



Transformation Team

Timetabling – Requirements

Gathering

Academic Guide

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Introduction

Welcome to the new Timetabling Data Gathering Forms! These forms will help you compile essential information that will be entered into the timetabling system.

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 Director and the relevant administrator for completion.

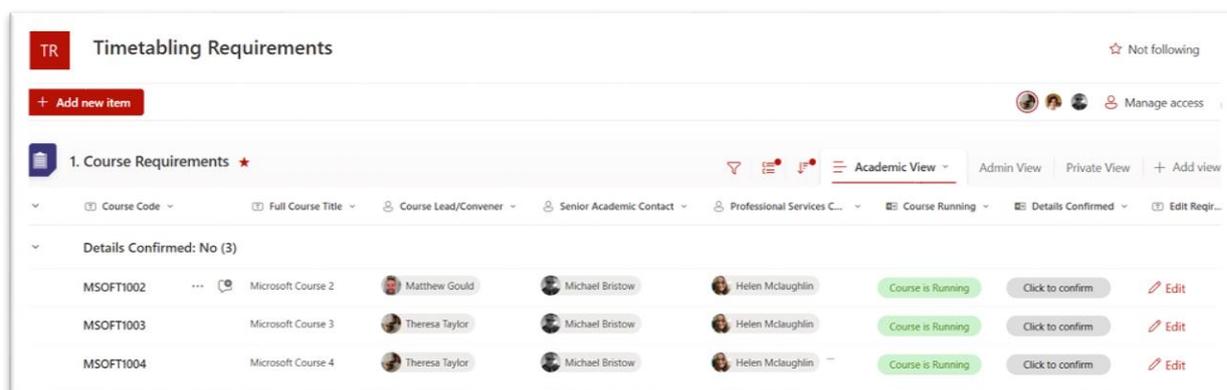
Form 2 collects details about course requirements, assigned staff, and important room features. You can also note any changes from the previous offering. This form will be forwarded to the Course Convener/Lead and the relevant administrator.

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 Senior Academics 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.



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

There are two viewing tabs on the screen (Fig 2). These are permission restricted – you will only have access to the “Academic View”.



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

Academic View	The only view available to academics
Admin View	Includes ability to export and track history

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

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

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

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

Descriptors of each field contained in the Glossary section are listed later in this guide – [Glossary \(Data Field Descriptors\)](#)

Form 1 Editing and Confirming Details

When 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 Senior Academics can edit course requirements

To do this, you will need to open Form 1 by selecting an individual course's 'Course Code' (Fig 3) or by double clicking the line.



(Fig. 3. 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 4).



(Fig. 4. 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 5). Course contact details will auto-fill with information received from the Schools earlier in the process, but can be updated if needed.

Section: Requirements Gathering Form 1

(Fig. 5. 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 by clicking “Save” at the bottom.

It is possible to edit the form without entering edit mode, and the data will update on the fly, 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 6) that switch between their default values: 'Course is Running' to 'Course not Running', and 'Click to confirm' to 'Confirmed'.

Course Code	Full Course Title	Course Lead/Convener	Senior Academic Contact	Professional Services Contact	Course Running	Details Confirmed	Edit
MSOFT1002	Microsoft Course 2	Matthew Gould	Michael Bristow	Helen McLaughlin	Course not Running	Click to confirm	Edit
MSOFT1003	Microsoft Course 3	Theresa Taylor	Michael Bristow	Helen McLaughlin	Course is Running	Click to confirm	Edit
MSOFT1004	Microsoft Course 4	Theresa Taylor	Michael Bristow	Helen McLaughlin	Course is Running	Click to confirm	Edit

(Fig. 6. Screenshot of cursor selecting ‘Course Running’ field for an individual course to switch the value to ‘Course not running’ for that particular course)

Requirements Gathering Form 1: New and Returning Courses

Introduction

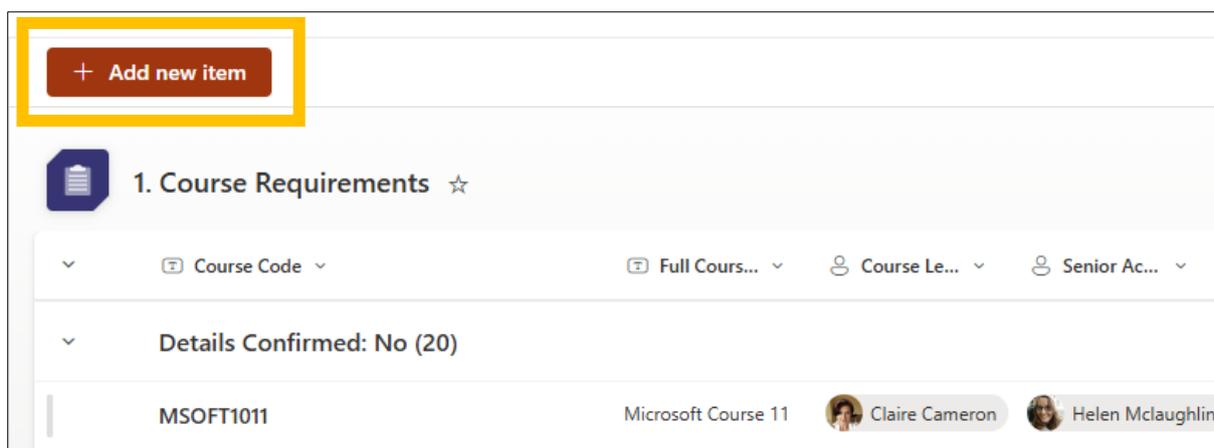
If a course is missing from the School dataset, follow the instructions below to add it. Without confirmation on Form 1, the Course Convener/Lead won't receive Form 2.

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 7) at the top left side of the screen.



(Fig. 7. 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 an 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.

The screenshot shows a form titled 'Course Details for [New Course Data Entry]'. It has two main sections. The first section, 'Course Code & Full Course Title', contains two text input fields: 'Course Code' and 'Full Course Title', both with the placeholder text 'Enter value here'. The second section, 'Course Contacts', contains three text input fields: 'Course Lead/Convener', 'Senior Academic Contact', and 'Professional Services Contact', all with the placeholder text 'Enter a name or email address'. Below the 'Course Lead/Convener' field is a note: 'If there are multiple Course Leads/Convenors, please list the name who is responsible for Timetabling'. Below the 'Senior Academic Contact' field is a note: '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. 8. 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 9) 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.

The screenshot shows a form section titled 'If this course did not run in 2024-25, is the course a new or returning course?'. It contains a radio button selection area with three options: 'New/Returning' (which is selected), 'New Course', and 'Returning Course'.

(Fig. 9. Screenshot of ‘Add new item’ Form 1 field ‘New/Returning’)

The field ‘Course Running’ will by default be set to ‘Yes’ (Fig 10):



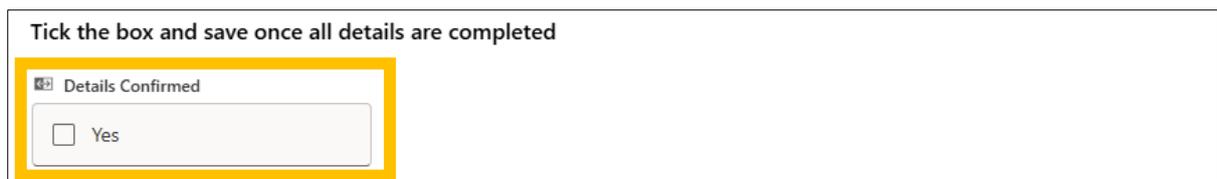
Is the course running in the next academic year?

Course Running

Yes

(Fig. 10. Screenshot of 'Add new item' Form 1 field 'Course Running')

Finally, the field 'Details Confirmed' (Fig 11) 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:



Tick the box and save once all details are completed

Details Confirmed

Yes

(Fig. 11. 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 of 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

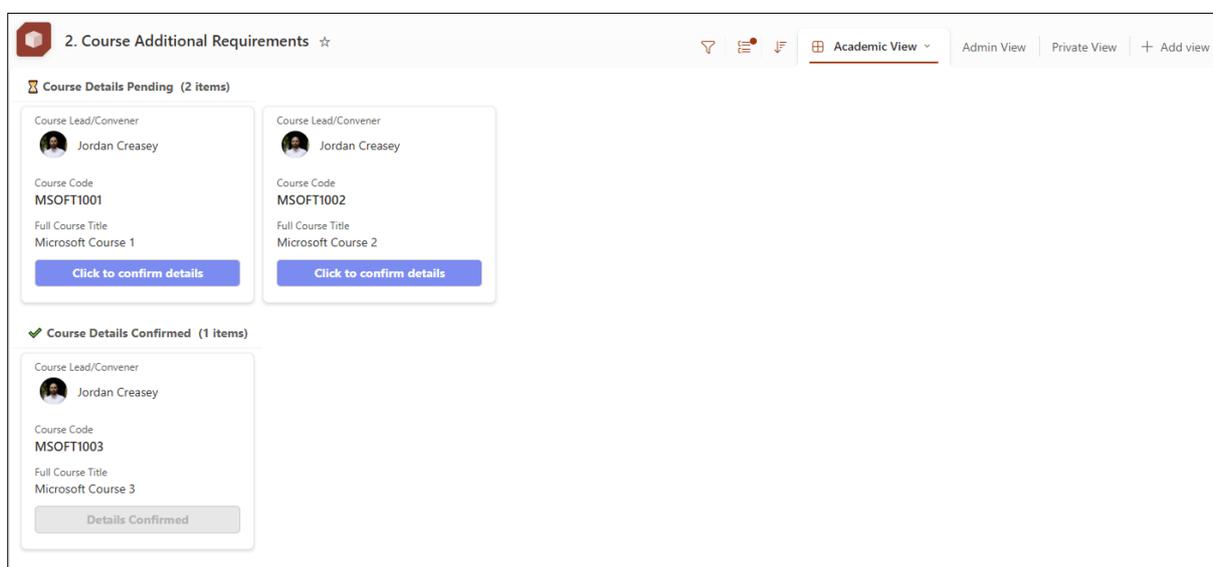
Form 2 will be sent to the Course Lead/Convenor that was allocated on Form 1. The course Lead/Convenor will then have to populate the form with the course delivery details and confirm the details once complete.

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 12), which will display all the courses 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 this with your administrator) or you can ask the relevant administrator to add this course for you.

Administrators will have the necessary permissions to access this tab, enabling them to view the data and assist where needed.



(Fig. 12. Screenshot of Form 2 'Academic View' tab)

Form 2 Editing and Confirming Details

Please click on the course's tile to open a new window where you can enter your course requirements (Fig 13).

Course Requirements for MSOFT1002: Microsoft Course 2

Course Lead/Convener
Michael Bristow

Did this course run in 2024-25?
 Yes
 No

Are there any changes to be made to this course?
 Yes
 No

This could be the size of class, day and time it's taught, pattern of delivery, additional feature requests etc.

Tick to confirm details
 Yes

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.

[MSOFT1002 CMIS Data \(25/26\)](#)

Comments

Be the first one to add a comment

(Fig. 13. Screenshot of the default values in Form 2)

Here you can confirm the requirements for your course or request changes.

In response to “Did this course run in 2024-25?” you can respond in one of three ways:

- If it did run then please select "Yes"
- If it didn't run then please select "No"
- If you're not sure please leave this blank

In response to "Are there any changes to be made to this course?" select either "Yes" or "No". If you choose "Yes" you'll see another form section where you can request adjustments. If you select "No," it will take you to a free text box where you will need to detail all of the course delivery details. Once complete, confirm the form and click “Save”.

Are there any changes to be made to this course?

Yes

No

This could be the size of class, day and time it's taught, pattern of delivery, additional feature requests etc.

Tick to confirm details

Yes

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.

Save Cancel

(Fig. 14. Example of 'No Changes to be made')

Selecting “Yes” will reveal further questions on the form. You will be presented with a series of 3 drop down questions to help categorise the planned changes (Fig 15):

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.

Change in Size (select all that apply)

If there are feasible and realistic 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.

Change in Teaching Format (select all that apply)

Type to filter

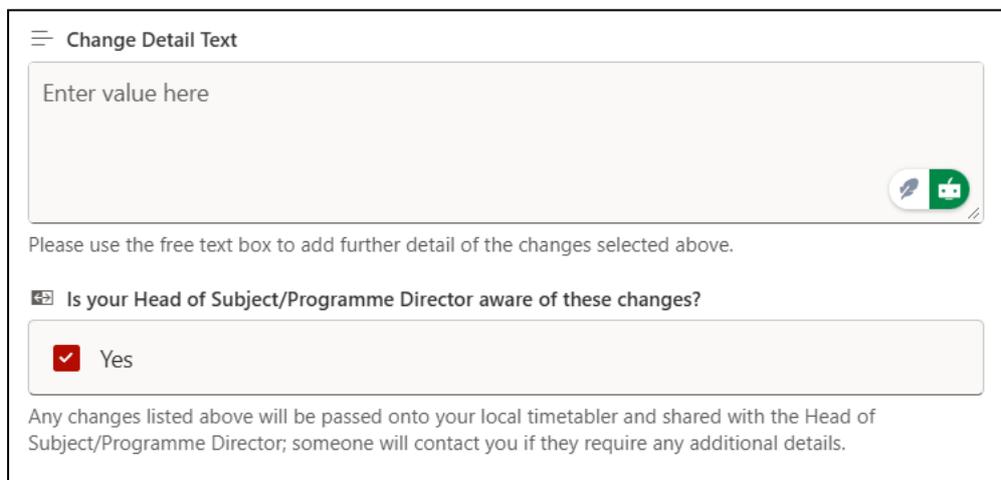
- Semester taught
- Day & time taught
- Duration of teaching events
- Add or remove teaching events

✓ X

(Fig. 15. Screenshot of the three drop down questions)

The final question includes a free text box for you to provide detailed information regarding the planned course delivery. The more comprehensive the information you provide in this section, the more beneficial it will be.

PLEASE NOTE: You will need to confirm whether your Head of Subject or Programme Director is aware of the changes you are requesting (Fig 16); It is important to answer this question honestly and ensure that all relevant parties are kept informed – you may be contacted for further information.



(Fig. 16. Screenshot of the free text box and Head of Subject approval confirmation)

Once you have reviewed and are satisfied with the information detailed on the form, please click “Save” and submit the Form 2. Your administrator will then be notified of your completion, allowing them to schedule the course as per the usual process.

Form 2 (CMIS Data)

Form 2 contains a link to the individual course’s teaching events in the 25/26 CMIS dataset (Fig 17).



(Fig. 17. Screenshot of the link, shown on Form 2, to a course’s 25/26 CMIS data)

Clicking this link will open a new browser tab and will display the teaching events associated with that individual course currently in the 25/26 CMIS dataset (Fig 18). The dataset is filtered only to the individual course and is presented in the same format as a usual CMIS data export :

Section: Requirements Gathering Form 2

Module	Mod	Day	Week(s)	Date(s)	Start	Finish	Grp	Size	Lecturer	Details
Microsoft Course 1	MSOFT1001	Mon	31	17/03/2025	09:00	10:00	LC01	144	Clague, Ms Julie	
Microsoft Course 1	MSOFT1001	Tue	31	18/03/2025	09:00	10:00	LC01	144	Clague, Ms Julie	
Microsoft Course 1	MSOFT1001	Thu	22	16/01/2025	09:00	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	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	10:00	11:00	SM02	18		
Microsoft Course 1	MSOFT1001	Wed	23-26,28-31	22-01-2025-12-02-2025, 26-02-2025-19-03-2025	09:00	10:00	SM03	18		

(Fig. 18. Screenshot of the link, shown on Form 2, to a course’s 25/26 CMIS data)

PLEASE NOTE: If no data appears on this tab, it may be because the course is not part of the 25/26 CMIS dataset, such as new courses not yet included in the timetabling system (i.e. new courses will not have data in this dataset due to them never being included on the timetabling system and following the link won’t make the course appear in the dataset).

For users less familiar with CMIS data exports, descriptors of each field are included in the SharePoint list (Fig 19). 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 - [CMIS Data \(Data Field Descriptors\)](#)

Day	Week(s)	Date(s)
Mon	6	23/09/2024
We	This field relates to the CTT weeks of course delivery	
Thu	6	26/09/2024
Tue	7-10,12-15	01-10-2024-22-10-2024,

(Fig. 15. Screenshot of the pop-up descriptor, shown on a course’s data line in the 25/26 CMIS dataset)

Adding Comments

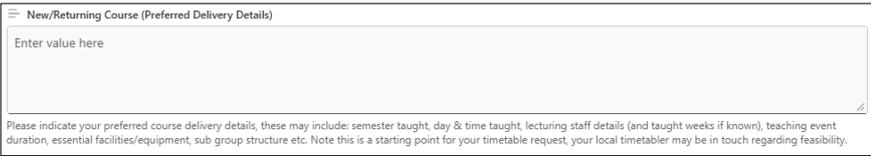
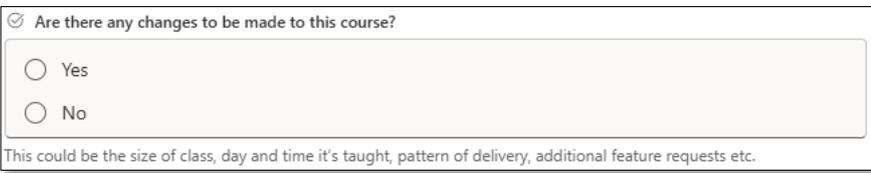
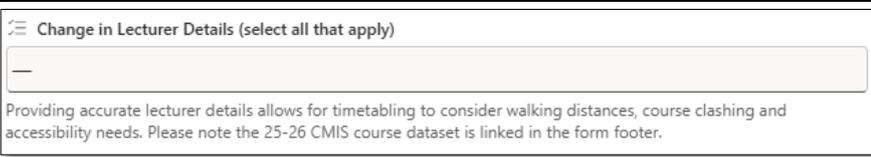
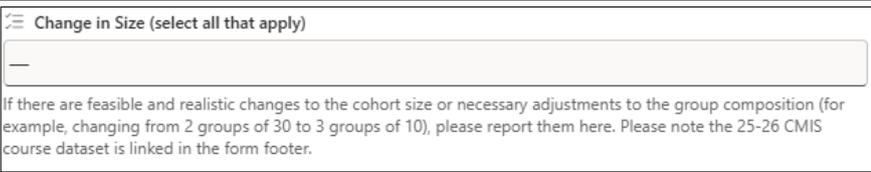
Users can add comments alongside Form 1 and 2 data fields for personal notes or for other colleagues assigned to the course. To notify someone of a comment, type @ followed by their name before saving. Note that only individuals assigned to the course can view the comments; if you @mention someone not 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.

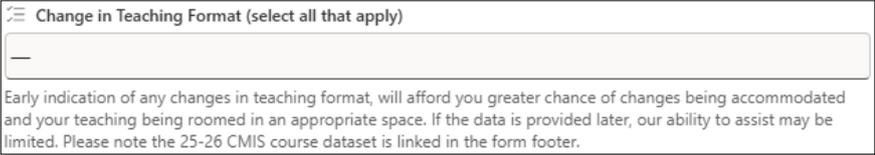
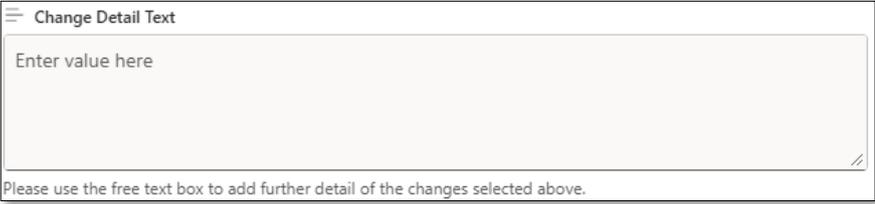
Glossary of Data Fields

Form 1 & 2 Data Field Descriptors

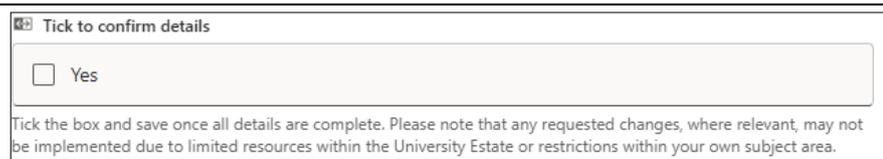
The following data fields are available/visible on the Forms for Professional Service colleagues.

1. Course Code FORM 1 & FORM 2	Unique course code of an individual data line (i.e. ACCFIN1001). This 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 FORM 1 & FORM 2	Full course title of an individual data line (e.g., 'Advanced Practice', not 'Adv Prc'). Confirmed via Form 1 and pre-populated, but can be edited via "Edit in grid view".
3. Senior Academic Contact FORM 1	The 'Senior Academic Contact' is the person responsible for managing the curriculum in their area. They are the person responsible for completing Form 1.
4. Course Lead/Convener FORM 1 & FORM 2	Course Lead/Convener responsible for the course (where multiple exist, the person responsible for timetabling). This field is confirmed 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 Services Contact FORM 1 & FORM 2	Professional Services contact(s), usually up to ~3, who require sight of timetabling requirements. This field is confirmed via Form 1 and so 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 run in 2024-25? FORM 2	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">  </div> <p><i>(Fig. 20. Screenshot of field 'Did this course run in 2024-25?' on Form 2)</i></p> <p>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).</p>

<p>7. New/Returning Course (Preferred Delivery Details). FORM 2</p>	 <p>(Fig. 21. Screenshot of field ‘New/Returning (Preferred Delivery Details)’ on Form 2)</p> <p>If the course did not run in the last session, users should indicate their preferred 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.</p>
<p>8. Are there any changes to be made to this course? FORM 2</p>	 <p>(Fig. 22. Screenshot of field ‘Are there any changes to be made to this course?’ on Form 2)</p> <p>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 will be directed to “Confirm Details”.</p>
<p>9. Change in Lecturer details (select all that apply) FORM 2</p>	 <p>(Fig. 23. Screenshot of field ‘Change in Lecture details (select all that apply)’ on Form 2)</p> <p>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):</p> <ul style="list-style-type: none"> ➤ Lecturing Staff Details (and the weeks they teach if known).
<p>10. Change in Size (select all that apply) FORM 2</p>	 <p>(Fig. 24. Screenshot of field ‘Change in Size (select all that apply)’ on Form 2)</p> <p>If there are changes to the cohort size or group composition (e.g., shifting from 2 groups of 30 to 3 groups of 10), select the relevant</p>

	<p>value(s). Otherwise, leave the selection blank. You may select multiple options if applicable:</p> <ul style="list-style-type: none"> ➤ Change in cohort size (e.g. you believe there is a significant change in size to your course for 2025/26). ➤ Group size constraints (e.g. number of lab benches, computers, or a change of size to seminar groups).
<p>11. Change in Teaching Format (select all that apply) FORM 2</p>	 <p>(Fig. 25. Screenshot of field ‘Change in Teaching Format (select all that apply)’ on Form 2)</p> <p>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):</p> <ul style="list-style-type: none"> ➤ Semester taught. ➤ Day & Time taught. ➤ Duration of teaching events. ➤ Add or remove teaching events. ➤ Change in teaching practices/facilities/equipment. ➤ Other change in teaching format.
<p>12. Change Detail Text FORM 2</p>	 <p>(Fig. 26. Screenshot of field ‘Change Detail Text’ on Form 2)</p> <p>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 box.</p>
<p>13. Is your Head of School/Programme Director aware of the changes? FORM 2</p>	 <p>(Fig. 27. Screenshot of field ‘Is your Head of Subject/Programme Director aware of these changes?’ on Form 2)</p> <p>Where any change to the course has been indicated, confirm that the Head of Subject/Programme Manager is aware of these changes by selecting the ‘Yes’ value.</p>

14. Tick to confirm details
FORM 2



(Fig. 28. Screenshot of field 'Tick to confirm details' on Form 2)

Once all other sections of Form 2 have been completed, the requirements can be confirmed by selecting the “Yes” value. This will indicate that the Course Lead/Convener has confirmed the requirements for the course.

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.
Type	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.

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