Introduction to CMIS Training Guide 2020/21

Introduction to Events Creation and Management
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1. Introduction

This guide is for staff in Schools/Institutes and in the Estates Directorate who are involved in booking rooms and producing and maintaining the class timetable. The guide covers:

1. Introduction to CMIS and the timetabling process

2. Creation of events and the allocation of rooms to those events.

School Timetabling Teams are referred to as STT
Space Management and Timetabling Team (Estates Directorate) is referred to as SMTT

The aim of this guide is to provide information about the timetabling process and the software tools the University uses to produce it.

1.1. What is a Timetable?

Timetables are a method by which various resources are brought together at a given time and place. The resources used in creating an education timetable include:

- **Staff**: lecturers, tutors
- **Rooms**: their location, and features/equipment in them
- **Courses**: which students select
- **Classes**: which students enrol on
- **Plans courses**: which students are registered on and may have mandatory
- **Equipment & Features**: required for teaching the class
- **Students**: enrolled on classes

A timetable ensures that the correct resources come together in a suitable location at the same time and that those resources are not booked in two places at the same time – i.e. they do not clash.

Timetables are created using a wide range of rules that determine how different resources may be used. At the simplest this includes days, times, weeks and the size of the group to be taught.

1.2. Who Does What?

The role of the timetabler is to manage the use of the resources and collect the details that will determine how they will be scheduled. The collation of this data is carried out largely by School Timetabling Teams working with the Space Management and Timetabling Team to jointly prepare the University's timetable.

The roles and responsibilities in the timetabling process are detailed in the University's policy. Broadly these are shared between:
Space Management and

Supports timetabling process University-wide

Timetabling Team
Allocates central (CTT) space and manages change requests

School Timetabling
Prepare and maintain timetable requests coordinated by the School’s Teams

Lead timetabler

Teaching Staff
Provide information and work with School teams

It is the responsibility of Schools to decide who carries out timetabling tasks under the guidance and direction of the nominated Lead School Timetabler. Timetabling brings together a number of different factors and it is important that roles and responsibilities are clearly defined (e.g. who is responsible for each course), and staff have training across the processes and understand the lifecycle.

1.3. How is Work Carried Out?

Timetabling processes are supported using:

<table>
<thead>
<tr>
<th>Service/Software</th>
<th>For</th>
<th>Used By</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMIS</td>
<td>Creating and maintaining the class timetable and non-teaching bookings</td>
<td>STT SMTT</td>
</tr>
<tr>
<td><strong>Timetables &amp; Room Booking</strong>&lt;br&gt;Available from MyGlasgow</td>
<td>Web timetable available to all University staff to search and view rooms/courses/calendar</td>
<td>All Staff</td>
</tr>
<tr>
<td></td>
<td><strong>Data Quality – class timetable</strong>&lt;br&gt;Used daily to monitor and flag any problems. Fix in CMIS for problems affecting your events.</td>
<td>STT SMTT</td>
</tr>
<tr>
<td></td>
<td><strong>Change Request – class timetable</strong>&lt;br&gt;Online Course Requirements Form&lt;br&gt;Assist school annual preparation process. For example, capturing online course requirements from teaching staff.</td>
<td>Teaching staff - if allocated by their School team in Spring.</td>
</tr>
<tr>
<td>Mobile&lt;br&gt;UofG Life App&lt;br&gt;Room Finder</td>
<td>Personal timetables for students and staff, late changes alerts, iCal downloads.&lt;br&gt;Openly available University location finder.</td>
<td>Students, Staff General Public</td>
</tr>
</tbody>
</table>
2. CMIS Timetabling Software

2.1. CMIS Overview

CMIS (sometimes called Facility CMIS) is a commercial software package used to create and maintain timetables and bookings.

It is the system we use for timetabling courses and all other room bookings. It is used to manage all centrally controlled space and local teaching space.

CMIS is connected to a database which holds the University’s timetable information.

2.2. Login to CMIS for the First Time

You will be authorised to use CMIS by a line manager for a particular purpose and area (e.g. School).

IT will install CMIS on your PC.

Select the CMIS 18.1.17-Live2 icon from your desktop.

Go to File / Open and select cmislive.MIS from your H:/CMIS directory

You only need to navigate to the H:Drive the first time you log in. Subsequently the file will be available to select from the dropdown when you click File.

This message will appear. Click OK to move onto the Login screen and add your Username (your own GUID) and a personal Password specifically for CMIS as supplied by SMTT.
2.3. Visual Control Path

On opening you will see the screen below. This is called the Visual Control Path (VCP). You can either use the icons to access functions or the Menu bar across the top of the screen.

![Visual Control Path Screen](image)

**Top Panel**

**Data source** is the database they are connected to (the example above is Live, someone may be using a Training Database)

**Connected** whether the connection is active or not

**Validated** not required for most users

**Selected dataset** which academic year you are working in (please make sure you are working in the correct dataset)

**Data Tab**

The icons under Physical, Academic, Miscellaneous, Lecturers and Students allow the user to quickly access the various resources on CMIS, such as Rooms, Courses and Features & Equipment.
2.4. Select a Data Set

Data is organised into separate data sets, which can represent an academic year or an exams period.

To select the correct data set: **Data | Selected data set.**

Select the data set you’re working in

Be careful at certain times of year as you may be switching regularly between different datasets. For example, when making non-teaching bookings now and preparing next year’s class timetable. A quick check on the CMIS Visual Control Path (VCP) will show you which dataset you are working in.

3. Understand the Timetable Views and Filters

To open a new timetable view: **Timetable | New Timetable**
A new timetable (with no filter selected) shows no timetable data until a filter is applied. This shows the different areas of a timetable window which has four elements:

- **Filter Title**: summary of the filter applied to this window
- **Graphical View**: timetable data, days on one axis / times along the other
- **Event List**: timetable data in list format
- **Clashing Window**: any potential clashes

The timetable window is configurable by the user to display timetable information in many different ways (covered in further documentation).

When you create a timetable by using the New Timetable option from the Timetable dropdown menu it will be added to your list of timetables at the bottom of the Timetable drop down menu. These can be renamed and deleted using the Edit Timetable Views menu option. To avoid creating lots of new timetables you can just use the Locate Resources timetable or your preferred timetable each time and apply whatever filter you require.

### 3.1. Display the Filter Button on the Timetable

To prevent having to right-click to get the timetable filter window, you can display a Filter button on the side of the timetable window.

To show the filter button, move the pointer to the right-hand border of the timetable (immediately after the vertical scroll bar). Right click and from the pop-up menu select Buttons.
3.2. Filtering the Timetable Window

To view timetable data a filter must be applied to the window. To apply a filter click on the Filter Button or in the grid Right Click | Filter

![Timetable Filter Window](image)

This window contains a number of filter tabs, the most commonly used of which are:

- **Basic**: filter Department, Course and Lecturer
- **More**: filter Building, Room and Weeks
- **Requests**: filter event status, requested room type (LOC, CTT), unroomed
- **Bookings**: Contacts

The filters in CMIS timetables combine data; so if you filter to Course A, and to Lecturer B, then only events containing **BOTH** Course A and Lecturer B will display. If you want to display first Course A then Lecturer B you need to clear the filter first, using the Clear Filter button. The Clear Tab button will only clear the filter on that tab, any filter on another tab will remain active.

💡 If you Clear Filter and then click OK you will filter to ‘All timetable data’ which will display the entire University timetable. This will take a long time to load. The upgraded version of CMIS that we are now running will warn you if you have nothing in the filter.

Always clear your filter before applying a new one. This ensures there is nothing unexpected left entered in any of the tabs.

3.3. Second Filter

There is a second filter in the timetable. If the events are showing in the graphical view but are not listed beneath, right click in that area and select Column > Filter > Clear Filter (In other areas within CMIS you can use the same method of right clicking on the list of data to access the filter options).
<table>
<thead>
<tr>
<th>Event Id</th>
<th>Status</th>
<th>Day</th>
<th>Weeks</th>
<th>Start</th>
<th>Finish</th>
<th>Course</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>74159</td>
<td>Confirm</td>
<td>Wed</td>
<td>22-32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3370</td>
<td>Confirm</td>
<td>Fri</td>
<td>6-11,22-32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>74160</td>
<td>Confirm</td>
<td>Wed</td>
<td>22-32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1184</td>
<td>Confirm</td>
<td>Thu</td>
<td>6-11,22-32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>81376</td>
<td>Confirm</td>
<td>Mon</td>
<td>22-32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>59659</td>
<td>Canceal</td>
<td>Mon</td>
<td>22-31</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1181</td>
<td>Confirm</td>
<td>Fri</td>
<td>22-32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>37651</td>
<td>Confirm</td>
<td>Thu</td>
<td>31</td>
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<tr>
<td>43136</td>
<td>Confirm</td>
<td>Mon</td>
<td>22-31</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Column options:
- Modify column details
- Filter
- Print
- Exporting

Filter options:
- Filter to records with Weeks = 22-32
- Filter to records without Weeks = 22-32

Clear filter
3.4. Displaying a Timetable

Open a timetable window then open the Filter window

**Basic tab**
Select your Department from the drop-down menu. Select a Course from the course drop-down menu

**More tab**
Enter 6-16 in the Weeks box (this will show Semester 1 bookings only). Please use the SMTT Timetabling Weeks Calendar to see what dates match the week numbers.
4. Creating Teaching Events

4.1. Adding a Teaching Event

The most basic way to create an event is in a Timetable View.

1. Select the Timetable menu

2. From the sub menu select Locate Resources or your preferred saved timetable

3. In the graphical view right click and Filter

4. Click Clear Filter

5. On the Basic tab select the Department in which the Course belongs to from the Department drop down

6. Select the Course you want from the Course drop down

7. Click OK

8. In the graphical view right click at the required day and time. For example, 10:00 on Monday.

9. Select New Event

Timetable event will automatically populate the details according to the filter of the timetable and where you place the cursor.
4.2. Input Event Details

1. Enter Day, Start time and number of Mins the event will last for
2. Click in the Weeks field and type in only the weeks in which the course is being taught
3. Click on the Source box at the top of the screen and select the source Teach
4. Click on Courses from the main event details section and select Department, Course Name/Code which will be taught on that/those date(s).
5. Select the Module type from the drop down.
6. Select the Course sub group from the drop down.
7. Select the Owner – this should be the department in which you belong to.
8. Select Lecturer from the drop down menu. Only add the Staff member teaching on this event (if different staff are teaching the course over the semester the event will need to split and each different staff member added to the correct teaching weeks) – click New

4.3. Add the Room

<table>
<thead>
<tr>
<th>For local space that you can book:</th>
<th>For CTT owned space that you need to request:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click Rooms</td>
<td>1. Click Requested Rooms</td>
</tr>
<tr>
<td>2. Select the Building</td>
<td>2. Select Category – Should always be &quot;TEACH&quot;</td>
</tr>
<tr>
<td>3. Select the Room</td>
<td>3. Select Type (CTT Space)</td>
</tr>
<tr>
<td>4. Click New</td>
<td>4. Click New</td>
</tr>
<tr>
<td>5. Click Requested Rooms</td>
<td></td>
</tr>
<tr>
<td>6. Select the Building</td>
<td></td>
</tr>
<tr>
<td>7. Select the Room</td>
<td></td>
</tr>
<tr>
<td>8. Select Type (Local Space)</td>
<td></td>
</tr>
<tr>
<td>9. Click New</td>
<td></td>
</tr>
</tbody>
</table>
4.4. Add any Required Equipment or Room Features

1. Highlight the icon under equipment or features depending on which you want to change
2. Click edit button – another screen will appear
3. Double click equipment or feature needed – this will add a 1 next to the label.
4. Click OK

Standard central teaching rooms contain a networked PC with projectors and screens or video monitors, appropriate to the size of the room, so these do not need to be added.

Selecting Equipment and Features will limit the rooms available, so only add what is really needed.

4.5. Add the Contact by Clicking the Booking Button

1. Click the dropdown arrow next to Matching - type in the contact’s surname and then select the correct contact from the list and click ADD
2. Click Contact drop down – type in contact’s number (taken from contacts to notify) select the contact.
3. Click Status from the drop down menu select Provisional if requesting CTT Space or another department’s Local Space. Select Confirmed if booking your own Local Space.
4. Click OK
5. Click OK – this will take you back to the timetable grid and you will see the new event

5. Creating Teachbreak Events
Teachbreak events should only be created as a breakout room for a timetabled teaching event, and should take place at the same time as the corresponding teaching event.

5.1. Adding a Teachbreak Event

1. Open a Timetable with the required Course
2. Right click at the required day and time and select New Event

5.2. Input Event Details

1. Enter Day, Start time and number of Mins the event will last for
2. Click in Weeks field and type in only the weeks in which the course is being taught
3. Click on the Source box at the top of the screen and select the source Teachbreak
4. Click on Courses from the main event details section and select Department, Course Name/Code which will be taught on that/those date(s).
5. Select the Owner
6. Select Lecturer from the drop down menu. Only add the Staff member teaching on this event (if different staff are teaching the course over the semester the event will need to split and each different staff member added to the correct teaching weeks) – click New
7. Click Class Groups and add the number of students attending to Capacity – click New

5.3. Add the Room

For local space that you can book:

1. Click Rooms
2. Select the Building
3. Select the Room
4. Click New
5. Click Requested Rooms
6. Select the Building
7. Select the Room
8. Select Type (Local Space)
9. Click New

For CTT owned space that you need to request:

1. Click Requested Rooms
2. Select Category – Should always be “TEACH”
3. Select Type (CTT Space)
4. Click New

5.4. Add any Required Equipment or Room Features

1. Highlight the icon under equipment or features depending on which you want to change
2. Click edit button – another screen will appear
3. Double click equipment or feature needed – this will add a 1 next to the label.

4. Click OK

5.5. **Add the Contact by Clicking the Booking Button**

1. Click the dropdown arrow next to Matching - type in the contact’s surname and then select the correct contact from the list and click ADD

2. Click Contact drop down – type in contact’s number (taken from contacts to notify) select the contact.

3. Click Status from the drop down menu select Provisional if requesting CTT Space or another department’s Local Space. Select Confirmed if booking your own Local Space.

4. Click OK

5. Click OK – this will take you back to the timetable grid and you will see the new event

6. **Creating Non-Teaching Events**

6.1. **Adding a Non-Teaching Event**

1. Open a Timetable and open the filter from the Graphical view

2. On the Bookings tab select your name from the Contact drop down

3. In the graphical view right click at the required day and time and select New Event

6.2. **Input Event Details**

1. Enter the Day, Start time and number of Mins the event will last for

2. Click the Weeks field and type the week(s) required

3. Click on the Source box at the top of the screen and select the source Nonteach

4. Click on Courses and select your Department – click New

5. Click Class Groups and enter the number of people attending – click New

6. Click Details and enter a title for the event – click New

7. Select the Owner

6.3. **Add the Room**

- **For local space that you can book:**
  1. Click Rooms
  2. Select the Building

- **For CTT owned space that you need to request:**
  1. Click Requested Rooms
  2. Select Category
For local space that you can book:

3. Select the Room
4. Click New
5. Click Requested Rooms
6. Select the Building
7. Select the Room
8. Select Type (Local Space)
9. Click New

For CTT owned space that you need to request:

3. Select Type (CTT Space)
4. Click New

6.4. Add the Contact by Clicking the Booking Button

1. Click the dropdown arrow next to Matching - type in the contact’s surname and then select the correct contact from the list and click ADD.
2. Click Contact drop down – type in contact’s number (taken from contacts to notify) select the contact.
3. Click Status from the drop down menu select Provisional if requesting CTT Space or another department’s Local Space. Select Confirmed if booking your own Local Space.
4. Click OK
5. Click OK – this will take you back to the timetable grid and you will see the new event.

7. Modifying Events

You can modify your un-roomed events or events in your own local space throughout the year.

To modify a teaching event in CTT space or another department’s local space you must raise a change request. Your Lead School Timetabler is able to make changes to the Lecturer(s) and Details on an event in CTT space using the Update Lecturer Tab.

To modify a non-teaching event in CTT space you must send a request to timetabling@glasgow.ac.uk.
8. Appendix: Document History

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>28/02/2014</td>
<td>0.1</td>
<td>First draft version of Intro guide</td>
</tr>
<tr>
<td>13/03/2014</td>
<td>0.2</td>
<td>CTT Updated</td>
</tr>
<tr>
<td>05/01/2016</td>
<td>0.3</td>
<td>CTT Updated</td>
</tr>
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<td>16/01/2019</td>
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<td>30/10/2019</td>
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<td>CTT Updated</td>
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<td>25/06/2020</td>
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<td>09/09/2020</td>
<td>1.4</td>
<td>CTT Updated - Formatting</td>
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</table>