EMS Campus Planning Interface User's Manual

EMS Campus 4.0

Customer Support   Customer support is available to organizations that purchase EMS Campus and that have a current Annual Service Agreement (ASA). Contact DEA, Inc. at:

Dean Evans and Associates, Inc.
5613 DTC Parkway, Ste 1250
Greenwood Village, CO 80111
800-288-4565 (Phone)
303-796-7429 (Fax)
support@dea.com
www.dea.com

Table of Contents

Preface

Welcome to the *EMS Campus Planning Interface User's Manual*. The purpose of the *EMS Campus Planning Interface User's Manual* is to answer your questions and guide you through the procedures necessary to use the EMS Campus Planning Interface application efficiently and effectively.

Using the manual

You will find the *EMS Campus Planning Interface User's Manual* easy to use. You can simply look up the topic that you need in the table of contents. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

Special information about the manual

The *EMS Campus Planning Interface User's Manual* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you print the document, for best results, it is recommended that you print it on a duplex printer; however, single-sided printing will also work. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document window for navigation through the document. For better viewing, decrease the size of the bookmark frame and use the magnification box to increase the magnification of the document to your viewing preference.

> *If you do print the document using a single-sided printer, you might see a single blank page at the end of some chapters. This blank page has been added solely to ensure that the next chapter begins on an odd-numbered page. This blank page in no way indicates that your book is missing information.*

Conventions used in the manual

The *EMS Campus Planning Interface User's Manual* uses the following conventions:

• A new term, or term that must be emphasized for clarity of procedures, is *italicized*.

• Page numbering is "online friendly." Pages are numbered from 1 to x, *starting with the cover* and ending on the last page of the manual.

> *Although numbering begins on the cover page, this number is not visible on the cover page or front matter pages. Page numbers are visible beginning with the first page of the table of contents.*

- This manual is intended for both print and online viewing.

  - If information appears in blue, it is a hyperlink. Table of Contents entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

Assumptions for the manual

The *EMS Campus Planning Interface User's Manual* assumes that:

- You are familiar with web-based applications and basic web functions and navigational elements.

Organization of the manual

In addition to this Preface, the *EMS Campus Planning Interface User's Manual* contains the following chapters:

- Chapter 1, "Getting Started with EMS Campus Planning Interface," on page 9 details the procedures for opening and logging in to the EMS Campus Planning Interface.

- Chapter 2, "EMS Campus Planning Interface Search Tools," on page 15 details the two different two search tools—the Academic Book and the Academic Browser—that you can use to search for courses and course dates in the EMS Campus Planning Interface and the Search for Rooms tool, which you can use to search for available rooms.

- Chapter 3, "Working with Courses in the EMS Campus Planning Interface," on page 29 details the functionality that is available in the EMS Campus Planning Interface for managing courses in an academic term, including adding new courses and course sections, editing courses and course dates, canceling courses and course dates, and setting preferences for courses.

- Chapter 4, "Managing User Options in the EMS Campus Planning Interface," on page 49 details the three options that are available to you for managing your account in the EMS Campus Planning Interface—changing your password, setting the options for the Academic Book display, and enabling/disabling custom help text.

- Chapter 5, "EMS Campus Planning Interface Reports," on page 55 details each of the six academic reports that are available in the EMS Campus Planning Interface to assist you in monitoring and maintaining your academic unit's courses and instructors as well as how to generate these reports.

Chapter 1

Getting Started with EMS Campus Planning Interface

The EMS Campus Planning Interface is the web-based interface that academic units typically use to review course schedule data and communicate changes to the Domain Scheduler.

This chapter covers the following topics:

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Chapter 1
Getting Started with EMS Campus Planning Interface

Logging in to and out of the EMS Campus Planning Interface

You can access EMS Campus Planning Interface through any standard Internet browser.

To log in to the EMS Campus Planning Interface

1. Open an Internet browser session.

2. In the browser's address field, enter the EMS Campus Planning Interface URL.

    Contact your EMS administrator if you need assistance.

    The EMS Campus Planning Interface Home page opens.

    Figure 1-1:   EMS Campus Planning Interface Home page
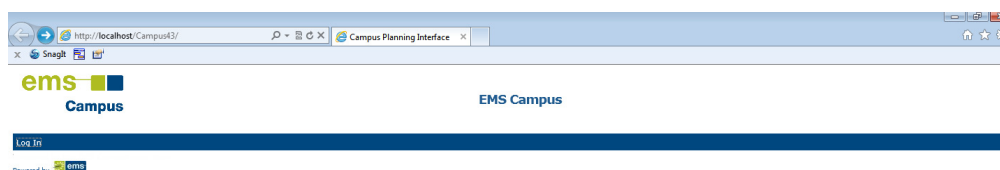
3. Click Log In.

    The EMS Campus Planning Interface Login page opens.

    Figure 1-2:   EMS Campus Planning Interface Login page
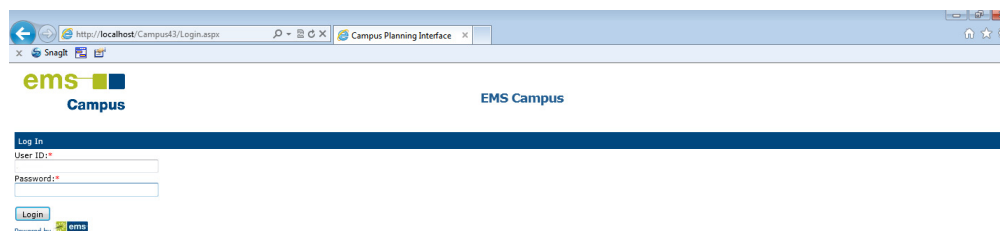
4. In the User ID field, enter your User ID, which is either your EMS User ID or your network User ID.

5. In the Password field, enter your password.

    If you do not know your User ID or password, contact your EMS administrator.

6. Click Login.

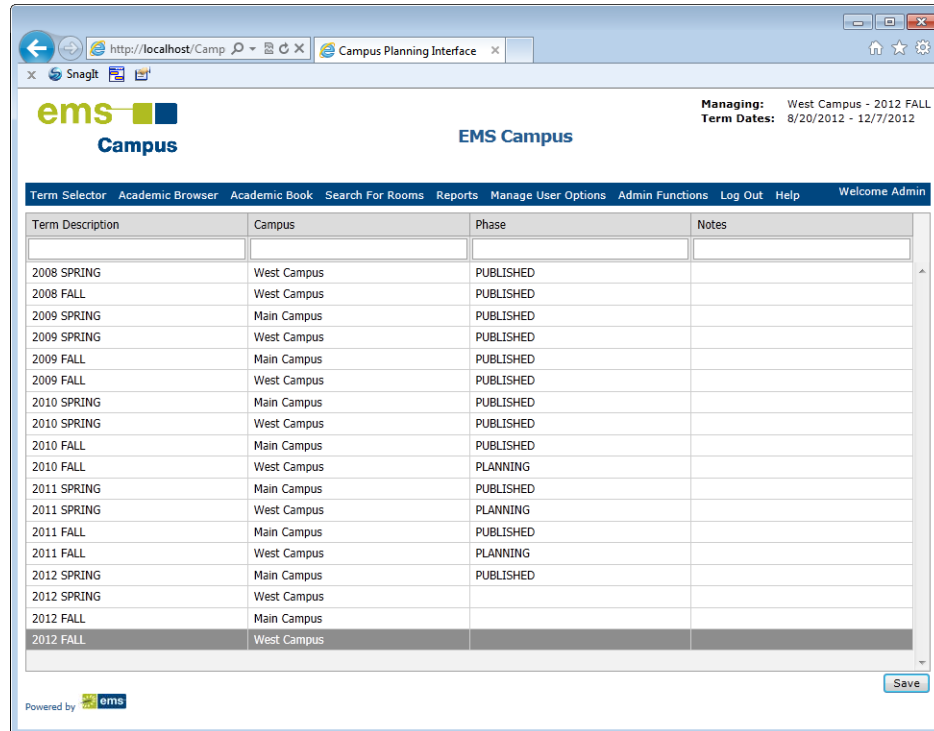The Term Selector page opens. This page lists all the available terms in your organization's implementation of EMS Campus.

Figure 1-3: EMS Campus Planning Interface Term Selector page

7. Select the term with which to work for this session of the EMS Campus Planning Interface, and then click Save.

*If the list of available terms is extensive, you can enter a search string in one or more of the available search fields and search for a specific term. Your search is not case-sensitive, but the search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, to search for **2008 Spring**, you can enter **2008**, but not Spring. After you tab out of a search field, the list of available terms that meet all your search criteria is dynamically updated.*

The Term Details page opens for the selected term opens. You are now ready to work with the selected term. See

Figure 1-4:   Term Details page

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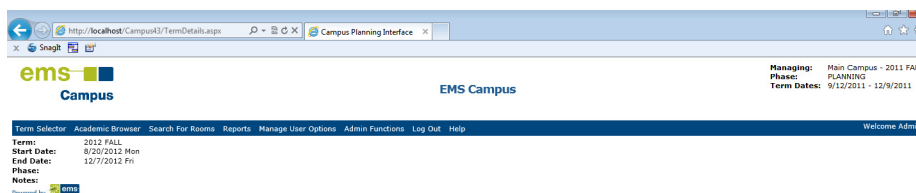
*The New Course option is displayed on the menu bar only if Define & Edit
Courses mode or Dual mode has been set for the displayed term, and your EMS
Administrator has configured your user account with the appropriate permissions.
The Academic Book option is displayed on the menu bar only if Read Only mode
has been set for the displayed term.*

To log out of the EMS Campus Planning Interface

On the EMS Campus Planning Interface menu bar, click Log Out.

Chapter 1
Getting Started with EMS Campus Planning Interface

Chapter 2
EMS Campus Planning Interface Search Tools

The EMS Campus Planning Interface has three search tools—the Academic Book, the Academic Browser, and the Search for Rooms tool. You use the Academic Book and the Academic Browser to search for courses. The tools differ in how they present their search results and the options that are available for working with the search results. You use the Search for Rooms tool to search for available rooms.

This chapter covers the following topics:

Chapter 2
EMS Campus Planning Interface Search Tools

Searching with the Academic Browser

You can use the Academic Browser to search for courses or course dates. The results are displayed in a list view. After the search results are returned, you have a variety of options for working with the results, including sorting and grouping information or using the Tools menu to perform functions. The actions that you can carry out in the Academic Browser depend upon the mode (Define & Edit Courses, Set Preferences, Dual Mode, or Read Only) that has been set in EMS Campus for the academic term with which you are working.

To search with the Academic Browser

1. On the Term Details page menu bar, click Academic Browser.

   The Academic Browser page opens. The page lists all the courses for all academic units (departments) without course dates and all courses for all academic units with course dates (meeting patterns) that have been defined for the selected term. "Multiple" is displayed for those courses with more than one course date. Canceled courses are displayed with a strikethrough.

   Typically, although you can view all courses for all academic units, only those courses that belong to your academic unit are available for editing.

Figure 2-1:   Academic Browser

2. Optionally, to filter the data, do one or both of the following:

• Click Filter to open the Filter popup, change the search criteria, and then click Get Data.

Figure 2-2: Filter popup

Option	Description
Academic Units	Select a specific academic unit by which to filter the search.
Subject	Select a specific subject by which to filter the search.
Modified Only	EMS Campus flags course changes using a field named Course State. New, modified, and canceled courses are marked as "New," "Edited," and "Cancelled," respectively in the State column. Select this option to limit the search to only those course for which academic units have requested additions, deletions and/or modifications during the Define & Edit Courses phase. **Note:** See "State" on page 19.
Show Course Dates	Selected by default. Courses without course dates are suppressed while courses with multiple meeting patterns are expanded. If you clear this option, then: • "Multiple" is displayed for those courses with more than one course date. • Courses without course dates are displayed.
Note: The selections that you make here are retained for all subsequent login sessions.	

• Enter a search string or select a specific value in one or more of the fields that are above the search results columns. For example:

• To search only for Accounting courses, in the blank field below Courses, enter ACCT for a search string.

• To search only for courses that are taught by a specific instructor, select the instructor from the dropdown list at the top of the Instructor column.

Your search is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, the search string "CHEM 400" returns CHEM 4003 01, CHEM 4003 02, and so on, but a search string of 400 does not return anything. After you tab out of a search field in which you have entered a search string, or you select a value from a dropdown list, the list of available courses that meet your search criteria is dynamically updated.

Column	Search Option
Course	Enter a search string.
Shares Space	Enter a search string: • To find all courses that share space, whether or not the course is a parent, enter an asterisk (*). • To find all courses that share space with a specific course, enter a search string for the specific course. For example, the search string PS would return all courses that share space with PS 521 01.
SIS Xlist	To find all courses that are cross-listed in the SIS, enter an asterisk (*).
CRN	Enter a search string.
Course Title	Enter a search string.
Course Type	Enter a search string.
Course Instructor	Select a specific instructor from the dropdown list. To search by all instructors (the default value), select the blank value from the dropdown list.
Start Date End Date	Select a specific start date/end date from the calendar. To search by all start dates/end dates, click Clear on the calendar.
Days	Enter the letter that corresponds to the day of the week on which the class meets. For example to search for all classes that meet on a Monday (be it Monday through Friday, or Monday/Wednesday/Friday only), enter an "M." If you enter multiple days of the week, then the search string must be a valid meeting pattern. For example, if you enter MW, then only those classes that meet Monday and Wednesday are returned in the search results. Classes that meet Monday through Friday, or Monday/Wednesday/Friday are not returned in the search results.
Location	Enter a search string.
Est Enroll Act Enroll Cred Hours	Enter a search string.
State	Campus flags course changes using a field named Course State. New, modified, and canceled courses are marked as "New," "Edited," and "Cancelled," respectively in this column. Enter a search string to limit the search results to a specific state; otherwise, to search for all states, under Filter, select Modified Only. **Note:** See "Modified Only" on page 18.
Prefs	To search for only those courses that have preferences indicated, select Checked on the dropdown list above the Preferences column. To search for only those courses that do not have preferences indicated, select Unchecked. To search for both types of courses (the default value), select the blank value on the dropdown list.
Final Exam Not Required	To search for only those courses that do not require a final exam, enter Y (for Yes). To search for all courses (the default value), clear the search string.
Reservation ID	Enter a search string.

> *To reset all filters to their default values in a single step, click Clear Filter.*

3. Optionally, do one or more of the following:

   • To sort the search results, click any column heading.

   • To rearrange the search results, drag a column to a new location using the column heading.

   • To group results by a specific column, drag the column header as indicated on the Results tab.

   • To open a course in the Course Details page, double-click the course entry on the Results tab.

Figure 2-3:   Viewing a course in the Course Details page

The Course Details page displays a variety of information about the course, including the course details, the course dates, the final exam settings, and if applicable, the course preferences, any cross-listed courses, and/or any shared space courses. (For information about the Course Details page, see "The Course Details page" on page 31.)

> *To return to the Academic Browser after you have viewed a course, click Back at the bottom of the course display.*

- If Define & Edit Courses mode or Dual mode has been set for the term with which you are working, then you can CTRL-click to select multiple courses, click Tools, and then select one of the following:

    - Shares Space—To apply the shared space designation to the selected courses if the courses are not cross-listed in the SIS, have the same meeting pattern, and are meant to be held in the same room.

    - Does Not Share Space—To reverse the shared space designation for the selected courses, or to indicate that a cross-listed course with a matching pattern is not meant to meet in the same room.

- To display custom help text for the Academic Browser, under Options, click Show Help Text. Conversely, to turn off the custom help text, under Options, click Show Help Text again.

The selection that you make here is retained for all subsequent login sessions.

Searching with the Academic Book

The Academic Book provides a week-at-a-glance graphical view of the courses that are assigned to a specific room or instructor.

> *Academic Book is an available option only if Read Only mode has been set for the term with which you are working.*

To search with the Academic Book

1. On the EMS Campus Planning Interface menu bar, click Academic Book.

   The Academic Book opens. If you are working with a future term, then the date is set to the first Sunday or Monday of a full week of the term; otherwise, if you are working with a current term, then the date is set to the current day's date.

Figure 2-4: Academic Book
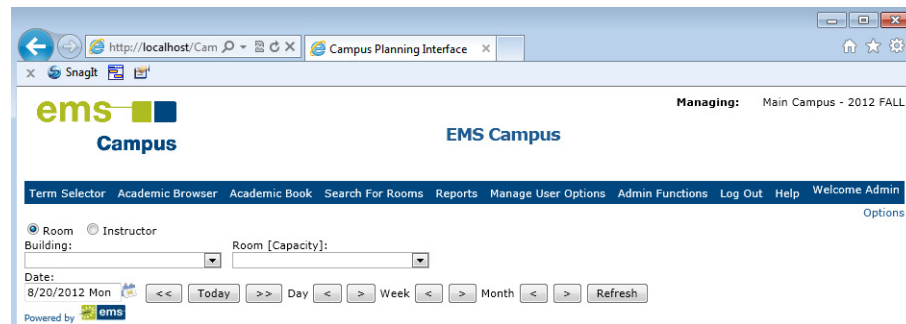
2. Do one of the following:

   • On the Building dropdown list, select an area, building, or view, and on the Room dropdown list, select a room.

   > *If a minimum and/or maximum capacity has been configured for a room, then this information is displayed next to the room on the Room dropdown list.*

   The Academic Book displays a week-at-a-glance graphical view of the courses that are assigned to the specific building and room. See Figure 2-5 on page 23.

   • Select Instructor, and then on the Subject dropdown list, select a subject, and on the Instructor dropdown list, select an Instructor.

   The Academic Book displays a week-at-a-glance view of the selected subject that is assigned to a specific instructor. See Figure 2-6 on page 23.

   > *Any selections that you make here remain in effect for subsequent login sessions.*

Figure 2-5:   Academic Book with a week-at-a-glance view of courses by building and room
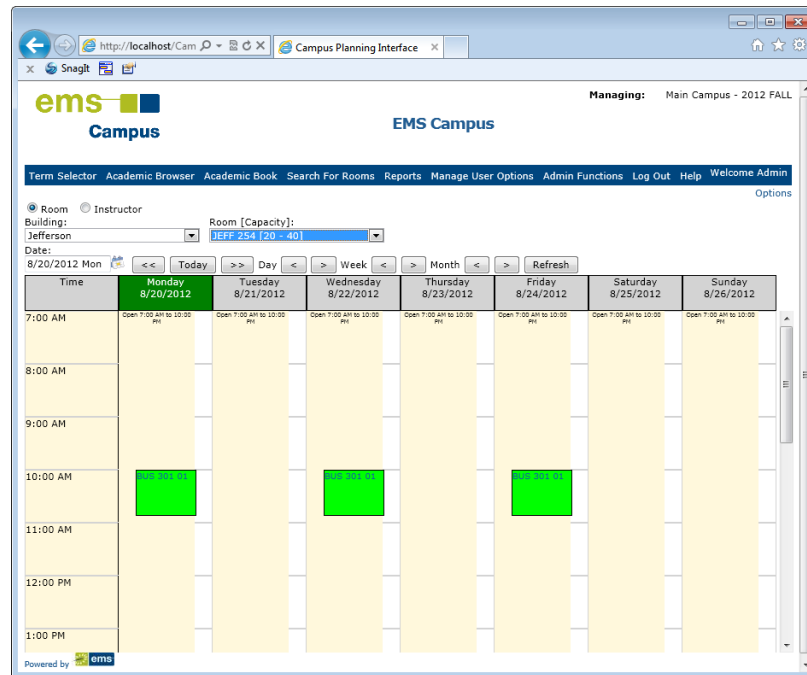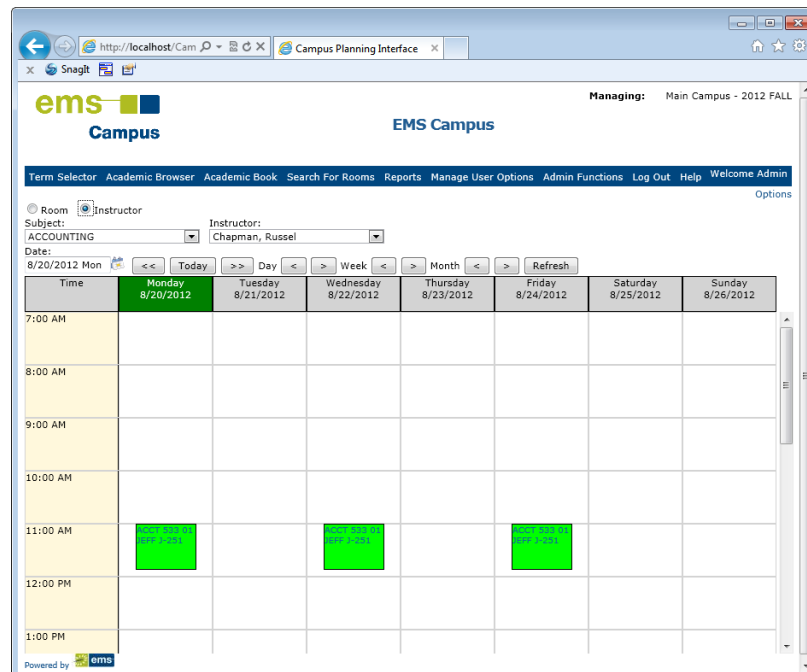

*Figure 2-6:   Academic Book with week-at-a-glance view of a subject by instructor*

3. Optionally, do one or more of the following to modify the week-at-a-glance view to better suit your working needs:

- To start the week-at-a-glance view on a different day, click the Calendar Picker icon next to the Date field to open the Calendar Tool and select a different date.

- To start the week-at-a-glance view on the first day of the term, click the Start of Term button that is to the left of the Today button.

- To start the week-at-a-glance view on the last day of the term, click the End of Term button that is to the right of the Today button.

- To start the week-at-a-glance view on the current day's date, click Today.

- To change the week-at-a-glance view by one day at time, click the Back One Day button or the Forward One Day button as needed.

- To change the week-at-a-glance view by one week at a time, click the Back One Week button or the Forward One Week button as needed.

- To change the week-at-a-glance view by one month at a time, click the Back One Month button or the Forward One Month button as needed.

Figure 2-7: Changing the week-at-a-glance view
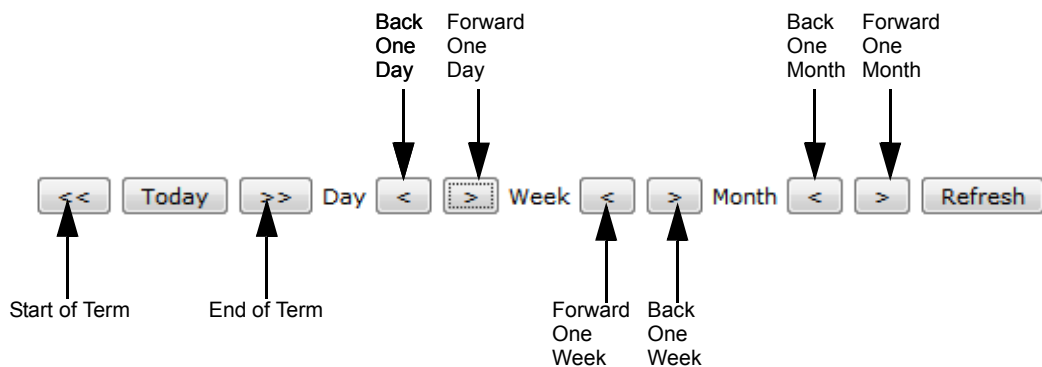
If you make a change to the week-at-a-glance view, and the change only partially refreshes the view, click Refresh to update the view.

4. Optionally, under Options, do one or more of the following to change the display for an entry in the Academic Book:

- Click Show Help Text to turn of any custom help text for the book. Conversely, to turn on any custom help text, click Show Help Text again.

- By default, the event name/course are displayed on an entry in the Academic Book. To display the name of the group/instructor on a course entry, click Display > Group/ Instructor.

- By default, the starting time for the week-at-a-glance view is 7:00 am. To change the starting time, click Start Time, and then select a different starting time.

- By default, the following information is displayed in a tooltip when you place the mouse pointer on a course entry in the Academic Book—Date, Room, Building, Instructor, Time, Estimated Enrollment, and Credit Hours. To remove the information from the tooltip, click Tool Tip Options, and then clear the selection for the information that is *not* to be displayed.

Any selections that you make here remain in effect for subsequent login sessions.

Using the Search For Rooms Tool

After a term is published, there are times when the specific rooms that are available for a particular meeting pattern and set of criteria must be identified. For example, you might need to add a new section for a course or you might be looking to change the times for a course. The Search for Rooms tool significantly simplifies the process of searching for classrooms in these situations.

The Search for Rooms tool is available only if your EMS administrator has set the correct permissions for you.

To use the Search For Rooms tool

1. On the EMS Campus Planning Interface menu bar, click Search for Rooms.

   The Search for Rooms page opens.

Figure 2-8:   Search for Rooms page

2. On the Domain dropdown list, select the appropriate domain and on the Term dropdown list, select the appropriate term.

3. Do one of the following:

   • Manually enter the meeting pattern information (start and end dates, start and end times, and meeting days) for the course.

   • Click Time Blocks to open the Time Blocks popup, and then select a time block from a list of time blocks that have been made available for the term.

4. Enter your search criteria.

Option	Description
Building	The default value is (no preference). You can select a specific building, area, or view.
Room Type	The default value is (no preference), but you can select from a list of pre-configured types.
Enrollment Ignore Room Capacity	Available only if Ignore Room Capacity is not selected. You can enter a specific room capacity by which to search.
Ignore Term Excluded Dates	Not selected by default. Select this option to search for rooms that are available even on dates that are marked as "Excluded" for the term.

5. Click Search.

   The rooms that meet all your search criteria and are available are displayed on the Available Rooms tab. The rooms that are in academic conflict (a course has already been scheduled in a room for the selected day and time pattern) are displayed on the Academic Conflicts tab. The rooms that are in event conflict (a non-academic event has already been scheduled in a room for the selected day and time pattern) are displayed on the Event Conflicts tab.

Chapter 3
Working with Courses in the EMS Campus Planning Interface

Like its desktop counterpart, the EMS Campus Planning Interface provides robust functionality for managing your courses in an academic term. You can add a new course, cancel an existing course or course date, and edit a course or course date. You can also set course preferences.

This chapter covers the following topics:

All available course management options are discussed in this chapter. Depending on how your EMS administrator has configured your user account, not all these options might be available to you. Contact your EMS administrator if you have questions.

Chapter 3
Working with Courses in the EMS Campus Planning Interface

The Course Details page

After you add a new course or course section to an academic term, or after you double-click a course entry in the Academic Browser, the course opens in the Course Details page. The Course Details page displays a variety of information about the course, including the course details, the course dates, the final exam settings, and if applicable, the course preferences, any cross-listed courses, and/or any shared space courses.

Figure 3-1:   Course opened in the Course Details page
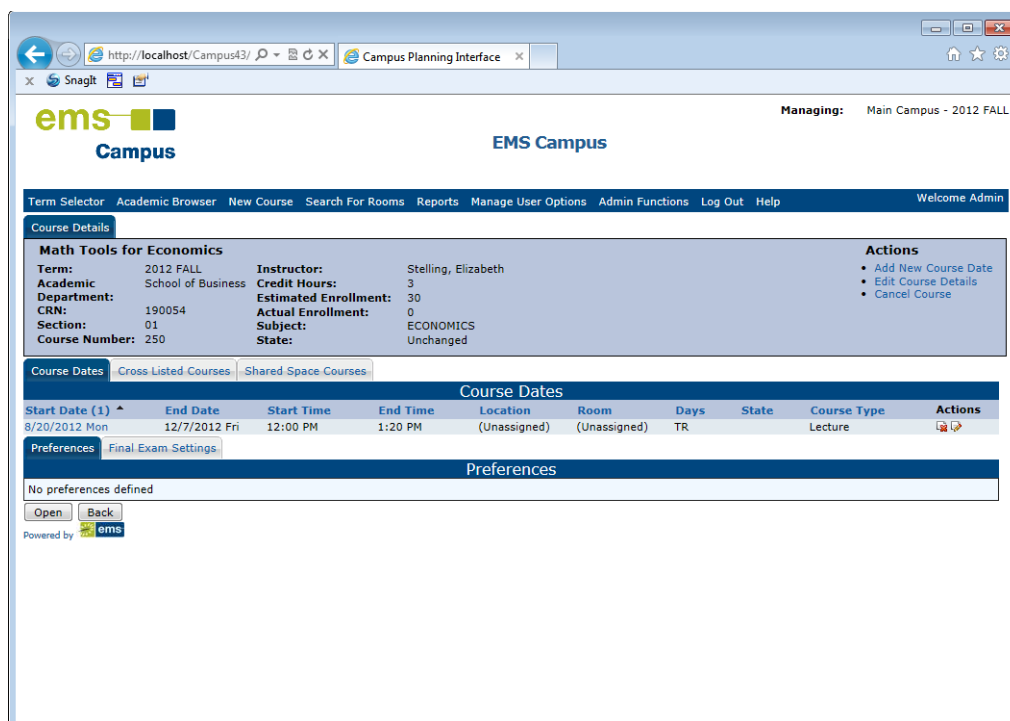
The Course Details page has the following characteristics:

- The top tab is the Course Details tab. This tab displays the details for the course, including the academic term, the course academic unit (department), the course reference number (CRN), the course section number, the course number, the course instructor, the course credit hours, the estimated enrollment, the actual enrollment, the course subject, and the course state (New, Edited, or Cancelled).

- A Course Dates tab always appears as a middle tab in the Course Dates page. This tab displays the course dates information for the course. For each course date, the following information is displayed—the start and end dates, the start and end times, the location (building), the room, the meeting pattern (MWF, TR, and so on), the state (New, Edited, or Cancelled), and the course type (lab, lecture, independent study, and so on). A Cancel Course Date icon 🗶 and an Edit Course Date Details icon 📝 are always displayed under Actions for a course date. As the names imply, you use these icons to cancel a selected course date or to edit the details for a course date, respectively.

Two other tabs might also appear as middle tabs in the Course Dates page—a Cross Listed Courses tab and a Shared Spaces Courses tab. The Cross Listed Courses tab lists any courses that are cross-listed in the SIS for the course that is currently open in the Course Details page. The Shared Space Courses lists any courses that are not cross-listed in the SIS but are meant to be held in the same room as the course that is currently open in the Course Details page.

- After you select a course date, the following tabs are displayed at the bottom of the Course Details page—the Preferences tab, which lists any preferences that have been set for the course date and the Final exam Settings tab, which lists the final exam settings (Exam Required, Seat Fill Percentage, Room Requested, and so on) for the selected course date.

The options that are available and the actions that you can carry out from the Course Details page are determined by the mode that is set for the academic term with which you are working and the permissions that your EMS administrator has configured for your user account.

Mode	Available Actions
Define & Edit Courses	• Add New Course Date • Edit Course Details • Cancel Course • Cancel Course Date • Edit Course Date Details **Note:** See "Editing Courses and Course Dates" on page 36.
Set Preferences	Set Course Preferences **Note:** See "Setting Course Preferences" on page 42.
Dual Mode	All actions that are available in both Define & Edit Courses mode and Set Preferences mode.

Adding a New Course

If the term with which you are working in the EMS Campus Planning Interface is set to Define & Edit mode or Dual mode, then you can add new courses.

To add a new course

1. On the EMS Campus Planning Interface menu bar, click New Course.

   The New Course page opens.

Figure 3-2:   New Course page

2. In the Course Details section, enter the information for the new course.

Required fields are marked with a red asterisk (*). An optional Notes field is provided for the academic units to communicate miscellaneous information about the course to the Domain Scheduler.

3. In the Course Date Details section, do the following:

    *   In the Start Date and End Date fields, click the Calendar Picker icon 📅 to open the Calendar Tool and select a start date and end date, or manually enter the appropriate dates in the fields.

    *   Do one of the following:

        *   In the Start Time and End Time fields, click the Time Picker icon 🕐 to open a list of times from which you can select a start time and end time, or manually enter the appropriate times in the field. Also, select the days of the week that the course is to meet.

        *   Click Time Blocks to open the Time Blocks popup, and select a time block from a list of time blocks that have been made available for the term.

    Depending on how your EMS administrator has configured EMS Campus, only the Time Blocks option might be available to you.

    *   Specify a Seat Fill percentage.

    Seat Fill Percentage, in conjunction with the estimated enrollment, is used to determine the size of the room needed for the class. For example, a Seat Fill Percentage of 50% and an estimated enrollment of 100 means that the course should be held in a room that can accommodate 200 people.

    *   Make sure to select Room Not Required if the course does not require a room, for example, an independent study class, a research class, and so on.

    *   Make sure to select Final Exam Required if the course requires one.

4. Click Save.

    The course opens in the Course Details page. See

Adding a New Course Section

After you have added a new course to an academic term, you can add new sections for the course.

To add a new course section

1. Use the Academic Browser to search for the appropriate course. See "Searching with the Academic Browser" on page 17.

2. In the results, select the course for which a new section is to be added, and then click New Section.

   The New Course Section page opens. The fields on the page are automatically populated with the information for the selected course.

Figure 3-3:   New Course Section page

3. Modify the section number and any other pertinent information as needed, and then click Save.

   The New Course Section page closes. The course opens in the Course Details page. See Figure 3-1 on page 31.

Editing Courses and Course Dates

If the term with which you are working in the EMS Campus Planning Interface is set to Define & Edit Courses mode, or Dual mode, then you can edit existing courses and course dates.

To edit courses and course dates

1. Use the Academic Browser to search for the appropriate course and then double-click the course to open the course in the Course Details page. See "Searching with the Academic Browser" on page 17.

Figure 3-4:   Course opened in the Course Details page

2. Continue to one of the following:

- "To add a new course date" on page 37.

- "To edit course details" on page 38.

- "To edit course date details" on page 39.

- "To cancel a course date" on page 41.

- "To cancel a course" on page 41.

To add a new course date

1. On the Course Details tab, under Actions, click Add New Course Date.

   The New Course Date page opens. The Course Details tab lists all the course details for the selected course and you cannot edit this information.

Figure 3-5:   New Course Date page

1. In the Start Date and End Date fields, click the Calendar Picker icon [icon] to open the Calendar Tool and select a start date and end date, or manually enter the appropriate dates in the fields.

2. Do one of the following:

   • In the Start Time and End Time fields, click the Time Picker icon [icon] to open a list of times from which you can select a start time and end time, or manually enter the appropriate times in the field. Also, select the days of the week that the course is to meet.

   • Click Time Blocks to open the Time Blocks popup, and select a time block from a list of time blocks that have been made available for the term.

   Depending on how your EMS administrator has configured EMS Campus, only the Time Blocks option might be available to you.

3. Specify a Seat Fill percentage.

    Seat Fill Percentage, in conjunction with the estimated enrollment, is used to determine the size of the room needed for the class. For example, a Seat Fill Percentage of 50% and an estimated enrollment of 100 means that the course should be held in a room that can accommodate 200 people.

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4. Make sure to select Room Not Required if the course does not require a room, for example, an independent study class, a research class, and so on.

5. Make sure to select Final Exam Required if the course requires one.

6. Click Save.

    The course opens in the Course Details page. The new course date is displayed on the Course Date tab.

To edit course details

1. On the Course Details tab, under Actions, click Edit Course Details.

    The Edit Course Details page opens. The course details fields are populated with the information for the selected course.

Figure 3-6:   Edit Course Details page

2. Modify the course details as needed.

3. Click Save.

   The course opens in the Course Details page. See Figure 3-1 on page 31.
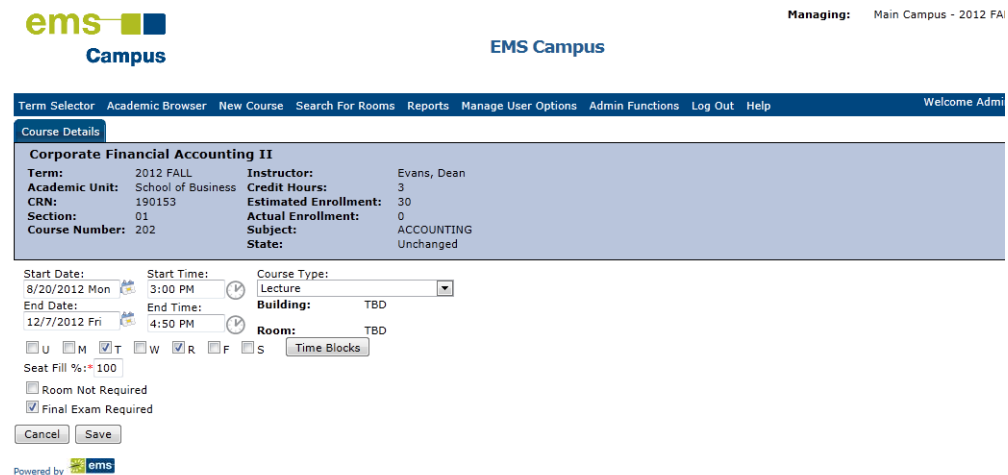
To edit course date details

When you edit course date details, you edit each course date independently.

1. On the Course Dates tab, select the course date that is to be edited.

2. Click the Edit Course Date Details icon 📝 for the selected course date.

   The Edit Course Date Details page opens. The details for the selected course date are displayed in the middle of the page.

Figure 3-7:   Edit Course Date Details page

3. Edit the details for the selected course date as needed.

- In the Start Date and End Date fields, click the Calendar Picker icon 🗓 to open the Calendar Tool and select a different start date and/or end date, or manually enter the appropriate dates in the fields.

- Do one of the following:

  - In the Start Time and End Time fields, click the Time Picker icon 🕐 to open a list of times from which you can select a start time and end time, or manually enter the appropriate times in the field. Also, manually edit the days of the week that the course is to meet.

  - Click Time Blocks to open the Time Blocks popup, and select a time block from a list of time blocks that have been made available for the term.

Depending on how your EMS administrator has configured EMS Campus, only the Time Blocks option might be available to you.

- Edit the Seat Fill percentage.

Seat Fill Percentage, in conjunction with the estimated enrollment, is used to determine the size of the room needed for the class. For example, a Seat Fill Percentage of 50% and an estimated enrollment of 100 means that the course should be held in a room that can accommodate 200 people.

- Select or clear the room option as needed.

Option	Description
Room Not Required	Select this option if the course does not require a room, for example, an independent study class, a research class, and so on. Requires Different Room becomes unavailable.
Requires Different Room	This option is displayed only if you have selected a cross-listed class. Use this option to indicate, that although cross-listed, this course date requires a different room than its cross-listed counterpart.

4. Optionally, if you are editing a cross-listed course and you want to apply these same changes to one or more related course dates, select the appropriate course dates in the Apply Changes to Related Course Dates section.

5. Select or clear Final Exam Required as appropriate.

6. Click Save.

   The Edit Course Date Details page closes. You return to the Course Details page.

To cancel a course date

1. On the Course Dates tab, select the course date that is to be canceled.

2. Click the Cancel Course Date icon 🗙 for the selected course date.

    A message opens, informing you to click OK to cancel the course date.

3. Click OK.

    The message closes. You return to the Course Details page. The course date is no longer displayed on the Course Dates tab.

To cancel a course

1. On the Course Details tab, under Actions, click Cancel Course Date.

    A message opens, informing you to click OK to cancel the course date.

2. Click OK.

    The message closes. You return to the Academic Browser. The course is no longer displayed in the browser.

Setting Course Preferences

If the term with which you are working in the EMS Campus Planning Interface is set to Set Preferences mode or Dual mode, then you can set preferences for a course. If a course has multiple course dates, then you can set the same preferences for all the course dates in a single step, or you can set the preferences for the course dates on a course by course basis. You can also set preferences for multiple course dates across different courses, for example, all 30 of your different Accounting courses, and then set the preferences for these courses from the Academic Browser.

To set preferences for a single course

1. Use the Academic Browser to search for the appropriate course and then double-click the course to open the course in the Course Details page. See "Searching with the Academic Browser" on page 17.

Figure 3-8:   Course opened in the Course Details page

2. If the course has multiple course dates (multiple meeting patterns for the same course), then on the Course Dates tab, select the date for which you are setting the preferences.

3. Make sure that the Preferences tab is open for the selected course, and then click Open.

    The Set Course Preferences page opens.

Figure 3-9:   Set Course Preferences page

4. Set your course preferences.

    •   The Seat Fill Percentage, in conjunction with the estimated enrollment, is used to determine the size of the room needed for the class. For example, a Seat Fill Percentage of 50% and an estimated enrollment of 100 means that the course should be held in a room that can accommodate 200 people.

    The Seat Fill Percentage is initially set to the default value that is specified in EMS (Campus) system parameters, but you can update the value on a per course date basis. See System Parameters in the EMS Setup Guide.

- Ignore Term Excluded Dates schedules bookings on all dates that adhere to the meeting pattern, regardless of the Excluded Dates that are marked on the term when the course dates are published.

- Publish In SIS Room (No Optimization) allows the course dates to avoid the optimization process. Bookings are published in the room that was carried over from the SIS.

- Require SIS Room flags buildings/rooms that come across from the SIS as Required. Courses with requirements still go through the optimization process.

- Requires Different Room identifies a meeting pattern that should be in its own room despite the cross-listed or shared space status. You can set preferences for this room.

- Same Room flags courses that should be in the same room but at different times when optimized.

- An academic unit can *require* only those buildings and rooms that have been assigned to its unit within the Academic Planning > Configuration > Academic Units area of EMS Campus. If the academic units specify requirements, then only a single room can be specified.

- Room types can be requested or required for all courses. By default the "limit by course type" selection is designated, but you can change it to honor a specific room type.

Configuration of the Course Types/Room Types matches is carried out in the Academic Planning > Configuration > Match Course Types/Room Types area of EMS Campus. See the EMS Setup Guide for detailed information.

- You can set features to Preferred or Required.

The list of Matching Rooms that is displayed in the middle of the page is dynamically updated based on the building, room type, and features selected. Each entry in this list is a hyperlink that opens a popup that displays information about the building and/or room.

5. Optionally, do one or both of the following:

    •   If you need some assistance in deciding if the preferences that you are setting are
        acceptable for the course, click the link for a room in the Matching Rooms list.

        A Building Detail/Room Detail popup opens that displays building details, the room
        details, and sometimes, an image of the building and/or room.

*Figure 3-10: Building Detail/Room Detail popup*
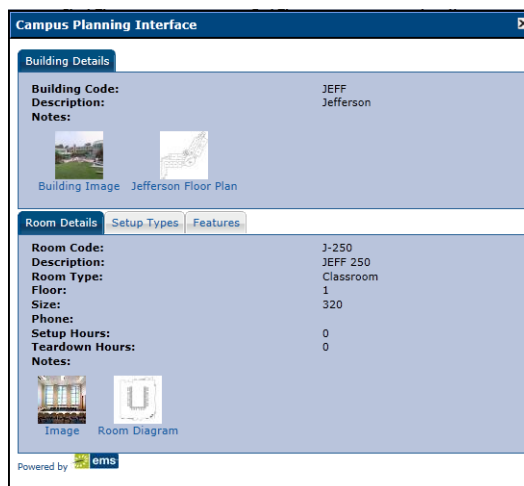
    •   In the Notes field, enter any information that can assist the Domain Scheduler in
        assigning the needed room to the course based on your selected preferences.

6. Click Save.

    •   If the course for which you set the preferences has a single course date, then the Set
        Course Preferences page closes. You return to the Course Details page.

    •   If the course for which you set the preferences has multiple course dates, or is
        cross-listed or shares space with another course, then the Apply Changes to Related
        Course Dates page opens. This page lists all other related course dates for the
        selected course. Go to Step 7.

Figure 3-11: Apply Changes to Related Course Date page (when setting course preferences)
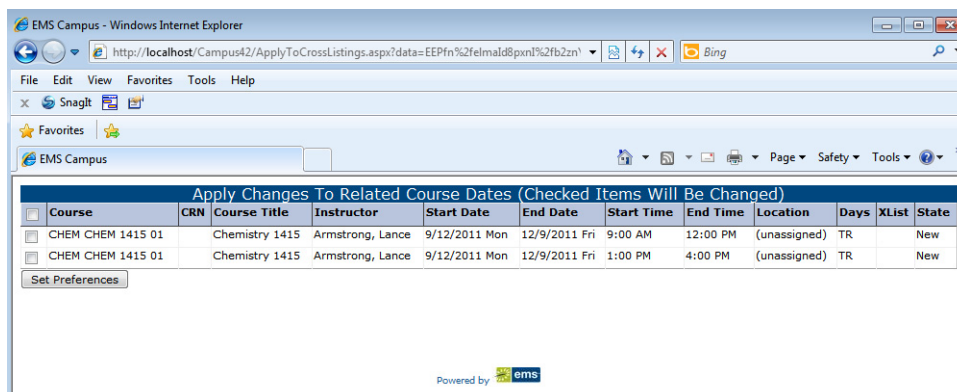
7. Do one of the following:

   - To apply the same preferences to *all* course dates, select the blank checkbox next to the Course column heading, and then click Set Preferences. The Apply Changes to Related Course Dates page closes. You return to the Course Details page.

   - To apply preferences on a course by course basis, click Set Preferences. The Apply Changes to Related Course Dates page closes. You return to the Course Details page. Repeat Step 2 through Step 6 until you have set the preferences for all the individual course dates.

To set course preferences for multiple courses

1. Use the Academic Browser to search for the multiple courses for which you are setting the course preferences. See "Searching with the Academic Browser" on page 17.

2. CTRL-click to select the courses for which you are setting the preferences, and then at the bottom of the Academic Browser page, click Set Preferences.

   The Set Preferences page opens.

Figure 3-12: Set Preferences page

3. Set your preferences for the courses. See Step 4 of "To set preferences for a single course" on page 42.

> *If any of the rooms that you select have existing features and you want to drop these existing features and apply only new features, select Override Existing; otherwise, select Add to Existing Preferences to append the new features to the list of existing features.*

4. Click Save.

    The Set Preferences page closes. You return to the Academic Browser.

Chapter 4

Managing User Options in the EMS Campus Planning Interface

When your EMS administrator configures your user account, a password is set for your account. If you want, you can change your own password for the EMS Campus Planning Interface. Also, your EMS Administrator might have configured custom help text that is displayed on pages in the EMS Campus Planning Interface. You can turn off the display of this help text.

This chapter covers the following topics:

Managing User Options

You can change your own password for the EMS Campus Planning Interface. You can also set the options for the Academic Book, and you can turn off or turn on any custom help text that is displayed on pages in the EMS Campus Planning Interface.

To manage user options

1. On the EMS Campus Planning Interface menu bar, click Manage User Options.

   The Manage User Options page opens. The Password Options tab is the active tab.

Figure 4-1:   Manage User Options page, Password Options tab
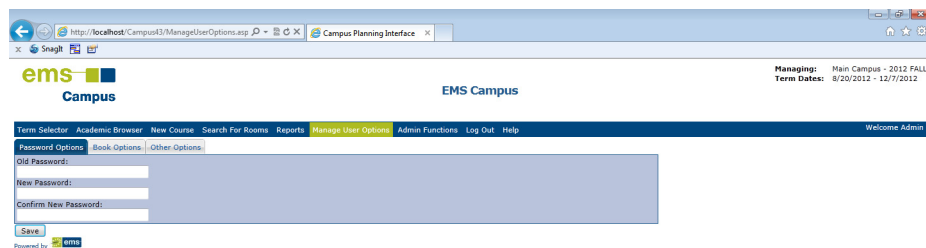
2. Continue to one or more or all the following as needed:

   • "To change your EMS Campus Planning Interface password" below.

   • "To set options for the Academic Book Display" on page 52.

   • "To turn on or off custom Help text" on page 53.

To change your EMS Campus Planning Interface password

1. In the Old Password field, enter your current password for the EMS Campus Planning Interface.

2. In the New Password field, enter your new password.

3. In the Confirm New Password field, enter your new password again, *exactly* as you entered in the New Password field, including spaces and capitalization.

> *The EMS Campus Planning Interface does not apply any rules or restrictions to your user password; however, your organization might have its own rules. Contact your EMS administrator for assistance.*

4. Do one of the following:

   • Click Save.

   You remain on the Manage User Options page. An "Options saved successfully" message is displayed at the top of the page. If you changed your password, then the next time you log into the EMS Campus Planning Interface, you must use your new password.

   • Continue to setting other user options as needed. See:

     • "To set options for the Academic Book Display" on page 52.

     • "To turn on or off custom Help text" on page 53.

To set options for the Academic Book Display

1. Open the Book Options tab.

Figure 4-2: Manage User Options page, Book Options tab

2. Set the options for the Academic Book display.

Option	Description
Display	The information that is displayed for an event/course in the Academic Book. Options are: • Event Name/Course (the default value) • Group/Instructor
Start Time	The daily start time for the Academic Book.
Tooltip Options	The items that are to be included in the tooltip that opens when you place the cursor over an event/course in the Academic Book.

3. Do one of the following:

- Click Save.

  You remain on the Manage User Options page. An "Options saved successfully" message is displayed at the top of the page. If you changed your password, then the next time you log into the EMS Campus Planning Interface, you must use your new password.

- Continue to setting other user options as needed. See:

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To turn on or off custom Help text

1. Open the Other Options tab.

   By default, when the Other Options tab first opens, Show Help Text is selected.

Figure 4-3: Manage User Options page, Other Options tab

2. Clear Show Help Text to turn off any custom help text that is displayed on any page of the EMS Campus Planning Interface; otherwise, select Show Help Text to turn on any custom help text that is displayed on any page of the EMS Campus Planning Interface.

3. Do one of the following:

- Click Save.

  You remain on the Manage User Options page. An "Options saved successfully" message is displayed at the top of the page. If you changed your password, then the next time you log into the EMS Campus Planning Interface, you must use your new password.
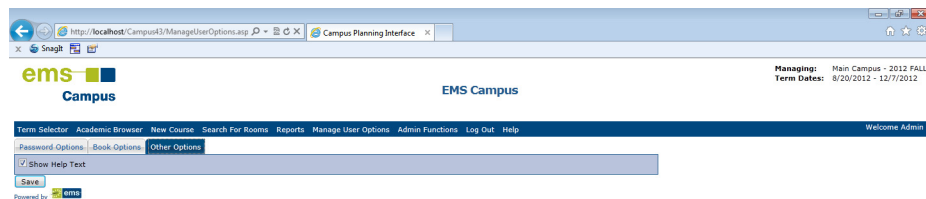
- Continue to setting other user options as needed. See:

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Chapter 5
EMS Campus Planning Interface Reports

Six academic reports are available in the EMS Campus Planning Interface to assist you in monitoring and maintaining your academic unit's courses and instructors.

This chapter covers the following topics:

Generating an Academic Report

All academic reports are available under the Reports option on the EMS Campus Planning Interface menu bar. For any academic report, you can specify the parameters, options, and format for the report, or you can generate the report according to *memorized* settings. Not all reports require the same parameters, nor do they all have the same options available. In addition, you can generate different reports in different formats.

> *For detailed information about a memorized report, see Working with Memorized Reports in the EMS User's Manual.*

To generate a report

1. On the EMS Campus Planning Interface menu bar, click Reports to open the Reports menu, and then click the option for the report that you are generating. For example, to generate the Course List report, click Reports > Course List.

2. On the Setup dropdown list, do one of the following:

   - To generate the report according to the filter settings that you want (parameters, options, and so on), leave user-specified selected, then go to Step 3.

   - To run the report with filter settings that have been saved, or *memorized,* select the memorized report, and then go to Step 5.

> *For detailed information about a memorized report, see Working with Memorized Reports in the EMS User's Manual.*

3. On the Date Range tab, select the domain, term, and scenario for which you are generating the report.

4. Specify the report parameters, options, and format. See "Report Descriptions and Options" on page 59.

> *For brevity and ease, the parameters and options that are available for each report are not discussed here. Instead, the options are discussed in "Report Descriptions and Options" on page 59. Contact your EMS administrator if you need assistance in generating any of these reports.*

5. Optionally, in the Report Comment field, enter a comment that is to be printed on the report.

> *The comment can be a maximum of 255 characters, including spaces.*

6. Click Generate Report.

Two tabs are opened in your browser. One tab is named < > Report and the second tab is simply named the same as the report that you generated. For example, if you generated the Course List report, then the first tab is named Course List Report and the second tab is named Course List. An onscreen preview of the report opens on the second tab. Use your browser's scroll features to scroll through a multiple page report. To close the report and return to the EMS Campus Planning Interface, close the second tab.

Unless you change the filter settings, all subsequent reports are generated and printed according to the parameters and options that you have specified and in the format that you specified.

Report Descriptions and Options

This section provides a description of every report that is available in the EMS Campus Planning Interface. It also defines the options that are available for each report. See:

Course List

Description	Options
Provides a list of courses and course dates. **Note:** This report is often sent out to academic units for review when the Domain Scheduler is finished with room assignments.	There are options to include courses without room assignments and to print User Defined Fields that are associated with courses. Formats include: • By Course • By Instructor • By Academic Department By Course • By Academic Department By Instructor • By Day of Week • By Location • By Estimated Enrollment • By Start Time • By Subject • By Course Type

Course Preferences

Description	Options
Used after Set Preferences mode to provide a list of courses and course dates with their preferences and requirements.	Format Choices: • By Course • By Academic Department By Course • By Academic Department by Instructor

Preferences Summary

Description	Options
After running an optimization scenario, this report is used to summarize the following information: • The number of each type of preference or requirement. • The number of the preferences that can be met from the optimization process. • The number of preferences that cannot be met from the optimization process. You can generate this report for each different scenario that was optimized.	N/A

Instructor Back to Back

Description	Options
Lists the courses that have instructors who are scheduled to teach two courses at the same time (Conflicts) and instructors who are teaching back to back in different locations within the time gap that is specified in Options.	• The days of the week that are to be included in the instructor's schedule. • The time gap (in minutes) between classes on the specified days that determines "back to back."

Instructor Summary

Description	Options
This report includes the following values per instructor: • Number of sections. • Number of teaching hours. • Number of credit hours. • Total estimated enrollment. • Total actual enrollment. • Number of sections in Prime Time. • Number of Time Block violations.	N/A

Final Exam Schedule

Description	Options
Displays a list of courses with their corresponding final exam date, time, and room as assigned by the final exam session.	• All Assigned - All courses that have been assigned to a room by the final exam session • Different Rooms - All courses that have been scheduled in room that was not the same that was used all semester for the course for the final exam • Unassigned - All courses that have not been scheduled in a room for the final exam • Final Exam Not Scheduled - All courses for which no final exam was scheduled

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