



University
of Glasgow

Introduction to CMIS Training Guide 2023/24

Introduction to Events Creation and Management

Space Management and Timetabling
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1. Introduction

This guide is for staff in Schools 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	Which students are registered on and may have mandatory courses
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 Timetabling Team	Supports timetabling process University-wide. Allocations central (CTT) space and manages change requests.
School Timetabling Teams	Prepare and maintain timetable requests coordinated by the School's 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:

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

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.

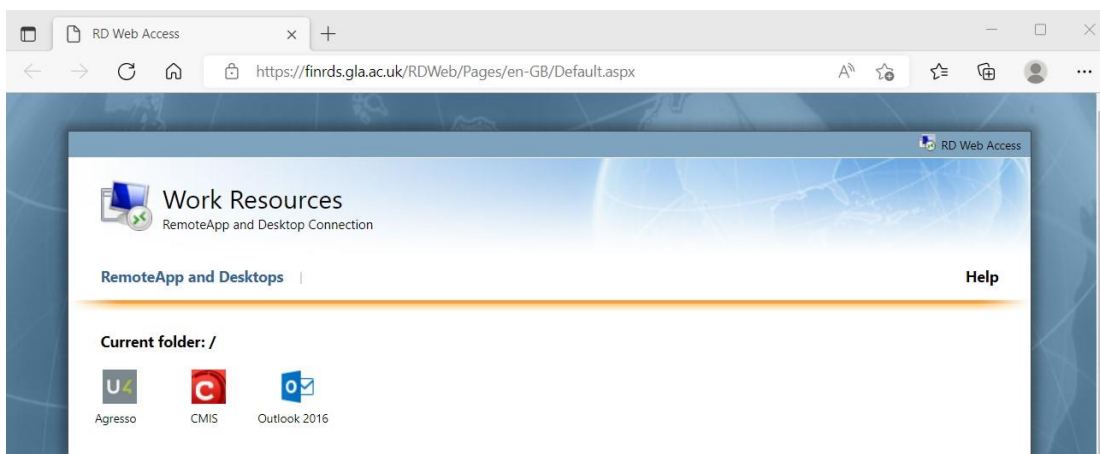
2.2. Login to CMIS for the First Time

You will be authorised to use CMIS by a line manager for a particular purpose and area (e.g., School). IT Services will install CMIS on your University profile.

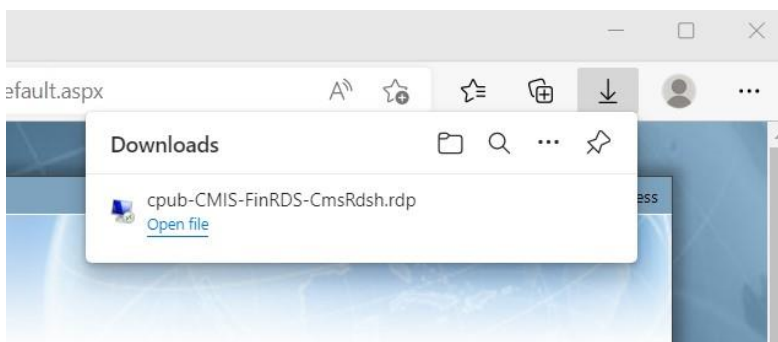
Select the CMIS icon from your desktop.



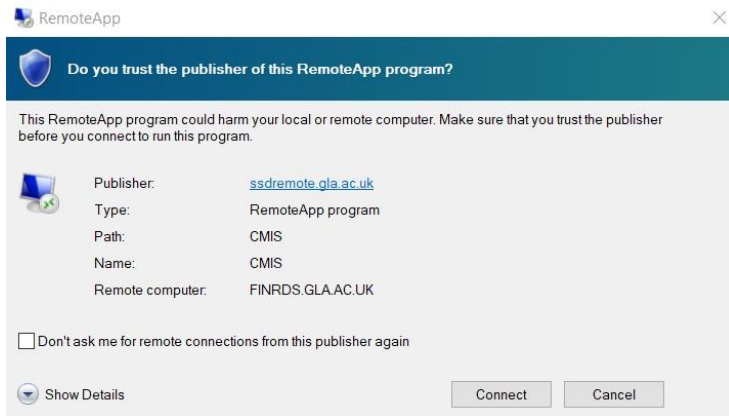
A page titled Work Resources will open in a browser window. Select the CMIS icon, then wait momentarily for the Remote Desktop file to download.



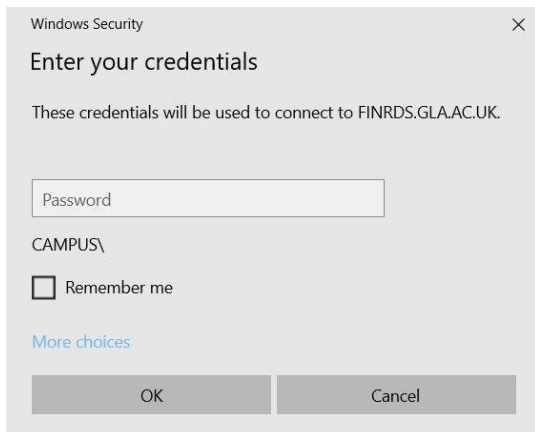
Once the download is complete, it will appear in a list of recent downloads which drops down from the browser's address bar. Click on the 'Open file' link beneath the file name.



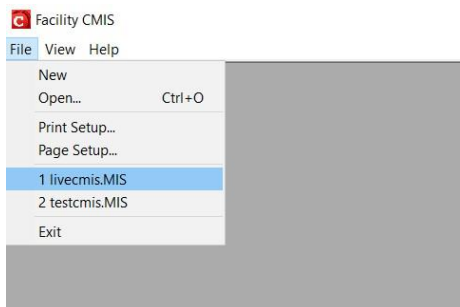
Windows will ask for your permission to open the file – click on ‘Connect’.



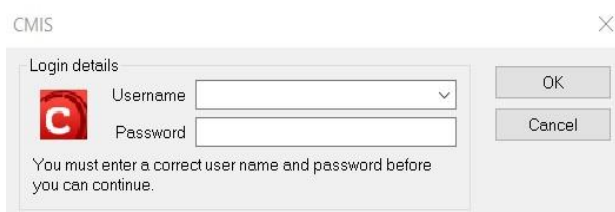
You will then be asked to enter your password. Please note: this is the password associated with your GUID that you use to access University web services, *not* your CMIS password.



Facility CMIS will open; click on File in the menu bar and select livecmis.MIS from the dropdown menu.

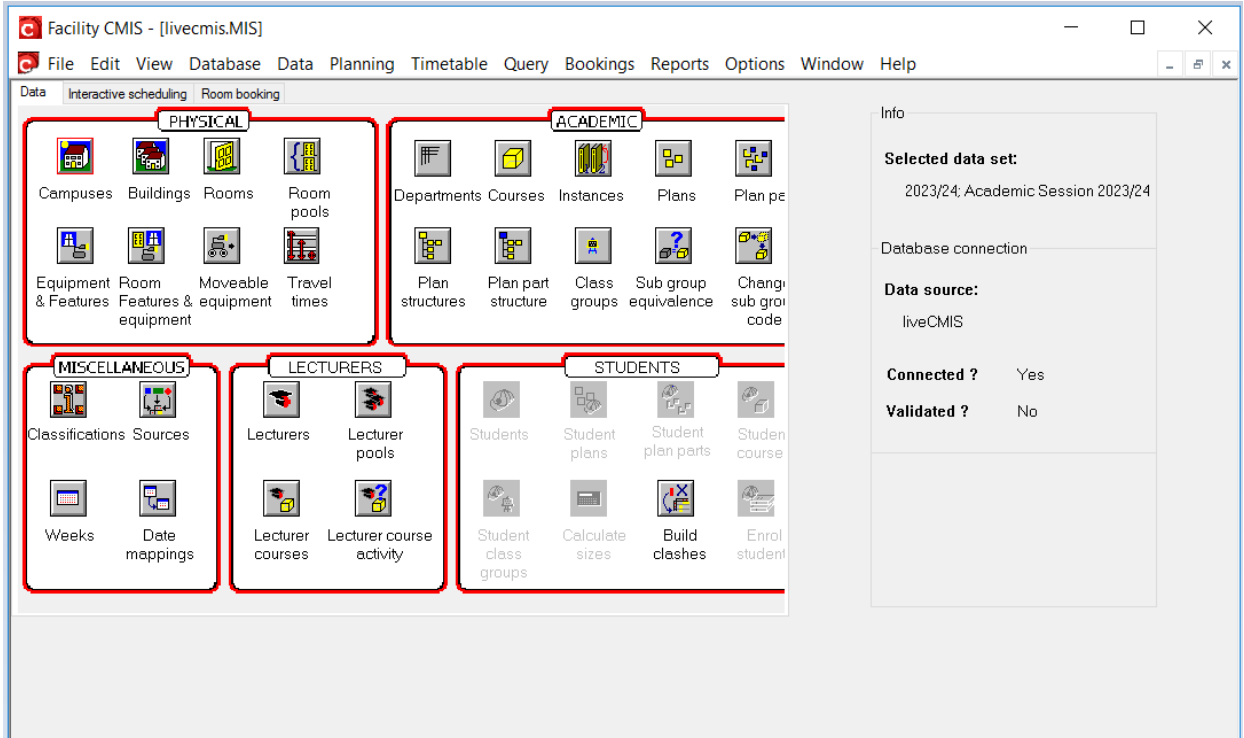


Enter your username and password when prompted. – (since the June 2022 CMIS update, existing users may be asked twice to change their password upon logging into the system for the first time. Follow the on-screen instructions when doing so; if you experience any problems, please raise a call via UofG Helpdesk using the Business Systems/Timetabling group.)



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.



Top Panel

Data source	The database you are connected to (this 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 data set	The 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 represent an academic year.

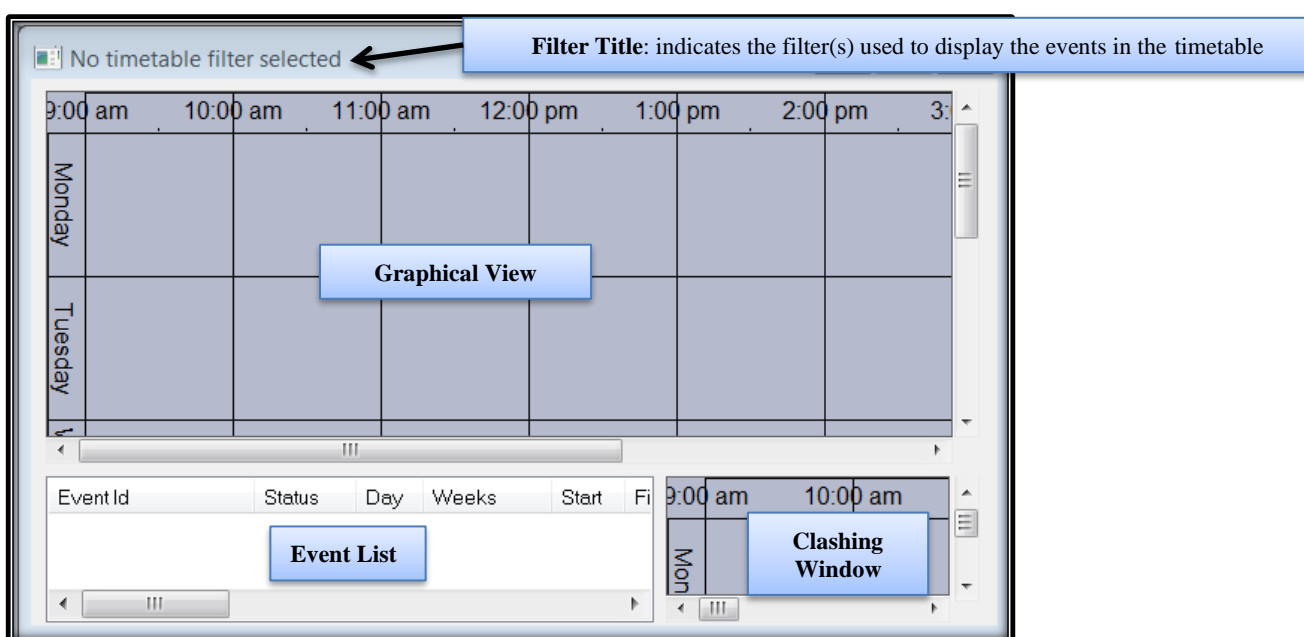
To select the correct data set in the Menu bar, select **Data | Selected data set**.

Select the data set you are 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 in the Menu bar, select **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 on the other
Event List	Timetable data in list format
Clashing Window	Any potential clashes

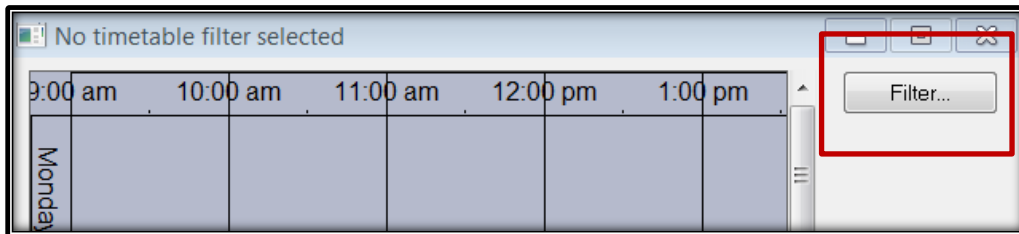
The timetable window is configurable by the user to display timetable information in many different ways.

When you create a timetable by selecting **Timetable | New Timetable** in the Menu bar, it will be added to your list of timetables at the bottom of the Timetable drop down menu. These can be renamed and deleted by selecting **Timetable | Edit Timetable Views**. 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

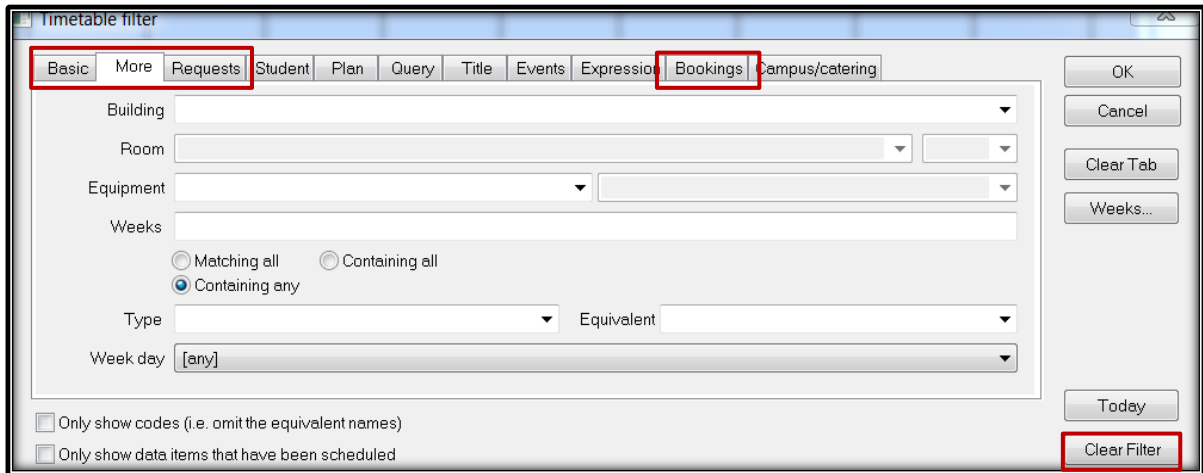
To prevent having to right-click to get the timetable filter window, you can display a Filter button on the side of the timetable window.

To show the filter button, right click in the graphical view and select **Configuration | 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 graphical view **Right Click | Filter**



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, Weeks and Event Type (ONLIVE, ONANY) |
| Requests | Filter Event Status, Requested Room Type (LOC, CTT), Rooms status (With Rooms, Without Rooms) |
| Bookings | Filter Contacts, Event Details |

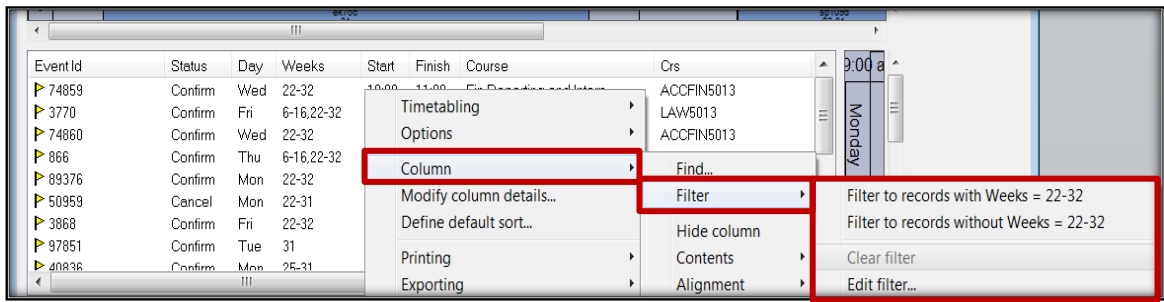
The filters in CMIS timetables combine data; so, if you filter to Course A and Lecturer B, then only events containing **BOTH** Course A and Lecturer B will display. If you want to display first Course A then Lecturer B you need to clear the filter first, using the Clear Filter button. The Clear Tab 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 current 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 the Event List 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).

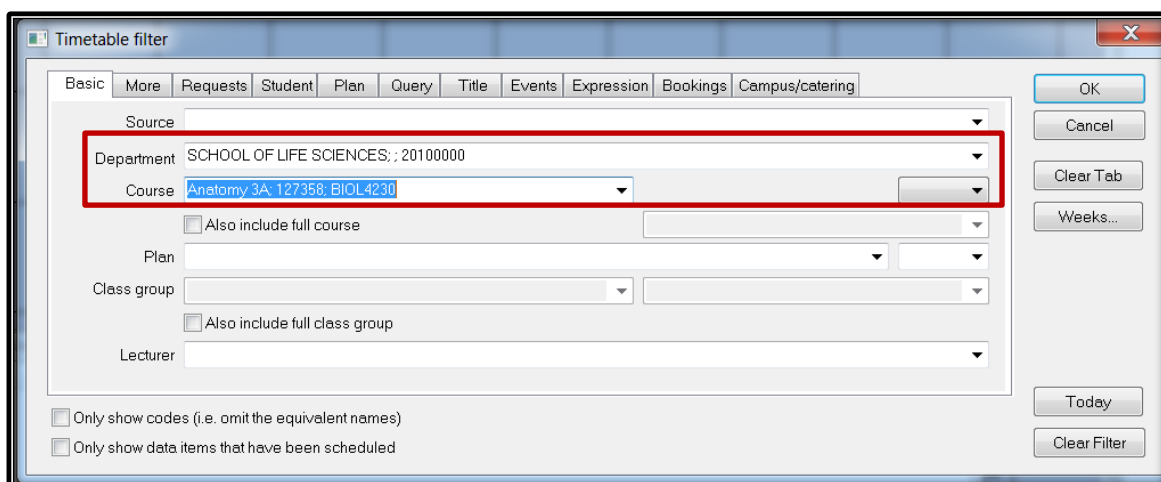


3.4. Displaying a Timetable

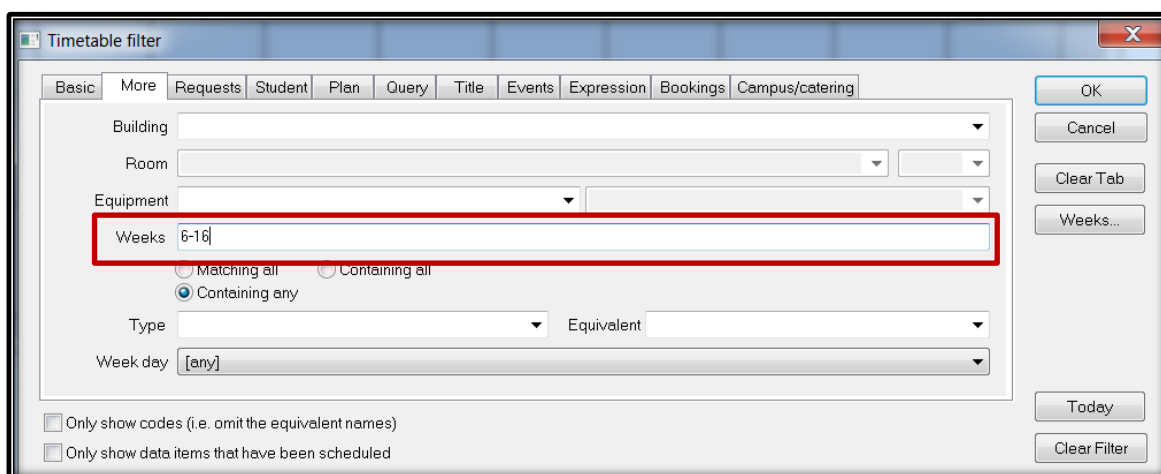
Open a timetable window then open the Filter window.

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.



The screenshot shows the 'Timetable filter' dialog box with the 'Basic' tab selected. The 'Department' dropdown is set to 'SCHOOL OF LIFE SCIENCES; : 20100000' and the 'Course' dropdown is set to 'Anatomy 3A: 127358; BIOL4230'. A red box highlights these two dropdowns. Other fields include 'Source', 'Plan', 'Class group', and 'Lecturer'. There are checkboxes for 'Also include full course', 'Also include full class group', 'Only show codes (i.e. omit the equivalent names)', and 'Only show data items that have been scheduled'. Buttons on the right include 'OK', 'Cancel', 'Clear Tab', 'Weeks...', 'Today', and 'Clear Filter'.



The screenshot shows the 'Timetable filter' dialog box with the 'More' tab selected. The 'Weeks' text box contains '6-16' and is highlighted with a red box. Other fields include 'Building', 'Room', 'Equipment', 'Type', 'Equivalent', and 'Week day'. There are radio buttons for 'Matching all', 'Containing all', and 'Containing any'. There are checkboxes for 'Only show codes (i.e. omit the equivalent names)' and 'Only show data items that have been scheduled'. Buttons on the right include 'OK', 'Cancel', 'Clear Tab', 'Weeks...', 'Today', and 'Clear Filter'.

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. Filter the timetable.
4. Click Clear Filter.
5. On the Basic tab select the Department 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 placed the cursor.

The screenshot shows a 'Timetable event' dialog box. At the top, it says 'Event details: size on entry: 145'. Below this, there are several input fields: 'Day' set to 'Monday', 'Start' set to '10:00', 'Mins' set to '60', and a 'Fix' checkbox which is unchecked. There are also 'Weeks' (29) and 'Source' (NONTEACH) fields. A large list box contains a tree view of course details, with 'Advanced Fin Accounting (dept ADAM SMITH BUSINESS SCHOOL): Non con: ...' selected. To the right of the list box are buttons for 'OK', 'Cancel', 'Weeks...', 'New', and 'Delete'. Below these are buttons for 'Booking..', 'Catering..', 'Ad-hoc Students', and 'Event Audit Trail'. At the bottom of the dialog, there are 'Owner' and 'Type' dropdown menus.

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 the 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 subgroup from the drop down.
7. Select the Owner – this should be the department which you belong to.
8. Click New.
9. 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 be split and each different staff member added to the correct teaching weeks) – click New.
10. Add an optional event description in Details. You should also add the Zoom link for the class here if this is being delivered online (see [Online Teaching](#) FAQ for details) – click New.
11. Add the ONLIVE or ONANY event type if applicable – this is the Type field in the bottom right of the event window.

4.3. Add the Room

For local space that you can book:	For CTT owned space that you need to request:
1. Click Rooms	1. Click Requested Rooms
2. Select the Building	2. Select Category – this should always be TEAC
3. Select the Room	3. Select the Type CTT Space
4. Click New	4. Click New
5. Click Requested Rooms	
6. Select the Building	
7. Select the Room	
8. Select the appropriate Category	
9. Select the Type Local Space	
10. Click New	

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 the Edit button – another screen will appear.
3. Double click the 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 cannot to be added.

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

4.5. Add the Contact

1. Click the Booking button on the right of the event window.
2. 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.
3. Click Contact drop-down – type in contact's code (taken from Contacts to notify), select the contact.
4. Click Status from the drop-down menu - select Provisional if requesting CTT Space or another department's Local Space, or select Confirmed if booking your own Local Space.
5. Click OK on the Booking details window.
6. Click OK on the Event window – this will take you back to the timetable grid and you will see the new event.

Booking details

Details

Contact: 123456 [Smith, Mr John] (highlighted)

Status: Provisional (highlighted)

Org: (empty)

Published: (empty) to: (empty)

Notify: (empty) day(s) before booking

Created: (empty)

Notified: (empty) Confirmed: (empty)

Id: (empty)

Title: (empty)

Address: (empty)

Speaker: (empty)

Topic: (empty)

Notes: (empty)

Chair: (empty)

URL: (empty)

Booked in: (empty)

Booked by: (empty)

Code	Name	Company	Phone	Address	Category
123456	Smith, Mr John	University of Glasgow		Tay House 300 Bath Street Glasgow	

Org search: (empty) Matching: (dropdown)

Con search: (empty) Matching: (dropdown) (highlighted)

Buttons: OK (highlighted), Cancel, Add (highlighted), Remove, Modify

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 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 Teachbreak.
4. Click on Courses from the main event details section and select the Department, Course Name/Code which will be taught on that/those date(s).
5. Select the Owner.
6. Click New.
7. 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 be split and each different staff member added to the correct teaching weeks) – click New.

- 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:	For CTT owned space that you need to request:
1. Click Rooms	1. Click Requested Rooms
2. Select the Building	2. Select Category – this should always be TEAC
3. Select the Room	3. Select the Type CTT Space
4. Click New	4. Click New
5. Click Requested Rooms	
6. Select the Building	
7. Select the Room	
8. Select the appropriate Category	
9. Select the Type Local Space	
10. Click New	

5.4. Add any Required Equipment or Room Features

- Highlight the icon under Equipment or Features depending on which you want to change.
- Click the Edit button – another screen will appear.
- Double click the equipment or feature needed – this will add a 1 next to the label.
- Click OK.

5.5. Add the Contact

- Click the Booking button on the right of the Event window.
- 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.
- Click Contact drop down – type in contact's code (taken from Contacts to notify), select the contact.
- Click Status from the drop-down menu - select Provisional if requesting CTT Space or another department's Local Space, or select Confirmed if booking your own Local Space.
- Click OK on the Booking details window.
- Click OK on the Event window – 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:	For CTT owned space that you need to request:
1. Click Rooms	1. Click Requested Rooms
2. Select the Building	2. Select the appropriate Category
3. Select the Room	3. Select the Type CTT Space
4. Click New	4. Click New
5. Click Requested Rooms	
6. Select the Building	
7. Select the Room	
8. Select the appropriate Category	
9. Select the Type Local Space	
10. Click New	

6.4. Add the Contact

1. Click the Booking button on the right on the Event window.
2. 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.
3. Click Contact drop down – type in contact's code (taken from Contacts to 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 on the Booking details window.
6. Click OK on the Event window – this will take you back to the timetable grid and you will see the new event.

6.5. Requesting a Room for a Non-Teaching Event

To request a room for your newly created non-teaching event you need to submit a request to the SMTT team. To do this either:

1. Submit a request through the UofG Helpdesk.
 - a. Select the **Business Systems: Request Help** tile and then **Timetabling** and **Room Booking Confirmation – CMIS User** from the dropdowns.
 - b. Include the Event ID of your created event and any other relevant information in the text box.
2. Send the Event ID of your created event and any other relevant information to timetabling@glasgow.ac.uk.

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

Date	Version	Changes
28/02/2014	0.1	First draft version of Intro guide
13/03/2014	0.2	CTT Updated
05/01/2016	0.3	CTT Updated
16/01/2019	1.0	CTT Updated
30/10/2019	1.1	CTT Updated
22/01/2020	1.2	CTT Updated
25/06/2020	1.3	CTT Updated
09/09/2020	1.4	CTT Updated - Formatting
23/02/2021	1.5	CTT Updated
02/02/2022	2.0	CTT Updated
16/06/2022	2.1	CTT Updated
23/02/2023	2.2	CTT Updated