

Optimizer Setup

In order to run the Schedule25 Optimizer, you'll need to have a few things set up first. This page explains the requirements along with best practices for success.



Security Note

Any user who plans to run the Optimizer must have the following permissions:

- **Academic: 4.0 Use Schedule25 Optimizer and Meeting Pattern Grid** enabled in [Series25 Group Administration](#)
- **Assignment policy** with "Assign" rights for all locations involved in the run
- (Optional) **Basic: 2.7 Override Location Blackouts & Basic: 2.9 Override Location Open/Close Hours** enabled in Series25 Group Administration if you plan to tell the Optimizer to ignore blackout dates

Events

All required data for events is provided by the LYNX import to your SIS. Here is a guide to how that data is used:

Primary Organization: This limits the possible locations that can be assigned to based on the organization's partition preferences.

HeadCount: This determines how large a location the section can be placed in. You decide whether to use expected or registered headcount as part of setting up the run. If that headcount is zero, the Optimizer uses your defined Default Enrollment value. A section's headcount can be further tweaked by the Enrollment Adjuster value. For more information, see [Schedule25 Optimizer Settings](#).

Binding Location Relationships: If two or more sections have a binding location assignment relationship, Schedule25 will assign them the same location regardless of their dates and times. To be assigned, a location must meet all the requirements of both sections. Bound sections are created in one of these ways:

- By designating them as [cross-listed or combined](#) sections in the SIS
- By defining them as [bound](#), [overlapping](#), or [back-to-back](#) groups in the LYNX Interface
- By creating a [bound relationship](#) in 25Live (not recommended for use with Optimizer)

Location Feature Preferences: The Optimizer treats any location feature preferences of a section as hard requirements that must be met for placement. It will place the section in a location only if the location has all the section's required features. (Note that this is more restrictive than location assignment in the 25Live Event Form, where a location feature preference is just a preference and does not limit your location choices.)

- Note: Location features must be enabled for use with the Optimizer by checking the Schedule25 box in 25Live. See [Adding and Editing Features In 25Live](#).

Location/Partition Preferences: If a section prefers to be placed in a specific location and/or partition, the Optimizer will attempt to place it in that location or partition before it considers the partition preferences of the section's primary organization. However, in its attempt to place the section, it won't override any location feature preferences the section may have (as described above) or displace a location that is already assigned to another section or event.

Locations

Locations used by the Optimizer must include a partition. Additional details described below can further enhance a run's results.

Partition: A location's partition determines which sections can be placed there. See more about setting up partitions in [Adding and Editing Partitions In 25Live](#).

Capacity: This determines how large a section can be placed in a location. The Optimizer will use either the maximum capacity or the capacity associated with the default layout, as determined by a run's settings.

Location Features: If a section has location feature preferences, the Optimizer will only place it in a location that contains all those features.

- Note: Location features must be enabled for use with the Optimizer by checking the Schedule25 box in 25Live. See [Adding and Editing Features In 25Live](#).

Open/Close Hours and Blackouts: These periods determine when the location is unavailable. Schedule25 will not place any sections in the location before and after the open/close hours or during the location's blackout periods. You can override this in a run's settings.

Fill Ratio: The default fill ratio determines the minimum utilization that the Optimizer can use. For example, a 100 seat location with a fill ratio of 50% would only be assigned to sections with an expected headcount between 50 and 100.



Do You Need a Location Fill Ratio?

Individual fill ratios on locations are only recommended for advanced Optimizer users. The fill ratio in a run's settings is usually enough

Organizations

The most important role each section's organization plays in Schedule25 is to determine not only where the section can be placed, but where it *prefers* to be placed.

This is controlled by the organization's partition preferences, which you can set in the 25Live organization details view.

Each organization can have up to four levels of preferences, with no limit on the number of partitions at each level. If a partition is not included at any level, then the Optimizer will never place a section into that partition. By customizing the preferences of each organization, you can control which departments are placed in which parts of campus.

As a best practice, it's good to include as many partitions as you can, even if that means stuffing them all in at the lowest level. After all, would instructors prefer to teach in a disfavored classroom or have no classroom at all?

ENGLISH, DEPT OF

Department of English

More Actions

Details

List

Calendar

Audit Trail

Edit Mode

Off

On

View and Edit Security

Help

General

Type

Administrative

Rating

Select an item

Accounting Code

Comments

Administrative Address

none

Billing Address

Categories

College of Performance, Art, and Languages

Select an item

Attributes

Add a Custom Attribute

Notification Policy

Approval Type

No Notification Policy

Partition Preferences

1

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×

Baker Classroom Complex

Business Administration Quad

Highland Science Center

Select items

Done

Select items

New Partition Group

☐ Baker Classroom Complex
 ☒ BJF Culinary Building
 ☐ Bray Hall
 ☐ Business Administration Quad
 ☐ Davis Arts Center