

# Transformation Team Timetabling – Requirements Gathering

**Professional Services Guide** 

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### Introduction

Welcome to the new Timetabling Data Gathering Forms! These forms help you compile essential information for CMIS.

Form 1 allows you to indicate whether a course will be offered in the upcoming academic session and is easily updated. This form will be sent to the Head of Subject or Programme Leader and the relevant administrator for completion.

Form 2 collects details about course requirements, assigned staff, and important room features. You can also note any changes from the previous offering. This form will be forwarded to the Course Convener/Lead and the relevant administrator.

The Test & Learn Ambassadors have collaborated with the Schools to compile the course lead / convener names, which have been used to populate the 'Course Lead/ Convener' field on Form 1.

# **Requirements Gathering Form 1**

#### Form 1 SharePoint Layout

The designated administrator(s) will receive access to Form 1 as agreed with the Schools. Upon accessing the system, you will see the Form 1 SharePoint list (Fig 1), which will display all the courses listed on the system that you are associated with.

1. Course Requirements 🔅				7 1≣	↓ <b>F</b> Academic V	iew 📃 Admin V	<b>/iew</b> Y Private V	/iew + Add view
	Full Cours ×	Senior Ac V	B Course Le V	OProfessio ~	⊘ New/Ret ∨	🖼 Course R 🗸	😰 Details C 🗸	🗊 Modified 🗸
MSOFT1001	D Microsoft Course 1	E Michael Bristow	Emma Craddock	Theresa Taylor Jordan Creasey X Arlene Mckenna		Course not Running	Confirmed	Monday at 11:35
MSOFT1002	Microsoft Course 2	Kichael Bristow	Helen Mclaughlin	Theresa Taylor		Course not Running	Confirmed	Monday at 14:48
MSOFT1003	Microsoft Course 3	Kichael Bristow	Helen Mclaughlin	Arlene Mckenna		Course not Running	Confirmed	Monday at 11:35
MSOFT1004	Microsoft Course 4	Kichael Bristow	Helen Mclaughlin	🙀 Arlene Mckenna	Returning Course	Course is Running	Confirmed	Monday at 14:54
MSOFT1005	Microsoft Course 5	Kichael Bristow	Helen Mclaughlin	Emma Craddock Jordan Creasey		Course is Running	Confirmed	Monday at 14:54
MSOFT1011	Microsoft Course 11	🚯 Helen Mclaughlin 🌔	Claire Cameron	Arlene Mckenna		Course is Running	Click to confirm	Monday at 10:50
MSOFT1012	Microsoft Course 12	🔮 Helen Mclaughlin 🌗	Claire Cameron	<ul> <li>Emma Craddock</li> <li>Theresa Taylor</li> <li>Jordan Creasey</li> </ul>		Course is Running	Click to confirm	Monday at 10:50

(Fig. 1. Screenshot of Form 1 SharePoint list)

There are two viewing tabs on the screen (Fig 2). These are permission restricted.



(Fig. 2. Screenshot of Form 1 SharePoint list view tab options)

Academic View	The only view available to academics. Restricted functionality
Admin View	Shows all associated with you. Full functionality (exports & additional columns)

There are three Key fields that need to be checked and updated on Form 1.

The <u>Senior Academic Contact</u> will be the person responsible for managing the curriculum in their area, this is the person responsible for completing Form 1.

The <u>Course Lead/Convenor</u> is the Academic member of staff responsible for managing that individual course, this is the person responsible for completing form 2.

The <u>Professional Services Contact</u> field will show all of the PS staff with access to the forms, several names can be added to this field.

Descriptors of each data field are listed later in this guide - Glossary of Data Fields

#### Form 1 Editing and Confirming Details

Where the Senior Academic Contact is satisfied with the details, they should switch the value to 'Confirmed'.

In the event changes are needing to be made to the 'Course Code', 'Full Course Title', 'Course Lead / Convenor' and/or 'Professional Service Contact' fields for a course, then administrators can edit course requirements in one of two ways.

The first is to select the 'Edit in grid view' option from the command bar (or from the dropdown list when right-clicking a data line) whilst in the 'Admin View' tab (Fig 3). This will shift the data to an editable table, similar to Excel, and allow you to edit fields directly as you see them (just click on a field to add, edit and remove values).

+	Add new item 🗄 Edit in grid view	9 Undo 🙆 Share 🕻	🗄 Export 👻 📰 Forr	ms 🥵 Automate ~	🕆 🕆 Integrate 🗸			😕 Manage access 🔒
	1. Course Requirements 🕁	Ś			₹ 1	↓ <del>=</del> Academic View	🚊 Admin View 🗸	Private View + Add view
		□ Full Cours ∨	Senior Ac 🗸	🐣 Course Le 👻	♀	⊘ New/Ret ~ 💵	Course R 🗸 🖾 Deta	ils C 🗸 🖃 Modified 🗸
	MSOFT1001	D Microsoft Course 1	Kichael Bristow	Emma Craddock	Theresa Taylor Jordan Creasey	Cou	rrse not Running Con	Monday at 11:35

(Fig. 3. Screenshot of cursor selecting 'Edit in grid mode' button in the command bar - an option only in the 'Admin View' tab)

The second method is to edit course requirements in the same manner as Senior Academics (e.g. through Form 1 itself). To do this, you will need to open Form 1 by selecting an individual course's 'Course Code' (Fig 4) or by double clicking the line.



(Fig. 4. Screenshot of cursor selecting a value under field 'Course Code', used to open Form 1)

And selecting 'Edit all' in the top right of Form 1 (Fig 5).

🖉 Edit all	Copy link □ □
Course Requirements for MSOFT1001: Microsoft Course 1	Comments ~ @mention or comment

(Fig. 5. Screenshot of cursor selecting 'Edit all' button on Form 2)

In 'Edit Mode' of Form 1 for a course, you can edit all relevant fields (Fig 6). Course contact details will auto-fill with information received from the Schools earlier in the process, but can be updated if needed.

		👄 Copy link 📮 🗙
Course Details for I	/ISOFT1002	Comments ~
Course Code & Full Course Title		@mention or comment
Course Code	Full Course Title	
MSOFT1002	Microsoft Course 2	
Course Contacts		
8 Course Lead/Convener	Senior Academic Contact S Professional Services Contact	
Felen Mclaughlin X	Michael Bristow X	
If there are multiple Course Leads/Conveners	This should be the academic with overall Enter a name or amail address	
please list the name who is responsible for Timetabling	responsibility for agreeing on the structure and context of programmes. This could be a programme director, year group lead, Head of Subject, or similar portation	
New/Returning     New Course     Returning Course  Is the course running in the next acad BE Course Running	emic year?	Ę
Yes		
Tick the box and save once all details	are completed	Be the first one to add a comment
Details Confirmed		
✓ Yes		
This form is only for timetably -	a nud daar wat yanlara zauga a nanyan ingaara guda ar yaug lagal Danya of Chudlar	
This form is only for timetabling purpose	and does not replace course approval process such as your local board of studies.	
	Save	el

(Fig. 6. Screenshot of an individual course's Form 1, opened in 'Edit Mode')

Whilst in 'Edit Mode' and where you have updated any data fields, ensure you save the details that you have provided by clicking "Save".

It is possible to edit the form without entering edit mode; however, you won't see the additional context in some of the fields.

The 'Course Running' and 'Details Confirmed' can be updated from the list as these fields are toggle columns (Fig 7) that switch between their default values: 'Course is Running' to 'Course not Running', and 'Click to confirm' to 'Confirmed'.

1. Course Requirements 🔅			√ {≣ ↓F Academ	nic View 📃 Admin View 🗸 Private View 🕴 + Add vie
	T Full Cours	Senior Ac Senior Ac	Professio ~	✓ ID Course R ✓ ID Details C ✓ ID Modified ✓
MSOFT1001	D Microsoft Course 1	Kichael Bristow 🤇 🗑 Emma Craddo Kichael Bristow	ck 🕜 Theresa Taylor 🏟 Jordan Creasey 🔯 Arlene Mckenna	Monday at 11:35
MSOFT1002	Microsoft Course 2	Kichael Bristow 🚯 Helen Mclaug	nlin 🞲 Theresa Taylor	Course not Running Confirmed Monday at 14:48

(Fig. 7. Screenshot of cursor selecting 'Course Running' field for an individual course to switch the value to 'Course not running' for that course)

# **Requirements Gathering Form 1: New and Returning Courses**

#### Introduction

If a course is missing from the School dataset, follow the instructions below to add it. Without a course being confirmed on Form 1, the Course Convener/Lead won't receive Form 2.

#### Form 1 Add a New/Returning Course

If you're aware of new courses that will be running in the upcoming academic session or courses from the previous academic sessions (e.g. year on, year off courses) that will be offered again, you can add a new course item to the existing SharePoint list for Form 1.

Adding a new course to this dataset will ensure that a Timetabling Requirements Gathering Form 2 is generated for that course and then distributed to the appropriate Course Lead/Convenor during the second stage of this process.

Click on the red 'add new item' button (Fig 8) at the top left side of the screen.

+ Ad	d new item		
	1. Course Requirements 🕁		
~			⊗ Course Le ∨ ⊗ Senior Ac ∨
~	Details Confirmed: No (20)		
	MSOFT1011	Microsoft Course 11	🕵 Claire Cameron 🛛 🚳 Helen Mclaughlin

(Fig. 8. Screenshot of 'Add new item' button on SharePoint site for Form 1)

# PLEASE NOTE: New courses should only be added if they have or will be approved by your local Board of Studies.

A new window will open asking you to provide the details of your new or returning course.

You should fill out the fields as required. Please note that when adding staff members to Form 2 fields, they must have a Microsoft365 account.

The 'Senior Academic Contact' should be the academic with the overall responsibility for the agreeing on the structure and content of programmes (e.g. Programme Directors, Year Group Lead, Head of Subject etc), and where there are multiple Course Leads/Convenors, list the name of the person who is responsible for timetabling.

Course Details for [	New Course Data Entry]	
Course Code	Full Course Title	
Enter value here	Enter value here	
Course Contacts		
Course Lead/Convener	Senior Academic Contact	Professional Services Contact
Enter a name or email address	Enter a name or email address	Enter a name or email address
If there are multiple Course Leads/Conveners, please list the name who is responsible for Timetabling	This should be the academic with overall responsibility for agreeing on the structure and content of programmes. This could be a programme director, year group lead, Head of Subject, or similar position	

(Fig. 9. Screenshot of 'Add new item' Form 1 fields 'Course Code', 'Full Course Title', 'Course Lead/Convener', 'Senior Academic Contact' and 'Professional Services Contact')

# PLEASE NOTE: If the course is new and is yet to be assigned a course code, please leave the 'Course Code' field blank.

Please indicate in the field 'New/Returning' (Fig 10) whether the course is new for 2025/26 or is a returning course.

Indicating whether this is a new or returning course helps the Professional Service Team in your area with the course timetabling process.

If this course did not run in 2024-25, is the course a new or returning course?		
⊘ New/Returning		
O New Course		
Returning Course		

(Fig. 10. Screenshot of 'Add new item' Form 1 field 'New/Returning')

The field 'Course Running' will by default be set to 'Yes' (Fig 11):

Is the course running in the next ac	ademic year?
🖾 Course Running	
Yes	

(Fig. 11. Screenshot of 'Add new item' Form 1 field 'Course Running')

Finally, the field 'Details Confirmed' (Fig 12) is the last check box on Form 1, and is for you to confirm that all the details for the course are accurate / correct to the best of your knowledge:

Details Confirmed           Yes	•	Tick the box and save once all details are completed		
Yes		Details Confirmed		
		Yes		

(Fig. 12. Screenshot of 'Add new item' Form 1 field 'Details Confirmed')

# PLEASE NOTE: Form 1 is only for timetabling purposes. It does not replace course approval process such as your local Board of Studies.

When you are satisfied that all the details are accurate / correct, please ensure that you click "Save" or your progress will be lost.

When you save the new course, it will appear on Form 1. The data will be visible in the SharePoint list for those named in the 'Professional Service Contact' and 'Senior Academic Contact' fields.

### **Requirements Gathering Form 2**

#### Introduction

Form 2 will be sent to the Course Lead/Convenor that was allocated on Form 1. The course Lead/Convenor will then have to populate the form with the course delivery details and confirm the details once complete.

Form 2 will provide you with the necessary information for inputting into CMIS and will help you determine whether a planning meeting with specific course conveners is required.

#### Form 2 SharePoint Layout

Upon accessing the system, you will see the screen shown below (Fig 13), which will display all the courses listed on the system that are relevant to you. If there are any courses missing, then you are either not allocated to this course (and you will need to resolve with your team) or you will need to add the course following the instructions later in this guide – Form 2 (Editing Values).

	University of Glasgow	SharePoint					ସ ୫	'©?
۵	TR Timetablin	g Requirements					☆ Not following	🔏 Site access
R	1. Course Requirements	+ Add new item 🖽 Edit in	grid view 🦻 Undo 🕻	🖄 Share 🖷 Export - 🛛 🏾	🗄 Forms 🖓 Automate 🕤 🕀 Integrate 🤊	·	<b>2</b> 4	3 Manage access
	2. Course Additional Req							
	3. Course CMIS Data (25/	2. Course Additional F	Requirements 🕁		∑ [≣	↓ F Academic View	Admin View   Private V	iew 🕂 + Add vie
	Test_1. Course Requireme	Course Code ~	Tull Cours ~	S Course Lead/Convener ~	Or Professio v Or Did this c v	⊘ Are there ∨ ⊘ Chan	ge i> 🔗 Change i> 🔅	🖇 Change i 👻
÷	Recycle bin	MSOFT1001	Microsoft Course 1	Jordan Creasey	Arlene Mckenna			
	Edit				Gail Devlin			
	Return to classic SharePoint	MSOFT1002	Microsoft Course 2	🐅 Claire Cameron	Arlene Mckenna No			
		MSOFT1003	Microsoft Course 3	Theresa Taylor	Cail Devin	Vec	Group size cons.	Semester taught
		MSOFTIOUS	microsoft course 5	There are harden	Matthew Gould		Group size consi.	Change in teach

(Fig. 13. Screenshot of Form 2 SharePoint site)

The tab 'Academic View' is the view that the Course Lead/Convener will see (Fig 14). Administrators will also have permissions to access this tab to see the (the administrator's) data in the same format that academics will see..

2. Course Additional Requ	uirements ☆	7 €• ↓	Academic View ~	Admin View	Private View + Add vie
Z Course Details Pending (2 items)					
Course Lead/Convener Jordan Creasey	Course Lead/Convener Jordan Creasey				
Course Code MSOFT1001	Course Code MSOFT1002				
Full Course Title Microsoft Course 1	Full Course Title Microsoft Course 2				
Click to confirm details	Click to confirm details				
✓ Course Details Confirmed (1 items)	)				
Course Lead/Convener					
Jordan Creasey					
Course Code MSOFT1003					
Full Course Title Microsoft Course 3					
Details Confirmed					

(Fig. 14. Screenshot of Form 2 'Academic View' tab)

#### Form 2 'Admin View' Tab

Within the 'Admin View' tab, you can quickly view the course code and course name of the items relevant to you. You will also be able to see the attached Senior Academic Contact, Course Lead/Convener and the key Professional Services staff (usually up to three persons) for those courses (Fig 15). These data fields (see below) were confirmed via Form 1 and so will be pre-populated when you receive access to Form 2.

		🐣 Course Lead/Convener 🗸	Professional Services Contact ~
MSOFT1001	Microsoft Course 1	Jordan Creasey	🙀 Arlene Mckenna   💮 Matthew Gould 🛛 🚳 Gail Devlin
MSOFT1002	Microsoft Course 2	Claire Cameron	🙀 Arlene Mckenna 🛛 🚳 Gail Devlin
MSOFT1003	Microsoft Course 3	Theresa Taylor	Arlene Mckenna 💮 💮 Matthew Gould

(Fig. 15. Screenshot of Form 2 fields which are pulled from Form 1 data)

The Course Lead/Convener completes Form 2 for each individual course. The information related to course requirements will display in the fields below and include the following information:

- Did this course run in 2024-2025.
  - If 'No', what are the preferred teaching delivery details.

- > If 'Yes', are there any changes to be made to the course.
  - and if there are changes:
  - Does this include a change to the lecturer details.
  - Does this include a change to the course size.
  - $\circ$   $\,$  Does this include a change to the teaching format.
  - $\circ$   $\;$  Is there any further detail to add to the changes specified.
  - Is the Head of Subject/ Programme Director aware of the changes.

After the Course Lead/Convener saves Form 2 for the course, the 'Tick to confirm details' field will change to 'Details Confirmed' (Fig 16).

	Tick to confirm details ~
MSOFT1001	Details Pending
MSOFT1002	Details Pending
MSOFT1003	Details Confirmed

(Fig. 16. Screenshot of Form 2 field 'Tick to confirm details' and associated values)

The administrator has access to three columns they can use to help track their progress (Fig 17):

- Updated on Timetabling System.
- Requirements Confirmed.
- Size Checked in CMIS.

	😰 Updated in Timetabling System 👻	Requirements Confirmed ~	Size Checked in CMIS ~
MSOFT1001 🤇	× No	×No	× No
MSOFT1002	Ves	×No	× No
MSOFT1003	VYes	✓ Yes	✓ Yes

(Fig. 17. Screenshot of additional 'tracking' fields, viewable only to professional service colleagues)

These fields are exclusive to administrative staff, visible only in the 'Admin View' tab, and are optional for tracking administrative actions.

The final fields on the 'Admin View' tab show when, and by whom, data for a course listed on Form 2 was last modified and created (Fig 18).

T Course Code ~	😇 Modified 🗸	S Modified By ~	🖃 Created 🗸	⊖ Created By ~
MSOFT1001	About an hour ago	Jordan Creasey	January 20	Jordan Creasey
MSOFT1002	About a minute ago	Jordan Creasey	January 20	Jordan Creasey
MSOFT1003	About a minute ago	Jordan Creasey	January 20	Jordan Creasey

(Fig. 18. Screenshot of Form 2 metadata fields 'Modified', 'Modified By', 'Created' and 'Created By')

Descriptors of each data field are listed later in this guide - Glossary of Data Fields

#### Form 2 (Input Form)

Within the 'Admin View' tab, you can open up Form 2 by clicking on an individual course's 'Course Code' (Fig 19):

			Course Lead/Convener ~	Professional Services Contact ~
$  \circ$	MSOFT1001 戻 … 📜	Microsoft Course 1	Jordan Creasey	🐞 Arlene Mckenna 🌘 Matthew Gould 🛛 🚳 Gail Devlin
	MSOFT1002	Microsoft Course 2	Claire Cameron	🙀 Arlene Mckenna 🛛 🚳 Gail Devlin
	MSOFT1003	Microsoft Course 3	Theresa Taylor	🙀 Arlene Mckenna 🌘 Matthew Gould

(Fig. 19. Screenshot of cursor selecting a value under field 'Course Code', used to open Form 2)

Form 2 will open in 'View Mode' (Fig 20) and you will see the course's current Form 2 data in the fields listed in the pane.

PLEASE NOTE: Form 2 may display additional or fewer questions based on the Course Lead/Convener's selections, such as showing more fields if 'Yes' is selected for changes to the course.

🖉 Edit all	🖙 Copy link 📮 🕼 🗸 🗙
Course Requirements for MSOFT1001: Microsoft	Comments ∨ @mention or comment
Course Lead/Convener Jordan Creasey	
<ul> <li>⊘ Did this course run in 2024-25?</li> <li>Yes</li> </ul>	
<ul> <li>Are there any changes to be made to this course?</li> <li>No</li> </ul>	
<ul> <li>Tick to confirm details</li> <li>Details Pending</li> <li>MSOFT1001 CMIS Data (25/26)</li> </ul>	

(Fig. 20. Screenshot of 'View Mode' of Form 2, with data fields on the left side and comments field on the right side)

You can switch between 'View Mode' and 'Edit Mode' by selecting the 'Edit all' button (Fig 21).

C Edit all	👄 Copy link 📮 🗗 🗸 🗙
کم در کمپر کې د کې کې د کې کې کې د کې کې کې د کې	Comments ~
O Course 1	@mention or comment

(Fig. 21. Screenshot of cursor selecting 'Edit all' button on Form 2)

When in 'View Mode' edited values are saved automatically upon clicking off from the field being edited. When in 'Edit Mode', please make sure you click "Save" before exiting or you will lose your updates!

# PLEASE NOTE: Form 2 is set to open in 'Edit Mode' by default for Course Leads/Convenors through the 'Academic View' tab.

Finally, Form 2 also contains a link to the course's teaching events in the 25/26 CMIS dataset. Please see section later in this guide for further information - <u>CMIS Data (Linked to Form 2)</u>.

#### Form 2 (Editing Values)

Administrators can edit course requirements for a particular course in one of two ways.

To edit data more easily, select 'Edit in grid view' (Fig 22) from the command bar or right-click a data line in the 'Admin View' tab. This opens an editable table where you can directly modify fields by clicking on them.



(Fig. 22. Screenshot of cursor selecting 'Edit in grid mode' button in the command bar - an option only in the 'Admin View' tab)

'Edit in grid view' allows you to edit fields not seen on Form 2 (i.e. the values not required for the Course Lead/Convener to input) such as the course name and course code etc.

'Edit in grid view' also allows you to add missing courses to the dataset. If you need to add a missing course, scroll to the bottom of your SharePoint data table whilst in 'Edit in grid view' and you will see the option to 'Add new item'; clicking this will let you add the course details to the dataset.

The second method to edit course requirements is to do so in the same manner as Course Leads/Convenors. To do this, you will need to open Form 2 by selecting an individual course's 'Course Code' (Fig 23) or by double clicking on the row.



(Fig. 23. Screenshot of cursor selecting a value under field 'Course Code', used to open Form 2)

And selecting 'Edit all' in the top right of Form 2 (Fig 24).

C Edit all	🖙 Copy link 📮 🕼 🗸 🗙
Course Requirements for MSOFT1001: Microsoft	Comments ~
Course 1	@mention or comment

(Fig. 24. Screenshot of cursor selecting 'Edit all' button on Form 2)

PLEASE NOTE: some values can only be edited in the 'Admin View' tab whilst in 'Edit in grid mode'. Such as 'Course Code', 'Course Name' and 'Professional Services Contact' etc'.

The three additional fields for Professional Service colleagues are toggle columns (Fig 25) that can be changed from 'No' (default) to 'Yes' by clicking them. You can also edit these values in 'Edit in grid mode' like other fields.

T Course Code ~	Updated in Timetabling System ~	Requirements Confirmed ~	■ Size Checked in CMIS ${}^{}$
MSOFT1001	S X No	× No	× No
MSOFT1002	✓ Yes	×No	× No
MSOFT1003	Ves	✓ Yes	✓ Yes

(Fig. 25. Screenshot of additional fields 'Updated on Timetabling System', 'Requirements Confirmed' and 'Size Checked in CMIS', viewable only to professional service colleagues)

#### Form 2 (Exporting Data)

Administrators can export data for local use using the 'Export' option in the 'Admin View' tab; this option is unavailable in the 'Academic View' tab.

We recommend downloading the data once you're fully satisfied that all the data is complete in the Forms (as you may miss some information otherwise!). To do this, click "Export" and then "Export to CSV" – this will create a local copy of the data for your records and internal reporting.

#### Form 2 (Version History)

Administrators can quickly see who the last person was to modify an individual course's data and the time/date of said modification via the relevant fields on the 'Admin View' tab (Fig 26).

7		🗄 Modified 🗸	Odified By ~	🗊 Created 🗸	○ Created By ~
	MSOFT1001	About an hour ago	Jordan Creasey	January 20	Jordan Creasey
	MSOFT1002	About a minute ago	Jordan Creasey	January 20	Jordan Creasey
	MSOFT1003	About a minute ago	Jordan Creasey	January 20	Jordan Creasey

(Fig. 26. Screenshot of Form 2 metadata fields 'Modified', 'Modified By', 'Created' and 'Created By')

For full details on changes to individual course data, administrators can also access a data line's version history by right-clicking anywhere on a data entry and clicking 'Version History' (Fig 27).

	Course Code	🐨 Modified 🗸	Modified By ~	🐨 Created 🗸	⊗ Created By ∨	
∥ ⊙	MSOFT1001 🤇	About an hour ago	Jordan Creasey	January 20	Jordan Creasey	🙆 Share
	MSOFT1002	About a minute ago	Jordan Creasey	January 20	Jordan Creasey	👄 Copy link
	MSOFT1003	About a minute ago	Jordan Creasey	January 20	Jordan Creasey	<ul> <li>Copy field value to clipboard</li> <li>Edit</li> </ul>
						Comment
						Manage access
						₽ Automate >
						Version history
						5 Undo

(Fig. 27. Screenshot of cursor selecting 'Version History' from dropdown list, which is accessed by right clicking on an individual course's Form 2 data line)

### Form 2 (CMIS Data)

Form 2 contains a link to the individual course's teaching events in the 25/26 CMIS dataset (Fig 28).

(Fig. 28. Screenshot of the link, shown on Form 2, to a course's 25/26 CMIS data)

Clicking this link will open a new bowser tab and will display the teaching events associated with that individual course currently in the 25/26 CMIS dataset (Fig 29). The dataset is filtered only to the individual course and is presented in the same format as a usual CMIS data export (the only exception being CMIS header 'Weeks2' has been changed to 'Dates).

3. Course CMIS Data (25/26) 🛧 🤅	9						⊽ ≣ ↓	All Items	CMIS Data (25/26) Filte	<ul> <li>+ Add view</li> </ul>
Keyword: MSOFT1001 ×										Clear filters ×
T Module ~	T Mod ~	⊘ Day ~	T Week(s) ~	Date(s) ~	🗊 Start 🗸	🗊 Finish 🗸	⊡ Grp ∨	① Size ~	Ecturer ~	T Details ~
Microsoft Course 1	MSOFT1001	Mon	i 31	17/03/2025	09:00	<u>(© 10:00</u>	LC01	144	Ay Clague, Ms Julie	
Microsoft Course 1	MSOFT1001	Tue	i 31	18/03/2025	O 09:00	<u>③ 10:00</u>	LC01	144	A≱ Clague, Ms Julie	
Microsoft Course 1	MSOFT1001	Thu	22	16/01/2025	© 09:00	③ 10:00	LC01	144	₽ Birch, Dr Jonathan	
Microsoft Course 1	MSOFT1001	Wed	23-26,28-31	22-01-2025-12-02-2025 26-02-2025-19-03-2025	09:00	③ 10:00	SM01	18		
Microsoft Course 1	MSOFT1001	Wed	23-26,28-31	22-01-2025-12-02-2025 26-02-2025-19-03-2025	· <u>③ 10:00</u>	<u>© 11:00</u>	SM02	18		
Microsoft Course 1	MSOFT1001	Wed	23-26,28-31	22-01-2025-12-02-2025 26-02-2025-19-03-2025	00:00	© 10:00	SM03	18		

(Fig. 29. Screenshot of the link, shown on Form 2, to a course's 25/26 CMIS data)

Please note that if no data is shown on this tab, this is likely due to the course not being included in the 25/26 CMIS dataset (e.g. new courses will not have data in this dataset due to them never being included on the timetabling system – thus, following this link for a new course will result in no data being shown).

For users less familiar with CMIS data, descriptors of each field are included in the SharePoint list (Fig 30). To bring up the field descriptors, left click on a value and it will appear in a pop-up; these descriptors are also listed later in this guide – <u>Glossary of Data Fields</u>.



(Fig. 30. Screenshot of the pop-up descriptor, shown on a course's data line in the 25/26 CMIS dataset)

# **Adding Comments**

Users can add comments alongside Form 1 and 2 data fields for personal notes or for other colleagues assigned to the course. To notify someone of a comment, type @ followed by their name before saving. Note that only individuals assigned to the course can view the comments; if you @mention someone not associated with the course, they won't see the comment or data – associated individuals are the Senior Academic Contact and Professional Services Contact for Form 1 and the Course Lead/Convener and Professional Services Contact for Form 2.

# **Glossary of Data Fields**

#### Form 1 & 2 Data Field Descriptors

The following data fields are available/visible on the Forms for Professional Service colleagues.

1. Course Code	Unique course code of an individual data line (i.e. ACCFIN1001). This
FORM 1 & FORM 2	field is confirmed via Form 1 and so will be pre-populated. Editing this
	value can be done through 'Edit in grid view'.
2. Full Course Title	Full course title of an individual data line (e.g., 'Advanced Practice', not
FORM 1 & FORM 2	'Adv Prc'). Confirmed via Form 1 and pre-populated, but can be edited
	via "Edit in grid view".
3. Senior	The 'Senior Academic Contact' is the person responsible for managing
Academic Contact	the curriculum in their area. They are the person responsible for
FORM 1	completing Form 1.
4. Course	Course Lead/Convener responsible for the course (where multiple
Lead/Convener	exist, the person responsible for timetabling). This field is confirmed
FORM 1 & FORM 2	via Form 1 and so will be pre-populated. Editing this value can be done
	through 'Edit in grid view' and by assigning a person (must have
	Microsoft365 Account).
5. Professional	Professional Services contact(s), usually up to ~3, who require sight
Services Contact	of timetabling requirements. This field is confirmed via Form 1 and so
FORM 1 & FORM 2	will be pre-populated. Editing this value can be done through 'Edit in
	grid view' on Form 2 and by assigning a person (must have
	Microsoft365 Account).
6. Did this course	Ø Did this course run in 2024-25?
run in 2024-25?	○ Yes
FORM 2	O No
	(Fig. 31. Screenshot of field 'Did this course run in 2024-25?' on Form 2)
	If the course ran in 2024-2025, check the 'Yes' value. Else, check the
	'No' value. 'Yes' value opens branched question (8). 'No' Value opens
	branched question (7).

7 Now/Poturning	- Nau/Paturning Course (Destand Dalium) Dataile)						
A sum of (Draformad	Enter value here						
Course (Preferred							
Delivery Details).							
FORM 2	Please indicate your preferred course delivery details, these may include: semester taught, day & time taught, lecturing staff details (and taught weeks if known), teaching event duration essential facilities/equipment sub group structure etc. Note this is a starting point for your timetable request, your local timetabler may be in touch regarding feasibility.						
	(Fig. 32. Screenshot of field 'New/Returning (Preferred Delivery Details)' on Form 2)						
	If the course did not run in the last session. users should indicate their						
	n me course du nor run in the last session, users should indicate their						
	preterred course delivery details (i.e. semester taught, day & time						
	taught, lecturing staff details (and taught weeks if known), teaching						
	event duration, essential facilities/equipment, sub group structure						
	etc). Note this is a starting point for your timetable request, your local						
	timetabler may be in touch regarding feasibility.						
8. Are there any							
changes to he							
made to this	() Yes						
	O No						
course?	This could be the size of class, day and time it's taught, pattern of delivery, additional feature requests etc.						
FORM 2							
	(Fig. 33. Screenshot of field 'Are there any changes to be made to this course?' on						
	Form 2)						
	If there are changes to be made to this course (i.e. size of the class,						
	day and time it's taught, pattern of delivery, additional feature requests						
	etc), then check the 'Yes' value. Else, check the 'No' value, 'Yes' value						
	,						
	opens branched questions $(9-13)$ (No?Value ends Form 2 and the user						
	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details"						
	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
9. Change in	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
9. Change in Lecturer details	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
9. Change in Lecturer details (select all that	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
9. Change in Lecturer details (select all that apply)	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details". Change in Lecturer Details (select all that apply) Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
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9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".          Image: Change in Lecturer Details (select all that apply)         Image: Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.         (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)         If there are changes to the Lecturer details, then from the drop-down,						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".          Image: Change in Lecturer Details (select all that apply)         Image: Change in Lecturer Details (select all that apply)         Image: Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.         (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)         If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".          Image: Change in Lecturer Details (select all that apply)         Image: Change in Lecturer Details (select all that apply)         Image: Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.         (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)         If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details". Change in Lecturer Details (select all that apply) Providing accurate lecturer details (select all that apply) Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer. ( <i>Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form</i> 2) If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".          Image: Change in Lecturer Details (select all that apply)         Image: Change in Lecturer Details (select all that apply)         Image: Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.         (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)         If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):         Image: Lecturing Staff Details (and the weeks they teach if known).						
9. Change in Lecturer details (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".          Image: Change in Lecturer Details (select all that apply)         Image: Change in Lecturer Details (select all that apply)         Image: Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.         (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)         If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):         Image: Lecturing Staff Details (and the weeks they teach if known).         Image: Change in Size (select all that apply)						
9. Change in Lecturer details (select all that apply) FORM 2 10. Change in Size (select all that	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".          Image: Change in Lecturer Details (select all that apply)         Image: Change in Lecturer Details (select all that apply)         Image: Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.         (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)         If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):         Image: Lecturing Staff Details (and the weeks they teach if known).         Image: Change in Size (select all that apply)						
<ul> <li>9. Change in Lecturer details (select all that apply)</li> <li>FORM 2</li> <li>10. Change in Size (select all that apply)</li> </ul>	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".          Image: In Lecturer Details (select all that apply)         Image: In Lecturer Details (select all that apply)         Image: In Lecturer Details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.         (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)         If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):         Image: Change in Size (select all that apply)         Image: Image: Staff Details (and the weeks they teach if known).         Image: Image: Image: Image: Staff Details (and the weeks they teach if known).         Image: Imag						
9. Change in Lecturer details (select all that apply) FORM 2 10. Change in Size (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".          Image: Change in Lecturer Details (select all that apply)         Image: Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.         (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)         If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):         Image: Change in Size (select all that apply)         Image: Image						
9. Change in Lecturer details (select all that apply) FORM 2 10. Change in Size (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".           Image:         Change in Lecturer Details (select all that apply)         Image:						
9. Change in Lecturer details (select all that apply) FORM 2 10. Change in Size (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".           Image in Lecturer Details (select all that apply)           Image in Lecture Details (select all that apply)' on Form 2)           If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):           Image in Size (select all that apply)						
9. Change in Lecturer details (select all that apply) FORM 2 10. Change in Size (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".           Image: in Lecturer Details (select all that apply)           Image: in Lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer.           (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2)           If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable):           Image: Lecturing Staff Details (and the weeks they teach if known).           Image: Change in Size (select all that apply)           Image: I						
9. Change in Lecturer details (select all that apply) FORM 2 10. Change in Size (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details".						
9. Change in Lecturer details (select all that apply) FORM 2 10. Change in Size (select all that apply) FORM 2	opens branched questions (9-13). 'No' Value ends Form 2 and the user will be directed to "Confirm Details". Change in Lecturer Details (select all that apply) Providing accurate lecturer details (select all that apply) Providing accurate lecturer details (select all that apply) Providing accurate lecturer details allows for timetabling to consider walking distances, course clashing and accessibility needs. Please note the 25-26 CMIS course dataset is linked in the form footer. (Fig. 34. Screenshot of field 'Change in Lecture details (select all that apply)' on Form 2) If there are changes to the Lecturer details, then from the drop-down, select the value(s) applicable to the change. Else, leave the selection blank. Values which can be selected include (you can select more than one option if applicable): Lecturing Staff Details (and the weeks they teach if known). (Fig. 35. Screenshot of field 'Change in Size (select all that apply)' on Form 2) If there are changes to the cohort size or necessary adjustments to the group composition (for example, changing from 2 groups of 30 to 3 groups of 10), please report them here. Please note the 25-26 CMIS course dataset is linked in the form footer. (Fig. 35. Screenshot of field 'Change in Size (select all that apply)' on Form 2) If there are changes to the cohort size or group composition (e.g., phibling from 2 groups of 20 to 2 t						

	value(s). Otherwise, leave the selection blank. You may select
	multiple options if applicable:
	Change in cohort size (e.g. you believe there is a significant
	change in size to your course for 2025/26).
	$\succ$ Group size constraints (e.g. number of lab benches,
	computers, or a change of size to seminar groups).
11. Change in	☐ Change in Teaching Format (select all that apply)
Teaching Format	
(select all that	
annly)	and your teaching being roomed in an appropriate space. If the data is provided later, our ability to assist may be
	limited. Please note the 25-26 CMIS course dataset is linked in the form footer.
	(Fig. 36. Screenshot of field 'Change in Teaching Format (select all that apply)' on Form 2)
	If there are changes to the teaching format, select the value(s)
	applicable to the change. Else, leave the selection blank. Values
	which can be selected include (you can select more than one option
	if applicable):
	Semester taught.
	Day & Time taught.
	Duration of teaching events.
	Add or remove teaching events
	<ul> <li>Change in teaching practices/facilities/equinment</li> </ul>
	<ul> <li>Other change in teaching format</li> </ul>
12 Change Detail	
Tevt	
	Enter value here
FUNPI 2	
	Please use the free text box to add further detail of the changes selected above.
	(Fig. 37. Screenshot of field 'Change Detail Text' on Form 2)
	Where a change in lecturer details size and/or a change in teaching
	format has been indicated further detail can be provided in the free
	text hox
13 Is your Head of	In your Hand of Subject/Drogramme Director aware of these changes?
School/Programm	s you need of subject Programme Director aware of these changes:
o Director owere of	Yes
the changes?	Any changes listed above will be passed onto your local timetabler and shared with the Head of Subject/Programme
the changes?	Director; someone will contact you if they require any additional details.
FURM 2	(Fig. 38. Screenshot of field 'Is your Head of Subject/Programme Director aware of
	these changes?' on Form 2)
	Where any abando to the source has been indicated, southing that the
	where any change to the course has been indicated, confirm that the
	Head of Subject/Programme Manager is aware of these changes by

14 Tick to confirm	Tick to confirm details				
detaile					
	Yes				
FURM 2	Tick the box and save once all details are complete. Please note that any requested changes, where relevant, may not				
	be implemented due to limited resources within the University Estate or restrictions within your own subject area.				
	(Fig. 39. Screenshot of field 'Tic	ck to confirm details' on Form 2)			
	Once all other sections	s of Form 2 have been completed, the			
	requirements can be conf	irmed by selecting the "Yes" value. This will			
	indicate that the Cou	rse Lead/Convener has confirmed the			
	requirements for the course.				
15. Updated in					
Timetabling	Course Code V	Departed in Timetabling System V			
Svstem	ACCFIN1004	× No			
FORM 2 ADMIN	×				
ONLY	TRS2005	✓ Yes			
	(Fig. 40. Screenshot of field 'Up	odated in Timetabling System' on Form 2)			
	This optional field hel	ps track updates to individual course			
	requirements in the tim	etabling system and is hidden from the			
	'Academic View' tab. You	can edit it via 'Edit in grid view' or by clicking			
	the value.	5 , 5			
16. Requirements					
Confirmed	T Course Code ~	Requirements Confirmed ~			
FORM 2 ADMIN	ACCFIN1004	XNo			
ONLY					
	TRS2005	Var Var			
	(Fig. 41, Screenshot of field 'Requirements Confirmed' on Form 2)				
	This optional field aids in tracking requirement confirmations in the				
	timetabling system after course undates. It is not visible in the				
	'Academic View' tab Edit it via 'Edit in grid view' or by clicking the				
	value.				
17. Size Checked					
in CMIS	T Course Code ~	Size Checked in CMIS V			
FORM 2 ADMIN	ACCEIN1004				
ONLY		× No			
	TRS2005				
	THE COD	V Yes			
	(Fig. 42. Screenshot of field 'Size Checked in CMIS' on Form 2)				
	This optional field helps track course size checks after updates in the				
	timetabling system. It is not visible on the 'Academic View' tab and can				
	be edited in grid view or by clicking the value.				
18. Modified	SharePoint will automatically populate this value.				

FORM 1 & 2	
ADMIN ONLY	
19. Modified By	SharePoint will automatically populate this value.
FORM 1 & 2	
ADMIN ONLY	
20. Created	SharePoint will automatically populate this value.
FORM 1 & 2	
ADMIN ONLY	
21. Created By	SharePoint will automatically populate this value.
FORM 1 & 2	
ADMIN ONLY	

#### CMIS Data Field Descriptors

The following data fields are available/visible on the SharePoint CMIS dataset for Professional Service colleagues.

Module	This field relates to the course title.
Mod	This field relates to the course code.
Day	This field relates to the day of course delivery.
Week(s)	This field relates to the CTT weeks of course delivery.
Date(s)	This field relates to the calendar weeks of course delivery.
Start	This field relates to the start time of the course (24hr format).
Finish	This field relates to the finish time of the course (24hr format)
Grp	This field relates to the group code.
Size	This field relates to the cohort size of the Grp (group) field.
Lecturer	This field relates to the lecturer attached to the course.
Details	This field relates to further details relevant to the course.
Equipment	This field relates to the equipment requirements of the course.
Features	This field relates to the room feature requirements of the course.
Source	This field relates to the source of the course.
Category	This field relates to the category of the course.
Туре	This field relates to the type of space booked for the course.
Classif	This field relates to the classification of the course.
Event ID	This field relates to the unique identifier (ID) associated with the course.

Document Control		
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