Introduction to CMIS Training Guide

Introduction to Events Creation & Management
# Table of Contents

1. **Introduction** .................................................................................................................. 3  
   - What is a timetable? .......................................................................................................... 3  
   - Who does what? .............................................................................................................. 4  
   - How is work carried out? ................................................................................................. 4  

2. **CMIS Timetabling Software** .......................................................................................... 5  
   - CMIS Overview ............................................................................................................... 5  
   - Login to CMIS for the First Time ................................................................................... 6  
   - Select a Data Set ............................................................................................................. 9  

3. **Understand the timetable Views and Filters** ................................................................. 10  
   - Display the Filter button on the timetable ........................................................................ 11  
   - Filtering the timetable window ....................................................................................... 11  
   - Displaying a timetable ..................................................................................................... 13  

4. **Event Information** ......................................................................................................... 13  
   - Creating Events ............................................................................................................... Error! Bookmark not defined.  
   - Automatic Email ........................................................................................................... 15  

Appendix: Document History ................................................................................................. 17
1. Introduction

This guide is for staff in Schools/Institutes and in Estates & Buildings who are involved in booking rooms, producing and maintaining the class timetable and covers:

- Introduction to CMIS and the timetabling process
- Creation of events and the allocation of rooms to those events.

School Timetabling Teams are referred to as **STT**

Space Management and Timetabling (Estates and Buildings) 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.

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**  
  which students are registered on & may have mandatory courses
- **Equipment & Features**  
  required for the teaching
- **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 used 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 its most basic this includes weeks, days, times and the size of the group to be taught.

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 campus timetabling, to jointly prepare the University’s timetable.
**Who does what?**

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

<table>
<thead>
<tr>
<th><strong>Space Management &amp; Timetabling</strong></th>
<th>Supports timetabling process University-wide:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Auto rooming and manual rooming of events requesting CTT space.</td>
</tr>
<tr>
<td></td>
<td>Allocates central space and manages change requests</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>School Timetabling Team</strong></th>
<th>Prepare and maintain timetable requests coordinated by the School’s Lead timetabler</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Teaching staff</strong></td>
<td>Provide information and work with School teams</td>
</tr>
</tbody>
</table>

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.

**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>School Timetabling, Space Management &amp; Timetabling</td>
</tr>
<tr>
<td>Timetables &amp; Room Booking</td>
<td>Web timetable available to all University staff to view rooms/courses/calendar</td>
<td>All staff</td>
</tr>
<tr>
<td><strong>Timetable Manager</strong></td>
<td><strong>Class timetable data quality</strong>&lt;br&gt;Used daily to monitor and flag any problems to fix in CMIS for problems affecting their events.</td>
<td>School timetabling, Campus timetabling</td>
</tr>
<tr>
<td></td>
<td><strong>Class Timetable Change Request</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Online Course requirements form</strong>&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><strong>Mobile</strong></td>
<td><strong>gla.ac.uk/timetable</strong>&lt;br&gt;Personal timetables for students and staff, late changes alerts, iCal downloads.</td>
<td>Students, Staff</td>
</tr>
<tr>
<td></td>
<td><strong>gla.ac.uk/locations</strong>&lt;br&gt;Openly available University location finder.</td>
<td>General public</td>
</tr>
</tbody>
</table>
2. CMIS Timetabling Software

**CMIS Overview**

CMIS (sometimes called Facility CMIS) is a commercial software package used to create and maintain timetables and bookings. The software has two key elements, CMIS and Scheduler.

- CMIS is the system used for timetabling courses and all other room bookings. It is used to manage all centrally controlled space and local teaching space.
- Scheduler is an offline version which can be used for:  
  - Large scale auto-room allocation at certain times of year
  - Modelling and what-if scenarios
  - Automatic scheduling
  - Exam scheduling and student fitting

Note: Scheduler is not detailed further in this guide.

CMIS is connected to a database which holds the university’s timetable information. The main menu on opening appears as:
Top Panel

- **Data source**: 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

Data Tab

The icons under Physical, Academic, Students, Staff and Miscellaneous allow the user to check key data. Some data can be entered or modified from this screen.

Room Booking Tab

For making non-teaching bookings, e.g. meetings or external groups.

Icons are arranged in three groups:

- **Data**: information about contacts and organisations
- **Bookings**: make new bookings
- **Costs**: for charging

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).

Select **CMIS Launcher** from the Windows programs list. When the Launcher opens select ‘Live environment (timetabling)’

If you cannot see the CMIS Launcher go to [http://www.gla.ac.uk/services/it/businesssystems/timetabling/](http://www.gla.ac.uk/services/it/businesssystems/timetabling/)
Go to the “File” menu and select `crblive12.mis`

If this entry does not appear under the “File” menu, select “Open”, navigate to C:\MISApps\CMIS\crbrun and select `crblive12.mis`

You will see this message. Click OK to continue to the login screen
You should now be at the login screen.

Add Username (your own GUID) and a personal Password specifically for CMIS as supplied by the support team.

![CMIS Login](image)

This is called the Visual Control Path (VCP). Use icons to access functions, or Menu bar across the top of the screen.

![CMIS Opening Window](image)
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

![Selected data set window](image)

Figure: CMIS Choosing the Correct Academic Year

The first time you use the software you will be asked which data set you wish to use. On subsequent occasions (as long as you save your settings on exit), it will return you to the same data set.

Be careful at certain times of year as you may be switching regularly between different datasets. 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

Timetables

Filter Title: indicates the filter(s) used to display the events in the 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 bar: summary of the filter applied to this window
- Graphical view: timetable data, typically, days on one axis / times along the other
- List view: timetable data in list format
- Clash view: any potential clashes

The timetable window is configurable by the user to display timetable information in many different ways.

💡 When you create a timetable by using the New Timetable menu option it will be added to your timetable sub-menu. These can be renamed and deleted using the Edit Timetable Views menu option.
**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 this button move the pointer to the right-hand border of the timetable (immediately after the vertical scroll bar). Alternate mouse-click (alt-click) and from the pop-up menu, select Buttons.

![Figure: Filter Button](image)

**Filtering the timetable window**

To view timetable data a filter must be applied to the window.

To apply a filter (in the graphical part of the window)

Click on the Filter Button
Or in the grid Right Click and select filter

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

- **Basic** – filter Department, course and Lecturer- *(When looking for a lecturer's availability - enter the lecturer's name from the drop down list and enter the weeks that you need them for - all of the events that they are attached to should appear - see below)*
- **More** – filter Building, Room and Weeks
- **Booking** – 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 button on the side of the filter window.

💡 If you Clear and then click the OK button you will filter to ‘All timetable data’ which will display the entire University timetable in a single window and which will take a very long time to load.
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). The day and week on CMIS correlate to a specific date. This is published every year as part of the timetable preparation detailed in section 4 of this guide.

4. Event Information

Adding an Event/ Input Event Details

Open a timetable (select timetable from VCP screen then select new timetable)

Right Click on Graphical View.

1. Select New Event
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 Teach/Teach- Break (if room is required for breakout)
(Creating a Teach Booking)

1. Click on Courses from the main event details section and select Department, Course Name/Code which will be taught on that/those date(s).

2. Select the Module type from the drop down.

3. Select the Course sub group from the drop down.

4. Select the Owner – this should be the department in which you belong to.

5. 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

**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 “TEACH”</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>

**Add any Required Equipment or Room Feature**

1. Highlight the icon next to 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. Only non-standard equipment needs to be added, as standard CTT teaching rooms contain a networked PC with projectors and screens, or video monitors, appropriate to the size of the room

4. Click OK
Add the Contact by Clicking the Booking Button

1. Click Con search – type in the contacts surname.

2. Click Matching - from the drop down select the contacts name and click ADD

3. Click Contact drop down – type in contacts number (taken from contacts notify) select the contact.

4. 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.

5. Click OK

6. Click OK – this will take you back to the timetable grid and you will see the new event
**Change Requests: (only for teaching events)**

All Teaching events requiring CTT space must come through change request. The event should be created in Cmis first- then the change request should be created.

**Automatic Email (only for Non-Teach Bookings)**

When an event is created requesting a room which is CTT owned, this is added to the system by STTs as a provisional booking. For the event to be confirmed an email is sent to SMTT for confirmation. To send the email:

- Highlight the event you have created on event list – right click
- Select **Timetabling then Booking Status Email** – this will bring up the **Bookings** Screen and should show your booking
- Click on the **E-mail** button – right hand side of screen – this will bring up the **Email Notification** Screen – Ensure contacts are ticked
- Under Notification message ensure Room Booking Request is selected from the drop down menu
- Click ok – this will bring up the email – check the event details and if correct click send.

An email will be sent to **Timetabling@glasgow.ac.uk** and when confirmed by SMTT a confirmation email sent to you.

CTT Rooms only need to have an email sent for confirmation. School owned space will have their own processes for booking non-teaching bookings.

**Ask your lead School Timetabler to confirm your local arrangements.**

If you are requesting from another School you may or may not be able create a request but always contact them to discuss any requests.

More development work will take place around non-teaching bookings and procedures updated at that time.
## 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>
</tbody>
</table>