EMS Campus
Academic Scheduling Process Guide

Tennessee Tech University

OVERVIEW OF STEPS
Steps Completed in Banner Only
1. **Roll Term in Banner (EMS Coordinator)**
2. **Begin Schedule Modification in Banner (Departments)**
   a. **Round 1 of Scheduling**

Steps Completed in EMS
3. **Create and Synchronize Term (EMS Coordinator)**
4. **Mark Shared Space Courses (Departments)**
5. **Publish Term (EMS Coordinator)**
6. **Complete Post-Publish Review (Departments)**
   a. **Round 2 of Scheduling**
   b. **Round 3 of Scheduling**
7. **Keep EMS up to Date (Departments)**

DETAILED COMPLETION OF EMS STEPS
EMS Coordinator
3. Create and Synchronize Term in EMS
   - Create Term in EMS
     - *Academic Planning > Configuration > Synchronize Terms*
       - Highlight Term > *Create > Process.* Term is now listed as Synchronized.
   - Synchronize Courses
     - *Academic Planning > Courses > Manage Terms*
       - Highlight Term > *Sync* to synchronize Courses.
       - Check *Available to Academic Units*.
       - Edit Term > Indicate Define & Edit Mode to prep for marking of shared space.
   - Review Courses in Academic Browser
     - *Academic Browser >* Select Term > *Get Data*

Departments
4. Mark Shared Space Courses
   - *Academic Browser*
     - Select Search Criteria > Get Data
       - Highlight each pair of courses that will share space > Tools > Share Space

EMS Coordinator
5. Publish Term
   - *Academic Planning > Courses > Manage Terms*
     - *Edit* Term for verification of settings.
       - *Excluded Dates* tab > Mark Excluded Dates (holidays/Breaks/Final Exams)
       - *Auto-Synch Settings Tab > Mark Auto-Synch Settings*
       - *Auto-Synch Settings tab> Mark Automatically Process Course Updates*
     - Highlight Term > *Publish*.
       - Accept all defaults for Statuses, Group, Reservation Source, etc.

Departments
6. Complete Post-Publish Review

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- Use the **Browser** (not the *Academic Browser*) on your EMS Toolbar to search for Reservations that may need follow-up.
    - **Academic Conflicts:**
        - Enter Search Criteria:
            - Term Dates
            - Group = Name of Academic Unit
            - Booking Status = Academic Conflict
        - Review each Conflict by completing following steps:
            - Open Course by double-clicking
            - Highlight first Booking in list of Bookings
            - Right-Click > Go To Book
                - Course will appear outlined in red. Review course and conflict.
                - Close Book.
        - Take one of the following appropriate steps to resolve.
            1. Search for a new location for conflicted course
                - Tools > Wizards > Change Rooms
                - Search for Rooms > Highlight room to Change > Next
                - Select bookings to change and enter search criteria for new room > Next
                - Select Room > Finish
                    - i. Room is now updated in EMS
                - Highlight Reservation Level > Highlight Meeting Pattern > Update
                    - i. Room is now updated in Banner.
            2. Change status to Crosslist/Shared to indicate intentional conflict
                - Tools > Wizards > Change Booking Status
                - Select Crosslist/Shared > Next
                - Select all dates to be changed > Finish
    - **Courses without a Room Assignment (TBD Courses)**
        - Enter Search Criteria:
            - Term Dates
            - Group = Name of Academic Unit
            - Building = TBD
        - **If course needs a room assignment, complete following steps to search for a room.**
            - **In Round 2 – search for a room within your College within *Browser***
                - Use Basic Search
                - Enter Start Date
                - Enter End Date
                - Select your group
                - Select your building
                - Get Data
                - Select Course
                - Tools > Wizards > Change Rooms
                - Search for Rooms > Highlight room to Change > Next
                - Select bookings to change and enter search criteria for new room > Next
                - Select Room > Finish
                    - Room is now updated in EMS

- o Highlight Reservation Level > Highlight Meeting Pattern > Update
  - Room is now updated in Banner.
- **In Round 3 – search for a room within the Campus**
  - o Tools > Wizards > Change Rooms
  - o Search for Rooms > Highlight room to Change > Next
  - o Select bookings to change and enter search criteria for new room > Next
  - o Select Room > Finish
    - Room is now updated in EMS
  - o Highlight Reservation Level > Highlight Meeting Pattern > Update
    - Room is now updated in Banner.

Departments
7. Keeping EMS up to date
   - If you need to change the **Days of the Week** or **Time**:
     - o Change in Banner
     - o Upon next synch, course will appear in Dashboard as CHANGED.
       - Open Dashboard > Course Update Tab
       - Highlight course and review change below.
       - Highlight Course > Process
         - If successful, course will be removed from Course Updates Window
         - If unsuccessful, Room Not Available Message will appear in Notes
           - o Click Conflicts to review what is in conflict.
           - o To assign to new room, click Assign and complete Search > Process.
           - o To schedule original room despite conflict, click Process again.
   - If you need to **add a course or meeting pattern**:
     - o Add in Banner
     - o Upon next synch, course will appear in Dashboard as NEW COURSE or NEW COURSE DATES.
       - Open Dashboard > Course Updates Tab.
       - Highlight Course > Process.
         - If successful, course will be removed from Course Updates Window
         - If unsuccessful, Room Not Available Message will appear in Notes
           - o Click Conflicts to review what is in conflict.
           - o To assign to new room, click Assign and complete Search > Process.
           - o To schedule original room despite conflict, click Process again.
   - If you need to **cancel a course**:
     - o Cancel in Banner
     - o Upon next synch, course will appear in Dashboard as CANCELLED
     - o Highlight Course > Process.
       - Course Reservation and Bookings will be cancelled.
   - If you update the Enrollment and it violates the Room Capacity:
     - o To assign to new room, click Assign and complete Search > Process.
     - o To leave in current room (and ignore violation), Highlight Course > Process.
   - If you need to change the **Instructor, Title, Enrollment (with no violation)**, etc - these changes will automatically be processed when the term is synched. No processing needed.