects the date format set in the *Regional Settings* of the *Control Panel* in *Windows*.

HOW TO ENTER A VALUE IN THE START AND END DATE FIELDS

Manual modification:

- Click on the day, month or year.
  - The value will appear highlighted.
  - Input the desired value.

OR

Using the calendar:

- Click on the drop- down arrow in the desired field — the Calendar pop-up will appear.

To change the Year value:

- Click on the year — up and down arrows will appear to the right of the year value.
- Use the arrows to increase or decrease the year value.

To change the Month value:

- Click on the Month name — a list of the 12 months will appear.
- Select the appropriate month.

OR

- Use the arrows appearing to the left and right of the Month and Year Value.

To change the Day value:

- Once the appropriate year and month have been selected, click on the desired day. This day will be selected.

How to Enter a Value in the Start and End Time Fields

- Time values adhere to a HH:MM format and are based on a 24-hour clock.

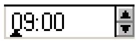
Example:	*2 PM = 14:00*
	8 AM = 08:00

To enter a time:

- Click in the appropriate time value field.
- Enter the appropriate time.

OR

- Double click in the appropriate time value field — the field will appear with up/down arrows and the cursor under the first character of the time value.



- Point the cursor under the character in the time value that you wish to change.
- Use the arrows to increase or decrease this value.

WORKING BETWEEN SCREENS

- Multiple screens can be opened, but only the screen in the forefront can be active.
- To move from one open screen to another, do one of the following:

- Click on any portion of the opened inactive screen — this will bring the screen to the forefront.

OR

- Select «Window» from the Main Menu — a list of opened screens will appear.
- Select the desired screen name — this will bring the selected screen to the forefront.

NOTE:	A checkmark appears to the left of the active screen in the «Windows» sub-Menu.

OR

- Hold the <CTRL> key down.
- Press the <F6> key to select an open inactive screen.
- Continue to hold the <CTRL> key down and press <F6> to move from one open screen to the next.

OR

- Minimize the active screen by clicking on the «Minimize button» in the top left corner.

SHOW/HIDE NAVIGATOR ELEMENTS AND TABS

NAVIGATOR ELEMENTS

Users can show or hide navigation elements (located in the left pane of the navigator). To do so, simply right-click in the left pane and select «*Select Navigator Elements*» to open the *«Select navigator Elements»* window. From that window, select the navigator elements to show or to hide (a checkmark next to the navigator element indicates the element will be shown).

TABS

Where available, users can show or hide tabs on screens such as Course, Sections, etc. To do so, simply right-click on any tab (in windows where available) and select «*Select Tabs*» to open the *«Select Tabs»* window. From that window, select the tabs to show or to hide (a checkmark next to the tab indicates that the tab will be shown).

CHAPTER 2 - INSTITUTIONAL FILES

INSTITUTION

- Information pertaining to your institution is stored in the «Institution» file.

INSTITUTION SCREENS

«GENERAL INFORMATION» TAB

ID

- Institution’s identification field.
- Usually the institution name.

Contact

- Institution’s contact field.
- This field represents the Scheduling Manager
- This field represents the person heading the installation

Client #

- Institution’s client number field.
- This unique client number is assigned by Infosilem.

Default Exam Grid

- The Exam grid that will be used if no exam grid is specified in the «Exam Components» screen.

Institution Logo

- This is where users can customize the logo that is to appear in certain reports.

Select Image

- By selecting this button, the image selection dialog box will open. Navigate to the appropriate directory where your institution image resides. Select the image to incorporate this image inside the Institution screen. Format supported are .bmp, .jpg (24-bit depth) and .gif.

«ADDRESS» TAB

Tel. 1

- Institutions phone number.

Tel. 2

- Institutions alternative phone number.

Fax

- Institutions fax number.

Address

- Institutions address.

«PRIVATE BLOCKOFF» TAB

- The «Private Blockoff» tab displays the list of private blockoffs (unavailabilities) associated to the institution. Please refer to «*How to Add an item*» to add a private blockoff.
- A private blockoff at the institutional level is used when the entire institution is to be made unavailable for a specific period of time.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

FACULTIES

- A grouping of departments is considered a Faculty.
- A department can belong to only one faculty and a faculty is composed of one or more departments.

FACULTY SCREENS

«GENERAL INFORMATION» TAB

ID

- Faculty's identification field.
- It is the unique identifier for a faculty. Duplicate faculties cannot be created.
- This is a required field.

Description

- Faculty's description field

Alternate Room Rules

- Faculty's alternate room rules associated to rooms used for examinations.

Student Seating Rule

- Faculty's student seating rule used for seating purposes

Marker

- The marker check box can be used as an indicator or reminder (Ex. Faculty is new, to be deleted, etc.)
- This is a user-specified field.

Disable

- This check box can be used to disable a faculty along with its child elements (Departments, Courses, etc.)
- This is a user-specified field.

«DEPARTMENTS» TAB

- The «Departments» tab displays the list of departments associated to a Faculty. Please refer to «*How to Add an item*» A faculty can consist of one or more departments.
- A department can only be added by associating it to a faculty.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

DEPARTMENTS

- A grouping of professors and/or courses is considered a Department.
- Courses and professors can only belong to one department.

DEPARTMENT SCREENS

«GENERAL INFORMATION» TAB

Faculty

- Department's Faculty
- This is a system-populated field.
- The user can not change the Faculty that a department belongs to via the department screen.
- The faculty ID along with the Department ID makes up the unique identifier for a department.

ID

- Department's identification field.
- Duplicate departments cannot be created under the same faculty.
- This is a required field.

Description

- Department's description field.

Alternate Room Rules

- Department's alternate room rules associated to rooms used for examinations.

Student Seating Rule

- The department's student seating rule used for seating purposes

Late Start / Early Finish

- These fields are used to override, for this department, the late start and early finish constraint defined in the scheduling rules.
- The values specified in these fields control late starts or early finishes for exam components based on a percentage of students having a «Late Start» or «Early Finish» scheduling constraint

Marker

- The marker check box can be used as an indicator or reminder.
- (Ex. Department is new, to be deleted, etc.) This is a user-specified field.

Disable

- This check box can be used to disable a Department along with its child elements (Professors, Courses, Sections, and Exam Components).
- This is a user-specified field.

«COURSES» TAB

- The «Courses» tab displays the list of courses associated to a department. Please refer to «How to Add an Item» section to add a course.
- A department can consist of one or more courses. A course can only be added by associating it to a department.

«PROFESSORS» TAB

- Within this tab, all professors linked to the current department are listed.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

CHAPTER 3 - LOCATION FILES

CAMPUSES

- A campus is a collection of buildings within a physical area.

CAMPUS SCREENS

«GENERAL INFORMATION» TAB

ID

- Campus identification field.
- This field is the unique identifier for the campus. Duplicated campuses cannot be created.
- This is a required field.

Description

- Campus Description field

Marker

- The marker check box can be used as an indicator or reminder (Ex. Campus is new, to be deleted, etc.).
- This is a user-specified field.

Disabled

- This check box can be used to disable a campus along with its child elements (Buildings, Rooms).
- This is a user-specified field.

«BUILDINGS» TAB

- The «Buildings» tab displays the list of buildings that belong to a campus. Please refer to «How to Add an Item» section to add a building to a campus.
- A campus can consist of one or more buildings.
- A building can only be added by associating it to a campus.

«TRANSFER TIMES» TAB

- A transfer time is used to define the time it takes to travel from one campus to another.
- In this grid, you will have to enter the transfer time information for campus.
- Within each column, select the category for which the transfer time applies — i.e.: Students (Apply to Student), Professors (Apply to Professor), Acad. Blocks (Apply to Academic Block) or All (Apply to All).
- Transfer times can be different between professors, students and/or academic blocks.

NOTE:	If you do not input a transfer time, the system will use the campus transfer time defined between the campuses where the buildings are located.

«PRIVATE BLOCKOFF» TAB

- The «Private Blockoff» tab displays the list of private blockoffs (unavailabilities) associated to a campus. Please refer to «How to Add an Item» section to add a private blockoff.
- A private campus blockoff is used when an entire campus is to be made unavailable for a specific period of time.

«ADDRESS» TAB

Street Address

- The street address of the campus' given address

PO Box

- The post office box of the campus' given address

City

- The city of the campus' given address

State/Province

- The state or the province of the campus' given address

Zip/Postal Code

- The zip code or postal code of the campus' given address

Country

- The country of the campus' given address

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

BUILDINGS

- A building is a physical structure that includes a collection of rooms.

BUILDING SCREENS

«GENERAL INFORMATION» TAB

Campus

- This is the selected building's campus. This is a system-populated field.
- The user can not change the campus in which a building is located via the building screen.
- The campus ID and Building ID make up the unique identifier for a building.

ID

- Building's identification field.
- Duplicate buildings cannot be created on the same campus. This is a required field.

Description

- Building description field

Marker

- The marker check box can be used as an indicator or reminder (Ex. Building is new, to be deleted, etc.)
- This is a user-specified field.

Disabled

- This check box can be used to disable a building and its child elements (Rooms).
- This is a user-specified field.

«ROOMS» TAB

- The «Rooms» tab displays the list of rooms located within a building. Please refer to «How to Add an item» section to add a room to a building.
- A building can consist of one or more rooms. A room can only be added by associating it to a building.

«TRANSFER TIMES» TAB

- A transfer time is used to define the time it takes to travel from one building to another.
- In this grid, you will have to enter the transfer time information for buildings.
- Within each column, select the category for which the transfer time applies — i.e.: Students (Apply to Student), Professors (Apply to Professor), Acad. Blocks (Apply to Academic Block) or All (Apply to All).
- Transfer times can be different between professors, students and/or academic blocks.

NOTE:	If you do not input a transfer time, the system will use the campus transfer time defined between the campuses where the buildings are located.

«PRIVATE BLOCKOFF» TAB

- The «Private Blockoff» tab displays the list of private blockoffs (unavailabilities) associated to a building. Please refer to «How to Add an item» section to add a private blockoff.
- A private building blockoff should be used when the entire building is to be made unavailable for a specific period of time.

«ADDRESS» TAB

Street Address

- The street address of the building's given address

PO Box

- The post office box of the building's given address

City

- The city of the building's given address

State/Province

- The state or province of the building's given address

ZIP/ Postal Code

- The zip code or postal code of the building's given address

Country

- The country of the building's given address

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

ROOMS

- A room is a physical space with a specific seating capacity.
- A room belongs to a building, which belongs to a campus. Rooms can be logically grouped by pavilion or zones.

ROOM SCREENS

«GENERAL INFORMATION» TAB

Campus and Building

- Room's campus and building
- This is a system-populated field.
- The user cannot change the campus or building that the room belongs to via the room screen
- The campus ID, building ID and room number make up the unique identifier for a room.

Pavilion

- A room can be associated to only one pavilion. A pavilion is a logical regrouping of rooms.
- The lookup function can be used in this field.

Room Type

- A room type is the most obvious attribute/characteristic for a set of rooms.
- Room types are created in the secondary files and the lookup function can be used in this field.

Room #

- Room's identification field.
- Duplicate rooms cannot be created in the same building.
- This is a required field.

Description

- Room description field

Exam Capacity

- This field defines the seating capacity of a room.

Max Durations

- Indicates the maximum number of different exam component durations allowed to schedule simultaneously within the selected room.

Max Different Exam

- The maximum allowable number of simultaneous exam components scheduled within the selected room.

Consider 'any room' groups as 1 exam

- If two or more exam components belonging to the same «Any Room» scheduling group are assigned to the selected room or sub-room(s), the exam components will be considered as one exam component, thus respecting the striping rules.

Double-desk exam ratio

- Selecting the «Double-desk exam» option will ensure that the number of seats reserved will be the assigned room's Double Desk ratio multiplied by the number of students associated to the exam component.

NOTE:	It is not recommended to define a double desk ratio of greater than 1 for exam rooms containing sub-rooms with stripe definitions representing exam room columns. The application will reserve a second adjacent seat for each student associated to the assigned exam component. Therefore, the application will never assign an exam component requesting a double desk ratio to exam rooms containing sub-rooms with stripe definitions representing exam room columns.

Example:	*Each sub-room is a representation of a column within the exam room. A different stripe definition is associated to every second column.* *Room X = Sub-room #1 = Column #1, Stripe definition = ODD.* *Sub-room #2 = Column #2, Stripe definition = EVEN.* *Sub-room #3 = Column #3, Stripe definition = ODD, etc.* *Assume Room X is defined with a double desk ratio of 2 and Exam Component Y is requesting a double desk ratio. The striping rules imply that an exam component can only be assigned to multiple sub-rooms within the same exam room with the same stripe definition. Using the double desk ratio, the application will assign a second adjacent seat to the exam component. However, the adjacent seat is in a sub-room with a different stripe definition. Therefore, the application will never assign Exam Component Y to Room X.*

Number of students associated to an exam component	*X*	**exam component ratio**	*X*	**double desk exam ratio**

Infosilem Enterprise Integration

Import Date

- This field will display the date of the last import process (from the Infosilem Enterprise) for that specific room.

Prevent modification from Enterprise

- Select this option to avoid any individual room from being modified or deleted by the import room process (the next time the room import process is launched).

Marker

- The marker check box can be used as an indicator or reminder (Ex. Room is new, to be deleted, etc.)
- This is a user-specified field.

Disabled

- This check box can be used to disable a room.
- This is a user-specified field.

«ZONES» TAB

- The «Zones» tab displays the list of zones associated to a room.
- Please refer to «*How to Attach an item*» section to attach zones to a room. A zone is a logical collection of rooms, usually defined in terms of proximity. This concept is primarily used when assigning rooms to an exam.
- Conceptually, zone is similar to «Same Set» in TPH exam (Dos product).

«ROOM CHARACTERISTICS» TAB

- The «Room Characteristics» tab displays the list of room characteristics associated to a room.
- Please refer to «*How to Attach an item*» section to attach characteristics to a room. Room characteristics are attributes that a room can possess which impact the room assignment of exams. One or more characteristics can be associated to a single room.

«EXAM COMPONENT» TAB

- The «Exam Components» tab displays a list of components that have been assigned to the selected room.
- Users can see, by icons, the status of the exam component at a glance.
- Please refer to the Status Circle Color Scheme section in this guide for more details.

«BLOCKOFFS» TAB

- The «Blockoffs» tab displays the list of blockoffs associated to a room. Please refer to «*How to Attach an item*» section to attach blockoffs to a room.
- One or more blockoffs can be attached to a single room.
- Public room blockoffs are used to indicate when a room is unavailable for a specific period of time.

«SUB-ROOMS» TAB

- The «Sub-Rooms» tab displays the list of sub-rooms associated to a room. Please refer to «How to Add an Item» section to attach sub-rooms to a room.
- One or more sub-rooms can be attached to a single room.

Max different exams per sub-room

- The maximum allowable number of simultaneous exam components scheduled within the sub-room.

Compact Exams

- To ensure that exam components are not fragmented across sub-rooms of the same room and that the defined sequence order of sub-rooms is respected check the «Compact Exams» checkbox.

Example:

Sub-Room	Sequence
A	1
B	2
C	3

- In this example, the application will ensure to assign exam components to sequential sub-rooms. Assuming only 2 sub-rooms are needed to seat the selected exam components; a combination of either sub-room A and B or B and C will be used.
- It is recommended that for all large, multi-exam testing facilities with defined sub-rooms, the «Compact Exams» option be checked.

Must Respect Proximity to Exit

- By checking this box, exams of shorter duration must be assigned to sub-rooms closest to the exit.
- This field is not a required field.

«STUDENT SEAT ASSIGNMENTS» TAB

- The «Student Seat Assignment» tab displays the batch student seating assignment results.
- Double clicking on an item can modify the results.

«SEAT PLAN» TAB

- This screen is used to create the seating plan for a large, multi- exam testing facilities.

Room Seat Plan Top Frame

- The «Room Seat Plan Top Frame» allows a user to generate a room seating plan based on the number of columns and rows defined.
- A sub-room can be generated for each column by selecting the «Create a sub-room for each column» checkbox.
- Once all values have been inputted, click on the «Generate Seat Plan» button to generate the room seat plan.

Room Seat Plan Bottom Part:

Columns Frame

- The «Columns» frame will indicate the number of specified columns along with their ID number.

Rows Frame

- The «Rows» frame will indicate the number of specified rows along with their ID number.

Sub-Rooms Frame

- The sub-room frame will indicate the color assigned to each sub-room, the id of the sub-room, the sequence and the capacity of each sub-room.

NOTE: This frame will be automatically populated if the «Create a sub-room for each column» checkbox was checked when generating the seat plan.

Sub-Rooms Frame Columns:

Marker and Color

- The marker check box can be used as an indicator or reminder (Ex. Sub-Room is new, to be deleted, etc.)
- The color is system generated and is used to identify the sub-room in the seat plan.

ID

- Sub-room’s identification field.
- Duplicate sub-rooms cannot be created in the same room.
- This is a required field.

Stripe

- Used to define a stripe for the sub-room

NOTE:	Sub-room stripes must be manually inputted

Sequence

- A sub-room sequence is used to define the assignment order of sub-rooms and the location of the row in relation to the exit location of the room.
- The nearest row to the exit door will have the smallest sequence number (1) and the furthest row will have the largest sequence number.

Description

- Sub-Room's description field

Capacity

- The «Capacity» field defines the seating capacity of the sub-room.
- This field is automatically calculated based on the defined number of rows

Seat Plan Frame

- Displays a graphical representation of the defined seat plan

«Assign Sub-Room» Button

- Allows a user to reassign seat(s) to another sub-room

NOTE:	Each seat is represented by a colored block.

How do I reassign a seat to another sub-room?

- Navigate to the 'Sub-Rooms' frame
- Select the sub-room you wish to reassign the seat to by selecting the corresponding ID cell.
- In the seat plan, highlight the seat(s) that you wish to be reassigned.
- Click on the «Assign Sub-Room» button.
- The seat(s) should now have the color of the newly assigned sub-room.

Disable / Enable Button

- Each seat can be disabled or enabled.

How do I Disable/Enable a Seat?

- Within the seat plan, select the seat that you wish to disable or enable.
- Click on the «Disable / Enable» button.
- If the seat has been disabled, an X will appear within the seat square.
- If the seat has been enabled, the X will be removed.

Set Exit Location Button

- This button allows you to assign an exit location within a room.

How do I set an Exit Location?

- Within the seat plan, select the seat nearest to the exit location.
- Click on the «Set Exit Location» button.
- The sequence field in each sub-room will now reflect their position in relation to the exit location.

NOTE: The exit location is considered closest to the sub-room defined with the lowest sequence number

Proximity to Exit Concept:

- The «Proximity to Exit» concept implies that large multi-exam testing rooms allowing more than 1 simultaneous exam durations will have the exams with the shortest durations assigned closer to the exit location- i.e. assigned in sub-rooms with the lowest sequence numbers.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

SUB-ROOMS

- Sub-rooms are divisions of an exam room and are associated to a stripe definition.

NOTE: Once a seat plan is created for a room, sub-rooms cannot be added via the directory tree pane or the sub-room tab in the room window. Sub-rooms can only be added within the sub-room frame of the «Seat Plan» tab.

SUB-ROOM SCREENS

«GENERAL INFORMATION» TAB

Campus, Building and Room

- These fields represent the Sub-Room’s campus, building and room.
- These are system-populated field.

ID

- Sub-room’s identification field.
- Duplicate sub-rooms cannot be created in the same room.
- This is a required field.

Description

- Sub-Room’s description field

Capacity

- The «Capacity» field defines the seating capacity of the sub-room

Stripe

- Sub-rooms stripe definition

Sequence

- A sub-room sequence is used to define the assignment order of sub-rooms and the location of the row in relation to the exit location of the room.
- The nearest row to the exit door will have the smallest sequence number (1) and the furthest row will have the largest sequence number.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Sub-Room is new, to be deleted, etc.)

«EXAM COMPONENT(S)» TAB

- The «Exam Component» tab displays the exam components that were assigned in this sub-room.
- Users can see, by icons, the status of the exam component at a glance.
- Please refer to the Status Circle Color Scheme section in this guide for more details.

PAVILIONS

- A pavilion is a logical regrouping of rooms, which can supersede physical boundaries (i.e. room ownership rights).
- A pavilion can be composed of buildings, or a set of rooms from several different buildings, or even a group of rooms within the same building.

PAVILION SCREENS

«GENERAL INFORMATION» TAB

ID

- Pavilion's identification field.
- This field is the unique identifier for a pavilion.
- Duplicate pavilion cannot be created.
- This is a required field.

Description

- Pavilion's description field

Marker

- The marker check box can be used as an indicator or reminder (Ex. Pavilion is new, to be deleted, etc.)
- This is a user-specified field.

«ROOMS» TAB

- The «Rooms» tab displays the list of rooms that are associated to the selected pavilion.

«PRIVATE BLOCKOFF» TAB

- The «Private Blockoff» tab displays the list of private blockoffs (unavailabilities) associated to a pavilion. Please refer to «How to Add an Item» section to add a private blockoff.
- A private pavilion blockoff is used when all the rooms within the selected pavilion are to be made unavailable for a specific period of time.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

CHAPTER 4 – EXAM FILES

COURSES

- A course is an academic offering that requires one or several institutional resources.

COURSE SCREENS

«GENERAL INFORMATION» TAB

Faculty

- A course's faculty
- This is a system-populated field.
- The user cannot change the faculty to which a course belongs via the course screen.
- This field, along with the course ID and the Department ID, make up the unique identifier for a course.

Department

- A course's department
- This is a system-populated field.
- The user cannot change the department to which a course belongs via the course screen.
- This field, along with the course ID and the Faculty ID, make up the unique identifier for a course.

Subject

- Enter the subject for the course

ID

- Course's identification field.
- Duplicate courses cannot be created within the same department.
- This is a required field.

Description

- The description for the course

Alternate Room Rule

- Course's alternate room rules associated to rooms used for examinations.

Student Seating Rule

- Course's student seating rule associated to students for examination seating purposes.

Exam Component Group Creation Assistant Options

Override Default Options

- Select this option to override the default exam component grouping options.

Grouping Options

- The following describes how to setup grouping options for a course with multiple exams.
- All exams are to be examined at the same time,
- At the course level, users will identify the courses that have multiple exams that need to be scheduled together.

Group Exam Components by Course

- Select this option to group the exam components by course.
- Once selected the matching Group Constraint field will be enabled.
- Using the lookup tool, select the desired group constraint for this option.

Group Exam Components by Professor

- Select this option to group the exam components by professor.
- Once selected the matching Group Constraint field will be enabled.
- Using the lookup tool, select the desired group constraint for this option.

Group Exam Components by Time Characteristics

- Select this option to group the exam components by time characteristics.
- Once selected the matching Group Constraint field will be enabled.
- Using the lookup tool, select the desired group constraint for this option.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Course is new, to be deleted, etc.)
- This is a user-specified field.

Disabled

- This check box can be used to disable a course and all its child elements (sections, exam components).
- This is a user-specified field.

«SECTIONS» TAB

- The «Section(s)» tab displays the list of sections associated to a course. Please refer to «How to Add an Item» section to add a section to a course.
- A course can consist of one or more sections.
- A section can only be added by associating it to a course.

«COURSE GROUPS» TAB

- The «Course Groups» tab displays the list of course groups that a course is associated to.
- A course can belong to one or more course groups.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

CREATE EXAM SCHEDULING GROUPS

RUN THE EXAM COMPONENT GROUP CREATION ASSISTANT

NOTE:	Make sure that the default **Exam Component Group Creation Assistant** options have been defined prior to running the **Exam Component Group Creation Assistant.** *Settings> Default Exam Component Group Creation Assistant Options*

- The **Exam Component Group Creation Assistant** automatically creates scheduling groups for selected courses. *Tools → Exam Component Group Creation Assistant*

INTRODUCTION

(1) Upon accessing the Exam Component Group Creation Assistant, users are presented with the introduction screen.

(2) Click on Next to move on to the next step.

NOTE:	You can select the «Do not show this introduction in the future» option to avoid the introduction page on subsequent uses.

DELETE EXAM COMPONENT GROUPS

(1) Users can select existing system generated exam component groups that are to be deleted from the application database once the Exam Component Group Creation Assistant is completed.

(2) Select the exam component groups to be deleted and click on Next.

(3) Click on Yes on the validation message to confirm the deletion of the selected exam component groups.

SELECT COURSES

(1) Users can select the courses for which exam component groups are to be created.

(2) Select the courses and click on Next.

CREATE GROUPS

(1) The exam component group creation process will start. The progress bar allows users to monitor the progression of the creation process.

NOTE:	It is possible to interrupt the creation of exam component groups by selecting the «Cancel» button. Once the groups are created, the «Cancel» button will no longer be available.

(2) When complete click Next to view the results.

RESULTS

(1) The results screen allows the user to view the created exam component groups.

(2) Click Finish to complete the process.

NOTE:	The section «Groups not created for these courses» will display groups that were not created as well as the reason why these groups were not created.

SECTIONS

- Sections are divisions or offerings of a course.

SECTION SCREENS

«GENERAL INFORMATION» TAB

Faculty

- This field is greyed out; the system fills it up when the item is created.
- It represents the faculty to which the section is associated.

Department

- This field is greyed out; the system fills it up when the item is created.
- It represents the department to which the section is associated.

Course

- This is a system-populated field.
- The user can not change the course that the section belongs to via the «Sections» screen.
- The course ID and section ID make up the unique identifier for a section.

ID

- Section’s identification field.
- Duplicate sections cannot be created within the same course.
- This is a required field.

Description

- Section’s description field.

Student Seating Rule

- Section’s student seating rule associated to students for examination seating purposes.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Section is new, to be deleted, etc.) This is a user-specified field.

Disabled

- This check box can be used to disable a course and all its child elements (exam components).
- This is a user-specified field.

«EXAM COMPONENTS» TAB

- The «Exam Components» tab displays the list of exam components associated to a section. Please refer to «How to Add an Item» section to add a section to a course. A section can have one or more exam components. An exam component can only be added by associating it to a section.
- Users can see, by icons, the status of the exam component at a glance.
- Please refer to the Status Circle Color Scheme section in this guide for more details.

«SECTION GROUPS» TAB

- The «Section Groups» tab displays the list of section groups that a section is associated to.
- A section can belong to one or more section groups.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

SHARED ACADEMIC RESOURCES FOR COURSES

- This feature lets you display the selected elements' shared resources. You can view shared resources for «Courses», «Sections» and «Exam Components».
- To create a list of shared resources, select the desired elements from the list pane and right click the list pane — a context menu will appear. Within this context menu, select «Shared Academic Resources».
- A new screen will appear. This new list will contain all the shared resources associated with all the selected elements. The information is categorized within three main tabs: «Professors», «Exam Academic Blocks» and «Students». The fourth tab displays a list of the selected elements.
- The values found within the Shared Academic Resource screen reflect all data elements that are shared among the selected data elements and their groups (if it applies). Please refer to the example described in the «DESCRIBING THE CONFLICT MATRIX« *s*ection on page 50 for an example that describes what is taken into account in the calculation of the report.

THE CONFLICT MATRIX

- You may use the conflict matrix to determine if there are any resource conflicts (students, professors and/or Academic blocks) for courses, sections and/or exam components.

OPENING THE CONFLICT MATRIX

- Starting from a courses list, or a sections list, or an exam components list, select the items (by highlighting them) for which you would like to generate a conflict matrix.
- Once those items are highlighted, right click on the list, a context menu will appear.
- Select the option «Shared Resources» and select the sub-menu option «Conflict Matrix».

NOTE:	You cannot display a conflict matrix that contains more than 255 course-related data elements.

DESCRIBING THE CONFLICT MATRIX

«CONFLICT MATRIX» TAB

- The Conflict Matrix tab contains a drop-down list that offers three (3) options:

(1) Student conflict matrix – Number of students

(2) Professor conflict matrix – Number of professors

(3) Academic block conflict matrix – Number of academic blocks

NOTE: These examples use Student IDs as the elements being queried. You can substitute «Student ID» with «Professor» or «Academic Blocks».

EXAMPLE OF STUDENT CONFLICT MATRIX WHERE THE DATA ELEMENT ARE NOT GROUPED

	Data Element A	Data Element B
Student ID	1	4
	2	5
	3	6

- In this instance, we want to query if there are any conflicts between Data Element A and Data Element B. In this case, there are no conflicts between the queried elements and therefore the conflict matrix will display a value of «0» at the intersection point of those two data elements (Data Element A and Data Element B).

EXAMPLE OF STUDENT CONFLICT MATRIX WHERE THE DATA ELEMENTS BELONG ARE GROUPED

- This example is based on the preceding example with the exception that the data elements are now grouped with other data elements. The query is based on data element A and data element B. Since data element A is grouped with data element AA, you must consider all the items associated with data element A and all items associated with data element AA as forming one data element.

	Group1		Group 2	
	Data Element A	Data Element AA	Data Element B	Data Element BB
Student ID	1	4	4	9
	2	7	5	10
	3	8	6	1

Group 1

- Is made up of Data Element A and Data Element AA

Group 2

- Is made up of Data Element B and Data Element BB
- The Conflict Matrix screen will indicate there are 2 conflicting items (student 1 and student 4) between Data Element A and Data Element B (Data Element A is grouped with Data Element AA and that makes one entity. Data Element B is grouped with Data Element BB and that makes another entity).
- Because a group, by definition, contains Data Elements that take place at the same time, whatever item is associated to more that one element that takes place at the same time represents a conflict.

Student 1

- Is associated with Data Element A (Group 1) and is also associated with Data Element BB (Group 2).

Student 4

- Is associated with Data Element B (Group 2) and is also associated with Data Element AA (Group 1).

Student Conflict Matrix

- Number of students:
  - Represents the number of shared active students.

Professor Conflict Matrix

- Number of professors:
  - Represents the number of shared active professors.

Academic Block Conflict Matrix

- Number of academic blocks:
  - Represents the number of shared active academic blocks.
- Upon the **initial** (very first) opening of the conflict matrix screen, the drop-down list is set to «Student conflict matrix – Number of students».
- When closing the conflict matrix, the system saves the option selected in the drop-down list and loads that option the next time the conflict matrix opens.

From the conflict matrix, you can:

- Copy a row to the Windows' clipboard;
- Copy the entire conflict matrix to the Windows' clipboard;
- Generate a report;
- Open the shared academic resources window.

COPYING ROWS TO THE WINDOWS' CLIPBOARD

(1) Click on the third tab. Depending on the element from which the conflict matrix has been generated, the third tab could be labelled as one of the following:

- «Selected Course», if the conflict matrix has been generated from the Course list, or;
- «Selected Section», if the conflict matrix has been generated from the Section list, or;

(2) «Selected Exam Components», if the conflict matrix has been generated from the Exam Components list.

(3) In the list pane, select the row to copy by doing a right click on it and, from the context menu that appears, select «Copy».

(4) Open the text editor of your choice (such as MS Word, MS Excel, Notepad, etc.).

(5) Click on Edit→Paste, or you could also:

(6) Right click on a blank cell, or a blank page, and select «Paste» or;

(7) Press and hold on the «Ctrl» key on the keyboard, and, press «v».

COPYING THE CONFLICT MATRIX TO THE WINDOWS' CLIPBOARD

(1) Right click on the conflict matrix — a context menu will appear.

(2) Click on «Copy matrix to clipboard».

(3) Open the text editor of your choice (such as MS Word, MS Excel, Notepad, etc.).

(4) Click on Edit→Paste, or you could also:

(5) Right click on a blank cell, or a blank page, and select «Paste» or;

(6) Press and hold on the «Ctrl» key on the keyboard, and, press «v».

GENERATING A REPORT

(1) Right click on the conflict matrix — a context menu will appear.

(2) Click on «Generate report».

(3) The report will appear. Once the report is displayed, you can print the report by clicking on the printer icon or by selecting, File→Print.

OPENING THE SHARED ACADEMIC RESOURCES WINDOW

(1) Right click on the conflict matrix, making sure not to click on self-referring co-ordinates such as (1,1), (2,2), (3,3), etc. A context menu will appear.

(2) Click on «Shared Academic Resources».

(3) The Shared Academic Resources will open, displaying, the shared resources, categorized by professors, academic blocks, and students.

«CONFLICT MATRIX –LIST VIEW» TAB

- The conflict matrix-list view is a list representation of the conflict matrix.
- It displays the Faculty 1, Department 1, Course 1, Faculty 2, Department 2, Course 2, Number of Students, Cumulative Weight, Number of Professors, Number of Academic Blocks and the Cumulative Block Size.

EXAM COMPONENTS

- An exam component is the actual examination data element that is requesting a time and a room.
- Users can see, by icons, the status of the exam component at a glance.
- Please refer to the Status Circle Color Scheme section in this guide for more details.

EXAM COMPONENT SCREENS

«GENERAL INFORMATION» TAB

Course and Section

- These are the exam component's course and section.
- These are system-populated fields.
- The user can not change the course or section that an exam component belongs to via the exam component screen.
- These fields in combination with the exam component ID make up the unique identifier for an exam component.

Exam Grid

- Exam components associated exam grid. Exam Grids are created in the secondary files and contain all the possible start times for exams.
- The lookup function can be used in this field.
- This is a required field.

Student Seating Rule

- Exam component's student seating rule associated to students for examination seating purposes.

Type

- This is the exam component's type. Exam component types are created in the secondary files.
- The lookup function can be used in this field.
- This is a required field.

ID

- Exam component's identification field.
- Duplicate exam components cannot be created within the same section.
- This is a required field.

Description

- Exam component's description field.

Scheduled Time Frame

- The «scheduled time» frame can be populated by the user (when forcing a time) or by the system (when assigning a period).

Date

- Displays the date that the exam was assigned or forced

Period

- Displays the period of the day when the exam was assigned or forced. The lookup function can be used to populate this field. Doing so will also populate the start time fields.

Start Time

- Displays the start time of the assigned or forced period
- This is a system-populated field.

«Clear Time» Button

- The «Clear Time» button allows you to «clear» (erase) the date, period and start time fields.

Prevent Automated Modification

- The «Prevent Automated Modification» check box can be used to indicate that it is unacceptable to have the system change the scheduled time of the selected exam component to schedule another exam component (prevent backtracking).

Time Request Frame ____

- Displays information pertaining to the time request for the selected exam component

Duration

- The duration (in hours) of the scheduled or unscheduled exam component
- This is a required field.

Override exam grid dates

- The «Override exam grid dates » checkbox can be used to indicate that an exam component must schedule within a date range that differs from that of the exam grid.

From/To

- Displays the date range of the exam grid that is associated to the exam component
- These are system-populated fields and are based on value in the exam grid field.

Time Characteristics ____

Characteristic

- Preferred time characteristic(s)
- Time characteristics are created in the secondary files and are associated to periods in the exam grid.

Required

- The «Required» checkbox can be used to indicate that a time characteristic is required.

Weight

- A weight must be associated to those time characteristics that are preferred but not required. The weight is defined as a percentage and indicates how strong a preference is.

Percentage students requiring late start

- The «Percentage students requiring late start» indicates the percentage of students associated to the selected exam grid having a late start restriction.

Percentage students requiring early finish

- The «Percentage students requiring early finish» indicates the percentage of students associated to the selected exam grid having an early finish restriction.

Grouped (percentage students late start)

- This field displays the overall percentage of the grouped students that are associated with the «late start» constraint.
- A «0» value indicates that there are no students with a «late start» or «early finish» constraint in the group.
- A blank indicates that the exam component is not grouped.
- The value displayed is rounded off to the next number — example: «0.01%» is rounded off to «1%».
- The calculation represents the overall number of students (of all the components belonging to this group) that are affected by this constraint divided by the total amount of students belonging to this group.

Example:	*25 students out of 100 belonging to Exam Component A, have «early finish» constraint (25%). The exam component is grouped, however, with section groups and/or course groups and/or exam component groups and none of those students has this constraint. The percentage of students having an «early finish» constraint is no longer 25% but rather 6.25%.* *25 ÷ **(**(exam component A) + (section groups) + (course groups) + (exam component groups)**)***

Grouped (percentage students early finish)

- This field displays the overall percentage of the grouped students that are associated with the «early finish» constraint.
- A «0» value indicates that there are no students with a «late start» or «early finish» constraint in the group.
- A blank indicates that the exam component is not grouped.
- The value displayed is rounded off to the next number — example: «0.01%» would be rounded off to «1%».
- The calculation represents the overall number of students (of all the components belonging to this group) that are affected by this constraint divided by the total amount of students belonging to this group.

Example:	*25 students out of 100 belonging to Exam Component A, have «early finish» constraint (25%). The exam component is grouped, however, with section groups and/or course groups and/or exam component groups and none of those students has this constraint. The percentage of students having an «early finish» constraint is no longer 25% but rather 6.25%.* *25 ÷ **(**(exam component A) + (section groups) + (course groups) + (exam component groups)**)***

Disable late start / early finish rules

- By checking this box, the «late start» or the «early finish» rule is not considered, however, the basic grouping constraint rules still apply. Please refer to «Group Constraints» for more detail explanation regarding the basic group constraint rules.

«ASSIGNED ROOM» TAB

- The assigned room tab can be populated by the user (when forcing a room) or by the system (when assigning a room). Please note that once a room has been assigned to the current exam component, you can open the Room's editing screen by right-clicking within the assigned room

«SEAT USED» TAB

- Within the Seat Used tab, the system will display the location information pertaining to the current exam component. It will display information associated with the current exam component; such as: The Campus, the Building, the Room, the Sub-room as well as the total number of students seated in the assigned room. Please note, for this information to be available, the student seating process needs to have already taken place.

Room Grid

- Displays the Campus, Building, Room and number of seats assigned to the selected exam component
- Moreover, each assigned sub- room and number of designated seats within the sub- room are listed. The lookup function can be used in campus, building, room and sub-room fields.

> **NOTE:** If redownloading "Students — Exam Components" and if the number of students decreases, the number of assigned seats will be adjusted accordingly.

Prevent Automated Modifications

- The «Prevent Automated Modifications» checkbox can be used to indicate that it is unacceptable to have the system replace the assigned room of the selected exam component if necessary (prevent backtracking).

«ROOM REQUEST CRITERIA» TAB

- This tab displays information pertaining to the room request(s) for the selected exam component

Campus

- This field is not required but can be used to request a room on a specific campus.
- The lookup function can be used in this field.

Pavilion

- This field is not required but can be used to request a room on a specific pavilion.
- The lookup function can be used in this field.
- The «Required» checkbox can be used to indicate that a certain pavilion is absolutely required for an exam component (the system will ignore the alternate pavilions).

Required

- The «Required» checkbox can be used to indicate that the pavilion is required.

Building

- This field is not required but can be used to request a room on a specific building.
- The lookup function can be used in this field.

Zone

- This field is not required but can be used to request a room(s) in a specific zone. This is primarily used when multiple rooms are assigned to an exam component.
- The lookup function can be used in this field.

Required

- The «Required» checkbox can be used to indicate that the zone is required.

Room Type

- This field is required.
- The lookup function can be used in this field.

- The «Required» checkbox can be used to indicate that a certain room type is absolutely required for an exam component (the system will ignore the alternate room types).

Required

- The «Required» checkbox can be used to indicate that the room type is required.

Exam Component Capacity

- How to calculate the Exam Component Required Capacity:
- It is the sum contained in the field «number of students» for all active students associated to the exam component multiplied by the ratio value.

Same-Room Group(s)

- How to calculate the Same Room Total calculation:
- It is the sum contained in the field «number of students» for all distinct active students associated to exam components of the super group «same room» multiplied by the ratio value of the student's exam component.

All Groups

- How to calculate the Group Total:
- It is the addition of 2 sums:
- The sum of the required capacity for all «same groups» that are associated to the exam component
- The sum of all required capacities of exams that are grouped «any room».

Required Seats Ratio

- The Required Seats Ratio indicates a room with a different seating capacity, either greater or smaller than the required capacity as determined by the number of students assigned to the exam component.
- A ratio that is greater than 1 indicates a room with a greater capacity; while a ratio smaller than 1 indicates a room with a capacity that is smaller.

Ratio Calculator Button

- Users can enter a desired capacity for an Exam Component and have the application automatically calculate the ratio. The ratio is then used to determine the room capacity that is required during scheduling.

Double-desk exam

- Check the Double Desk ratio to ensure that the selected exam component will be assigned to a room defined with a double desk ratio of 2.
- Defining a room with a double desk ratio of 2 ensures that 2 seats are reserved for each associated student.

Maximum number of assigned rooms

- Input the maximum number of rooms that can be assigned to the selected exam component. This value must be greater than 0.

FORMULA:

Number of students assigned to the selected exam component	X	Required Seats Ratio	=	Required Capacity

Restrict to zone

- The «Restrict to zone» checkbox can be used to ensure that all assigned rooms are located within the same zone.

Override Striping

- If checked, the application will ignore striping rules when assigning rooms to the selected exam component
- Striping rules imply that exam component can only be assigned to multiple sub-rooms in the same room with the same stripe definition. I.E. the application will never assign an exam component to sub-rooms of different stripe definitions within the same room.

THE RATIO CALCULATOR SCREEN

Same-Room Group(s)

- This field is a read-only field and the value displayed in this field reflects the value of the same field the within the Exam Component screen

Exam Component Capacity

- This field is a read-only field and the value displayed in this field reflects the value of the same field the within the Exam Component screen

Number of Student

- This field is a read-only field and the value displayed in this field represents the total number of students that are associated to the current exam component (within the Student tab of the exam component).

Desired Room Capacity

- This field is editable, and the user can enter a new value to change the seat ratio.

If the Exam Component is a grouped component, the ratio calculation is as follows:

$$\frac{\text{(Desired Room Capacity - (Same Room Group - Exam Capacity))}}{\text{Number of Students}}$$

If the Exam Component is not a grouped component, the ratio calculation is as follows:

$$\frac{\text{(Desired Room Capacity / Number of Students)}}{\text{Number of Students}}$$

> **NOTE: The Number of Students is calculated as follows:**
> It is the sum of the value in the «Number of Students» field for all active students in the «Students» tab of the Exam Component (saved or not saved).

Ratio

- This field is a read-only field and the value displayed in this field reflects the value of the «Required Seat Ratio» field the within the Exam Component screen.

«ROOM CHARACTERISTICS» TAB

Characteristic

- Preferred room characteristic(s)
- Room characteristics are created in the secondary files and are associated to rooms.

Required

- The «Required» checkbox can be used to indicate that a room characteristic is absolutely required.

Weight

- A weight must be associated to those room characteristics that are preferred but not required. The weight is defined as a percentage and indicates how strong a preference is.

«PROFESSORS» TAB

- The «Professor(s)» tab displays the list of professors associated to an exam component. Please refer to «How to Add an Item» section to attach a professor to an exam component.
- One or more professors can be attached to a single exam component.

«STUDENT» TAB

- The number that appears in parentheses on the student tab represents the number of students that are registered to the exam component.

«STUDENT REGISTRATION» TAB

- The «Student Registration» tab displays the list of students that are registered in the selected exam component. Please refer to «How to Add an Item» section to attach a student to an exam component.
- One or more students can be attached to a single exam component.

«STUDENT SEAT ASSIGNMENTS» TAB

- The «Student Seat Assignment» tab will list the rooms, sub-rooms and seats assigned to each associated student

«ACADEMIC BLOCKS» TAB

- The «Academic Blocks» tab displays the list of academic blocks associated to an exam component. Please refer to «How to Add an Item» section to attach an academic block to an exam component.
- One or more academic blocks can be attached to a single exam component.

«EXAM COMPONENT GROUPS» TAB

- The «Exam Component Groups» tab displays a list of component groups that an exam component is associated to.
- An exam component can belong to one or more component groups.

«BLOCKOFFS» TAB

- The «Blockoffs» tab displays the list of blockoffs associated to an exam component. Please refer to «How to Add an Item» section to attach a blockoffs to an exam component.
- One or more blockoffs can be attached to a single exam component.
- Blockoffs are used to indicate unacceptable scheduling times for an exam component.

«SEQUENCING» TAB

- The Sequencing tab offers the possibility to define a sequence between several exam components. For example, which exam components must be scheduled before or after a given exam component.
- The Sequencing tab displays the number of active exam components that are to be scheduled before and/or after the current exam component (excludes any disabled exam component).
- Any invalid sequencing can be seen in the Exam Sequencing Validation Report. For example, if an exam component was defined as needing to be scheduled both before and after another exam component.

Exam components to schedule before current exam component

- Within this section of the Sequencing tab, users can attach exam components that need to be scheduled before the current exam component. As well, users have the possibility to open the Move Screen for a selected exam component or even establish back-to-back constraints between exam components. All those options are available right-clicking inside the list and selecting the appropriate menu item.

Exam components to schedule after current exam component

- This frame displays all exam components that are scheduled after the current exam component. This frame is a read-only frame and serves as information only, displaying exam components which have set the current exam component in their "scheduled before" field. For example, if, within exam component B, it is defined that exam component A must be scheduled before it, when exam component A is opened, exam component B will show in the "scheduled after" list.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

CHAPTER 5 – RESOURCE FILES

PROFESSORS

- A professor can be assigned to multiple exam components.

PROFESSOR SCREENS

«GENERAL INFORMATION» TAB

Faculty

- The professor's faculty
- This is a system- generated field.
- Users cannot change the faculty to which the professor belongs via the professor screen.

Department

- The professor's department
- This is a system- generated field.
- Users cannot change the department to which the professor belongs via the professor screen.

Constraint Type

- The associated constraint type will dictate the general scheduling rules for the selected professors. Constraint types are created and defined within the secondary files.
- The lookup function can be used in this field.

NOTE:	If no constraint type is defined, professor constraints will not be considered in the timetabling process for the selected professor.

ID

- The professor's identification field.
- This field is the unique identifier for a professor.
- This is a required field. Duplicate professors cannot be created.

Description

- The professor's description field.

Name

- The professor's first name.

Surname

- The professor's surname.

E-Mail

- The professor's e-mail address

Marker

- The marker check box can be used as an indicator or reminder (Ex. Professor is new, to be deleted, etc.). This is a user-specified field.

Disabled

- This check box can be used to disable a professor.
- A professor that is disabled will have no bearing on how their exam components schedule.
- This is a user-specified field.

«EXAM COMPONENTS» TAB

- The «Exam Components» tab displays the list of Exam Components associated to a professor. Please refer to «How to Add an Item» section to attach an exam component.
- One or more exam components can be associated to a single professor.
- Users can see, by icons, the status of the exam component at a glance. Please refer to the Status Circle Color Scheme section in this guide for more details.

«BLOCKOFFS» TAB

- The «Blocks Offs» tab displays the list of blockoffs associated to a professor.
- Use professor blockoffs to ensure that a professor is unavailable for a specified period of time. Please refer to «How to Add an Item» section to attach a predefined public blockoffs. One or more blockoffs can be associated to a single professor.

«ADDRESS» TAB

Phone/Office

- The office phone number of the professor

Phone/Fax

- The fax number of the professor

Phone/Home

- The home phone number of the professor

Phone/Mobile

- The mobile number of the professor

Phone/Pager

- The pager number of the professor

Street Address

- The street address of the professor's given address

PO Box

- The PO Box of the professor's given address

City

- The city of the professor's given address

State/Province

- The state or province of the professor's given address

ZIP/Postal Code

- The zip code or postal code of the professor's given address

Country

- The country of the professor's given address

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

STUDENTS

- A student is one who is enrolled or attends classes at a school, college, or university. A student can represent one person or a group of students.

STUDENT SCREENS

«GENERAL INFORMATION» TAB

ID

- Student's identification field. This field is the unique identifier for a Student.
- Duplicated students cannot be created.
- This is a required field.

Name

- Student's name field.

Surname

- Student's surname field.

Constraint Type

- The associated constraint type will dictate the general scheduling rules for the selected student.
- Constraint types are created and defined within the secondary files.
- The lookup function can be used in this field.

NOTE: If no constraint type is defined, student constraints will not be considered in the timetabling process for the selected student.

Number of Students

- To be used when a fictitious student represents multiple students (i.e. Scheduling by program).
- Input the number of students that this student represents.
- If the student record represents a real student, set this field to 1.

Early Finish

- Selecting the «Early Finish» check box will ensure all associated exam components will schedule with an «Early» restriction.

NOTE: The Early Finish date is defined in the «Exam Grid».

Late Start

- Selecting the «Late Start» checkbox will ensure all associated exam components will schedule with a «Late» restriction.

NOTE: The Late Start date is defined in the «Exam Grid».

Description

- The student's description

Marker

- The marker check box can be used as an indicator or reminder (Ex. Student is new, to be deleted, etc.).
- This is a user-specified field.

Disabled

- This check box can be used to disable a student.
- This is a user-specified field.

«EXAM COMPONENTS» TAB

- The «Exam Components» tab displays the list of Exam Components associated to a student. Please refer to «How to Add an Item» section to attach an exam component
- Users can see, by icons, the status of the exam component at a glance. Please refer to the Status Circle Color Scheme section in this guide for more details.

«BLOCKOFFS» TAB

- The «Blockoffs» tab displays the blockoffs associated to a student. Please refer to «How to Add an Item» section to attach blockoffs to a student.
- One or more blockoffs can be attached to a single student.

«SEAT ASSIGNMENTS» TAB

- The «Student Seat Assignment» tab will list, for each associated exam components, the selected students' assigned room(s), sub-rooms and seat.

«ADDRESS» TAB

Street Address

- The street address of the student's given address

PO Box

- The PO Box of the student's given address

City

- The city of the student's given address

State/Province

- The state/province of the student's given address

Zip/Postal Code

- The zip code or postal code of the student's given address

Country

- The country of the student's given address

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

ACADEMIC BLOCKS

- Academic Blocks ensure that attached exam components schedule according to the associated constraint type rules. Exam components may belong to one or several academic blocks.

ACADEMIC BLOCKS SCREENS

«GENERAL INFORMATION» TAB

ID

- Academic Block identification field.
- This field is the unique identifier for an academic block. Duplicate academic blocks cannot be created. This is a required field.

Description

- Academic Block description field

Constraint Type

- The associated constraint type will dictate the general scheduling rules for the selected academic block. Constraint types are created and defined within the secondary files.
- The lookup function can be used in this field.

NOTE: If no constraint type is defined, academic block constraints will not be considered in the timetabling process for the selected academic block.

System Generated

- If the academic block was generated using the «Generate Academic Blocks Based on Student Registrations» tool, then this option will be selected automatically. If left grayed out, then the academic block has been created manually. For more information regarding system generated academic blocks, please refer to the «Generate Academic Blocks Based on Student Registration» section.

Marker

- The marker check box can be used as an indicator or reminder.
- (Ex. Academic Block is new, to be deleted, etc.)
- This is a user-specified field.

Disabled

- This check box can be used to disable an academic block. This is a user-specified field.

«EXAM COMPONENT» TAB

- The «Exam Components» tab displays the Exam Components associated to an academic block. Please refer to «How to Add an Item» section to attach an exam component.
- Users can see, by icons, the status of the exam component at a glance. Please refer to the Status Circle Color Scheme section in this guide for more details.

«BLOCKOFFS» TAB

- The «Blocks Offs» tab displays a list of blockoffs associated to an Academic Block.
- Use academic block blockoffs to ensure that an academic block is unavailable for a specified period of time. Please refer to «How to Add an Item» section to attach predefined public blockoffs. One or more blockoffs can be associated to a single academic block.

GENERATE ACADEMIC BLOCKS BASED ON STUDENT REGISTRATIONS

- This feature allows the user to generate an automated process that creates academic blocks for exams based on student demands.
- From the toolbar, select «Tools» → «Generate Academic Blocks Based on Student Registrations…» This will launch the academic block creator.

THE FILTER COURSE SCREEN

Exam Term

- Select the «Exam Term» for which to build academic blocks. The lookup function is available.

Apply filter

- By leaving this box unchecked, the system will create academic blocks based on the student registration for All the exam components of the chosen exam term.
- By checking this box, the system will create academic blocks based on the filters selected.

Filter Selection ____

Faculties

- Select the faculties that are to be included in the creation of academic blocks.

Departments

- Select the departments that are to be included in the creation of academic blocks.

Courses

- Select the courses that are to be included in the creation of academic blocks.

Sections

- Select the sections that are to be included in the creation of academic blocks.

Exam Components

- Select the exam components that are to be included in the creation of academic blocks.

<Previous

- Click on this button to return to the previous screen.

Next>

- Click on this button to advance to the next screen.

Cancel

- Click on this button to exit the academic block creator.

Help

- Click on this button to display the online help.

The Options Screen ____

Academic Block ID

- Enter the prefix for the academic block ID that will be generated.

Minimum number of different exams

- Enter the minimum number of exams required to build a block

Minimum number of shared students

- Enter the minimum required number of common students among the selected exams to build a block.

Constraint Type

- Select the constraint type that will be associated to the academic blocks that the system will create. The lookup function is available.

<Previous

- Click on this button to return to the previous screen.

Start

- Click on this button to start the automated process.

Cancel

- Click on this button to exit the academic block creator.

Help

- Click on this button to display the online help.
- The system will start the process of creating the academic blocks. A progress bar will be displayed.
- Once the system has finished creating the academic blocks, the «Done» screen will appear. Click on Finish to end the process.
- Once you have clicked on «Finish», the system will save the newly created academic blocks.
- In the navigation panel, the academic block list will display all academic blocks including the newly created academic blocks.
- The system generated academic blocks will contain the prefix you have selected during the creation process followed by an incrementing digit at the end of the prefix. Also, in the «System Generated» column, the boxed will be checked to show that those blocks have been created by the system — serving as a marker of sorts.

CHAPTER 6 – SCHEDULING GROUP FILES

SCHEDULING GROUP DEFINITION

- Scheduling groups allow the system to schedule certain exam data elements (courses, sections or exam components) at the same time.

GROUP CONSTRAINTS

- Exam data elements must be grouped at the same level and unlike ***Infosilem Timetabler***, there is no scheduling group replication. In other words, all exam components found below the initial grouping level will be grouped together with the same scheduling rules.

Example:	*Two courses, each consisting of three sections are grouped together. The system will not attempt to match section IDs to create three sub groups; it will simply group all six sections together.*

- Members within each group are scheduled according to the group constraint that they are associated to.
- Group constraints are user-defined rules that elements within scheduling group adhere to.

GROUP CONSTRAINT SCREENS

«GROUP CONSTRAINTS» TAB

ID

- Group Constraint's identification field.
- This field is the unique identifier for the group constraint. Duplicate group constraints cannot be created.
- This is a required field.

Description

- Group Constraint's description field.

Authorize Resource Sharing

- Authorize resource sharing allows certain resources to be scheduled at the same time without appearing as conflict.
- Check the appropriate check boxes to define which resource will be shared among grouped exam components.

NOTE: There is no check box for «Same Time»; this rule is implied for all group constraints.

Late Start / Early Finish

Consider all group members

- The percentage will be calculated based on the entire group as opposed to based on each component. The resulting calculation will appear in the «Group» field of the «Exam Component» screen.

Room Assignment Constraints

- Room assignment constraints ensure that certain locations be used at the same time by certain exam data elements.
- Select the appropriate check boxes to define the room assignment constraints to be followed by the grouped exam components.

Same Rooms

- If checked, exam components belonging to the same scheduling group will be assigned to the same room or rooms that accommodate the combined exam component enrolment total.

Any Room

- If checked, each exam component belonging to the same scheduling group will be assigned to a separate room that accommodates the individual exam component enrolment.

Same Building, Same Campus, Same Pavilion, Same Room Type, Same Zone

- If checked, the exam components within an «Any Room» scheduling group will be assigned to rooms that adhere to selected room assignment constraints.

Example:	*If «Same Building» is checked for an «Any Room» scheduling group, only rooms within the same building will used to assign the corresponding exam components.*

Allow Sub-Room Sharing

- If checked, for a group of «Any room» type, more than one exam component can share the same sub-room.

NOTE:	This setting has priority over the «Max different exams per sub-room» from the «Room» screen. If the «Max different exams per sub-room» is set to 1, the system will not consider this value and will allow the assignment of more that one exam component in a same sub-room.

Compact Exams

- If checked, the system will attempt to assign the exam components to adjacent sub-rooms.

Override Striping

- If checked, the application will ignore striping rules when assigning rooms to exam components belonging to the same scheduling group.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Group constraint is new, to be deleted, etc.)
- This is a user-specified field.

Disabled

- This check box can be used to disable a group constraint and its groups.
- This is a user-specified field.

«COURSE GROUPS» TAB

- The «Course Group» tab displays all the groupings made at the course level that will follow a group constraint.

To add a scheduling group at the course level:

Method #1: Classic Method

(1) Right click in the «Course Groups» tab

(2) Select «Add New»

(3) In the Directory Tree Pane, select the «Group Constraints» heading — the «Course Group» edit window will appear

(4) Enter an ID and description for the scheduling group

(5) Navigate to the «Course» tab

(6) Select «Attach» — a list will appear displaying all course records found in the database

(7) Select one or more courses by using the <Shift> or <Ctrl> keys

(8) Close the list window — all the selected courses will now be attached to the created scheduling group

(9) Click on the «Save» button in the toolbar

(10) Repeat this process for all necessary scheduling groups

Method #2: Automatic Group Creation

(1) Select the «Course» button from the Data Element Button List

(2) In the Directory Tree Pane, select the «Course» heading — all courses will be listed in the List pane

(3) Use the <Ctrl> and <Shift> keys to select all scheduling group members

(4) On the highlighted area, right click and select «Create Group» — the «Course Group» edit window will appear

(5) Input the appropriate group constraint in the «Group Constraint» field

NOTE:	The lookup function can be used in the «Group Constraint» field

(6) Input a valid ID and description for the group

(7) Click on the «Save» button in the command bar

THE COURSE GROUP SCREEN

«COURSE GROUP GENERAL INFORMATION» TAB

Group Constraint

- Course Group's group constraint ID.
- This is a system-populated field and cannot be modified.
- The group constraint ID and the course group id make up the unique identifier for a course group.

ID

- Course Group's identification field
- Duplicate course groups cannot be created within the same group constraint.
- This is a required field.

Description

- Course Group's description field

Exam Grid

- This field identifies the exam grid for this course group.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Course group is new, to be deleted, etc.).
- This is a user-specified field.

Disabled

- This check box can be used to disable a course group.
- This is a user-specified field.

«COURSE GROUP COURSES» TAB

- The «Courses» tab displays the courses associated to the selected course group. Please refer to «How to Add an Item» section to attach courses to a course group.
- A course group can consist of several courses.
- Courses within a course group will follow the rules defined within the group constraint.

«SECTION GROUPS» TAB

- The «Section Group» tab displays all the grouping made at the section level that will follow a group constraint.

To add a scheduling group at the section level:

Method #1: Classic Method

(1) Right click in the «Section Groups» tab

(2) Select «Add New»

(3) In the Directory Tree Pane, select the «Group Constraints» heading — the «Section Group» edit window will appear

(4) Enter an ID and description for the scheduling group

(5) Navigate to the «Section» tab

(6) Select «Attach» — a list will appear displaying all section records found within the database

(7) Select one or more courses by using the <Shift> or <Ctrl> keys

(8) Close the list window — all the selected sections will now be attached to the created scheduling group

(9) Click on the «Save» button in the toolbar

(10) Repeat this process for all necessary scheduling groups

Method #2: Automatic Group Creation

(1) Select the «Section» button from the Data Element Button List

(2) In the Directory Tree Pane, select the «Section» heading — all sections will be listed in the List pane

(3) Use the <Ctrl> and <Shift> keys to select all scheduling group members

(4) On the highlighted area, right click and select «Create Group» — the «Section Group» edit window will appear

(5) Input the appropriate group constraint in the «Group Constraint» field

NOTE: The lookup function can be used in the «Group Constraint» field

(6) Input a valid ID and description for the group

(7) Click on the «Save» button in the command bar

THE SECTION GROUP SCREEN

«SECTION GROUP GENERAL INFORMATION» TAB

Group Constraint

- Section Group's group constraint ID.
- This is a system-populated field and cannot be modified.
- The group constraint ID and the section group ID make up the unique identifier for the section group.

ID

- Section Group's identification field
- This is a required field. Duplicate section groups cannot be created within the same group constraint.

Description

- Section Group's description field

Exam Grid

- This field identifies the exam grid for this section group.

Marker

- The marker check box can be used as an indicator or reminder.
- (Ex. Section group is new, to be deleted, etc.).
- This is a user-specified field.

Disabled

- This check box can be used to disable a section group.
- This is a user-specified field.

«SECTION GROUP SECTION» TAB

- The «Section» tab displays the sections associated to the selected section group. Please refer to «How to Add an Item» section to attach sections to a section group.
- A section group can consist of several sections.
- Sections within a section group will follow the rules defined in the group constraint.

THE EXAM COMPONENT GROUPS

- The «Exam Component Groups» tab displays all the groupings made at the exam component level that will follow a particular group constraint.

To add a scheduling group at the component level:

Method #1: Classic Method

(1) Right click in the «Exam component Groups» tab

(2) Select «Add New»

(3) In the Directory Tree Pane, select the «Group Constraints» heading — the «Exam component Group» edit window will appear

(4) Enter an ID and description for the scheduling group

(5) Navigate to the «Exam component» tab

(6) Select «Attach» — a list will appear displaying all exam component records found within the database

(7) Select one or more courses by using the <Shift> or <Ctrl> keys

(8) Close the list window — all the selected exam components will now be attached to the created scheduling group

(9) Click on the «Save» button in the toolbar

(10) Repeat this process for all necessary scheduling groups

Method #2: Automatic Group Creation

(1) Select the «Exam component» button from the Data Element Button List

(2) In the Directory Tree Pane, select the «Exam component» heading — all exam components will be listed in the List pane

(3) Use the <Ctrl> and <Shift> keys to select all scheduling group members

(4) On the highlighted area, right click and select «Create Group» — the «Exam component Group» edit window will appear

(5) Input the appropriate group constraint in the «Group Constraint» field

NOTE:	The lookup function can be used in the «Group Constraint» field

(6) Input a valid ID and description for the group

(7) Click on the «Save» button in the command bar

GENERAL INFORMATION

- The General Information tab will display the scheduling group associated to group constraint, the ID, description and the system-generated flag.
- For more information regarding the Exam Component Group options, please refer to the «GROUPING OPTIONS» section in this guide.

Group Constraint

- Component Group's, group constraint ID
- This is a system-populated field and cannot be modified. The group constraint ID and the exam component ID make up the unique identifier for the component group.

ID

- Exam Component Group's identification field
- This is a required field.
- Duplicate exam component groups cannot be created within the same group constraint.

Description

- Exam Component Group's description field

System Generated

- Automatically selected if the exam component group is generated by the system
- Users can also select or unselect it manually if so desired.

Exam Grid

- This field identifies the exam grid for this component group.

Marker

- The marker check box can be used as an indicator or a reminder (Ex. Component group is new, to be deleted, etc.).
- This is a user-specified field.

Disabled

- This check box can be used to disable an exam component group.
- This is a user-specified field.

EXAM COMPONENTS

- The Exam Components tab will list exam components associated to the selected exam component scheduling group.
- An exam component group can consist of several exam components.
- Exam Components within an exam component group will follow the rules defined in the group constraint.

SCHEDULING GROUPS VALIDATION

- The Scheduling Groups Validation report will display all scheduling groups within the database. Moreover, any invalid scheduling groups will be identified.
- To access the Scheduling Groups Validation either click on the « Scheduling Groups Validation» button on the toolbar.

Group list:

Top list ____

- The Group list displays all scheduling groups within the database, their assignment status and whether the scheduling groups are invalid.

Exam Component list:

Bottom list ____

- The Exam Component list displays exam components associated to selected scheduling group

The Group List

- The following fields are displayed in the Group List:
- Marker, Assignment Status, Invalid, Group Level, Group ID, Exam Grid, Required Seats, Group Constraint, Same Professors, Same Students, Same Academic Blocks, Same Rooms, Same Buildings, Same Campuses, Same Pavilions, Same Room Types, Same Zones.

Assignment Status

- The Assignment Status circle adheres to a color scheme that represents the assignment status for both room and time for an exam component. The top half of the Assignment Status circle represents the assignment status for room and the bottom half of the Assignment Status circle represents the assignment status for time. ⊖

Room Assignment Status Circle Color Scheme (Top Half)

Color	Definition
Red	Indicates that the selected exam component has been assigned to a **disabled room** or it indicates that there is **no room request**. **NOTE:** If all the following three conditions are met, the exam component does not have a room request. - No room has been specified - The prevent automated flag has been checked - The «Maximum Number of Assigned Rooms» field has been set to 0.
Green	Indicates a **complete assignment**: the exam component associated to the selected scheduling group has been assigned to an enable room.
White	Indicates that a **request has not yet been satisfied**: the exam component associated to the selected scheduling group is requesting a room that has not yet been assigned.
Yellow	Indicates a **partial assignment**. The following points denote possible reasons that could create a partial room assignment: - One or more exam components associated to the selected scheduling group are requesting a room where the sub rooms are not assigned yet. - One or more exam components associated to the selected scheduling group have not reserved enough seats within the assigned room. - One or more exam components associated to the selected scheduling group have been assigned to a disabled room.

Time Assignment Status Circle Color Scheme (Bottom Half)

Color	Definition
Red	The time assignment status will **never** be red.
Green	Indicates a **complete assignment**. In other words, the exam components associated to the selected scheduling group has been assigned to time.
White	Indicates that a **request has not yet been satisfied**. In other words, the exam components associated to the selected scheduling group are requesting times that has not yet been assigned.
Yellow	Indicates a **partial assignment** and an **invalid** scheduling group. In other words, one or more exam component(s) associated to the selected scheduling group have not indicated a specified time where as remaining member have indicated a specified time

Invalid

- Indicates the reason why the selected group is invalid.

 # Members

- Indicates the number of exam components associated to the selected scheduling group.

 # Time Sched.

- Indicates the number of exam components associated to the selected scheduling group having a specified time.

#Time Not Sched.

- Indicates the number of exam components associated to the selected scheduling group not having a specified time.

 # Room Req.

- Indicates the number of exam components associated to the selected scheduling group having a room request.

 # No Room Req.

- Indicates the number of exam components associated to the selected scheduling group not having a room request.

 # Unsched Room Req.

- Indicates the number of exam components associated to the selected scheduling group having an unscheduled room request.

 # Full Sched Room Req.

- Indicates the number of exam components associated to the selected scheduling group having a scheduled room request

 # Part Sched Room Req.

- Indicates the number of exam components associated to the selected scheduling group having a partially scheduled room request

The Exam Component List

- The Exam Component list displays exam components associated to selected scheduling group.
- The following fields represent the exam component information:
  Marker, Faculty, Department, Course, Section, Exam Component, Exam Grid, Type, Date, Start Time, Period, Duration, Rooms

Assignment Status

- The Assignment Status circle adheres to a color scheme that represents the assignment status for both room and time. The top half of the Assignment Status circle represents the assignment status for room and the bottom half of the Assignment Status circle represents the assignment status for time. ⊖

Room Assignment Status Circle Color Scheme (Top Half)

Color	Definition
Red	Indicates that the selected exam component has been assigned to a **disabled room**.
Green	Indicates a **complete assignment**: the selected exam component has been assigned to an enable room.
White	Indicates that a **request has not yet been satisfied**: the selected exam component is requesting a room, or several rooms, that are not yet assigned.
Yellow	Indicates a **partial assignment**. The following points denote possible reasons that could create a partial room assignment: • The exam component associated to the selected scheduling group is requesting a room where the sub rooms are not assigned yet. • The selected exam component has not reserved enough seats within the assigned room.

Time Assignment Status Circle Color Scheme (Bottom Half)

Color	Definition
Red	The time assignment status will **never** be red
Green	Indicates a **complete assignment**. In other words, the selected exam component's time has been assigned.
White	Indicates that a **request has not yet been satisfied**. In other words, the selected exam component is requesting a time that has not yet been assigned.
Yellow	The time will **never** be yellow for an exam component

ALTERNATE ROOM RULES

- Alternate room rules manage the alternate room types, alternate pavilions and the minimization preference of certain data elements. Alternate room rules can be associated to faculties, departments and courses.

ALTERNATE ROOM RULES SCREENS

«GENERAL INFORMATION» TAB

ID

- Alternate Room Rule's identification field.
- This field is the unique identifier for an alternate room rule. Duplicate alternate room rules cannot be created.
- This is a required field.

Description

- Alternate Room Rule's description field.

Weights

- The weight (importance) of each room criteria (Room Type, Pavilion, Characteristics and Minimization) relative to one another
- The weights are used when the system searches for a room.
- A user would assign the highest weight to the attribute the system should respect the most and he/she would assign the lowest weight to the attribute that the system should respect the least.

Example:	*«Room Type» contains the highest weight.* *«Pavilion» contains the next highest weight.* *«Zone» contains the next highest weight.* *«Characteristics» contains the lowest weight.* *«Minimization» contains the next highest weight.*

- If an exact match for the requested room of an exam component is not found, the system will ***first*** try to find a room without the requested characteristic(s). The room should have the *same room type*, within the *same pavilion* and will *minimize the number of assigned rooms or wasted seats* (depending on what was specified).

Minimization Preference

- This setting is used to define the minimization trend that the system should follow when assigning rooms. Selecting «minimize number of assigned rooms» will ensure the application uses as few rooms as possible to fully assign an exam component. Selecting «minimize wasted seats» will ensure the application wastes as few seats as possible when assigning exam component to one or more rooms.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Alternate room rule is new, to be deleted, etc.)
- This is a user-specified field.

«ALTERNATE PAVILIONS» TAB

- Alternative Pavilions are used to determine the acceptable pavilions that the system can select to assign an exam component to if the one requested is unavailable. The priority given to an alternative path determines the quality of assigning a delivery to that pavilion.
- The «Requested» column is the starting point. If the system cannot find a room for an exam component requesting a certain pavilion (Requested), it will search for a room in an alternate pavilion (Alternate) based on the specified rank column.

Example:

REQUESTED	ALTERNATE	RANK
PAV1	PAV2	1
PAV1	PAV3	1
PAV1	PAV4	2
PAV3	PAV1	1

Analysis of the Example: If an exam component is requesting a room in «PAV1» and there are no rooms available, the system will try to find a room in «PAV2» or «PAV3». «PAV2» and «PAV3» are equally acceptable and therefore have the same rank. If there are no rooms available in either of these pavilions, the system will look to «PAV4» for a room. «PAV4» is a less favourable alternate and therefore has a rank of 2. «PAV1» is also the only alternate for «PAV3».

NOTE: A user can define an unlimited number of Alternative Pavilion paths

«ALTERNATE ROOM TYPES» TAB

- Alternative Room Types are used to determine the acceptable room types that the system can select to assign an exam component to if the one requested is unavailable. The priority given to an alternative path determines the quality of assigning a delivery to the alternate room type
- The «Requested» column is the starting point. If the system cannot find a room for an exam component requesting a certain room type (Requested) it will search for an alternate room type (Alternate) based on the specified rank.

Example:

REQUESTED	ALTERNATE	RANK
ROOMT1	ROOMT2	1
ROOMT1	ROOMT3	1
ROOMT1	ROOMT4	2
ROOMT3	ROOMT1	1

Analysis of the Example: If an exam component is requesting a room of type «RoomT1» and there are no rooms available, the system will try to find a room of type «RoomT2» or «RoomT3». «RoomT2» and «RoomT3» are equally acceptable and therefore have the same rank. If there are no rooms of either type available, the system will look for rooms of type «RoomT4». «RoomT4» is a less favourable alternate and therefore has a rank of 2. «RoomT1» is also an alternate room type for «RoomT3».

NOTE: A user can define an unlimited number of Alternative Room Type paths

«ZONES» TAB

- From the «Zones» tab you attach zones that will be associated to that alternate room rule. To add one or several zones, you can use the lookup functionality. The «Rank» column serves to identify the rank of each zone and determines the order (the preference) in which the alternate room rule selects the zone.

BLOCKOFF TYPES

- Blockoff types are categories that distinguish or group certain blockoffs together. Blockoff types can apply to Exam components, Professors, Rooms and Academic Blocks.
- The application will automatically create a blockoff type «Exam Period» that cannot be modified by users. The «Exam Period» blockoff type contains a blockoff associated to each examination period. The blockoffs can then be attached to any of the data elements.

BLOCKOFF TYPE SCREENS

«GENERAL INFORMATION» TAB

ID

- Blockoff Type's identification field.
- This field is the unique identifier for a blockoff type.
- This is a required field.
- Duplicated blockoff types cannot be created.

Description

- Blockoff Type's description field

Apply To

- Use the drop-down menu to select the category to which the blockoffs will apply.
- Possible category choices:
  - All
  - Exam components
  - Professors
  - Rooms
  - Students
  - Academic Blocks

Marker

- The marker check box can be used as an indicator or reminder (Ex. Blockoff type is new, to be deleted, etc.)
- This is a user-specified field.

Disabled

- This check box can be used to disable the blockoff type and its child elements (blockoffs).
- This is a user-specified field.

«BLOCKOFFS» TAB

- The «Blockoffs» tab displays the list of blockoffs (unavailabilities) associated to a blockoff type. Please refer to «How to Add an Item» section to add a blockoff.
- Blockoffs can only be added by associating them to a blockoff type.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

BLOCKOFFS

- A blockoff is used to prevent certain data elements from being scheduled at specific times. Blockoffs are defined in the secondary files and can be attached to professors, students, academic blocks, rooms and exam components.

BLOCKOFF SCREENS

«GENERAL INFORMATION» TAB

Blockoff type

- Associate blockoff type
- This is a system-populated field.
- The user cannot change the blockoff type that a blockoff belongs to via the blockoff screen.

ID

- Blockoff's identification field.
- This is a required field.

Description

- Blockoff's description field.
- System-generated blockoffs will include the date in the description field.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Blockoff is new, to be deleted, etc.).
- This is a user-specified field.

Disabled

- This check box can be used to disable a blockoff.
- This is a user-specified field.

«TIME» TAB

«FREQUENCIES» TABS

- Frequencies define specific data ranges for an unavailability. A blockoff can have unlimited frequencies.
- To add frequency, right click on the «Frequency» tab header and select add.
- To delete a frequency, right click on the «Frequency» tab header and select delete.

Start Date and End Date

- Define the date range for the selected frequency

Every X Weeks

- Define how often the unavailability will occur (based on weekly interval). For example, every «1» week indicates that the blockoff occurs every week. Every «2» weeks indicates that the blockoff occurs every second week.

Forced Times

- Input the specific:

(1) Duration

- Length of the time needed for selected blockoff (HH:MM)

(2) Day

- Day of the week for the selected blockoff

(3) Start time

- Start time of the blockoff.

NOTE: Time is based on the 24-hour system.
End time is automatically populated after inputting the «Duration» and «Start Time».

«BLOCKOFF LOCATION» TAB

- If necessary, a location can be reserved for the selected blockoff. This location will be unavailable for scheduling during the selected blockoff time.

Pavilion

- The pavilion where the room is located
- The lookup function can be used in this field.

Campus

- The campus where the room is located
- The lookup function can be used in this field.

Building

- The building where the required room is located
- The lookup function can be used in this field.

Room #

- The room that is to be reserved during the blockoff
- The lookup function can be used in this field.

THE «ATTACHED TO…» TAB:

NOTE: The title of the 4th tab in the «Blockoff» window corresponds to the associated blockoff type

- This tab list the data elements associated to the selected blockoff. All records appearing in this list will schedule while respecting the specified blockoff. Please refer to «How to Add an Item» section to attach a data element.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

CONSTRAINT TYPES

- A constraint type defines general scheduling rules that can be attached to professors, students and/or academic blocks.

CONSTRAINT TYPE SCREENS

«GENERAL INFORMATION» TAB

Top section: ____

ID

- Constraint type’s identification field.
- This is the unique identifier for the constraint type. Duplicate constraint types cannot be created.
- This is a required field.

Description

- Constraint type’s description field.

Must Respect Transfer Times

- Select the «Must Respect Transfer Times» checkbox to ensure that transfer times will be respected when scheduling resources associated to this constraint type.

Maximum Resource Breaking Constraints

- The Maximum number of resources (e.g.: students) allowed to break the constraints associated to the constraint type while scheduling.

Middle section (List Frame) and Constraint Setting Window: _____________________________

- The List frame, found in the middle section of the «General Information» tab, displays all the constraint definitions that were specified in the «Scheduling Rules» (found under the Settings menu item).
- The Constraint definitions are disabled by default. Enable the constraint definitions that you wish to apply to the selected constraint type.

Where do I set the constraint definitions?

- In the «Scheduling Rules» found under «Settings» in the main menu

Where do I set values for the constraint definitions?

- In the «Constraint Settings» window

How do I access the «Constraint Setting» window?

- Double click on the desired constraint definition — the Constraint Settings window will appear

How do I set values for the constraint definitions?

- Through the «Constraint Settings» window

CONSTRAINT SETTING WINDOW

Weight

- The weight (importance) of the selected constraint relative to the other constraints
- The constraint with the lowest weight will have the greatest chance of having its preference overlooked.

Preference

- The preferred valued for the constraint.
- The preferred value satisfies the selected constraint with a 100% quality rating. This is the ideal number of occurrence for the constraint.

Limit

- The minimum constraint value the system must respect to schedule.
- The limit value satisfied the selected constraint with a 0% quality rating. This is the «worst case scenario» value for the constraint.

Value/ Weight Grid

- Values other than the Preference and Limit can also be specified.
- If the inputted values fall between the Preference and Limit, specify a weight between 1%- 99%.
- If the inputted values exceed the limit value, specify a weight of less than 0% (-1% - -100%)
- The weight indicates the level of satisfaction or quality rating of a period when the system reaches a particular value for a constraint.
- Any values specified with a weight of below 0% will not be scheduled by the system. These values will, however appear on the exam component's move screen allowing the user to select these values.

Disabled

- This check box can be used to disable a constraint.
- By default, the «Disabled» checkbox is selected for all constraint definitions. They must be enabled for them to take effect. This is a user-specified field.

Bottom section: ____

- The bottom section of the «General Information» tab graphically displays the selected constraint. All values (preference, limit and other values) defined within the constraint are displayed along the horizontal axis. The weights given to these values are displayed along the vertical axis.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Constraint type is new, to be deleted, etc.)
- This is a user-specified field.

«PROFESSOR» TAB

- The «Professor» tab displays the list of professors associated to selected constraint type.

«STUDENT» TAB

- The «Student» tab displays the list of students associated to selected constraint type.

«ACADEMIC BLOCK» TAB

- The «Academic Blocks» tab displays the list of academic blocks associated to selected constraint type.

EXAM COMPONENT TYPES

- Component types are categories that characterize the nature of an examination (i.e. lab exam, take home exam, etc.)

EXAM COMPONENT TYPE SCREENS

«GENERAL INFORMATION» TAB

ID

- Component type's identification field.
- This is the unique identifier for a component type. Duplicate component types cannot be created.
- This is a required field.

Description

- Component type's description field.

Color

- Select the color to allocate to the current Exam Component Type in the Consolidated Exam Timetable Report.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Component type's is new, to be deleted, etc.)
- This is a user-specified field.

«EXAM COMPONENT(S)» TAB

- The «Exam Components» Tab displays the exam components associated to the selected type.
- Users can see, by icons, the status of the exam component at a glance.
- Please refer to the Status Circle Color Scheme section in this guide for more details.

EXAM TERMS

- The Exam Term is used to define the start date and end date of your examination period. Multiple exam grids can be associated to a single exam term.

EXAM TERM SCREENS

«GENERAL INFORMATION» TAB

ID

- Exam term's identification field
- This is the unique identifier for an exam term.
- Duplicate exam terms cannot be created. This is a required field.

Description

- Exam term's description field.

Start Date

- This field is used to indicate the start date of the exam term.

End Date

- This field is used to indicate the end date of the exam term.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Exam term is new, to be deleted, etc.)
- This is a user-specified field.

«EXAM GRIDS» TAB

- The «Exam Grids» tab displays the list of exam grids associated to the exam term. Please refer to «How to Add an Item» section to add an exam grid.

EXAM GRIDS

- A database must include at least one exam grid. An Exam Grid defines the start time, duration and the time characteristics for each examination period.
- An exam grid contains all the time elements associated to exams.

EXAM GRID SCREENS

«GENERAL INFORMATION» TAB

Exam Term

- Associate Exam Term.

ID

- Exam Grid's identification field.
- This is the unique identifier for the exam grid. Duplicate exam grids cannot be created.
- This is a required field.

Description

- Exam Grid's description field.

Start Date and End Date

- Defaults to defined Start Date and End Date of associated Exam Term.

Late Start

- Defines the late start date for an exam period (i.e. Comprehensive exams)

Early Finish

- Defines the early finish date for an exam period (i.e. Graduating students)

Grid Generator Button

- The grid generator allows a user to generate all periods for the entire examination session. Enter the exam period information for a typical examination day and the grid generator will apply the inputted information for all examination days within the defined «Start Date» and «End Date».

Grid Times:____

Disabled

- This check box is used to disable a period.

Date

- Date of an exam period. By double-clicking inside this grid, a calendar opens. Select the date from the calendar and click on OK.

Period #

- A unique identifier given to an exam period within a day.
- Duplicate period number can exist, however not within the same day.

Start Time

- Start time of an exam period. Please note that the Start Time needs to be greater than 0:00.

Duration

- Maximum duration for an exam component during the period. Please note that the Duration needs to be greater than 0:00.

Order

- Can be used to indicate a strong preference for certain periods; for example, a user would like to schedule exams in week 1 before scheduling in week 2. Periods in week 1 should have an order of '1' and periods in week 2 should have an order of '2'. Please note that this setting has a significant impact on the overall schedule and should be used wisely. Comparable to the date sequence in TPH exam (DOS)

Weight

- For periods with the same order and overall quality, the weight identifies preferred time slots.

Time Characteristics

- Will display each exam time for the periods created, manually or through the Exam Grid Generator, in their respective columns for the current exam grid.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Exam grid is new, to be deleted, etc.)
- This is a user-specified field.

THE GRID GENERATOR

- The grid generator allows a user to generate all periods for the entire examination session. Enter the exam period information for a typical examination day and the grid generator will apply the inputted information for all examination days within the defined «Start Date» and «End Date»

Generate Saturdays and Sundays

- These check boxes indicate whether exam periods are to be generated on the Saturdays and Sundays within the defined date range in the exam grid.

Enable Saturdays and Sundays

- These check boxes indicate whether exam periods are to be enabled (suitable for scheduling) on the Saturdays and Sundays within the defined date range in the exam grid.
- Once all appropriate values have been inputted, click on the «Apply» button to automatically populate the exam grid.

EXAM TIME SCREEN

«General information» Tab

Exam Term
The exam term to which this Exam Time is associated

Exam Grid
The Exam Grid to which this Exam Time is associated.

Period #
Enter a period number for the current Exam Time.

Date
Enter the date on which this Exam Time takes effect (must be within the Exam Grid's date established date range).

Start Time
Enter the start time for the current Exam Time

Duration
Enter the duration for the current Exam Time

Order
Enter the order for the current Exam Time

Weight
Enter the weight to give to the current Exam Time

Time Characteristics
Users can attach time characteristics to the current Exam Time.

«Exam Components» Tab
Under this tab, all exam components that are associated with the current Exam Time are displayed.

ROOM CHARACTERISTICS

- Room characteristics are defined as attributes that a room can possess which may impact the room assignment of exam components. For example, a room characteristic can be a blackboard, an Internet connection, a projector, etc.

ROOM CHARACTERISTIC SCREENS

«GENERAL INFORMATION» TAB

ID

- Room Characteristic's identification field.
- This field is the unique identifier for a room characteristic. Duplicate characteristics cannot be created.
- This is a required field.

Description

- Room Characteristic's description field.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Room characteristic is new, to be deleted, etc.).
- This is a user-specified field.

«ROOMS» TAB

- The «Room» tab displays the list of rooms that have the selected room characteristic.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

ROOM TYPES

- Room types are generally defined as the most obvious traits or characteristics that a group of rooms may share. For example: classroom, auditorium, computer lab, etc.

ROOM TYPE SCREENS

«GENERAL INFORMATION» TAB

ID

- Room Type's identification field.
- This is a required field and is the unique identifier for a room type. Duplicate room types cannot be created.

Description

- Room Type's description field

User Controlled

- Ensures that rooms associated to this room type are specified by the user at the exam component level. This is comparable to «L» type rooms in TPH Exam (DOS)

Marker

- The marker check box can be used as an indicator or reminder (Ex. Room Type is new, to be deleted, etc.)
- This is a user-specified field.

«ROOMS» TAB

- The «Rooms» tab displays the list of rooms that are associated to selected room type.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

STRIPES

- Stripes are used to define how exam components will be assigned in sub-rooms. Stripes ensure that exam component can only be assigned to multiple sub-rooms in the same room with the same stripe definition. I.E. the application will never assign an exam component to sub-rooms of different stripe definitions within the same room.

STRIPE SCREENS

«GENERAL INFORMATION» TAB

ID

- Stripe's identification field.
- This is a required field and is the unique identifier for a stripe. Duplicate stripes cannot be created.

Description

- Stripe's description field

Marker

- The marker check box can be used as an indicator or reminder (Ex. stripe is new, to be deleted, etc.)
- This is a user-specified field.

«SUB-ROOMS» TAB

- The «Sub-rooms» tab displays the list of sub-rooms that are associated to selected stripe.

STUDENT SEATING RULES

- Student Seating Rules dictate how students will be seated in rooms assigned to their associated exam components. Student Seating Rules can be associated to the institution, faculties, departments, courses or exam components.

STUDENT SEATING RULE SCREENS

«GENERAL INFORMATION» TAB

ID

- Student seating rule's identification field.
- This is a required field and is the unique identifier for a student seating rule. Duplicate Student seating rules cannot be created.

Description

- Student seating rule's description field

Marker

- The marker check box can be used as an indicator or reminder (Ex. Student seating rule is new, to be deleted, etc.) This is a user-specified field.

«MULTI-ROOM ORDERING» TAB

- Multi-Room ordering is only applicable if more than one room has been assigned to an exam component.
- Multi-Room ordering allows a user to define the criteria that will determine the order in which assigned exam component sub-rooms and/or rooms are to be filled.
- For an item to be used in the ordering process, right click on that item and select 'Use in Sort'. Use the arrows to sort the items in ascending or descending order. The sorting process will order according to the first item of the list to the last item of the list.

«STUDENT ORDERING» TAB

- Allows the user to define the criteria that will determine the order in which students will be assigned to their associated exam component sub-rooms and/or rooms.
- For an item to be used in the ordering process, right click on that item and select 'Use in Sort'. Use the arrows to sort the items in ascending or descending order. The sorting process will order according to the first item of the list to the last item of the list.

SUBJECTS

«GENERAL INFORMATION» TAB

- Within the secondary files, users can define subjects. Defined subjects are associated to courses.

ID

- This is the ID of the **subject**.

Description

- Enter a description for the subject.

«COURSES» TAB

- The Courses tab will display all courses associated with this subject.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

TIME CHARACTERISTICS

- A time characteristic is used to further define an examination period. Exam components can then request these time characteristics and schedule accordingly.

Example:	*An exam period that begins at 09:00 AM can be further identified as having characteristics:* *Morning* *Early*

TIME CHARACTERISTIC SCREENS

«GENERAL INFORMATION» TAB

ID

- Time characteristic's identification field.
- This is the unique identifier for a time characteristic. Duplicate time characteristics cannot be created.
- This is a required field.

Description

- Time characteristic's description field.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Time characteristic is new, to be deleted, etc.)
- This is a user-specified field.

«PERIODS» TAB

- The «Periods» tab displays the list of periods that are associated to selected time characteristic.

ZONES

- A zone is a collection of rooms that is usually based on their proximity. Zones are primarily used when the system must assign multiple rooms to an exam component. Zones are comparable to «Sets» in TPH Exam (DOS).

ZONE SCREENS

«GENERAL INFORMATION» TAB

ID

- Zone's identification field.
- This is the unique identifier for a zone. Duplicate zones cannot be created.
- This is a required field.

Description

- Zone's description field.

Marker

- The marker check box can be used as an indicator or reminder (Ex. Zone is new, to be deleted, etc.)
- This is a user-specified field.

«ROOM» TAB

- The «Rooms» tab displays the list of rooms that are associated to the selected zone. Rooms can belong to several zones. You can add rooms to a zone by using the lookup function. Please refer to «How to Add an Item» section to add rooms to a zone.
- If you need to add that same room in second zone, simply open that second zone's window and attach the room inside it.

CHAPTER 8 – REPORTS

LIST REPORTS

- A report can be generated for all elements that appear in a list pane. A list report can include all records appearing within a list or include only specific listed records. Ensure to highlight the records that you wish to include in the report.
- List reports can also be generated for tabs that display attached items.
- In this case, the list represents the students that are attached to a selected exam component.
- All columns appearing in the list can be resized. Please refer to the «Using the Navigator« section to resize a column.

NOTE: By resizing a column in the list you are also resizing the column in the report.

- A printed report list will appear as it is displayed on the screen.
- To generate the report, select the records to be included in the report and click on the «Report» button in the toolbar. Your Internet browser will open, and the list report will appear in XML format.
- List reports are also available in lists that display results. In other words, a list report can be created using the Timetabler screens, the Room Search screens and the Verify Academic Resource screens.

VALIDATIONS

VERIFY ACADEMIC RESOURCE REPORT

- The «Verify Academic Resource» report allows you to identify resources not respecting scheduling constraints
- Defined constraints and custom constraints can be selected. Defined constraints are constraints that were previously defined within the database under constraint types. Custom constraints allow a user to define constraints they wish to verify that have not be defined within the constraint types.
- The Verify Academic Resource» report can be accessed via the main menu by clicking on «Report» and then «Verify Academic Resource».

> **NOTE:** All selected constraints and options will be remembered after closing and re-opening the report

«SETTINGS» BUTTON

Selection Screen:

- The selected screen allows users to select the constraints they wish to verify.
- The «Scheduling Constraints» pane lists constraints that were previously defined in the system.
- The «Selected Constraints» pane lists constraints to be verified within the generated report.
- Custom constraints can be defined within the «Reporting Constraints» pane.
- Select the appropriate exam term using the «Selected Exam term» pane.
- Use the directional arrow buttons to add or remove a constraint from one pane to the other.
- Once the constraints to be verified have been selected, generate the report by clicking on the «Results» button or on the «Report» button in the toolbar. This will open the «Academic Resource Constraints Validations» screen.

«RESULTS» BUTTON

Select this button to view the results based on the selected constraints. The results screen will display the selected constraints in the summary pane even if there are no conflicts associated to them.

Academic Resource Constraints Validations screen:

Summary pane:

- Displays the constraints that have not been respected and the number of resources affected.

Resource Details pane:

- Displays the resources that are affected by the selected broken constraints.

Normal View:

- Displays affected resources in a linear format

Report View:

- Displays the broken constraint, the affected resource and all exam components associated to the affected resource in a linear format. An XML report can be generated based on the information displayed in the «Report View» or the information can be exported into any text editor software. Please refer to the "List Reports" section for an in-depth explanation of how to generate reports from a list.

Exam Components pane:

- Displays the exam components associated to the selected resource in the normal view of the «Resource Detail» pane.
- A list report can be generated for each of these screens.

«REFRESH» BUTTON

Selecting this button will refresh the view for the current screen.

VERIFY BLOCKOFFS REPORT

«BLOCKOFFS FILTER» BUTTON

- From this screen, users can select the blockoff type on which to filter. When selecting a blockoff type or several blockoff types in the «Blockoff Types» section of the screen, the list of associated blockoffs will be displayed in the «Blockoff» section of the screen.

«ALL CONFLICTS» BUTTON

- The conflict screen will display blockoffs of the selected blockoff type that have conflicts.
- From the list of conflicts, users can double-click a selected record (or several records) to open the corresponding exam component screen. Furthermore, users can right-click the selected record(s) and can

«Edit Exam Components»

- Select this option to open the exam component screen that is in conflict.

«Edit Blockoffs»

- Select this option to open the blockoff that is in conflict.

«Edit Resources»

- Select this option to open the resource that is in conflict.

The columns

Resource Identification

- This column displays the Resource's identification of the conflicting blockoff. The identification is created by concatenating several elements.
- If the conflicting blockoff is:
  - ***Room:*** The Resource Identifier is created by concatenating
    Campus + Building + Room Number
  - ***Professor:*** The Resource Identifier is created by concatenating
    Identification + Name + Surname
  - Academic Block:
    Academic Block Identification
  - ***Student:*** The Resource Identifier is created by concatenating
    Identification + Name + Surname
  - ***Exam Component:*** The Resource Identifier is created by concatenating
    Faculty + Department + Course + Section + Exam Component

Resource Type

- This column displays the Resource Type:
- Room / Professor / Academic Block / Student / Exam Component

Private

- This column indicates if the blockoff is a private blockoff (if the checkbox contains a check mark) or public blockoff (if the checkbox does not contain a check mark.)

Blockoff Type Name

- This column displays the name of the blockoff type.

Blockoff Name

- This column displays the name of the blockoff

Conflict Date

- This column displays the date on which the conflict is taking place

Conflict Start Time

- This column displays the starting time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Conflict End Time

- This column displays the end time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Faculty

- This column displays the name of the Exam Component's Faculty

Department

- This column displays the name of the Exam Component's Department

Course

- This column displays the name of the Exam Component's Course

Section

- This column displays the name of the Exam Component's Section

Exam Component

- This column displays the name of the Exam Component

Exam Component Type

- This column displays the name of the Exam Component Type

Exam Component Date

- This column displays the date of the Exam Component

Exam Component Period Name

- This column displays the name of the Exam Component's scheduled period

Exam Component Start Time

- This column displays the start time of the Exam Component

Exam Component End Time

- This column displays the end time of the Exam Component

«ROOMS »BUTTON

Campus

- This column displays the name of the Campus

Building

- This column displays the name of the Building

Room

- This column displays the name of the Room

Private

- This column indicates if the blockoff is a private blockoff (if the checkbox contains a check mark) or public blockoff (if the checkbox does not contain a check mark.)

Blockoff Type Name

- This column displays the name of the blockoff type.

Blockoff Name

- This column displays the name of the blockoff

Conflict Date

- This column displays the date on which the conflict is taking place

Conflict Start Time

- This column displays the starting time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Conflict End Time

- This column displays the end time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Faculty

- This column displays the name of the Exam Component's Faculty

Department

- This column displays the name of the Exam Component's Department

Course

- This column displays the name of the Exam Component's Course

Section

- This column displays the name of the Exam Component's Section

Exam Component

- This column displays the name of the Exam Component

Exam Component Type

- This column displays the name of the Exam Component Type

Exam Component Date

- This column displays the date of the Exam Component

Exam Component Period Name

- This column displays the name of the Exam Component's scheduled period

Exam Component Start Time

- This column displays the start time of the Exam Component

Exam Component End Time

- This column displays the end time of the Exam Component

«PROFESSORS» BUTTON

Professor Identification

- This column displays the identification of the professor

Professor Name

- This column displays the name of the professor

Professor Surname

- This column displays the surname of the professor

Private

- This column indicates if the blockoff is a private blockoff (if the checkbox contains a check mark) or public blockoff (if the checkbox does not contain a check mark.)

Blockoff Type Name

- This column displays the name of the blockoff type.

Blockoff Name

- This column displays the name of the blockoff

Conflict Date

- This column displays the date on which the conflict is taking place

Conflict Start Time

- This column displays the starting time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Conflict End Time

- This column displays the end time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Faculty

- This column displays the name of the Exam Component's Faculty

Department

- This column displays the name of the Exam Component's Department

Course

- This column displays the name of the Exam Component's Course

Section

- This column displays the name of the Exam Component's Section

Exam Component

- This column displays the name of the Exam Component

Exam Component Type

- This column displays the name of the Exam Component Type

Exam Component Date

- This column displays the date of the Exam Component

Exam Component Period Name

- This column displays the name of the Exam Component's scheduled period

Exam Component Start Time

- This column displays the start time of the Exam Component

Exam Component End Time

- This column displays the end time of the Exam Component

«ACADEMIC BLOCK» BUTTON

Academic Block Identification

- This column displays the identification of the Academic Block.

Private

- This column indicates if the blockoff is a private blockoff (if the checkbox contains a check mark) or public blockoff (if the checkbox does not contain a check mark.)

Blockoff Type Name

- This column displays the name of the blockoff type.

Blockoff Name

- This column displays the name of the blockoff

Conflict Date

- This column displays the date on which the conflict is taking place

Conflict Start Time

- This column displays the starting time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Conflict End Time

- This column displays the end time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Faculty

- This column displays the name of the Exam Component's Faculty

Department

- This column displays the name of the Exam Component's Department

Course

- This column displays the name of the Exam Component's Course

Section

- This column displays the name of the Exam Component's Section

Exam Component

- This column displays the name of the Exam Component

Exam Component Type

- This column displays the name of the Exam Component Type

Exam Component Date

- This column displays the date of the Exam Component

Exam Component Period Name

- This column displays the name of the Exam Component's scheduled period

Exam Component Start Time

- This column displays the start time of the Exam Component

Exam Component End Time

- This column displays the end time of the Exam Component

«STUDENTS» BUTTON

Student Identification

- This column displays the identification of the student

Student Name

- This column displays the name of the student

Student Surname

- This column displays the surname of the student

Private

- This column indicates if the blockoff is a private blockoff (if the checkbox contains a check mark) or public blockoff (if the checkbox does not contain a check mark.)

Blockoff Type Name

- This column displays the name of the blockoff type.

Blockoff Name

- This column displays the name of the blockoff

Conflict Date

- This column displays the date on which the conflict is taking place

Conflict Start Time

- This column displays the starting time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Conflict End Time

- This column displays the end time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Faculty

- This column displays the name of the Exam Component's Faculty

Department

- This column displays the name of the Exam Component's Department

Course

- This column displays the name of the Exam Component's Course

Section

- This column displays the name of the Exam Component's Section

Exam Component

- This column displays the name of the Exam Component

Exam Component Type

- This column displays the name of the Exam Component Type

Exam Component Date

- This column displays the date of the Exam Component

Exam Component Period Name

- This column displays the name of the Exam Component's scheduled period

Exam Component Start Time

- This column displays the start time of the Exam Component

Exam Component End Time

- This column displays the end time of the Exam Component

«EXAM COMPONENTS» BUTTON

Faculty

- This column displays the name of the Exam Component's Faculty

Department

- This column displays the name of the Exam Component's Department

Course

- This column displays the name of the Exam Component's Course

Section

- This column displays the name of the Exam Component's Section

Exam Component

- This column displays the name of the Exam Component

Exam Component Type

- This column displays the name of the Exam Component Type

Exam Component Date

- This column displays the date of the Exam Component

Exam Component Period Name

- This column displays the name of the Exam Component's scheduled period

Exam Component Start Time

- This column displays the start time of the Exam Component

Exam Component End Time

- This column displays the end time of the Exam Component

Private

- This column indicates if the blockoff is a private blockoff (if the checkbox contains a check mark) or public blockoff (if the checkbox does not contain a check mark.)

Blockoff Type Name

- This column displays the name of the Blockoff type.

Blockoff Name

- This column displays the name of the blockoff

Conflict Date

- This column displays the date on which the conflict is taking place

Conflict Start Time

- This column displays the starting time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

Conflict End Time

- This column displays the end time of the blockoff as it was entered in the blockoff screen when the blockoff was created.

«REFRESH» BUTTON

- Select the «Refresh» button to refresh the current list.

VERIFY ROOMS REPORT

- The «Verify Rooms» report will identify problematic exam rooms and exam components that are causing the selected room problem
- The «Verify Rooms» report can be accessed via the main menu by clicking on «Report», «Space» and then «Verify Rooms».

Exam Term

- This field is used to indicate the exam term that will be used to verify the rooms.

Options

- Displays all possible room issues that can be verified.
- Select the desired options then click on the «Refresh» button to update the lists.

Room Frame

- List rooms corresponding to selected options

Exam Components Frame

- List exam components assigned to rooms selected in the «Room Frame»

SCHEDULING GROUPS VALIDATION REPORT

- Please refer to the Scheduling Groups Validation section in this guide.

EXAM SEQUENCING VALIDATION REPORT

- This report will display all sequenced exam components and users can use the filter to display invalid sequenced exam components. For example, if an exam component was defined as needing to be scheduled both before and after another exam component.
- To produce the report, select the exam term for which you want to display all the invalid sequenced exam components.
- Double-clicking on an exam component within the report will open the edit screen of that exam component.

SEATING

LIST OF ASSIGNED SUB-ROOMS

- The «List of Assigned Sub-rooms» report will take into account the student seat assignment. In other words, when the student seat assignment for a given exam component is established, the report will display all sub-rooms used by the student seat assignment, however, if the student seat assignment is not established, the report will display all the assigned sub-rooms (even if they are grouped).

Exam Term

- This field is used to indicate the exam term that will be used to verify the rooms.

STUDENT SEAT ASSIGNMENT

- The «Student Seat Assignment» report allows you to view the results of the student seat assignment.
- The «Student Seat Assignment» report will list the room, sub-rooms and seats assigned to each student for each examination period.
- The «Student Seat Assignment» report can be accessed via the main menu by clicking on «Report», and then «List of Assigned Sub-Room».

ROOM TIMETABLES

- From the rooms list, right click on the room(s) for which to view the timetable and select «Open Timetable» or;
- Click on the «Open Timetable» icon located in the toolbar to open the room timetable.
- Depending on the «Type of blocks to show» (Exam components and/or blockoffs), the results may appear in four different colors.

Grey:

- Represents one or more exams

Gold:

- Represents one or more exam component and blockoffs

Red:

- Represents simultaneous blockoffs and exam components

Purple:

- Represents grouped exam components – conflict free.

«TIMETABLE» TAB

Exam Term

- Select the term for which the room timetable is to be produced. The lookup functionality is available for this field.

Start Date

- Enter the start date for which the room timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

End Date

- Enter the end date for which the room timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

Automatically Resize

- Select this option to resize the timetable screen automatically. When this option is selected, the data displayed within the screen will be resized dynamically as the screen is resized.

Start Time

- Enter the start time for which you want the report to start.

End Time

- Enter the end time for which you want the report to end.

Time Unit

Enter the desired time unit to be displayed. The default value is 15 minutes.

Types of blocks to show

- The «Timetable» tab lets users decide the types of blocks to be shown within the report being produced. Users can select to produce:
    - Exam Components
    - Blockoffs

Report button

- Clicking the Report button will produce a report using the values currently displayed in the current timetable.

Refresh button

- The Refresh button will blink if a value in one of the parameters has been modified. Clicking the Refresh button at that moment, will refresh the current view of the current timetable using the new modified parameters.

«PRINT OPTIONS» TAB

Days to include

- Select the days that are to be included in the report

Number of pages

- Enter the number of pages desired per report. The default value is 1.

PROFESSOR TIMETABLES

- From the professors list, right click on the professor(s) for which to view the timetable and select «Open Timetable» or;
- Click on the «Open Timetable» icon located in the toolbar to open the professor timetable.
- Depending on the «Type of blocks to show» (Exam components and/or blockoffs), the results may appear in three different colors.

Grey:

- Represents one or more exams

Gold:

- Represents one or more exam component and blockoffs

Red:

- Represents simultaneous blockoffs and exam components

Purple:

- Represents grouped exam components – conflict free.

«TIMETABLE» TAB

Exam Term

- Select the term for which the professor timetable is to be produced. The lookup functionality is available for this field.

Start Date

- Enter the start date for which the professor timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

End Date

- Enter the end date for which the professor timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

Automatically Resize

- Select this option to resize the timetable screen automatically. When this option is selected, the data displayed within the screen will be resized dynamically as the screen is resized.

Start Time

- Enter the start time for which you want the report to start.

End Time

- Enter the end time for which you want the report to end.

Time Unit

- Enter the desired time unit to be displayed. The default value is 15 minutes.

Types of blocks to show

- The «Timetable» tab lets users decide the types of blocks to be shown within the report being produced. Users can select to produce:
  - Exam Components
  - blockoffs

Report button

- Clicking the Report button will produce a report using the values currently displayed in the current timetable.

Refresh button

- The Refresh button will blink if a value in one of the parameters has been modified. Clicking the Refresh button at that moment, will refresh the current view of the current timetable using the new modified parameters.

«PRINT OPTIONS» TAB

Days to include

- Select the days that are to be included in the report

Number of pages

- Enter the number of pages desired per report. The default value is 1.

STUDENT TIMETABLES

- From the student list, right click on the student(s) for which to view the timetable and select «Open Timetable» or;
- Click on the «Open Timetable» icon located in the toolbar to open the student timetable.
- Depending on the «Type of blocks to show» (Exam components and/or blockoffs), the results may appear in three different colors.

Grey:

- Represents one or more exams

Gold:

- Represents one or more exam component and blockoffs

Red:

- Represents simultaneous blockoffs and exam components

Purple:

- Represents grouped exam components – conflict free.

«TIMETABLE» TAB

Exam Term

- Select the term for which the student timetable is to be produced. The lookup functionality is available for this field.

Start Date

- Enter the start date for which the student timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

End Date

- Enter the end date for which the student timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

Automatically Resize

- Select this option to resize the timetable screen automatically. When this option is selected, the data displayed within the screen will be resized dynamically as the screen is resized.

Start Time

- Enter the start time for which you want the report to start.

End Time

- Enter the end time for which you want the report to end.

Time Unit

- Enter the desired time unit to be displayed. The default value is 15 minutes.

Types of blocks to show

- The «Timetable» tab lets users decide the types of blocks to be shown within the report being produced. Users can select to produce:
  - Exam Components
  - blockoffs

Report button

- Clicking the Report button will produce a report using the values currently displayed in the current timetable.

Refresh button

- The Refresh button will blink if a value in one of the parameters has been modified. Clicking the Refresh button at that moment, will refresh the current view of the current timetable using the new modified parameters.

«PRINT OPTIONS» TAB

Days to include

- Select the days that are to be included in the report

Number of pages

- Enter the number of pages desired per report. The default value is 1.

ACADEMIC BLOCK TIMETABLES

- From the academic block list, right click on the academic block(s) for which to view the timetable and select «Open Timetable» or;
- Click on the «Open Timetable» icon located in the toolbar to open the academic block timetable.
- Depending on the «Type of blocks to show» (Exam components and/or blockoffs), the results may appear in three different colors.

Grey:

- Represents one or more exams

Gold:

- Represents one or more exam component and blockoffs

Red:

- Represents simultaneous blockoffs and exam components

Purple:

- Represents grouped exam components – conflict free.

«TIMETABLE» TAB

Exam Term

- Select the term for which the academic block timetable is to be produced. The lookup functionality is available for this field.

Start Date

- Enter the start date for which the academic block timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

End Date

- Enter the end date for which the academic block timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

Automatically Resize

- Select this option to resize the timetable screen automatically. When this option is selected, the data displayed within the screen will be resized dynamically as the screen is resized.

Start Time

- Enter the start time for which you want the report to start.

End Time

- Enter the end time for which you want the report to end.

Time Unit

- Enter the desired time unit to be displayed. The default value is 15 minutes.

Types of blocks to show

- The «Timetable» tab lets users decide the types of blocks to be shown within the report being produced. Users can select to produce:
  - Exam Components
  - blockoffs

Report button

- Clicking the Report button will produce a report using the values currently displayed in the current timetable.

Refresh button

- The Refresh button will blink if a value in one of the parameters has been modified. Clicking the Refresh button at that moment, will refresh the current view of the current timetable using the new modified parameters.

«PRINT OPTIONS» TAB

Days to include

- Select the days that are to be included in the report

Number of pages

- Enter the number of pages desired per report. The default value is 1.

COURSE TIMETABLES

- From the course list, right click on the course(s) for which to view the timetable and select «Open Timetable» or;
- Click on the «Open Timetable» icon located in the toolbar to open the course timetable.
- Depending on the «Type of blocks to show» (Exam components and/or blockoffs), the results may appear in three different colors.

Grey:

- Represents one or more exams

Gold:

- Represents one or more exam component and blockoffs

Red:

- Represents simultaneous blockoffs and exam components

Purple:

- Represents grouped exam components – conflict free.

«TIMETABLE» TAB

Exam Term

- Select the term for which the course timetable is to be produced. The lookup functionality is available for this field.

Start Date

- Enter the start date for which the course timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

End Date

- Enter the end date for which the course timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

Automatically Resize

- Select this option to resize the timetable screen automatically. When this option is selected, the data displayed within the screen will be resized dynamically as the screen is resized.

Start Time

- Enter the start time for which you want the report to start.

End Time

- Enter the end time for which you want the report to end.

Time Unit

- Enter the desired time unit to be displayed. The default value is 15 minutes.

Types of blocks to show

- The «Timetable» tab lets users decide the types of blocks to be shown within the report being produced. Users can select to produce:
  - Exam Components
  - blockoffs

Report button

- Clicking the Report button will produce a report using the values currently displayed in the current timetable.

Refresh button

- The Refresh button will blink if a value in one of the parameters has been modified. Clicking the Refresh button at that moment, will refresh the current view of the current timetable using the new modified parameters.

«PRINT OPTIONS» TAB

Days to include

- Select the days that are to be included in the report

Number of pages

- Enter the number of pages desired per report. The default value is 1.

SECTION TIMETABLES

- From the section list, right click on the section(s) for which to view the timetable and select «Open Timetable» or;
- Click on the «Open Timetable» icon located in the toolbar to open the section timetable.
- Depending on the «Type of blocks to show» (Exam components and/or blockoffs), the results may appear in three different colors.

Grey:

- Represents one or more exams

Gold:

- Represents one or more exam component and blockoffs

Red:

- Represents simultaneous blockoffs and exam components

Purple:

- Represents grouped exam components – conflict free.

«TIMETABLE» TAB

Exam Term

- Select the term for which the section timetable is to be produced. The lookup functionality is available for this field.

Start Date

- Enter the start date for which the section timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

End Date

- Enter the end date for which the section timetable is to be produced. If you have already entered a term, this field will automatically be filled by the system.

Automatically Resize

- Select this option to resize the timetable screen automatically. When this option is selected, the data displayed within the screen will be resized dynamically as the screen is resized.

Start Time

- Enter the start time for which you want the report to start.

End Time

- Enter the end time for which you want the report to end.

Time Unit

- Enter the desired time unit to be displayed. The default value is 15 minutes.

Types of blocks to show

- The «Timetable» tab lets users decide the types of blocks to be shown within the report being produced. Users can select to produce:
  - Exam Components
  - blockoffs

Report button

- Clicking the Report button will produce a report using the values currently displayed in the current timetable.

Refresh button

- The Refresh button will blink if a value in one of the parameters has been modified. Clicking the Refresh button at that moment, will refresh the current view of the current timetable using the new modified parameters.

«PRINT OPTIONS» TAB

Days to include

- Select the days that are to be included in the report

Number of pages

- Enter the number of pages desired per report. The default value is 1.

ROOMS USED BY EXAMS REPORT

- The **Rooms Used by Exams Report** displays rooms that have scheduled exams for the selected date and times
- Reports → Rooms Used By Exams Report

Date Filters

Exam Term

- Enter the Exam Term for which the Rooms Used by Exam Report will be produced. Users can use the lookup feature to enter the desired term.

From Date

- Using the drop-down arrow, select the From Date (if different from the already term-defined From Date)

To Date

- Using the drop-down arrow, select the To Date (if different from the already term-defined To Date)

Exam Time to Display

All

- Select this option to include every single Start Time in the report. To include only certain Start Times, unselect this option and select the «Selected» box next to each desired Start Time.

Rooms

(1) Select the desired Room(s) for which the report will be generated.

(2) Select the «New» icon .to open the Rooms Used By Exams Report Option screen.

(3) Create the appropriate number of options that can be selected when generating the report.

(4) Save the created option.

ROOMS USED BY EXAMS REPORT OPTIONS

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Report Note (Header)

- Specify the report note to be displayed within the generated report.

Original Date Time Display Options

- Select the time and duration fields to be displayed within the generated report.

Room Display Options

- Select the room fields to be displayed within the generated report.

DETAILED EXAM REPORT

- The **Detailed Exam** report provides a consolidated list report of the exam room schedule along with the exam details.

Exam Term

- Enter the Exam Term for which the report will be produced. Users can use the lookup feature to enter the desired term

Exam Grid

- Enter the Exam Grid for which the report will be produced. Users can use the lookup feature to enter the desired grid. If no grid is selected the report will be based upon all grids associated to the selected term.
- Once the selection is done, the related data will be presented to the user in list format. The report columns include all the data related to the exam component that impacts or is a direct result of the completed schedule. Some of the included columns are Professors, Seats Reserved, and Exam Capacity. Each column can be used to filter the report data to meet the user's individual needs.
- As this report is produced in a list format, the data can also be copy/pasted into Excel for further customization.

CONSOLIDATED EXAM TIMETABLE REPORT

(Only available for Period-based exams)

The Consolidated Exam Timetable Report lets institutions view, in block form, all exam components that are scheduled within a given period. Only active exams with an assigned time are displayed in the report.

ROOM FILTERS SCREEN

- From the Room Filters screen, select the rooms on which to filter.

Include Exam Components with Unassigned Rooms

Select this option to include in the report exam components that have no room assigned.

COURSE FILTERS SCREEN

- From the Course Filters screen, select the courses to include in the report.

TIME FILTERS SCREEN

- From the Time Filters screen, select the exam times (active or inactive) for which to report.

SETTINGS

- From the Settings screen, users can select what element to use to display the room identification as well as for exam components. If no elements are selected for one type of information or another, the information will be blank.

RESULTS

- From the Results tab, users can see the results in a list format. The Timetable tab will display all the elements listed in the Results tab.

TIMETABLE

- From the Timetable tab, the information listed in the Results tab is displayed in a graphical timetable format (in cells representing periods). Each cell will display the number of active exam components, the number of active students and the number of active student conflicts. By double clicking on a cell, a list of exam components will be displayed.

Room information:

- The room information will be displayed as defined in the Settings tab
- If an exam component has a time assigned but no room assigned, the report will display *Unassigned*.
- If an exam component has a time assigned but is assigned to a disabled room, the report will display *Disabled*.

Student count:
(Applies to active students only)

- The report will display the student count in the following fashion:
  - If the seating was run (Batch Student Seating), the report will display the number of students seated in each room of that exam.
  - If the seating was not run, for the current exam component, and if the current exam component has been assigned to a room, then the report will display the number of seats assigned to the room.
  - If there are no seats assigned to the room, the report will use the total number of active students.

> **NOTE:** If exam components are grouped (same room), the student count will only be displayed for one of the grouped exam components, all other grouped exam components will display (0*) for the student count. The asterisk indicates that the exam components are grouped.

SCHEDULING METRICS

STATISTICS

- The Statistics report provides a quick access to various statistics at a glance, pre-or post-scheduling. It helps to follow the status of the current exercise of Exam scheduling without having to run multiple reports and cross-check data.
- The Statistics report provides consolidated counts of data at a given time and a sense of volume (ex.: volume of Exam Components, average number of exam components per students, counts of active rooms, etc.)
- The report can be exported to html by using the «Generate Report» button. The html export can be used for comparison purposes such as comparing results between different databases (ex.: Fall 2016 vs Fall 2017). This report is also accessible from the toolbar.

BUSINESS INTELLIGENCE

EXAM DISTRIBUTION

- The **Exam Distribution** report provides statistics on each possible exam start time. The report can be used once the schedule is built to evaluate the quality of the schedule and also to assist in the planning of resources that are required during the examination period.
- The report is based solely on active periods, exam components and students.

Exam Term

- Enter the Exam Term for which the report will be produced. Users can use the lookup feature to enter the desired term.

Split report results by exam grid (Time Based Only)

- This option is available for time-based exam databases which allows for overlapping periods. When selected the report results will be broken down by Exam Grid and the associated exam grid will be displayed in the report results

Exam Grid

- Enter the Exam Grid for which the report will be produced. Users can use the lookup feature to enter the desired grid. If no grid is selected the report will be based upon all grids associated to the selected term.
- Once the selections have been made the related data will be presented to the user in list format. The report columns; Exam Grid, Date, Start Time, Period, # Students, # Students Also in Next Period, # of Students Also in Next 2 periods, # of Student Conflicts, # of Rooms Used, # of Rooms Unused, Total Seats in Rooms Used, # of Seats Used in Rooms Used, # of Seats Unused in Rooms Used, # Different Exams and the # of Exams; can all be used to filter and sort the data as per the user's needs.
- As this report is produced in a list format, the data can also be copy/pasted into Excel for further customization.

RESULTS

Note: The resource's blockoffs are not taken into account in the calculation.

#Students
This column displays the number of students assigned to this period (Note: conflicting/grouped students are not counted twice).

#Stud. also in Next Period
This column displays the number of students that are also assigned to an exam component in the next period of the schedule.

#Stud. also in Next 2 Periods
This column displays the number of students that are also assigned to an exam component in the next 2 periods of the schedule.

#Student Conflicts
This column displays the number of students having 2 exams scheduled within the same period and that are not grouped as "same student".

#Rooms Used
This column displays the number of rooms (enabled) that are scheduled at this period.

#Rooms Unused
This column displays the number of active rooms – Number of rooms scheduled at this period.

Total Seats in Rooms Used
This column displays the total number of seats used at this period.

#Seats Used in Rooms Used
This column displays the number of rooms/seats that are scheduled/used at this period (Note: "same room" grouped exam components are not counted twice)

#Seats Unused in Rooms Used
This column displays the number of seats in all active rooms – The number of seats scheduled/used at this period.

#Diff Exams:
This column displays the number of exam components assigned at this period (Note: grouped exam components are not counted twice).

 # Exam Components:
This column displays the number of exam components assigned at this period (Note: grouped exam components are counted twice).

UNUSED ROOMS BY PERIOD

- The **Unused Rooms by Period** report displays the rooms that are not used by scheduled exams for the selected Exam Term and Exam Grid.

Exam Term

- Enter the Exam Term for which the report will be produced. Users can use the lookup feature to enter the desired term.

Split report results by exam grid (Time Based Only)

- This option is available for time based exam databases which allows for overlapping periods. When selected the report results will be broken down by Exam Grid and the associated exam grid will be displayed in the report results

Exam Grid

- Enter the Exam Grid for which the report will be produced. Users can use the lookup feature to enter the desired grid. If no grid is selected the report will be based upon all grids associated to the selected term.
- Once the selections have been made the related data will be presented to the user in list format. The report columns; Exam Grid, Date, Start Time, Period, Campus, Building, Room, Room Type, Pavilion and Exam Capacity; can all be used to filter and sort the data as per the user’s needs.
- As this report is produced in a list format, the data can also be copy/pasted into Excel for further customization.

HOW TO EXPORT A REPORT

- Information displayed in a list can be exported to most text editing software. Word, Excel, Notepad…

To export list information:

(1) Navigate to the list from which you want to export information.

(2) Select the information to be exported and copy it.

(3) Open the software in which you want to paste the information (in this case Excel).

(4) Select where you want to paste your information and paste it. The selected information will be pasted in the software.

DATA CONSISTENCY REPORTS

- The data consistency check will identify incomplete and disabled data relationships.
- Data consistency reports are accessible via the navigator by clicking on the «Data Consistency Check» button. The directory tree pane lists the different validations that can be viewed. A list report can then be generated for any of the data consistency checks.
- Each element in the directory tree pane corresponds to a different validation. For example, by selecting «Student assigned to same seat» all the students that are assigned to the same seat will be displayed in the list pane

PART 2 – SCHEDULING

CHAPTER 9 – SCHEDULING CONFIGURATION

VALIDATION OPTIONS

NOTE:	This part will only cover the 'Validation Options' tab in the 'Options' screen.

- The validation option screen lets you set validation criteria when adding or modifying an item.
- These validations verify there are no time conflicts or broken constraints.

NOTE:	If you decide not to validate certain items, should a conflict be created, no warning will be issued and the conflict will be saved in the database.

- The validation option screen is accessible via the «Tools» menu.

Validation Options

- Only selected elements will be taken in consideration by the validation process.
- Note that the more elements selected, the longer a validation can take.

EXAM SCHEDULING RULES

- This screen displays the global settings and rules that the application will follow.

Alternate Room Rules

- This field displays the alternate room rule that will apply to data elements that do not have a specific alternate room rule.

Student Seating Rule

- This field displays the student seating rule that will apply to students that does not have a specific student seating rule.

Multi-Rooming

- These settings allow you to define how the system will deal with multiple room assignments for data element that do not have a specific alternate room rule.

Default maximum number of assigned rooms per room request

- This field indicates the maximum number of rooms that the system can assign to a single exam component.

Minimum % of required seats used per room.

- This field is used to specify the minimum percentage of seats that must be filled for a room to be used for an exam component. Enter a value between 0 and 100.

Extra Seat Balancing

- This is where you indicate to the system how the extra seats in a multiple room exam are to be balanced during the seating process.

NOTE: Only rooms allowing a single exam at a time can be considered. Rooms with sub-rooms are not compatible with the extra seat balancing function.

Leave all extra seats in last room

- The system will fill all the assigned rooms, except for one of the rooms, in which extra seats will be left unused.

Balance free seats evenly (same number of free seats per room)

- The system will tend to leave the same number of seats unused in each of the assigned room.

Balance free seats proportionally according to room capacity

- The system will tend to leave several seats unused proportionally to each of the reserved room capacities (the larger the room, the more extra seats will be left unused).

Scheduling Mode

- The scheduling mode is used to specify on what the constraints will be based, time based, or period based.
- If period based is selected the period of an exam grid will not be allowed to overlap. If time based is selected the periods of an exam grid can be overlapped.

Maximum time between exam components to be considered consecutive

- This field specify the maximum time allowed between two periods to be considered consecutive.

Late Start / Early Finish

- The values specified in these fields reflects the minimum percentage needed of students in a component that can be late start and/or the early finish to apply the exam grid late start and early finish options.

Scheduling Constraints

- These settings are used to specify scheduling constraints and their time intervals. The constraints will vary depending of what has been selected in the scheduling mode. The constraints will help spread the exams throughout the schedule or to constrict them (depending on the constraint selected) based on the constraint definition established in the secondary files section (Constraint Types)

Weight settings

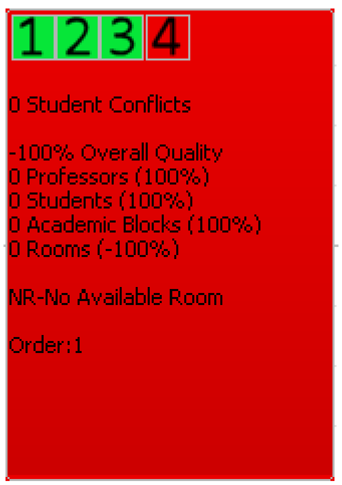
- This is where the user prioritizes constraints to calculate the quality of the potential time. For example, if a user wants to give professor constraints priority over academic block constraints, the professor constraint would receive a heavier weight. The system calculates the quality of each criterion (Room, Course, Student, Professor, Academic Block) and then calculates a value according to the weight the user assigned to each criterion.

CHAPTER 10 – THE MOVE SCREEN

- For each examination period defined within the associated exam grid, the move screen will display acceptable times, potential time conflicts, broken constraints and inaccessible time for resources relating to an exam component
- The move screen allows a user to assign or re-assign an exam component to one of the displayed periods.
- The «Room Search» and «Verify Academic Resources» report can be accessed via the move screen.
- The move screen is accessible when an «Exam Components» edit window is open or when it is selected in any list window.

BLOCK EXPLANATIONS

- A potential time for an exam component is represented by a time block displayed on the move screen.
- The application considers four data elements when evaluating potential times for an exam component:



Resource Blocks

- These four resources are represented by colored squares along the top of the time block.

Resource Block 1

- Represents the quality of the time block for the professor(s) associated to the exam component

Resource Block 2

- Represents the quality of the time block for the student(s) associated to the exam component

Resource Block 3

- Represents the quality of the time block for the academic block(s) associated to the exam component

Resource Block 4

- Represents the quality of the time block for the given room requests associated to the exam component

Student Conflicts (with show “Qualities” option selected)

- Displays the number of students that have a simultaneous or overlapping exam for that period

NOTE:	If an exam component is part of a group, the value for student conflicts will represent the total time conflicts for the entire group.

Total Student Conflict (with show “Statistics” opiton selected)

- Displays the total number of conflicts that exist for the selected period.

Overall Quality

- The overall quality of the time block based on the qualities of the four resources and their weights in the scheduling rules.

> **NOTE:** If all data elements contain an individual quality above 0, the overall quality of the time period will be a weighted average based on resource weights defined in the institutional scheduling rules.
>
> If one or more of the data elements contain an individual quality below zero, the lowest individual data element quality will determine the overall quality of the time period.

Professor

- Represents the quality of the time block for the professor(s).
- The value to the left of the element indicates the number of professors that have broken constraints during that period.

Student

- Represents the quality of the time block for the student(s).
- The number to the left of the element indicates how many students that have broken constraints during that period.

> **NOTE:** This value may differ from the value displayed for «Student Conflicts».

Academic Block

- Represents the quality of the time block for the academic block(s).
- The value in parentheses indicates the number of academic blocks have broken constraints during that period.

Room

- Represents the quality of the time block for the room(s).
- The value in parentheses represents the number of room conflicts that would be caused by moving the exam component, for which the move screen was opened, onto this block.

> **NOTE:** If in a given block there are already other room conflicts caused by other exams, they are not included in the number in parentheses. The number in parentheses is always relative to the exam component for which the Move Screen is opened.
>
> A room conflict that is counted in the total can be for either of the following reasons:
>
> - Moving the current exam component onto that block would cause too many simultaneous exams in the room (the room's 'Max different exams' would be violated), or;
> - Moving the current exam component onto that block would require more Seats (Assigned Room's Seats column) than allowed by the room's Exam Capacity.
>
> Please note that if a room is causing a conflict for both of these reasons simultaneously, this is still counted as 1 conflict in the total, not as 2. The number is not the total of conflicting rules for all affected rooms, but rather the number of rooms themselves.

Order

- Displays the period's order defined in the exam grid.

Time Blocks

- Time blocks displayed on the move screen represent exam periods defined within the exam component's associate exam grid. The color of the time block indicates the ***overall*** quality of the slot.

Color	Definition
Blue	Scheduled exam components
Shades of green	Acceptable times. A darker shade of green indicates a more favourable time.
Shades of yellow to red	Times that break constraints or create time conflicts. The Scheduler will not assign an exam component to periods appearing in shades of yellow to red. However, a user can manually select these periods. Shades that are closer to red indicate less favourable times than those that appear in shades of yellow.
Grey	Inaccessible time. Periods that are blocked off, disabled or if a delivery from ***Infosilem Timetabler*** has been scheduled during an exam period will appear in grey.

MOVE SCREEN FEATURES

Quality Frame

The Move Screen Slider Bar

- Using the move screen slider bar will display time block qualities based in satisfaction percentages defined within the constraint types.

Example:	*An over-limit value is defined within a constraint type having a weight of -50. If the move screen slider bar is set to -50, all time blocks reaching the over-limit value and contain an overall quality rating of -50 will appear as acceptable (green).*

Ignore Assigned Rooms

- If this feature is selected, the Move Screen will display the exam components as if it has no assigned rooms.

Lock Status Frame

- The lock status in the move screen is used to temporarily lock exam components during the timetabling process. This feature is only applicable when timetabling in batches. If it is not desired that the backtracking feature re-assigns certain exam components, ensure to check the appropriate box in the move screen.

> **NOTE:** The lock status in the move screen bears different implications than locking an exam component using the prevent automated checkbox.

Room Requests

- If checked, the backtracking feature will not re-assign the previously assigned room.

Time Requests

- If checked, backtracking feature will not re-assign the previously assigned time

Resize Frame

Automatically Resize

- Select this option to resize the Move Screen automatically. When this option is selected, the data displayed within the Move Screen will be resized dynamically as the Move Screen is resized.

Qualities

- When selected the Time Block will display the number of student conflicts, overall quality rating along with the quality rating of each associated resource for each period.

Statistics

- When selected, the Time Block will display the number of scheduled exams, the number of scheduled students, the number of rooms used and the number of unused rooms for each period.

TIME BLOCK FEATURES

- Double clicking on a time block will open its «Detail» window.
- When "Qualities" is selected the «Detail» window displays the number of student conflicts, overall quality rating and the quality rating of associated resources for the selected time block.
- When "Statistics" is selected the «Detail» window displays the number of scheduled exams, the number of scheduled students, the number of rooms used and the number of unused rooms for the selected time block.
- Placing your mouse cursor over the time block or resource block will display quality rating information.
- Right-clicking in a time block will display a sub- menu where three functions can be accessed:
  - Assign
  - Room Search
  - Verify Academic Resources

ASSIGN

- Selecting «Assign» will assign the exam component to the selected time block.

ROOM SEARCH

- The room search function allows a user to find the ideal room for an exam component.

Room Search Information Pane:

- Displays the room search information of the selected exam component.

Required Seats

- The number of seats required for the exam component.

Required Seats Left

- The number of unassigned seats for the exam component.

Actual Combination Quality

- The quality of the selected combination of rooms.

Resulting Room Combination Pane

- Displays the ideal room(s) to assign to the selected exam component.

Campus

- The listed room's campus.

Building

- The listed room's building.

Room

- The listed room's number

Room Type

- The listed room's type

Pavilion

- The listed room's pavilion

Zone

- The listed room's zone

Room Total Capacity

- The total seating capacity of the listed room

Multiple Exams

- Indicates the if multiple exam components have been simultaneously scheduled within the listed room

Max Different Exam

- Indicates the maximum allowable number of simultaneous exam components that can be scheduled within the listed room

Max Different Duration

- Indicated the maximum number of different exam durations allowed to schedule simultaneously within the listed room

Room Description

- The listed room's description

Assigned

- Indicates whether the listed room has been assigned to the exam component

Available Seats

- Remaining available seats in the room

Seats To Reserve

- The number of seats that the exam component will occupy

Room Quality (%)

- The overall quality of the listed room if assigned to the exam component

Search Results Pane:

- Displays the other potential rooms that could be assigned to the selected exam component

Campus

- The listed room's campus

Building

- The listed room's building

Room

- The listed room's number

Room Type

- The listed room's type

Pavilion

- The listed room's pavilion

Zone

- The listed room's zone

Room Total Capacity

- The total seating capacity of the listed room
- Indicates the if multiple exam components have been simultaneously scheduled within the listed room

Max Different Exam

- Indicates the maximum allowable number of simultaneous exam components that can be scheduled within the listed room

Max Different Duration

- Indicated the maximum number of different exam durations allowed to schedule simultaneously within the listed room

Room Description

- The listed room's description

Assigned

- Indicates whether or not the listed room has been assigned to the exam component

Available Seats

- Remaining available seats in the listed room

Seats To Reserve

- The number of seats that the exam component will occupy

Room Quality (%)

- The overall quality of the listed room for the exam component

CmbQuality (%)

- Indicates the quality of a possible room combination for the exam component when the seating requirement has not been met yet

Best Quality (%)

- Indicates the quality of the combined room quality if this room were to be selected to be part of the room assignment combination

Is Best

- Indicates the most suitable rooms

VERIFY ACADEMIC RESOURCES

- The «Verify Academic Resource» report allows you to identify resources not respecting scheduling constraints associated to the selected exam component

Summary Pane

- Displays the constraints that have not been respected and the number of resources affected

Resource Details pane:

- Displays the resources that are affected by the selected broken constraints

Normal View:

- Displays affected resources in a linear view

Report View:

- Displays the broken constraint, the affected resource and all exam components associated to the affected resource.
- An XML report can be generated based on the information displayed in the «Report View» or the information can be exported into any text editor software. Please refer to the "List Reports" section for an in-depth explanation of how to generate reports from a list.

Exam Component Pane

- Displays the exam components associated to the affected resource

CHAPTER 11 – THE SCHEDULER

- The ***Scheduler*** function will process and attempt to schedule all selected exam components.
- Select the ***Scheduler*** icon from the Main Toolbar to access the ***Scheduler*** function.

NOTE:	The timetable should be viewed as a separate platform from the data. Scheduled information is only written back to the data once scheduling results have been committed.

- Once opened, the *Scheduler* Toolbar, displaying all *Scheduler* command buttons and the Selection screen, listing all active exam components will be visible.

NOTE:	The application is locked when the ***Scheduler*** is open, thus preventing other users from accessing the database.

SCHEDULER OPTIONS

- The «Timetabler» options tab allows a user to modify backtracking setting.

Backtracking functionality:

- If the application is faced with an exam component that can not be scheduled, the backtracking feature will attempt to reassign a previously scheduled exam component to assign the non-schedulable exam component.

NOTE:	The backtracking process could be quite lengthy depending on the options selected, as the system can take up to the timeout value multiplied by the levels value per reject.

Backtracking options:

Disabled

- If checked, backtracking is not active.

Process Rejects as they occur

- If checked, the backtracking feature will deal with failed exam components throughout the scheduling process.

Process Rejects at the end

- If checked, the backtracking feature will deal with failed exam components at the end of the scheduling process.

Levels

- Levels define the depth which the backtracking reaches when trying to solve a rejected request.
- It also determines the number of levels the backtracking analyses *before* the actual displacing of the reject takes place.

  Example: If you enter a value of 1, the backtracking will look at all the assigned exam components that are one level under the rejected request and will consider every aspect of the impact of displacing any one of those assigned exam components.

Initial Search

- Enter the number of levels that the backtracking analyses *before* the actual process of displacing assigned requests begins.

Limit

- Enter the maximum number of levels that the backtracking can reach during the displacing of assigned requests. If the Timeout is reached before the backtracking has reached the limit value, the request then becomes a reject.

Timeout (ms)

- The value entered in this field defines the maximum amount of time, in milliseconds, per move (*see* ***Limit***) the system can use to try to place an exam component per rejected exam component. After which the backtracking feature will stop processing the current request and start to process the next failed exam component.
- The timeout value is in milliseconds, therefore
  2 minutes = 120 second (2*60) and 120 seconds = 120000 milliseconds (120 * 1000)

Post-scheduling Room optimization

- The Post-scheduling Room optimization process runs at the end of the scheduling process. The process will attempt to minimize the number of rooms used and improve room assignments.

Minimize number of rooms used per period

- Select this option to use as little rooms as possible per period.

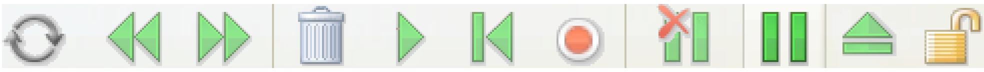
Minimize the amount of unused seats per room and per period

- Select this option to reduce the amount of unused seats within each room per period.

No optimization needed *(selected by default)*

- Select this option to leave the rooming as is – no optimization to be carried out.

THE SCHEDULER TOOLBAR



- The Scheduler toolbar is displayed once the Scheduler function has been accessed. The command buttons are timetabling specific and will only be used during the timetabling process.

 **Re-Initialize button:**

- Change is made to the data while the ***Scheduler*** function is active will be reflected once the «Re-initialize» button has been clicked.

NOTE:	Re-initializing the ***Scheduler*** will eradicate any non- committed scheduling results.

 **«Back» button:**

- Allows a user to navigate to a previous ***Scheduler*** screen.

 **«Forward» button:**

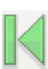
- Allows a user to navigate to a preceding ***Scheduler*** screen.

 **«Clear» button:**

- Clears the any applied filters.

 **«Assign» button:**

- Assigns the selected exam components.

 **«Rollback» button:**

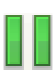
- Annuls assignment results from the last commit

 **«Commit» button:**

- Writes the assignment results to the data.

 **«Break on first reject» button:**

- If selected, the timetabling process will halt once a rejected exam component is discovered.

 **«Pause» button:**

- Allows a user to pause the assignment process. To resume the assignment process, re- click the pause button.

 **«Done» button :**

- Closes the Scheduler.

 **Currently not implemented.**

SCHEDULER SCREENS

THE SELECTION SCREEN

- The selection screen appears once the Scheduler function is accessed. Listed in the «Selection» screen are all active exam components within the selected database.

Exam Term

- Displays exam term defined with the database

Exam Component List

- Lists all active exam components found within the selected database

Scheduler Information

Exam Component

- The name of the exam component being processed

Assignment Time

- Time spent processing the exam components

Session Time

- Total time spent processing selected exam components

Rejected Requests

- Amount of exam components rejected by the scheduler

Assigned Requests

- Amount of exam components assigned by the scheduler

Remaining Requests

- Amount of exam components left to process

Assignment Status

- The Assignment Status circle adheres to a color scheme that represents the assignment status for both room and time for an exam component. The top half of the Assignment Status circle represents the assignment status for room and the bottom half of the Assignment Status circle represents the assignment status for time. 

Room Assignment Status Circle Color Scheme (Top Half)

Color	Definition
Red	Indicates that the selected exam component has been assigned to a **disabled room** or there is **no room request**. **NOTE:** Three conditions must be meet in order for an exam component not have a room request: (1) No room has be specified (2) The prevent automated flag has been checked (3) The «Maximum Number of Assigned Rooms» field has been set to 0.
Green	Indicates a **complete assignment**. In other words, the selected exam component has been assigned to an enable room.
White	Indicates that a request **has not yet been satisfied**. In other words, the selected exam component is requesting a room(s) that has not yet been assigned.
Yellow	Indicates a **partial assignment**. Possible reasons for a partial room assignment: (1)The selected exam component is requesting a room but sub-rooms have not yet been assigned or (2) The selected exam component has not reserved enough seats within the assigned room

Time Assignment Status Circle Color Scheme (Bottom Half)

Color	Definition
Red	The time assignment status will **never** be red.
Green	Indicates a **complete assignment**. In other words, the selected exam component's time has been assigned.
White	Indicates that a request **has not yet been satisfied**. In other words, the selected exam component is requesting a time that has not yet been assigned.
Yellow	The time will **never** be yellow for an exam component.

Room Locked

Lock status for the room request or assignment.

Lock type	Description
Unlock	The room request is not locked therefore backtracking can be applied to the selected exam component
System lock	The room is locked due to the 'Lock Room' option being checked under the «Lock Status» feature in the Move Screen.
User lock	The room has been specified by the user and «Prevent Automated Modification» has been checked. The backtracking function will not be applied to exam components with user lock status.

Time Locked

Lock status for the time request or assignment

Lock type	Description
Unlock	The time request is not locked therefore backtracking can be applied to the selected exam component.
System lock	The time is locked due to the «Lock Time» option being checked under the «Lock Status» feature in the Move Screen.
User lock	The time has been specified by the user and «Prevent Automated Modification» has been checked. The backtracking function will not be applied to exam components with user lock status.

RESULTS SCREEN

- The «Results» screen displays assignment results for exam components selected in the «Selection» screen

«SUBSET RESULTS» TAB

- This «Subset Results» tab lists the failures and successes for the current assignment session.

«FAILURE» TAB

Results

- The «Failures» tab lists exam components with failed assignments.
- Double clicking on any listed item will access the items edit window.

Top Half

- Displays the failed exam components, the number of rejected times, the number of inaccessible times and whether the exam component is invalid.

Bottom Half

- Three tabs are displayed pertaining to the «# of Rejected time», «# of Inaccessible times» and «Invalid» columns found in the top half.

Scheduler Information

Exam Component
The name of the exam component being processed

Assignment Time
Time spent processing the exam components

Session Time
Total time spent processing selected exam components

Rejected Requests
Amount of exam components rejected by the scheduler

Assigned Requests
Amount of exam components assigned by the scheduler

Remaining Requests
Amount of exam components left to process

«REJECTED TIMES» TAB

- Displays all rejected times and number of resources affected at each rejected time. It also displays the number of resources having direct conflicts, i.e. breaking the Max simultaneous/overlapping exam constraints, and the number of resources breaking other type of constraints. Note that the Verify Academic resource report can be open from the contextual menu to validate for resources with broken constraints .

NOTE:	Information will only be displayed in the «Rejected Times» tab if a value appears in the «# Rejected Times» column for a listed exam component

«INACCESSIBLE TIMES» TAB

- Displays all inaccessible times and reason why each time is inaccessible

NOTE:	Information will only be displayed in the «Inaccessible Times» tab if a value appears in the «#Inaccessible Times» column for a listed exam component.

«INVALID» TAB

- Displays reason why a selected exam component is invalid.

NOTE:	Information will only be displayed in the «Invalid» tab if a value appears in the «Invalid» column for a listed exam component.

«SUCCESSES» TAB

- The «Success» tab lists exam components that have been successfully assigned times and rooms.

«SESSION RESULTS» TAB

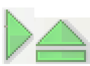
- This «Session Results» tab lists the failures and successes for the cumulative assignment session.
- The layout of «Session Results» tab is identical to the «Subset Results» tab.

CHAPTER 12 – THE BATCH STUDENT SEATING

- The «Batch Student Seating» process will assign students associated to exam components to rooms and/or sub rooms and/or seats.
- Select the *Batch Student Seating* icon from the Toolbar to access the Batch Student Seating process.

NOTE:	The Batch Student Seating process is run after the examination schedule is complete and committed. The application is locked when the Batch Student Seating is open, thus preventing other users from entering the database.

THE BATCH STUDENT SEATING TOOLBAR

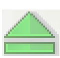


- The batch student seating toolbar will appear once the batch student seating function has been activated and will provide access to the «Assign» button and «Done» button.

NOTE:	Only the «Assign» button and «Done» button will used to perform the batch student seating.

«Assign» button:

- Assign students associated to exam components to rooms and/or sub rooms and/or seats.



«Done» button:

- Closes the batch student seating.

THE SELECTION SCREEN

Exam Term

- Specify the appropriate exam term

Rooms Frame

- Displays all rooms within the database
- Select all rooms that students will be assigned

Exam Components Frame

- Displays exam components assigned to rooms selected in the «Room» list
- Students will be assigned to rooms associated to the selected exam components

NOTE:	The application will save seating results while assigning. There is no "Results Screen" for the batch student seating. To view the batch student seating results, run the "Student Seat Assignment Report". Please refer to *"Student Seat Assignment"* section to run this report.

PART 3 – UTILITIES

CHAPTER 13 – THE EXAM CREATION ASSISTANT

- The Exam Creation Assistant will create one exam component for each course section pre-existing in your database.

How do I access the Exam Creation Assistant?

(1) Navigate to «Tools» in the main menu

(2) Select «Exam Creation Assistant»

(3) The «Exam Creation Assistant» window will appear

THE EXAM CREATION ASSISTANT SCREEN

Select Exam Grid

- Select the exam grid (date range) for the exam components.

Exam Creation Options

- View Sections radio button
- Lists courses along with their respected sections in the «Courses without exams» frame
- View Courses radio button
- Lists courses without respected sections in the «Courses without exams» frame

Import professor links

- If this option is checked, professors attached to delivery(ies) in Infosilem Timetabler belonging to the courses selected in the exam creation assistant will now also be attached to the corresponding exam components.

Edit Default Value button

- Please refer to the section "Exam creation Option" for details

Courses Without Exams

- Lists all courses or course sections pre- existing in the database that do not have corresponding exam components. Course or course sections to be examined are selected in this frame

Courses with Exams

- Lists course sections that do have corresponding exam components
- This frame will become populated once exams have been generated for selected courses.

How do I create exam components?

(1) In the Courses without exams Frame, select the courses or course sections to be examined.

(2) Select the desired options.

(3) Click on the «Save» command button in the toolbar. Exam components for the selected courses or course sections will be generated.

EXAM CREATION OPTIONS (*DEFAULT VALUES*)

- The Exam Creation Options window allows a user to set default values for the generated exam component, the exam component groups and professors.

How do I access the Exam Creation Options window?

- Click on the «Edit Default Values» button in the Exam Creation Options frame of the exam creation assistant — the «Exam Creation Options» window will open.

«EXAM COMPONENT ID» TAB

- Allows a user to specify default values for the generated exam component.

Default Exam Identification

- Specify the ID for the generated exam components. This is a required field

Default Exam Type

- Specify the Exam Type for the generated exam components. This is a required field

Exam Duration

- Specify the Duration for the generated exam components. This is a required field. Ensure that this duration does not surpass the maximum duration value specified on the exam grid.

Required Seats Ratio

- Specify the Required Seats Ratio for the generated exam components.

FORMULA:

Number of students assigned to the selected exam component	X	Required Seats Ratio	=	Ideal number of seats for selected exam component

Make sure the Required Seats ratio is greater than 0

Maximum Number of Assigned Rooms

- Specify the maximum number of rooms that can be assigned for the generated exam components..
- Make sure the Maximum Number of Assigned Rooms is greater than 0.

«PROFESSOR IMPORTATION» TAB

Constraint Type

- Specify the constraint type to be associated to all linked professors.

NOTE: If the professor's constraint type has be previously specified, this value will not be changed. If the professor does not have a specified constraint type, this value will be given to the professor.

DEFAULT EXAM COMPONENT GROUP CREATION ASSISTANT OPTIONS

- Authorized users can set default **exam component group options** to determine the grouping options and the generated exam component group ID when the **exam component group creation assistant** tool is run via the settings menu located on the toolbar.
- The indicated settings will be applicable to all selected courses within the exam component group creation assistant if not overridden at the course level.
- To begin, navigate to default exam component group creation assistant options:
- Settings→ Default Exam Component Group Creation Assistant Options

GROUPING OPTIONS

Group Exam Components by Course

- If selected, exam components associated to sections of the same course will be members of the same created scheduling group under the indicated group constraint once the exam component group creation assistant is run.

Group Exam Components by Professor

- If selected, exam components associated to sections of the same course having the same professor will be members of the same created scheduling group under the indicated group constraint once the exam component group creation assistant is run.

Group Exam Components by Time Characteristic

- If selected, exam components associated to sections of the same course having the same time characteristics will be members of the created scheduling group under the indicated group constraint once the exam component group creation assistant is run.

Exam Component Group ID ____

- Select the exam component fields to be included within the exam component group ID for exam component groups generated through the exam component group creation assistant.
- The exam component group ID can differ depending on the selected grouping options:

Group Option	Exam Component Condition	Group ID	Group Description
Group Exam Components by Course	Same Exam Term	Selected Exam Component Group ID within the Default Exam Component Group Creation Assistant Options	Null
	Not Same Exam Term	Selected Exam Component Group ID within the Default Exam Component Group Creation Assistant Options + Term ID	
Group Exam Components by Professor	Same Exam Term	Selected Exam Component Group ID within the Default Exam Component Group Creation Assistant Options + Professor ID	First Name + Last Name
	Not Same Exam Term	Selected Exam Component Group ID within the Default Exam Component Group Creation Assistant Options + Term ID + Professor ID	
Group Exam Components by Time Characteristic	Same Exam Term	Selected Exam Component Group ID within the Default Exam Component Group Creation Assistant Options + Time Characteristic ID	Time Characteristic Description
	Not Same Exam Term	Selected Exam Component Group ID within the Default Exam Component Group Creation Assistant Options + Term ID + Time Characteristic ID	

ROLLOVER

ROLLOVER – DELETE RECORDS

- The Rollover – Delete tool lets user delete unwanted data in order to ease the use of the same database for a new term.
- Select, from the Toolbar, Tools-Rollover-Delete to open the Rollover – Delete Records screen

SELECTION SCREEN

- From the Selection screen, users are to select the data to delete through the Rollover tool.
- Select, from the Description column the records that are to be deleted.
- Users can sort alphabetically the description field or numerically the Record Count field to ease the selection of records to delete.

Advanced option

- Select the «Advanced» button to open the Advanced Filter screen and to filter in more details what data elements need to be deleted.

Select a data element

- From this drop-down field, select the type data element to delete (example, Courses, Exam components, Students, etc.)
- Using the available options, select the proper filters to determine the data element to delete.
- Once done, select the «Next» button to proceed to the next screen.

CONFIRM AND DELETE RECORDS SCREEN

- From this screen, users need to confirm that the data elements listed are the ones that need to be deleted. Select PREVIOUS to return to the previous screen to modify the selection or select DELETE to proceed and delete the listed data elements or select. At which point, a message will be displayed asking the user to confirm once more that the listed data elements are the right elements to delete. Please note that once the records are deleted, they can no longer be recuperated (unless a backup has been taken before the entire Rollover process has been launched). Once the records are deleted, select the «Done» button to exit the Rollover tool.

STUDENT REGISTRATION IMPORT

This feature will help schedulers keep the student registration data current and will also help reflect real student enrollment, which in certain cases, will allow schedulers to adjust room assignment and students seating accordingly. This feature allows users to :

- Add new students without modifying or deleting existing ones
- Replace/update all Student Registrations for a given Exam component

> **NOTE:** During the process, users must not be logged into the application.
>
> After an Exam Student Registration import even if rejects may appear:
> 1. The process will always update exam capacities
> 2. Optionally update seats reserved for Exam Components
> 3. Student seat assignment must be re-done when importing new Student Registrations to ensure a proper seat assignment based on real student counts.

THE STUDENT REGISTRATION IMPORT SCREEN

File Selection

Student CSV File
Enter the path of the location of the student .csv file.

Student Registration CSV File
Enter the path of the location of the student registration .csv file.

Reduce reserved seats for all exam components
If selected, the system will reduce the reserved seats for all exam components during the Student Registration Import process. By default, this option is selected.
If reserved seats are reduced for a grouped exam, all exams of that group will have their timestamp updated (and the updated assigned rooms and sub-rooms as well)

Import
Select the Import button to launch the import process. Once the process is completed, the user will be able to either click on the Student Reject Report button or on the Student Registration Reject Report button (depending on which one is available).

Close
Select the Close button to exit the Student Registration Import process and to close the screen.

Student Registration Reject Report
By clicking on this button (if available), the Student Registration Reject Report will open and will display, in a HTML Web page format, all records that have been rejected during the student registration import process.

Student Reject Report
By clicking on this button (if available), the Student Reject Report will open and will display, in a HTML Web page format, all records that have been rejected during the student import process.

CHAPTER 14 – MY VIEWS

- The «My View» function allows a user to easily setup custom views and reports.
- My Views is accessible via the data element button list in the navigator.
- In order to properly use My Views, one must be familiar with the data relationships & data hierarchy. Knowledge of SQL is not required but can be useful to create and/or modify advanced queries. The My Views created can be private or public. A private My View is represented with an icon of a key.

CREATING A VIEW

- In order to create a view, right click in the navigator tree list and select add view — the wizard will appear.
- Click on the «Next» button to begin creating a view.

THE SOURCE SCREEN

- The «Source Screen» is used to select the source object (parent) of the view.
- For example, if campus is selected as the source object the all child elements of a campus can be then selected. Click on the «Next» button to proceed to the next screen.

THE SELECTING FIELDS SCREEN

- This screen allows a user to select the fields to be displayed in the created view.
- Parent and children fields can be located by using the «+» found to the left of the resource name.

NOTE:	Fields are displayed following the application's data hierarchy

- In this example, campus has been selected as the source object of the view. All the fields related to campus can then be selected along with the children elements of a campus (buildings, rooms, etc.)
- Once all fields have been selected, click on the «Next» button to proceed to the next screen

ADDING FILTERS SCREEN

- The Adding Filters screen allows a user to apply a filter on any of the selected fields.

NOTE:	This step is **not** mandatory and can be skipped.

Available Fields

- Displays fields selected in the «Selecting Fields» screen.
- Allows a user to select fields to apply a filter to.

Edit Filter For…

- Allows a user to define a filter for selected field.

How Do I Create A Filter?

(1) Select the «NOT» checkbox to create a filter beginning with the NOT condition.

(2) Use the drop-down arrow to select the main filter clause.

(3) Input the filter criteria.

(4) Select the «Add» or «Or» clause in the second criteria.

(5) Click on the «Save» button — the inputted filter will appear listed in the «Filters» frame.

(6) Add any other necessary filters.

NOTE:	For users who are more familiar with the query process, it is possible to manually create queries using SQL commands by clicking on the «Advanced**»** button and then clicking on the «Next» button.

Once all filters have been defined, click on the «Next» button to proceed to the next screen.

SQL EDITING SCREEN

NOTE:	The «SQL Editing» screen will appear if the «Advanced» button was selected in the «Adding Filters» screen.

- Queries can be manually created or edited using SQL commands in the «SQL Editing» screen. Click on the «Validate» button to validate the inputted commands. The validation results will appear in the «Status» pane.
- Once query is complete and valid, click on the «Next» button to proceed to the next screen

SETTING FIELD FORMAT SCREEN

- The «Setting Field Format» screen allows a user to modify field names and column headers.

NOTE:	If the «Advanced» button was selected in the «Adding Filters» screen, the format of each field can be modified.

- Once modifications have been completed, click on the «Next» button to proceed to the next screen.

SAVING THE VIEW

- This allows a user to define the view's name. This name will be used to identify the view in the navigator.

View Name

- Enter the name for this My View. This name cannot be duplicated. If the user is trying to save a My View with a name that is already in use, a message will indicate to the user that the name is already taken, and that the user needs to select a new name before the My View can be saved.

Category
By default, the system associates the current view to the Source selected in the Source screen.
Users can enter a category name for this current view. The folder for the current view is created with the name entered in this field or by the default name used by the system.

NOTE: **Renaming a Category**

It is possible to rename a category. To do so, simply:

1. Right-click on the Category folder and select Rename Category from the context menu
2. Enter a new name for that category and press Enter.
3. All the myviews under that category will be moved to the new category except for shared views that are not owned by the current user and for views currently locked by another user.

When exporting a view, please note that the view will be exported with the renamed category.

Share this view with all users

- Select this option to make this My View a "public" My View, meaning it will be made available to all users.

NOTE: When selecting this option, the system will verify all the My View names that are saved on the Application Server and validate that this My View name is not already used by another My View. If it is, a message will be displayed advising that this My View cannot be saved until a new name is entered.

Owner

- Once the My View is created, this field will display the name of the user who created (saved) this My View. The name that will be entered in this field will be the login name of the person who created the My View.

NOTE: Only the owner of a My View can edit or delete it. And only the owner of the My View can change its property (i.e.: making a private My View into a public My View or vice versa).

If a user (not the owner) wants to modify a public My View, that user needs to copy the My View first. At this point that user becomes the owner of the copied My View and may then proceed to modifying it.

- After all information of the My View is entered, click on Finish to exit the wizard.

WORKING WITH VIEWS

- Various options will be available by right clicking on a listed view or within the results themselves.

Add View

- Select this option to add a new view.

Edit View

- Select this option to edit an existing view.
- The wizard will appear when editing an existing view.

Delete View

- Select this option to delete the selected view.

Convert to Advanced Mode

- Selecting this option will convert your view to advanced mode which allows a user to edit an existing view using SQL commands.

NOTE:	A view that has been converted to Advanced Mode cannot be reverted to normal mode.

Export View
This option allows you to save your view to a file in MyView format (*.myview). This file can then be imported on another workstation.

Import View
Select this option to import a MyView file.

NOTE:	The myview file (*.myview) must reside on a local drive or a shared network drive to import the view.

Save as HTML
(right-click in results)
This option allows you to save the current results in a HTML file format.

Save as CSV
(right-click in results)
This option allows you to save the current results in a CSV (such as MS Excel) file format.

HOW TO COPY A LIST FROM MY VIEWS

- You can copy and paste any list from My Views and paste it in a text editor or a spreadsheet such as MS Word, or MS Excel.

To copy elements from a list pane:

- Select the elements from the list that you want to copy by clicking on it. Once the item is highlighted, right click to have the context menu appear. Select «Copy».

To paste the copied elements:

- If it is not already done, open the text editor or the spreadsheet application.
- You can now paste the data inside the application with a right click on the location where the content is to be pasted and selecting «paste» from the context menu.

CHAPTER 15 – THE DATABASE TOOLS

- Navigate to «File—Database Tools» to open the Database Tools screen. Within the Database Tools screen, users can create an empty database or can copy an existing database.

THE DATABASE TOOLS SCREEN

New Database Name
Enter a name to give to the database being created.

Destination Server
From the server list, select the server on which the database will be created.

Options

Create Empty Database
Select this option to create an empty database (only the tables and fields will be created but no data will be present. It will be up to the user to populate the database being created or it will be up to the user to import data into the database being created using the transfer tools).

Copy Database
Select this option if copying an existing database.

Source Server
Select the server on which the database to be copied resides.

Source Database
Select the database to be copied.

Create
Select the «Create» button to start creating the empty database or to start copying an existing database.

Close
Select the «Close» button to close the «Database Tools» screen.

SYSTEM ADMINISTRATION TOOLS

- Navigate to the «System Administration» button in the data element button list to access the system administration tools.
- The Directory Tree pane will display the following three items:

(1) Backup

(2) Users

BACKUPS

- A backup is similar to taking an image or snapshot of your database at a specific point in time.
- Backups can be created, restored and deleted using the backup command buttons on the toolbar.

Create Backup

- The «Backup» command button allows you to create a backup of your database.

Restore Backup

- The «Restore» command button allows you to restore a backup of your database.

NOTE:	Once a backup is restored, any changes made from the time of the backup will not be saved within the database. Restoring a backup will revert the database back to the point in time when the backup was taken.

Delete Backup

- The «Delete backup» command button allows you to delete a backup.

HOW TO CREATE A BACKUP

(1) Select «System Administration» from the Data Element button List

(2) In the Directory Tree Pane, select the «Backup» heading

(3) In the List pane perform one of the following actions:

- Right click and select «Add New»
- Press the <INSERT> key.
- Click on the «New» command button in the toolbar.
- Click on «Edit» in the main menu and from the sub-menu select «Add».
- Press the <CTRL>+<N> keys simultaneously. The «Backup» edit window will appear.

(4) Input the appropriate values in the «ID» and «Description» fields.

NOTE:	Make sure to include the Date and Time of the backup in either the identification or description field.

(5) Click on the «Backup» button to begin the backup process. A message box will appear to confirm that the backup has been created.

HOW TO EDIT A BACKUP

- Editing a backup implies editing the ID or the description of the backup — NOT the contents of the backup.

(1) Select «System Administration» from the data element button List

(2) In the Directory Tree Pane, select the «Backup» heading

(3) All created backups will appear listed in the List pane

(4) Select the desired backup and perform one of the following actions:

- Double click on the desired item in the list pane.
- Right click on the desired item and select «Edit».
- Right click on the desired item in the list pane and select «open viewer».
- Click on the «Edit» command button in the toolbar
- Click on «Edit» in the main menu and from the sub-menu select «Edit».
- Press the <F2> function key — the selected backup's edit window will appear

(5) In the edit window, make all necessary changes to the ID and Description field

(6) Save modification by performing one of the following actions:

- Click on the «Save» command button in the toolbar.
- Press the <CTRL>+<S> keys simultaneously.
- Click on «File» in the main menu and from the sub-menu select «Save».

HOW TO DELETE A BACKUP

(1) Select «System Administration» from the data element button List

(2) In the Directory Tree Pane, select the «Backup» heading — all created backups will appear listed in the List pane

(3) Select the desired backup

(4) Click on the delete «Backup» button on the toolbar. A pop-up message will appear to confirm the delete command.

(5) Click on Yes to delete the backup.

(6) Click on No to cancel the deletion.

HOW TO RESTORE A BACKUP

(1) Select «System Administration» from the data element button List

(2) In the Directory Tree Pane, select the «Backup» heading — all created backups will appear listed in the List pane

(3) Select the desired backup and perform one of the following actions:

- Double click on the desired item in the list pane.
- Right click on the desired item and select «Edit».
- Right click on the desired item in the list pane and select «open viewer».
- Click on the «Edit» command button in the toolbar
- Click on «Edit» in the main menu and from the sub-menu select «Edit».
- Press the <F2> function key.

- The selected backup's edit window will appear

(4) Click on the «Restore» backup command button — the backup will be restored.

USERS

- Users are created within licensed modules.
- Users are associated to groups that grant them access and permissions to licensed modules.
- There are two default users that exist within each module:
    - super
    - admin
- The **super** user has been granted all permissions. This user may be deleted or modified.

NOTE: The password for the **super** user is: super (*it may have been previously modified*).
The **admin** user is for Infosilem exclusive use. This user may not be deleted nor modified.

THE GENERAL INFORMATION TAB:

Login Name

- Input the login name to be used by the user when accessing any module.
- This is a required field.

Password

- Input the password to be used by the user when accessing any module.
- This is a required field.

Password Confirmation

- Re-enter the password to be used by the user when accessing any module.
- This field is required.

Role

View and Edit

- Select this option to give the current user access to view and edit records within the application.

View Only

- Select this option to give the current user a restricted access (read only) within the application. This option is useful for users who want to view information but do not need to schedule.

NOTE: A *view-only* user will not be allowed to log into the Infosilem Exam module.

Permissions

(The following permissions are unavailable (greyed out) if the selected user role is View Only.)

User Management

- Select this option to give to this user access to the User menu in the System Administration menu item

Import

- Select this option to give to this user access to the Import menu (File > Import)

Restore Backups

- Select this option to give to this user access to restoring backups. The user can still create backups if this option is not selected.

Database Tools

- Select this option to give to this user access to the Database Tools (*File > Database Tools*)

Comments

- Enter any relevant comments for the selected user.

SWITCH DATABASE

(Located under File > Switch Database)

- Upon selecting this feature, the system will close all opened windows and will then proceed to close the current session. Once the current session closed, the system will display the login screen. At this point, you can select a new database from the login screen and log into the selected database. For more information regarding the login screen, please refer to the Login Screen section in this guide.

PART 4 – INFOSILEM ENTERPRISE INTEGRATION

CHAPTER 16 — ENTERPRISE INTEGRATION SCREEN

(Located in the Manager)

- The Enterprise Integration configuration is meant to be carried out by an administrator with the proper technical knowledge. This configuration is meant to be done at the time the product is installed, or when an installation is modified, such as modifications to the Application server, etc.

Connections ___

New Button

- Select this button to activate the fields below and to create a new connection.

Edit Button

- Select this button to edit an already existing connection. Once selected, all pertinent fields and buttons will activate and will be editable.

Delete Button

- Select this button to delete the connection that is displayed. Once the button is selected, a message box will ask to confirm the action. Select «Yes» to delete the connection or «No» to cancel this action.

Connection Name

- Enter the name of the connection being created.

Enterprise API URL
(Only available when creating or editing a connection)

- Enter the Enterprise API URL.

User/Password

- Enter the Infosilem Enterprise username and password. It is recommended to make sure that the user has all the permissions.

Test Connection

- Select this button to test the connection between Infosilem Enterprise and Infosilem Academic Suite.

Apply

- Select this button to apply the entries (or modifications)

Cancel

- Select this option to cancel the entire process and to empty and disable the fields.

Default Settings ____

Default Connection

- This field displays the default connection to Infosilem Enterprise. If there is more than one connection defined, the user can select from the drop-down list, the connection to establish as the default connection.

Enable Enterprise Integration

- Select this option to enable the Enterprise Integration feature within the application.

Prevent users from using Enterprise Integration

- Select this option to prevent users from using the Enterprise Integration feature.

Close

- Select this option to close the Enterprise Integration window.

ENTERPRISE INTEGRATION SETTINGS SCREEN

(Settings → Enterprise Integration Settings)

Use default settings

- Select this option to use the default settings as it is established in the Enterprise Integration screen in the Manager.

Use specific settings

- Select this option to use a specific connection setting, regardless of the default connection that is defined in the Manager.

Enterprise Default Connection

(«Use specific settings» option must be selected)

- If there is more than one connection defined, select from this drop-down, the connection to establish as the default connection.

Enable Enterprise Integration

- Select this option to Enable or Disable Enterprise Integration (checkbox) - this option overrides the Manager default setting for this checkbox.

SAVING MODIFICATIONS

- To save any modification to the Enterprise Integration Settings screen, simply close the screen to display the save option screen. Within this screen, select

Yes

- To save the modifications

No

- To close the Enterprise Integration Settings screen without saving any of the modifications

Cancel

- To close the save option screen and to return to the Enterprise Integration Settings screen without having saved

ENTERPRISE INTEGRATION – IMPORT ROOMS SCREEN

(Tools → Enterprise Integration → Import Rooms…)

Settings

Enterprise Connection

- This field displays the connection used for the import. Authorized users can modify the connection by selecting the *Settings —Enterprise Integration Settings* menu item.

Type of Import

- This section offers two sets of preferred settings, allowing two reusable settings configurations for an Initial import from Enterprise vs subsequent update imports later.

  Presets (Preset 1 / Preset 2)

  - Users can define the import options for each of the presets. By selecting the NEXT button, the selected settings will be saved for the current preset.

Create safety backup

- Select this option to create a backup of your database before importing rooms from Infosilem Enterprise. The import process cannot be undone and therefore creating a safety backup is good practice, if for some reason users want to return the database to the state it was prior to the import process. The backup is automatically named "Enterprise Integration" along with the current date and time at which the backup was created. The description field will contain a description representing the synchronization process that was launched: for example, "Automatically generated when synchronizing Rooms" / "Automatically generated when synchronizing Blockoffs".

Import rooms between __ and __

- Using the drop-down calendar, select the date range in which the rooms to import are to be effective in Infosilem Enterprise. Rooms in Infosilem Enterprise with effective dates that partially cover the entered date range will be imported in Infosilem Academic Suite with blockoffs attached to them for the dates the rooms are not effective but are within the entered date range. Rooms with effective dates that are not within the entered date range will not be imported.
- If Room profiles have been defined in Infosilem Enterprise, the system will associate to the imported rooms the profile that is in effect at the beginning of the selected date range.
- If a room has no room profile taking place at the beginning of the selected date range, the system will use the next available room profile for that given room.

THE FIELDS:

- Within the central part of the screen, users can determine the import process' settings for each field listed in that screen by using the drop-down field next to each element. These selections will be saved within the selected preset. These settings will be saved upon moving to the next screen.

Room	- **Create and Modify** ***(default selection)*** - Modify only
	Description - Do not change - **Update from Enterprise** ***(default selection)***

	Campus
	- **Create if no match found** ***(default selection)***
	  - Creates ***the Campus for the room*** if no matching Campus is found
	- Reject if no match found
	  - Rejects the room if no matching Campus is found.

	Building - **Create if no match found** ***(default selection)*** - Reject if no match found
	Room Type - **Create if no match found (*default selection)*** - Reject if no match found
	Capacity - Do not change - **Update from Enterprise (*default selection)***
	Room Characteristic - **Create** (the Characteristic) **if no match found (*default selection)*** - Reject (the room) if no match found - Ignore if no match found *(please see note)*
	Pavilion - **Create** (the pavilion) **if no match found (*default selection)*** - Reject (the room) if no match found - Ignore if no match found *(please see note)*
	Note - Do not change - **Update from Enterprise (*default selection)***
Room Characteristic	**Description** - Do not **change** - **Update from Enterprise**
Room Type	**Description** - Do not change - **Update from Enterprise**

Campus	**Description**	- Do not change - **Update from Enterprise (*default selection)***
	Address	- Do not change - **Update** from **Enterprise (*default selection)***
	Note	- Do not change - **Update from Enterprise** ***(default selection)***
Building	**Description**	- Do not change - **Update from Enterprise (*default selection)***
	Address	- Do not change - **Update from Enterprise (*default selection)***
	Note	- Do not change - **Update from Enterprise (*default selection)***
Pavilion	**Description**	- Do not change - **Update from Enterprise (*default selection)***

If a room does not exist in Enterprise ___ in Suite database

- This option lets users select how the import process should behave if a room that exists Infosilem Academic Suite does not exist in Infosilem Enterprise.

Disable the room

- Select this option to disable the room in Infosilem Academic Suite

Ignore the room (default selection)

- Select this option to ignore the room — it remains as is.

Delete the room

- Select this option to delete the room in Infosilem Academic Suite

NOTE:	When selecting the «Ignore Pavilion if Pavilion not found» or «Ignore Characteristic if no Characteristic found» option, the system will still import the room information into Infosilem Academic Suite without associating a pavilion or a characteristic to that room since the characteristic or pavilion does not exist in Infosilem Academic Suite.

ROOM FILTERS SCREEN

- The Room Filters screen will display the Rooms that can be imported from Infosilem Enterprise as well as the Campuses, Buildings, Room Types to which those rooms are associated.

NOTE: At this point, the Room information that is in Infosilem Enterprise needs to be compared with the information already contained in Infosilem Academic Suite in order to determine the Status of each Room.

- Select the rooms to import from Infosilem Enterprise.

THE DIFFERENT ROOM STATUSES

New in Enterprise:

- The room exists only in the Infosilem Enterprise database.

No Match in Enterprise:

- The room exists only in the Infosilem Academic Suite database.

Modified:

- The room is found in both applications, but one or more of the room's fields are different in Infosilem Enterprise.

Identical:

- Room exist both in applications, and all fields are identical.

ROOM CHARACTERISTICS FILTERS SCREEN

- If the selected rooms have room characteristics associated to them, the Room Characteristic Filters screen is displayed. Within this screen, select the Characteristics to import.
- Select the «Validate» button to proceed to the next screen.

VALIDATION SCREEN

- The validation screen displays all the records that will be imported.
- The results are split into three (3) types:

The Validation Tabs

Successes

- The Successes tab will list all rooms that will be imported successfully as per the selected options in the previous screen.

Warnings

- The Warnings tab will list all rooms that will be imported but have warning associated to them. The warning reasons will be listed within the Warnings column. At this point, the user can select the «Previous» button to return to the previous screen to modify the selection(s) and try to rectify the situation (if possible).

Rejects

- The Rejects tab will list all rooms that will not be imported because those records are rejected. The rejection reasons will be listed within the Errors column. If the rejection message is undesirable, the user can select the «Previous» button to return to the previous screen(s) to modify the selection(s) to rectify the situation (if possible).

NOTE: Before proceeding with the Room Import process, make sure that any individual room that should not be modified or deleted from the Import process is marked for protection by checking «Prevent Modification from Enterprise» option that is in the Room screen.

- To proceed with the import process, select the Import button. The system will create a backup (if the option "Create safety backup" is activated in the Settings screen) and proceed with the import process. Once the import process is completed, select Done to exit.

ENTERPRISE INTEGRATION – IMPORT RESERVATIONS SCREEN

- The purpose of this feature is to import reservation occurrences from Infosilem Enterprise and to create blockoffs in Infosilem Academic Suite to represent them.

NOTE:	The Import Reservations feature will import booked rooms **only** if those booked rooms previously exist in the Infosilem Exam database.

THE SETTINGS SCREEN

Enterprise Connection

- This field displays the connection used for the import. Authorized users can modify the connection by selecting the *Settings — Infosilem Enterprise Integration Settings* menu item.

Reservations to import ____

- This feature lets users indicate which type of reservation to import

Event Reservations *(Default settings)*

- Select this option to import Events.

Course Reservations

- Select this option to import Courses.

Exam Reservations

- Select this option to import Exams.

Create safety backup

- Select this option to create a backup of your database before importing rooms. The import process cannot be undone and therefore creating a safety backup is good practice, if for some reason users want to return the database to the state it was prior to the import process.
- The backup is automatically named «Enterprise Integration» along with the current date and time at which the backup was created. The description field will contain a description representing the synchronization process that was launched: for example, «Automatically generated when synchronizing Rooms» / «Automatically generated when synchronizing blockoffs».

Filed Import Settings ____

BLOCKOFF ID

- Select the Enterprise field(s) that will make up the blockoff ID.

Functional Unit (*default*)

- By selecting this field, the Functional Unit (alone or concatenated with other selected field(s)) will create the as the blockoff ID

Scheduling Data Set

- By selecting this field, the Scheduling Data Set (alone or concatenated with other selected field(s)) will create the as the blockoff ID

Event ID

- By selecting this field, the Event ID (alone or concatenated with other selected field(s)) will create the as the blockoff ID

Event Description

- By selecting this field, the Event description (alone or concatenated with other selected field(s)) will create the as the blockoff ID

Activity ID

- By selecting this field, the Activity ID (alone or concatenated with other selected field(s)) will create the as the blockoff ID

Activity Description

- By selecting this field, the Activity description (alone or concatenated with other selected field(s)) will create the as the blockoff ID

Reservation ID

- By selecting this field, the Reservation ID (alone or concatenated with other selected field(s)) will create the as the blockoff ID

Reservation Description

- By selecting this field, the Reservation description (alone or concatenated with other selected field(s)) will create the as the blockoff ID

BLOCKOFF DESCRIPTION

Select the filed(s) that will create the blockoff description. This tab can be left blank, it is not required.

BLOCKOFF NOTE

Select the filed(s) that will create the blockoff note. This tab can be left blank, it is not required.

Delimiter character used to combine fields
Select from the drop-down list the character to use as a delimiter.

DATE AND TIME FILTERS SCREEN

Defining date and time ranges

From this date:

- Select from the drop-down calendar, the date that will define the starting point of the date range.

To this date

- Select from the drop-down calendar, the date that will define the end point of the date range.

NOTE: You can also select the dates by clicking and dragging the cursor on the desired dates in the calendar.

Between this time

- Enter the time that will represent the starting point of the time range.

And this time

- Enter the time that will represent the end point of the time range.

Days of the Week

- Select the days of the week that are to be taken into consideration during the import process.
- In other word, for an element to be imported, it must take place within the defined date range, within the defined times and on one of the defined days of the week.

ADDITIONAL FILTERS SCREEN

- The Additional Filters Screen will display 1, 2 or 3 tabs (depending on the reservations to import selected in the first screen). Each tab contains a series of filters. Select the filters to apply (within each tab) to the Enterprise Integration – Import Reservations process. **Please note** that not selecting any element within a filter is treated by the system the same way as having selected all elements within a filter.

THE VALIDATION SCREEN

- The validation screen displays the results of the Reservation Import

SUCCESSES

- The Success tab will display the reservations that will be imported successfully, i.e. that will create blockoffs. For each active occurrence, the system will also create a frequency.

REJECTS

- The Rejects tab will display the reservations that will not be imported, i.e. occurrences that have been rejected.

PART 5 – EXAM ADMINISTRATION APPENDIX

DOCUMENT SCOPE AND PURPOSE

- This section of the guide is addressed to customers who have licensed Error! Unknown document property name.. Just like the previous sections in this guide, the section that follows relates to the functionality of the Module and its associated fields.

INSTITUTIONAL FILES

INSTITUTIONAL INFORMATION

INSTITUTIONAL BLOCKOFFS

- Institutional blockoffs represent days that should not be included within the marks due date calculation.

(1) Navigate to the Private blockoffs tab.

(2) Add the appropriate blockoff.

IMAGE

- Users can select an **Image** that is to appear on all generated reports in the upper right-hand corner.

(1) Within the General Information tab, click the «Select Image» button.

(2) Browse for the appropriate Image.

(3) Select the image to appear within the reports.

DEPARTMENTS

- The **Department** data element will store the **Account Number**. This **Account Number** will appear on the administration group as well as on the printing requisition report.

«INVIGILATORS» TAB

- Within the «Invigilators» tab, invigilators associated to the selected department will be listed.

CAMPUS

«INVIGILATORS» TAB

- Within the Invigilators tab, Invigilators associated to the selected campus will be listed.

EXAM ADMINISTRATION FILES

EXAM ADMINISTRATION CORE DATA

- The following data elements are specific to administration of exam components and will be part of the core database that is rolled from exam session to exam session.

«EXAM ADMINISTRATION» BUTTON

- Various exam administration core data elements can be found within the «Exam Administration» data button located on the data element button list.

EXAM ADMINISTRATION GROUP TYPES

- **Exam Administration Group Types** are used to identify the type of exam administration group.

GENERAL INFORMATION

- The General Information tab displays the Exam Administration Group ID and Description fields.

EXAM ADMINISTRATION GROUP

- The Exam Administration Group tab will list the exam administration groups associated to the selected **Exam Administration Group Type**.

	Exam Administration Groups
NOTE:	Exam administration groups represent a group of exam components whose associated students are said to be writing the same exam paper.

- **Exam Administration Group Types** will appear on various reports and serve to easily identify the type of exam administration group.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

INVIGILATOR POSITIONS

- **Invigilator Positions** are defined with the **Invigilator Positions** menu item. The **Invigilator Positions** are then associated to invigilators and used when assigning the invigilators to rooms.
- The ID defined within the **Invigilator Positions** screen will appear in the Detailed Exam Schedule Report associated to the invigilator assignments once the report is generated.
- The **Invigilator Positions** are each defined with an appropriate hourly rate that will be used to calculate the invigilator's pay. The invigilator pay will be based on the defined hourly rate and the duration of the invigilation for the selected position.
- The **Invigilator Positions** need to be manually entered during initial database setup and then maintained as a part of your core data each exam period.

GENERAL INFORMATION

- The General Information tab displays the **Invigilator Position** ID, Description, Code and the Hourly Rate.

INVIGILATOR ASSIGNMENTS

- The Invigilator Assignments tab will list invigilators assigned to rooms and times with the selected position.

INVIGILATORS

- The Invigilator tab will list invigilators associated to the selected **Invigilator Position**.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

INVIGILATORS

- Contained in this menu item are all the individuals who supervise exam sittings. The list of these individuals can be downloaded initially and then manually maintained as a part of the core data.

GENERAL INFORMATION

- The General Information tab is where the personal information for the invigilator is contained.

ID

- Enter an ID for the current Invigilator.

Description

- Enter a description for the current Invigilator.

Campus

- Campus ID can be added if the invigilator is associated to a Campus

Department

- Department ID can be added if the invigilator is associated to a Department

Student ID

- Student ID can be added if the invigilator is a student

Work Start Date

- Effective Date

Title

- Enter a Title for the current Invigilator.

First Name

- Invigilator’s first name

Middle Name

- Invigilator’s middle name (if applicable)

Last Name

- Invigilator’s last name

Email

- Enter the Invigilators email address in this field

POSITIONS

- The positions associated to the invigilator are listed on the Positions tab. The user is also able to associate new positions to the invigilator from within this tab as well.

ASSIGNMENTS

- The individual invigilators schedule is accessible from the schedule tab. New room assignments can also be completed from this information tab.

INVIGILATION HISTORY

- The invigilators history is viewed and maintained from this tab.

ADDRESS

Phone/Office

- The office phone number of the Invigilator

Phone/Fax

- The fax number of the Invigilator

Phone/Home

- The home phone number of the Invigilator

Phone/Mobile

- The mobile number of the Invigilator

Phone/Pager

- The pager number of the Invigilator

Street Address

- The street address of the Invigilator’s given address

PO Box

- The PO Box of the Invigilator’s given address

City

- The city of the Invigilator’s given address

State/Province

- The state or province of the Invigilator’s given address

ZIP/Postal Code

- The zip code or postal code of the Invigilator’s given address

Country

- The country of the Invigilator’s given address

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

«EXAM RELEASED TO» VALUES

- The **Exam Released To** values identify those groups or individuals who are permitted to have possession of the exam paper once the exam paper has been written. The **Exam Released To** IDs are displayed on the Exam Data Collection Form and can be associated to Exam Administration Groups.
- Selected defined **Exam Released To** values will appear as options within the «Exam Data Collection Form».
- A note can be associated to the defined **Exam Released To** value. The specified note will appear to the right of the selectable **Exam Released To** option within the «Exam Data Collection Form».
- Moreover, the appropriate **Exam Released To** value can be selected at the exam administration group level to identify that the associated group of exam components will have their exam released to the indicated value.

GENERAL INFORMATION

- The General Information tab displays the **Exam Released To** ID and Description.

EXAM ADMINISTRATION GROUPS

- The Exam Administration Group tab will list the Exam Administration Groups having the **Exam Released To** value selected.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

PAPER VERSIONS

- Users can identify the appropriate **Paper Versions** for exam papers. Moreover, a color for the version and price per page can be defined for each **Paper Version**.
- Users can identify the **Paper Versions** of the exam at the exam administration group level.
- When generating the Exam Printing Requisition Report, the indicated **Paper Version**, color and price will appear.

GENERAL INFORMATION

- The General Information tab displays the exam **paper version** ID, Description, Color and Price per Page.

EXAM ADMINISTRATION GROUPS

- The Exam Administration Group tab will list the exam administration groups having the **paper version** selected.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

PRINTING DELIVERY LOCATIONS

- **Printing Delivery Locations** and contacts are managed in the exam administration core data.
- The printing location will appear associated to exam administration groups and will appear within the Exam Printing Requisition Report.
- All the records contained in this data element are to be manually maintained by the end user.

GENERAL INFORMATION

- The General Information tab displays exam **Printing Delivery Location** general information

EXAM ADMINISTRATION GROUPS

- The Exam Administration Group tab will list the exam administration groups having the **Printing Delivery Location** selected.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

PRINTING REQUIREMENTS

- Special printing instructions for exam papers are managed in the Printing Requirements data element.
- Selected defined Printing Requirement values will appear as options within the «Exam Data Collection Form».
- A note can be associated to the defined **Printing Requirements**. The specified note will appear to the right of the selectable **Printing Requirements** option within the «Exam Data Collection Form».
- Moreover, the appropriate **Printing Requirement** values can be selected at the Exam Administration Group level to identify that the associated group of exam components require **Printing Requirements**.
- This information will appear within the Exam Printing Requisition Report.

GENERAL INFORMATION

- The General Information tab displays the printing requirement ID and Description.

EXAM ADMINISTRATION GROUPS

- The Exam Administration Group tab will list the exam administration groups having the printing delivery location selected.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

EXAM SUPPLY TYPES AND EXAM SUPPLIES

- The admissible **Exam Supply Types and Supplies** are managed in this menu item.
- These values can then be associated to the appropriate Exam Administration Groups and will display on the Exam Data Collection Form generated for that group.
- Selected defined **Exam Supply Type** values will appear as separate questions within the Exam Data Collection Form.
- Selected defined **Exam Supply** values will appear as selectable answers within the Exam Data Collection Form.
- A note can be associated to the defined **Exam Supply**. The specified note will appear to the right of the selectable **Exam Supply** option within the Exam Data Collection Form.
- Moreover, the appropriate **Exam Supply** values can be selected at the exam administration group level to identify that the associated group of exam components have the selected **Exam Supplies**.
- This information will appear within the Detailed Exam Schedule Report.

EXAM SUPPLY TYPES

GENERAL INFORMATION

- The General Information tab displays the **exam supply type** ID and Description.

EXAM SUPPLIES

- The Exam Supplies tab will list the exam supplies associated to the selected **exam supply type**.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

EXAM SUPPLIES

GENERAL INFORMATION

- The General Information tab will identify the **Exam Supply Type**, ID and Description of the **Exam Supply**.

EXAM ADMINISTRATION GROUPS

- The Exam Administration Group tab will list the exam administration groups having **Exam Supply** selected.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

EXAM ADMINISTRATION SETTINGS

- Various **Exam Administration Settings** define calculated fields at the exam administration group level, these settings also define default values to be populated when generating exam administration groups and they determine the ID of generated exam administration groups.

CALCULATED FIELDS

- Settings for the calculated fields at the administration group level can be defined within the Exam Administration Settings screen and can be applied to all generated Exam Administration Groups.

Automatic Marks due Date Calculation

- The following settings are defined to determine how the application will determine the marks due date at the administration group level.

Marks Due Date for Exam Admin Group =

$$\text{Scheduled Exam Date} + \left[\frac{\text{Number of Students}}{(\text{Number of Papers per day} \times \text{Number of Graders})} \right] + \text{Additional marking days}$$

Calculate marks due date automatically

- Select this option if the marks due date should be automatically calculated.

Number of copies marked per day

- Indicate the number of copies a single marker can mark per day.

Added days allowed for marking

- Indicate the additional days required for marking.

Exclude Institutional Blockoffs

- Select this option if institutional blockoffs will NOT be considered as marking days and will be excluded from the marks due date calculation.

Specified Days of the Week

- Select the days of the week to be considered as marking days.

No Later Than

- From the drop-down calendar, select the latest marks due date.

Marks Due Date for Courses without a Scheduled Exam Component

- From the drop-down calendar, select the marks due date for courses without a scheduled exam component.

Printing Requisition Number

- A unique number is created when a printing requisition is generated.
- These setting allow the user to determine the format of the printing requisition number.

Prefix

- Indicate the printing requisition number prefix.

Starting Number

- Indicate the printing requisition starting number.

Suffix

- Indicate the printing requisition number suffix.

Number of Digits

- Indicate the number of digits for the printing requisition number.

Next Printing Requisition Number

- Populated with the next printing requisition number to be generated

Others____

Calculate Printing Charges Automatically

- Use the «Calculate printing charges automatically» option to indicate if the system should calculate the printing charges when creating the exam administration groups.

Printing Charges for Exam Admin Group	**=**	Number of Copies	**X**	Price per page	**X**	Number of pages

EXAM ADMINISTRATION GROUP DEFAULT VALUES

- Allows users to indicate the default values to be selected/ indicated when exam administration groups are generated.

Exam Administration Group Type

- Indicate the exam administration group type to be associated to the created exam administration groups.

Printing Delivery Location

- Indicate the printing delivery location to be associated to the created exam administration groups.

Override Calculated Costs

- If selected, costs will not automatically be calculated for the created exam administration groups.

Information

Entered By

- Indicate the text to appear within the «**Entered By**» field for the created exam administration groups.

Date

- Indicate the date to appear within the entered by date for the created exam administration groups.

Exam Released To

- Select the exam released to values to be selected for the created exam administration groups.

Exam Supplies

- Select the exam supplies to be selected for the created exam administration groups.

Grading Methods

- Select the grading methods to be selected for the created exam administration groups.

Exam Printing Specifications

Number of Pages

- Indicate the number of pages to appear for the created exam administration groups.

Exam Printing Requirements

- Select the printing requirements to be selected for the created exam administration groups.

EXAM ADMINISTRATION GROUP CREATION PROCESS OPTIONS

Exam Administration Group ID- For non- grouped exams

- Users are able to indicate the fields to be included within the ID field for created exam administration groups.
- These settings apply to exam components that are not associated to an exam scheduling groups (exam administration groups generated from exam scheduling groups will inherit the scheduling group ID as the exam administration group ID).

EXAM ADMINISTRATION GROUPS

CREATE EXAM ADMINISTRATION GROUPS

- ALL Scheduling Groups should exist within the system prior to generating Exam Administration Groups.
- Exam Administration groups represent a group of Exam Components whose associated students are said to be writing the same exam paper. Administration information is entered at the administration group level and Exam Data Collection Forms to be distributed to departments are generated by administration group.

RUN THE EXAM ADMINISTRATION GROUP CREATION ASSISTANT

NOTE:	Make sure that the Exam Administration Settings have been defined prior to running the Exam Administration Group Creation Assistant

- Settings> Exam Administration Settings
- The «Exam Administration Group Creation Assistant» will allow users to create Exam Administration Groups for exam scheduling groups or individual Exam Components.

(1) Select Tools on the Main Menu toolbar

(2) Select Exam Administration Group Creation Assistant

INTRODUCTION

(1) Upon accessing the Exam Administration Group Creation Assistant, users are presented with the introduction screen

(2) Click on <<Next>>

NOTE:	Select the «Do not show this introduction in the future» flag to ensure that the introduction page is not presented to the end user on subsequent uses.

SELECT EXAM COMPONENT GROUPS AND EXAM COMPONENTS

(1) Select the Exam Component Groups on the Exam Component Group tab

NOTE:	Some exam component may belong to both a Stacked and Combined scheduling group. Ensure to select the appropriate Scheduling Group.

(2) Select the Exam Components on the Exam Components tab

(3) Click on <<Next>>

CREATE EXAM ADMINISTRATION GROUPS

(1) The Exam Administration Group creation process will commence. The progress bar allows users to monitor the progression of the creation process

(2) Click on <<Cancel>> at anytime to stop the process

(3) When complete click on <<Next>> to view the results

RESULTS

(1) The results screen allows users to view the created Exam Administration Groups

(2) Click on <<Finish>> to complete the process

(3) Exam Administration Group will be created for selected Exam Scheduling Groups where all Exam Components are enabled.

VERIFY EXAM ADMINISTRATION GROUPS

- Once generated, the application will assign a unique name to each created exam component group based on the selected group constraint.

EXAM ADMINISTRATION GROUP ID

- A unique identifier will be assigned to each generated exam administration group:

Creation Method	Exam Admin Group ID
For Scheduling Groups	Scheduling Group ID
For Individual Exam Components	Selected Exam Administration Group ID within the Exam Administration Group Creation Process Options

- Exam Components within the exam administration group associated to the same faculty and department will have their faculty and department associated automatically. Exam Components with differing faculty and departments will have these values appearing as null values

GENERATE EXAM DATA COLLECTION FORM

- The Exam Data Collection Form contains information about Exam Administration Groups and is used to collect scheduling and administration data for Exam administration groups.

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Exam Data Collection Form

(4) The Exam Data Collection Form edit window will appear

(5) Select the appropriate Filters

FILTERS

- Four filters are available when running the Exam Data Collection Form report. Based on the selected Faculty, Department and Exam Administration Group Type filters, the appropriate number of Exam Administration Groups will appear listed within this section:

Faculties

- Select the desired Faculties. Only Administration Groups associated to the selected Faculties will have an Exam Data Collection Form generated.

Departments

- Select the desired Departments. Only Administration Groups associated to the selected Departments will have an Exam Data Collection Form generated.

Exam Administration Group Types

- Select the desired Exam Administration Group Types. Only Administration Groups associated to the selected Exam Administration Group Types will have an Exam Data Collection Form generated.

Exam Administration Groups

- Select the Exam Administration Groups. Only selected Exam Administration Groups will have an Exam Data Collection Form generated.

OPTIONS

- Multiple options can be defined for the Exam Data Collection Form Report.
- Users will need to select the appropriate option when generating the Exam Data Collection Form Report.
- Select the «Report» icon within the Toolbar — the Exam Data Collection Form will appear
- Please refer to the following section for detailed information about the Exam Data Collection Form Options:
- Database Creation> Report Options> Exam Data Collection Form

UPDATE EXAM ADMINISTRATION GROUPS

- Once the Exam Data Collection Forms have been received, collected data can be inputted at the Exam Administration Group level.
- The user will enter the Exam Data Collection Form data into the designated areas of the Exam Administration Group data window.

GENERAL INFORMATION TAB

General Information

- Any of these fields can be modified.

Identification

- Automatically generated when the Administration Groups are created

Creation Method	Exam Admin Group ID
For Scheduling Groups	Scheduling Group ID
For Individual Exam Components	Faculty ID + Department ID + Course ID + Section ID + Exam Component ID

Type

- This field is automatically populated with default value indicated within the Exam Administration Settings when Exam Administration Groups are created. This field can be overridden at the Exam Administration Group level.

Description

- Description of the Exam Administration Groups

Faculty

- This field is automatically populated when Exam Administration Groups are created.
- Exam Components within the exam administration group associated to the same faculty will have their faculty associated automatically. Exam Components with differing faculty values will have the Department field appearing as null values

Department

- This field is automatically populated when Exam Administration Groups are created.
- Exam Components within the exam administration group associated to the same department will have their department associated automatically. Exam Components with differing department values will have the Department field appearing as null values

Exam Information ____

Number of Students

- Sum of Number of Students of all associated Exam Components

Reserved Seats

- Sum of Reserved Seats of all associated Exam Components

Duration

- Longest duration of all associated Exam Components

NOTE:	Any changes required to Exam Information must be completed at the Exam Component level

Account Information ____

Account Number

- Automatically populated with Account number of associated Department

Override Account Number

- Allows end users to override the defaulted Account number

NOTE:	the indicated Account Number will appear within the Billing Report for Departments

Information ____

Entered By

- This field is automatically populated with default value indicated within the Exam Administration Settings when Exam Administration Groups are created. This field can be overridden at the Exam Administration Group level.

Received Date

- This field is automatically populated with default value indicated within the Exam Administration Settings when Exam Administration Groups are created. This field can be overridden at the Exam Administration Group level.

Marks ____

Number of Graders

- Allows users to input the number of Graders

Exam Marks Due Date

- The Exam Mark due Date will be calculated when the exam has been scheduled
- In the event that the Exam Mark due Date should not adhere to the default calculation indicate this by checking the «Override Calculated Date» field
    - ***Marks Due Date for Exam Admin Group*** = Scheduled Exam Date + [Number of Student/(Number of Papers per day*Number of Graders)] + Additional marking days

About Marks Due Date

- Users are able to verify the Marks Due date for scheduled and non- scheduled exam components

(1) Select the «Exam Administration» data element button

(2) Select the «Marks Due Date» tree frame menu

- All exam components within the database will appear list with their Marks Due Date

Marks Due Date Calculation

- The Marks Due Date calculation is defined within the Exam Administration Settings accessed via the «Settings» menu.

Marks Due Date for Scheduled Exams

- ***Marks Due Date for Exam Admin Group*** = Scheduled Exam Date + [Number of Student/(Number of Papers per day*Number of Graders)] + Additional marking days

Marks Due Date for non- Scheduled Exams

- Defined Date within «Marks due date for courses without a scheduled Exam Component» field

Exam Released To

- The user indicates to whom the exam paper may be released to once it has been written.
- Use the «Selected» column to indicate the appropriate Exam Release to Values.
- Selected values will appear within the Detailed Exam Schedule Report

Exam Supplies

- The user indicates the exam supplies and note for the selected Exam Administration Group.
- Use the «Selected» column to indicate the appropriate Exam Supply values.
- Input appropriate text within the «Note» field
- Selected values and indicated Note will appear within the Detailed Exam Schedule Report

Grading Methods

- The user indicates the grading methods and note for the selected Exam Administration Group..
- Use the «Selected» column to indicate the appropriate Grading Method values.

Exam Copy

Exam Copy Due Date

- Indicate the date that the Exam Copy is due

Exam Copy Received Date

- Indicate the date that the Exam Copy was received
- This date is required when generating Exam Printing Requisitions. Only Exam Administration Groups with a populated Exam Copy Received Date will appear as selectable when generated the Exam Printing Requisitions.

Receipt Note

- Input an appropriate note

Exam Printing Specifications

Number of Pages

- Indicate the number of pages of the exams

Version Grid

- Displays all the versions that have been defined within the database
- Input the number of copies for the applicable version
- Printing Charges are calculated based on the indicated number of Pages and Number of Copies
  - ***Printing Charges for Exam Admin Group*** = Number of Copies*(Price per page*Number of pages)

Printing Requisition Number

- Automatically populated with requisition number generated for the Exam Administration Group

Printing Requirement

- Users are able to indicate if there are special printing requirements for each selected version the exam by ticking the selected box beside the requirement.
- Selected Printing Requirements will appear within the Exam Printing Requisition Report

Note

- Users are able to specify a Note that will appear within the Exam Printing Requisition Report

Charge

Printing Charge

- If automatic pricing was activated in the Exam Administration settings the printing costs will be automatically calculated when the «# of pages» and «# of copies» are entered.

Override Calculated Cost

- If selected, users are able to override the calculated printing cost and input a Printing Charge.

Additional Charge

- Users are able to input any additional charges

Total Charge

- Printing Charge + Additional Charge

Note

- Users are able to input a note associated to the charges

Printing Delivery Location

- The user can indicate the location to have the exam papers deliver after printing in this frame. The default location indicated with the Exam Administration Setting can be overridden at the Exam Administration Group level.

«EXAM COMPONENTS» TAB

- The Exam Components tab lists the Exam Components associated to the Exam Administration Group.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

SPECIAL NEEDS SCHEDULING

SPECIAL NEEDS OPTIONS

- The Special Needs Options define the default values that will be associated to Special Needs exam components.

Special Needs Rescheduled Exam Component Default Values ______________________________________

Exam Component Type

- Select the exam component type to be assigned to the created rescheduled exam components for **special needs** students.

Exam Component ID Prefix

- Indicate the exam component ID prefix to be used for the rescheduled exam components for **special needs** students.

NOTE:	Exam component ID for generated rescheduled exam component = indicated prefix + student ID + original component type ID .

ACCOMMODATIONS

- Defined within the secondary files, **accommodations** are associated to a special needs student's exam component.

«GENERAL INFORMATION» TAB

ID

- Enter the ID for this **accommodation**

Description

- Enter a description for this **accommodation**.

«STUDENTS» TAB:

- The «Students» tab displays students that are associated with this accommodation.

«EXAM COMPONENTS» TAB:

- The «Exam Components» tab displays exam components that are associated with this accommodation.

«NOTE» TAB

- Within the Note tab, users insert notes regarding the current data element.

RESCHEDULING EXAM COMPONENTS

AUTOMATICALLY CREATE RESCHEDULED EXAM COMPONENTS

- The Special Needs Rescheduled Exam Component Creation Assistant will automatically create a rescheduled Exam Components for each Exam Component assigned to a Special Needs Student that has an associated accommodation.

RUN THE SPECIAL NEEDS RESCHEDULED EXAM COMPONENT CREATION ASSISTANT

- Prior to running the Special Needs Rescheduled Exam Component Creation Assistant, please make sure the Special Needs Options have been defined.
- Settings> Special Needs Options

NOTE: Rescheduled Exams will only be created where Student Exam Accommodations exist.

(1) Select Tools on the Main Menu toolbar

(2) Select Special Needs Rescheduling Assistant

SELECT SPECIAL NEED STUDENTS

(1) Users are able to select both the Student(s) and Exam Component(s) for which rescheduled Exam Components are to be created.

(2) Select the desired records and click on <<Next>>

CREATE RESCHEDULED EXAM COMPONENTS

(1) The Rescheduled Exam Component creation process will commence. The progress bar allows users to monitor the progression of the creation process

(2) Click on <<Cancel>> at anytime to stop the process

(3) When complete click on <<Next>> to view the results

RESULTS

(1) The results screen allows the user to view the number of created Rescheduled Exam Components

(2) Click on <<Finish>> to complete the process

VERIFY SYSTEM GENERATED RESCHEDULED EXAM COMPONENT

- Once generated, the application will assign a unique exam component ID to each created rescheduled exam component based on the selected options.

Data Fields for System Generated Rescheduled Exam Components

Data Field	Field Description
ID	Indicated Prefix in Special Needs Options + Student ID+ Original Exam ID
Original Exam Component Original Exam Date Original Exam Time	Auto populated
Exam Component Type	Indicated Exam Component Type in Special Needs Options
Date/ Time	Date and Time of Original Exam Component
Off- Grid checkbox	Auto selected
Assigned Room	Removed, grid appears as null
Ratio	1
Exam Scheduling Group	Exam Scheduling Group associated to the Original Exam Component is NOT associated to the Rescheduled Exam Component
Student Assignment	Student is removed from Original Exam Component Student appears associated to the newly Rescheduled Exam Component
Student Exam Accommodations/ Student Accommodations	Accommodations associated to the Student's exam are associated to the newly Rescheduled Exam Component
Exam Administration Group	Exam Administration Group associated to the Original Exam Component is associated to the Rescheduled Exam Component

- The user may now use all the scheduling tools available for Exam Components to schedule the newly created Exam Component (Special Needs Scheduling Aid, Move Screen, Room Search etc.)

MANUALLY CREATE RESCHEDULED EXAM COMPONENTS

METHOD 1: EXAM COMPONENT

(1) Select the Special Needs tab

(2) Select the Exam Component to reschedule in the Student Exam Component frame

(3) Right click and select «Reschedule Exam» — a new Exam Component edit window will open with a newly created exam

(4) Change the Exam Component type to rescheduled

(5) Save the newly created Exam Component – a link to the original Exam Component is maintained in the field of the same name

METHOD 2: STUDENT RECORD

(1) Select the special needs tab

(2) Choose the Exam Component to reschedule from the Student Exam Component Accommodations frame

(3) Right click and select «Reschedule Exam»

(4) Repeat Steps 4 and 5 in Method 1

NOTE: The selected student is unassigned from the original exam and is assigned to the newly created Exam Component.

- A link is maintained in the original exam component screen to the newly created Exam Component via the **Rescheduled Exam Component** field.

SPECIAL NEEDS SCHEDULING AID

- The Special Needs Scheduling Aid allows users to schedule rescheduled Exam Components.

Information regarding

- Exam Components
- Scheduled times
- Assigned rooms
- Associated Student's accommodations
- Exam Supplies

- For the associated Exam Administration Group, and for the associated Student's scheduled, are displayed within the Special Needs Scheduling Aid.

METHOD #1- EXAM COMPONENT LIST

(1) Within an Exam Component list, select the rescheduled Exam Component

(2) Right click and select «Special Needs Scheduling Aid» — the Special Needs Scheduling Aid for the selected Exam Component will appear

(3) Schedule the rescheduled Exam Component

(4) Select the next rescheduled Exam Component to be scheduled

NOTE: All available scheduling tools are accessible via the Special Needs Scheduling Aid (Move Screen, Room Search etc.).

METHOD #2- SPECIAL NEEDS SCHEDULING AID BUTTON

(1) Open a rescheduled Exam Component edit window

(2) Within the Toolbar, select the «Special Needs Scheduling Aid» button to open the Special Needs Scheduling Aid for the selected Exam Component.

(3) Schedule the rescheduled Exam Component

NOTE: All available scheduling tools are accessible via the Special Needs Scheduling Aid (Move Screen, Room Search etc.).

METHOD #3- STUDENT EXAM COMPONENTS TAB

(1) Open a Student edit window for a student with rescheduled Exam Components

(2) From the Exam Component tab select one of the rescheduled Exam Components

(3) Within the Toolbar, select the «Special Needs Scheduling Aid» button – to open the Special Needs Scheduling Aid for the selected Exam Component.

(4) Schedule the rescheduled Exam Component

(5) From the Student→Exam Component tab; select the next rescheduled Exam Component to update for the student. The information in the Special Needs Scheduling Aid will refresh to display the currently selected rescheduled Exam Component.

NOTE: All available scheduling tools are accessible via the Special Needs Scheduling Aid (Move Screen, Room Search etc.).

STUDENT DID NOT WRITE

- Users are able to indicate the students that did not write their exam

(1) Navigate to a Student Edit window

(2) Select the «Exam Components» tab

(3) Select the appropriate Exam Component that the student did not write

(4) Right click and select «Did Not Write»

(5) Upon saving the «Did Not Write» column will be populated for the selected student exam.

INVIGILATION

ASSIGN INVIGILATORS TO ROOMS

- Once the Exam Schedule is complete, the users will begin the process of staffing all the examination rooms by assigning invigilators appropriately.

(1) Open a Room Edit window

(2) Select the Schedule tab

- A new «Invigilator Assignments» tab will appear within the Room edit window. Users will be able to assign Invigilators via this tab.

«INVIGILATOR ASSIGNMENTS» TAB

- A new «Invigilator Assignments» tab will appear within the Room edit window.
- Users will be able to assign Invigilators via this tab.

Room Schedule ____

- This frame displays the exam grid slots

Exam Components frame ____________________________________

- This frame displays the Exam Components scheduled within the selected room at the selected time slot.
- The list of Exam Component will be refreshed when the user selects a different time slot within the «Room Schedule» frame.

Invigilator Assignments frame ___

- This frame displays the invigilators assigned within the selected room at the selected time slot.
- The list of invigilators will be refreshed when the user selects a different time slot within the «Room Schedule» frame.

(1) Within the Room Schedule frame, double click on the time slot to assign invigilators — the «Room Time Block» edit widow will appear

(2) Assign the appropriate number of Invigilators

- Users are able to select:
- Position
- The invigilator
- Start Time of the Invigilation
- The duration of the Invigilation
- Sub-room(s)
- The «Rate» column will be automatically populated based on the selected position
- The «Pay» column will be automatically populated based on the indicate duration

(3) Save the Invigilation

- Upon saving the Invigilation, the «Room Schedule» frame will be updated

(4) The «Nbr of Invigilators» column will increase

- The «Invigilator Duration» column will be updated
- The «Pay» column will be updated

- Upon saving the Invigilation, the «Invigilator Assignments» frame will list the assigned invigilator

INVIGILATOR VALIDATIONS

- Non-valid situations such as Invigilators assigned to rooms where no exams occurs, invigilators assigned to a position that they are not associated to, etc. can be validated using the data consistency checks.

DATA CONSISTENCY CHECKS

(1) Select «Data Consistency Checks» from the data element button list — the Invigilator Validation Data Consistency Checks will open.

(2) Select the appropriate Data Consistency Check

REPORTS

REPORT OPTIONS

- Users can define various options within the provided reports.

EXAM DATA COLLECTION FORM

- The **Exam Data Collection Form** contains information about exam administration groups. It is used to collect scheduling and administration data for exam administration groups.

(1) Select the «New» icon to open the Exam Data Collection Form Options screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Location ID

- Specify the location ID to be displayed within the generated report's header.

Location Address

- Specify the location address to be displayed within the generated report's header.

Exam Component Display Option

- Select the exam component fields to be displayed within the generated report.

Exam Administration Data Elements to Display

- Select the exam released to, exam supplies and exam printing requirements to be displayed within the generated report.

NOTE: No **exam administration data element** will be selected upon the creation of a new option.

- To **add Exam Administration Data Elements** to be displayed within the generated report:

(1) Within the appropriate frame, right-click and select «Select» – the list of defined data elements will appear.

(2) Select the appropriate data element to appear within the generated report.

(3) Close the edit window.

INVIGILATOR ASSIGNMENT REPORT

- The **Invigilator Assignment Report** lists the invigilator assignments for the selected exam term.

(1) Select the «New» icon to open the Invigilator Assignment Report Options screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Options

Show Invigilator Note

- If selected, the note associated to the invigilator will appear on the generated report above the assignment information.

One Page Per Invigilator

- If selected, a separate report will be generated for each selected invigilator.

Original Date Time Display Options

- Select the time field for the original date of a rescheduled exam component to be displayed within the generated report.

Room Display Options

- Select the room fields to be displayed within the generated report.

Accommodations

- Select the **accommodations** to be displayed for rescheduled special needs exam components within the generated report.
- To **add an accommodation** to be displayed within the generated report:

(1) Within the accommodations frame, right-click and select «Select» − the list of defined accommodations will appear.

(2) Select the appropriate accommodation to be displayed within the generated report.

(3) Close the edit window.

EXAM PRINTING REQUISITION REPORT

- The **Exam Printing Requisition Report** displays information about the **printing requirements** for the selected exam administration groups. The **printing requisition** report can only be generated for exam administration groups having an indicated exam copy received date.

(1) Select the «New» icon.to open the Printing Requisition Report Options screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Account Number

- Specify the account number to be displayed within the generated report.

Exam Component Display Option

- Select the exam component fields to be displayed within the generated report.

Printing Requirements

- Select the **printing requirements** to be displayed within the generated report.
- To **add a printing requirement** to be displayed within the generated report:

(1) Within the printing requirement frame, right-click and select «Select» − the list of defined printing requirements will appear.

(2) Select the appropriate printing requirement to be displayed within the generated report.

(3) Close the edit window.

STUDENT SCHEDULES

- The **Student Schedules Report** displays selected exam components assigned for the selected students.

(1) Select the «New» icon to open the Student Schedules Options screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Report Note (Header)

- Specify the report note to be displayed within the generated report.

Report Note (Footer)

- Specify the report note to be displayed within the generated report.

Options

Include Student Note

- If selected, the note associated to the student will appear on the generated report above the exam information.

One Page Per Student

- If selected, a separate report will be generated for each selected student.

Exam Component Display Option

- Select the exam component fields to be displayed within the generated report.

Original Date Time Display Options

- Select the time field for the original date of a rescheduled exam component to be displayed within the generated report.

Room Display Options

- Select the room fields to be displayed within the generated report.

Accommodations

- Select the **accommodations** to be displayed for rescheduled special needs exam components within the generated report.

- To **add an accommodation** to be displayed within the generated report:

(1) Within the accommodations frame, right-click and select «Select» – the list of defined accommodations will appear.

(2) Select the appropriate accommodation to be displayed within the generated report.

(3) Close the edit window.

Exam Administration Group Type ___

- Select the **exam administration group types** to be displayed within the generated report.
- To **add an exam administration group type** to be displayed within the generated report:

(1) Within the exam administration group type frame, right-click and select «Select» – the list of defined exam administration group types will appear.

(2) Select the appropriate exam administration group type to be displayed within the generated report.

(3) Close the edit window.

EXAM LABELS

- The exam labels display selected exam components assigned for the selected students within the standard 6X6 Avery label format.

(1) Select the «New» icon to open the Exam Labels Options screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

Report Title

- Specify the report title to be displayed within the generated report.

Exam Component Display Option ___

- Select the exam component fields to be displayed within the generated report.

Original Date Time Display Options ___

- Select the time field for the original date of a rescheduled exam component to be displayed within the generated report.

Room Display Options ___

- Select the room fields to be displayed within the generated report.

Accommodations ___

- Select the **accommodations** to be displayed for rescheduled special needs exam components within the generated report.
- To **add an accommodation** to be displayed within the generated report:

(1) Within the accommodations frame, right-click and select «Select» – the list of defined accommodations will appear.

(2) Select the appropriate accommodation to be displayed within the generated report.

(3) Close the edit window.

EXAM SEATING SETUP REPORT

- The Exam Seating Setup Report displays exams scheduled within a room for the selected date and time.

(1) Select the «New» icon to open the Exam Seating Setup Report Options screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Report Note (Header)

- Specify the report note to be displayed within the generated report.

Report Note (Footer)

- Specify the report note to be displayed within the generated report.

Exam Component Display Option

- Select the exam component fields to be displayed within the generated report.

Room Display Options

- Select the room fields to be displayed within the generated report.

Supplies

- Select the exam supplies to be displayed within the generated report.

- To add an exam supplies to be displayed within the generated report:

(1) Within the exam supplies frame, right-click and select «Select» – the list of defined exam supplies will appear.

(2) Select the appropriate exam supplies to be displayed within the generated report.

(3) Close the edit window.

PRINTING BILLING REPORT

- The Printing Billing Report displays by department, billing information for the associated exam administration groups.

(1) Select the «New» icon to open the Printing Billing Report Options screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Report Note (Header)

- Specify the report note to be displayed within the generated report.

Options

- Include Exam Administration Groups with no Printing Charge
- If selected, exam administration groups with no printing charge will be displayed within the generated report.

Exam Component Display Option

- Select the exam component fields to be displayed within the generated report.

Exam Administration Group Type

- Select the exam administration group types to be displayed within the generated report.

- To add an exam administration group type to be displayed within the generated report:

(1) Within the exam administration group type frame, right-click and select «Select» – the list of defined exam administration group types will appear.

(2) Select the appropriate exam administration group type to be displayed within the generated report.

(3) Close the edit window.

Exam Printing Requirements

- Select the exam printing requirements to be displayed within the generated report.
- To add an exam printing requirement to be displayed within the generated report:

(1) Within the exam printing requirements frame, right-click and select «Select» – the list of defined exam printing requirements will appear.

(2) Select the appropriate exam printing requirement to be displayed within the generated report.

(3) Close the edit window.

DETAILED EXAM SCHEDULE REPORT

- The Detailed Exam Schedule Report contains various sub-reports that display exam scheduling and exam administration information.

(1) Select the «New» icon to open the Detailed Exam Schedule Report Option screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

GENERAL OPTIONS

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Report Note (Header)

- Specify the report note (Header) to be displayed within the generated report.

Sub- Reports to be Display

- Select the sub-reports to be generated.

Page Break After Each Sub- Report

- If selected, a page break will appear after each generated sub-report.

Exam Component Display Option

- Select the exam component fields to be displayed within the generated report.
- Selected options will be applicable to all generated sub-reports.

Original Date Time Display Options

- Select the time field for the original date of a rescheduled exam component to be displayed within the generated report.
- Selected options will be applicable to all generated sub-reports.

Room Display Options

- Select the room fields to be displayed within the generated report.
- Selected options will be applicable to all generated sub-reports.

DISPLAY OPTIONS

Accommodations

- Select the accommodations to be displayed for rescheduled special needs exam components within the generated report.
- To add an accommodation to be displayed within the generated report:

(1) Within the accommodations frame, right-click and select «Select» – the list of defined accommodations will appear.

(2) Select the appropriate accommodations to be displayed within the generated report.

(3) Close the edit window.

- Selected accommodations will be applicable to all generated sub-reports where accommodations are displayed.

Exam Supplies

- Select the exam supplies to be displayed within the generated report.
- To add an exam supplies to be displayed within the generated report:

(1) Within the exam supplies frame, right-click and select «Select» – the list of defined exam supplies will appear.

(2) Select the appropriate exam supplies to be displayed within the generated report.

(3) Close the edit window.

- Selected exam supplies will be applicable to all generated sub-reports where exam supplies are displayed.

Exam Released To

- Select the exam released to values to be displayed within the generated report.

(1) To add an exam released to value to be displayed within the generated report:

(2) Within the exam released to frame, right-click and select «Select» – the list of defined exam released to values will appear.

(3) Select the appropriate exam released to value to be displayed within the generated report.

(4) Close the edit window.

- Selected exam released to values will be applicable to all generated sub-reports where exam release to values are displayed.

Exam Administration Group Type

- Select the exam administration group types to be displayed within the generated report.
- To add an exam administration group type to be displayed within the generated report:

(1) Within the exam administration group types frame, right-click and select «Select» – the list of defined exam administration group types will appear.

(2) Select the appropriate exam administration group types to be displayed within the generated report.

(3) Close the edit window.

- Selected exam administration group types will be applicable to all generated sub-reports where exam administration group types are displayed.

ROOM ORDER

- Define the order in which rooms will appear within the generated sub-reports.

(1) Select the appropriate room(s).

(2) Use the up and down arrows to determine the room order. The selected room order will be applicable to all generated sub-reports.

INVIGILATOR ORDER

- Define the order in which assigned invigilators will appear within the generated sub-reports based on the indicated position.

(1) Select the invigilator position.

(2) Use the up and down arrows to determine the invigilator order.

- The selected invigilator order will be applicable to all generated sub-reports.

SUB REPORTS

- Options within the sub-report tab allow users to define options for each generated sub-report.

INVIGILATORS ASSIGNED TO ROOMS WITHOUT EXAMS

- The invigilator assigned to rooms without exams sub-report will list all invigilators that have been assigned to a room at the selected date and time where no exam is scheduled.

Sub- Report Title

- Specify the report title to be displayed within the generated sub-report.

Invigilator Position

- Select the invigilator positions to appear within invigilator assigned to rooms without exams sub-report.
- Only invigilators assigned to rooms without exams to the selected position(s) will appear within the sub-report.
- To add an invigilator position to be displayed within the generated sub-report:

(1) Within the invigilator positions frame, right-click and select «Select» – the list of defined invigilator positions will appear.

(2) Select the appropriate invigilator positions to be displayed within the generated report.

(3) Close the edit window.

EXAM SCHEDULE

- The exam scheduled sub-report allows users to define multiple sub-reports that when generated will display relevant exam schedule information.

(1) Within the exam scheduled frame right-click and select «Add» – a sub-report will be created.

(2) Input the appropriate information.

(3) Add the appropriate number of sub-reports.

Title

- Specify the report title to be displayed within the generated sub-report.

Exam Component Types

- Select the exam component type to appear within defined sub-report.
- Only exam components assigned to the selected exam component type will appear within the sub- report.
- To add an exam component type to be displayed within the generated sub-report:

(1) Within the exam component types frame, right-click and select «Select» – the list of defined exam component types will appear.

(2) Select the appropriate exam component type to be displayed within the generated report.

(3) Close the edit window.

Exam Administration Group Types

- Select the exam administration group types to be displayed within the generated sub-report.
- Only exam components associated to exam administration groups assigned to the selected exam administration group type will appear within the sub-report.
- To add an exam administration group type to be displayed within the generated report:

(1) Within the exam administration group type frame, right-click and select «Select» – the list of defined exam administration group types will appear.

(2) Select the appropriate exam administration group type to be displayed within the generated report.

(3) Close the edit window.

MULTI-ROOM SEATING

- The multi-room seating sub-report will list exam components and the student seating alpha-split scheduled within multiple rooms at the selected date and time.

Sub- Report Title

- Specify the report title to be displayed within the generated sub-report.

Exam Component Types ____

- Select the exam component type to appear within multi-room seating sub-report.
- Only exam components assigned to the selected exam component type will appear within the sub-report.
- To add an exam component type to be displayed within the generated sub-report:

(1) Within the exam component types frame, right-click and select «Select» – the list of defined exam component types will appear.

(2) Select the appropriate exam component type to be displayed within the generated report.

(3) Close the edit window.

STUDENT EXAM

- The student exam sub-report will list (by student) the exam component scheduled at the selected date and time. All appropriate student information will also be displayed.

Sub- Report Title

- Specify the report title to be displayed within the generated sub-report.

Exam Component Types ____

- Select the exam component type to appear within student exam sub-report.
- Only exam components assigned to the selected exam component type will appear within the sub-report.
- To add an exam component type to be displayed within the generated sub-report:

(1) Within the exam component types frame, right-click and select «Select» – the list of defined exam component types will appear.

(2) Select the appropriate exam component type to be displayed within the generated report.

(3) Close the edit window.

PROFESSOR EXAM SCHEDULE REPORT

- The Professor Exam Schedule Report displays selected exam components assigned for the selected professor.

(1) Select the «New» icon to open the Professor Exam Schedule Report Option screen.

(2) Create the appropriate number of options that can be selected when generating the report.

(3) Save the created option.

Report Title

- Specify the report title to be displayed within the generated report.

Page Footer

- Specify the page footer to be displayed within the generated report.

Report Note (Header)

- Specify the report note to be displayed within the generated report.

Report Note (Footer)

- Specify the report note to be displayed within the generated report.

Options

List All Students

- If selected, students assigned to the listed exam component will be displayed.

One Page Per Professor

- If selected, a separate report will be generated for each selected professor.

Exam Component Display Option

- Select the exam component fields to be displayed within the generated report.

Original Date Time Display Options

- Select the time field for the original date of a rescheduled exam component to be displayed within the generated report.

Room Display Options

- Select the room fields to be displayed within the generated report.

Accommodations to Display

- Select the accommodations to be displayed for rescheduled special needs exam components within the generated report.
- To add an accommodation to be displayed within the generated report:

(1) Within the accommodations frame, right-click and select «Select» – the list of defined accommodations will appear.

(2) Select the appropriate accommodation to be displayed within the generated report.

(3) Close the edit window.

Exam Administration Group Type to Display

- Select the exam administration group types to be displayed within the generated report.
- To add an exam administration group type to be displayed within the generated report:

(1) Within the exam administration group type frame, right-click and select «Select» – the list of defined exam administration group types will appear.

(2) Select the appropriate exam administration group type to be displayed within the generated report.

(3) Close the edit window.

EXAM DATA COLLECTION FORM

- The Exam Data Collection Form contains information about Exam Administration Groups. It is used to collect scheduling and administration data for Exam administration groups.

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Exam Data Collection Form — the Exam Data Collection Form edit window will open.

(4) Select the appropriate Filters

FILTERS

- Four filters are available when running the Exam Data Collection Form report:
  - Faculties
  - Departments
  - Exam Administration Group Types
  - Exam Administration Groups

Faculties

- Select the Faculties
- Only Administration Groups associated to the selected Faculties will have an Exam Data Collection Form generated.

Departments

- Select the Departments
- Only Administration Groups associated to the selected Departments will have an Exam Data Collection Form generated.

Exam Administration Group Types

- Select the Exam Administration Group Types
- Only Administration Groups associated to the selected Exam Administration Group Types will have an Exam Data Collection Form generated.

Exam Administration Groups

- Based on the selected Faculty, Department and Exam Administration Group Type filters, the appropriate number of Exam Administration Groups will appear listed within the Exam Administration Group frame
- Select the Exam Administration Groups
- Only selected Exam Administration Groups will have an Exam Data Collection Form generated.

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Exam Data Collection Form Report.
- Users will select the appropriate option when generating the Exam Data Collection Form Report.
- Please refer to the following section for detailed information about the Exam Data Collection Form Options:
- Database Creation> Report Options> Exam Data Collection Form

INVIGILATOR ASSIGNMENT REPORT

- The Invigilator Assignment Report lists the invigilator assignments for the selected exam term.

(1) Select Reports menu (on the Main Menu Toolbar).

(2) Select Exam Administration.

(3) Select Invigilator Assignment Report — the Invigilator Assignment Report edit window will open.

(4) Select the appropriate Filters.

FILTERS

- Two filters are available when running the Invigilator Assignment Report:
  - Date Filters
  - Invigilators

Date Filters

- Select the Exam Term.
- The From Date and To Date will be populated based on the selected defined Exam Term Dates.
- Only Invigilator Assignments occurring between the selected From Date and To Date will appear within the Invigilator Assignment Report.

Invigilators

- Select the Invigilators.
- Only selected Invigilators will have an Invigilator Assignment Report generated.

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Invigilator Assignment Report.
- Users will select the appropriate option when generating the Invigilator Assignment Report.
- Please refer to the following section for detailed information about the Invigilator Assignment Report Options:
- Database Creation> Report Options> Invigilator Assignment Report
- Select the «Report» icon within the Toolbar — the Invigilator Assignment Report will appear.

EXAM PRINTING REQUISITION REPORT

- The Exam Printing Requisition Report display information about the printing requirements for the selected Exam Administration Groups. The Printing Requisition Report can only be generated for Exam Administration Groups having an indicated Exam Copy Received date.

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Exam Printing Requisition Report — the Exam Printing Requisition Report edit window will open.

(4) Select the appropriate Filters

FILTERS

- Four filters are available when running the Exam Printing Requisition Report:
  - Faculties
  - Departments
  - Exam Administration Group Types
  - Exam Administration Groups

Faculties

- Select the Faculties
- Only Administration Groups associated to the selected Faculties will have an Exam Printing Requisition Report generated.

Departments

- Select the Departments
- Only Administration Groups associated to the selected Departments will have an Printing Requisition Report generated.

Exam Administration Group Types

- Select the Exam Administration Group Types
- Only Administration Groups associated to the selected Exam Administration Group Types will have an Exam Printing Requisition Report generated.

Exam Administration Groups

- Based on the selected Faculty, Department and Exam Administration Group Type filters, Exam Administration Groups having an Exam Copy Received date populated will appear listed within the Exam Administration Group frame
- Select the Exam Administration Groups
- Only selected Exam Administration Groups will have an Exam Printing Requisition Report generated.

NOTE: To ensure that the Exam Printing Requisition Report to fit on one page a maximum of **four** Exam Administration Groups should be selected. A maximum of **two** of the selected Exam Administration Groups can have four or more versions.

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Exam Printing Requisition Report
- Users will select the appropriate option when generating the Exam Printing Requisition Report
- Please refer to the following section for detailed information about the Exam Printing Requisition Report Options:
- Database Creation> Report Options> Exam Printing Requisition Report

(1) Select the «Report» icon within the Toolbar — the Exam Printing Requisition Report form will appear

(2) Upon closing the Exam Printing Requisition Report, a message prompting the user to save the generated Exam Printing Requisition will open.

(3) Click «Yes» to save the generated Exam Printing Requisition

(4) Click «No» to ignore the generated Exam Printing Requisition

SAVED PRINTING REQUISITIONS

- Saved Printing Requisitions are stored within the «Printing Requisitions» tree frame menu within the «Exam Administration» data element button.
- Users can access saved Printing Requisitions and input all appropriate information

(1) Access the «Printing Requisition» tree frame menu within the «Exam Administration» data element button — a list of saved Printing Requisitions will appear

(2) Double Click on a saved Printing Requisition

GENERAL INFORMATION

ID

- The ID field is auto populated
- The ID field displays the Printing Requisition number generated for the selected Printing Requisition.
- Users indicate the format of the Printing Requisition number within the Exam Administration Settings accessed via the «Settings» menu

Description

- Input a description within the Description field

Account Number

- The Account Number field is auto populated
- The Account Number field displays the Account Number indicated within the defined Printing Requirements Options selected when the Printing Requisition Report was generated.

Printed Date

- The Printed Date field is auto populated
- The Printed Date field displays the date that the Printing Requisition was generated on

Total Printing

- The Total Printing field is auto populated
- Total Number of Copies* Number of Pages

Completed By

- Input the Completed By

Completed Date

- Select the Date

Price

- Input the Prince

EXAM ADMINISTRATION GROUPS

- The Exam Administration Group tab will list the Exam Administration Groups appearing within the generated Printing Requisition

STUDENT SCHEDULES

- The Student Schedules Report displays selected Exam Components assigned for the selected students.

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Student Schedules — the Student Schedules Report edit window will open.

(4) Select the appropriate Filters

FILTERS

- Three filters are available when running the Student Schedules Report:
  - Date Filters
  - Exam Component Types
  - Students

Date Filters

- Select the Exam Term
- The From Date and To Date will be populated based on the selected defined Exam Term Dates
- Only Students scheduled between the selected From an To date will appear within the Student Schedule Report

Exam Component Types

- Select the Exam Component Types
- Only Exam Components associated to the selected Exam Component Type(s) will appear within the generated Student Schedule Report.

Students

- Select the Students
- Only selected Students will have a Student Schedule Report generated.

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Student Schedule Report.
- Users will select the appropriate option when generating the Student Schedule Report.
- Please refer to the following section for detailed information about the Student Schedule Report

Options:

- Database Creation> Report Options> Student Schedule Report
- Select the «Report» icon within the Toolbar — the Student Schedule Report will appear.

EXAM LABELS

- The Exam Labels displays selected Exam Components assigned for the selected students within the standard 6X6 Avery label format.

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Exam Labels — the Exam Labels edit window will open.

(4) Select the appropriate Filters

FILTERS

- Four filters are available when running the Exam Labels Report:
  - Date Filters
  - Exam Component Types
  - Exam Time to Display
  - Students

Date Filters

- Select the Exam Term
- The From Date and To Date will be populated based on the selected defined Exam Term Dates
- Only Students scheduled between the selected From an To date will appear within the Exam Labels Report

Exam Component Types

- Select the Exam Component Types
- Only Exam Components associated to the selected Exam Component Type(s) will appear within the generated Exam Labels Report

Exam Time to Display

- Select the Exam Times
- Only selected Exam Times will have a Exam Labels Report generated.

Students

- Select the Students
- Only selected Students will have a Exam Labels Report generated.

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Exam Labels Report.
- Users will select the appropriate option when generating the Exam Labels Report.
- Please refer to the following section for detailed information about the Exam Labels Report

Options:

- Database Creation> Report Options> Exam Labels Report
- Select the «Report» icon within the Toolbar — the Exam Labels Report will appear

EXAM SEATING SETUP REPORT

- The Exam Seating Setup Report displays Exams scheduled within a room for the selected date and time.

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Exam Seating Setup Report — the Exam Seating Setup Report edit window will open.

(4) Select the appropriate Filters

FILTERS

- Three filters are available when running the Exam Seating Setup Report:
  - Date Filters
  - Exam Time to Display
  - Students

Date Filters

- Select the Exam Term
- The From Date and To Date will be populated based on the selected defined Exam Term Dates
- Only Exams scheduled between the selected From an To date will appear within the Exam Seating Setup Report

Exam Time to Display

- Select the Exam Times
- Only Exams scheduled at the selected Exam Times will appear within the Exam Seating Setup Report

Rooms

- Select the Rooms
- Only selected Rooms will have a Exam Seating Setup Report generated.

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Exam Seating Setup Report.
- Users will select the appropriate option when generating the Exam Seating Setup Report.
- Please refer to the following section for detailed information about the Exam Seating Setup Report Options:
- Database Creation> Report Options> Exam Seating Setup Report
- Select the «Report» icon within the Toolbar — the Exam Seating Setup Report will appear

PRINTING BILLING REPORT

- The Printing Billing Report displays by Department, billing information for the associated Exam Administration Groups.

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Printing Billing Report — the Printing Billing Report edit window will open.

(4) Select the appropriate Filters

FILTERS

- Four filters are available when running the Printing Billing Report:
  - Faculties
  - Departments
  - Exam Administration Group Types
  - Exam Administration Groups

Faculties

- Select the Faculties
- Only Administration Groups associated to the selected Faculties will appear within the generated Printing Billing Report

Departments

- Select the Departments
- Only Administration Groups associated to the selected Departments will appear within the generated Printing Billing Report

Exam Administration Group Types

- Select the Exam Administration Group Types
- Only Administration Groups associated to the selected Exam Administration Group Types will appear within the generated Printing Billing Report

Exam Administration Groups

- Based on the selected Faculty, Department and Exam Administration Group Type filters, the appropriate number of Exam Administration Groups will appear listed within the Exam Administration Group frame
- Select the Exam Administration Groups
- Only selected Exam Administration Groups will appear within the generated Printing Billing Report

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Printing Billing Report.
- Users will select the appropriate option when generating the Printing Billing Report
- Please refer to the following section for detailed information about the Printing Billing Report Options:
- Database Creation> Report Options> Printing Billing Report
- Select the «Report» icon within the Toolbar — the Printing Billing Report will appear

DETAILED EXAM SCHEDULE REPORT

- The Detailed Exam Schedule Report contains various Sub- Reports that display Exam Scheduling and Exam Administration Information

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Detailed Exam Schedule Report — the Detailed Exam Schedule Report edit window will open.

(4) Select the appropriate Filters

FILTERS

- Two filters are available when running the Detailed Exam Schedule Report:
  - Date Filters
  - Exam Time to Display

Date Filters

- Select the Exam Term
- The From Date and To Date will be populated based on the selected defined Exam Term Dates
- A Detailed Exam Schedule Report will be generated for each day within the selected date range

Exam Time to Display

- Select the Exam Times
- A Detailed Exam Schedule Report will be generated for each selected time.

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Detailed Exam Schedule Report.
- Users will select the appropriate option when generating the Detailed Exam Schedule Report.
- Please refer to the following section for detailed information about the Detailed Exam Schedule Report Options:
- Database Creation> Report Options> Detailed Exam Schedule Report
- Select the «Report» icon within the Toolbar — the Detailed Exam Schedule Report will appear

PROFESSOR EXAM SCHEDULE REPORT

- The Professor Exam Schedule Report displays selected Exam Components assigned for the selected Professor.

(1) Select Reports on the Main Menu Toolbar

(2) Select Exam Administration

(3) Select Professor Exam Schedule Report — the Professor Exam Schedule Report edit window will open.

(4) Select the appropriate Filters

FILTERS

- Three filters are available when running the Student Schedules Report:
  - Date Filters
  - Exam Component Types
  - Faculties
  - Departments
  - Students

Date Filters

- Select the Exam Term
- The From Date and To Date will be populated based on the selected defined Exam Term Dates
- Only Professors scheduled between the selected From an To date will appear within the Professor Exam Schedule Report

Exam Component Types

- Select the Exam Component Types
- Only Exam Components associated to the selected Exam Component Type(s) will appear within the generated Professor Exam Schedule Report.

Faculties

- Select the Faculties
- Only Professors associated to the selected Faculty will appear have a Professor Exam Schedule Report generated.

Departments

- Select the Departments
- Only Professors associated to the selected Departments will appear have a Professor Exam Schedule Report generated.

Professors

- Select the Professors
- Based on the selected Faculty and Department filters, Professors will appear listed within the Professor frame
- Only selected Professors will have a Professor Exam Schedule Report generated.

(1) Navigate to the «Edit» icon to open the Exam Data Collection Form Options screen.

(2) Select the appropriate Options

OPTIONS

- Multiple options can be defined for the Professor Exam Schedule Report.
- Users will select the appropriate option when generating the Professor Exam Schedule Report.
- Please refer to the following section for detailed information about the Professor Exam Schedule Report:
- Database Creation> Report Options> Professor Exam Schedule Report
- Select the «Report» icon within the Toolbar — the Professor Exam Schedule Report will appear