Setting Classroom Preferences in the Campus Planning Interface (CPI)

Contents
Getting Started: Logging in ................................................................. 2
Sorting and Filtering.............................................................................. 3
Setting Preferences................................................................................ 4
Viewing Preferences for a Class ............................................................. 7
Cross Listed/Shared Resources Classes ............................................... 8
Running Course Preferences Report ..................................................... 9
Appendix – Helpful Tips: ...................................................................... 13
Getting Started: Logging in

Fully Online, Arranged and Off Campus classes will not be in the CPI.

Only assign classroom preferences in the CPI if an instructor has room/technology preferences.

1) Log into the CPI: https://uaems.albany.edu/campusplanninginterface/
   a. User ID= UAlbany NetID
   b. Password=your set password
      i. If you forgot your password, e-mail scheduling@albany.edu.

2) Go to the Term Selector. Highlight the term you are working on and click Save.

3) Click the Academic Brower.

4) Select the Academic Department from the drop down menu. Then click, Get Data.
   a. You can also limit your results by searching for a specific Subject within the department.
   b. Browsing for Course Dates will allow you to set room preferences for multiple meeting patterns if they exist on a class (e.g., a class meets MWF and TR. You may want a computer lab on MWF and a regular classroom on TR).
   c. Browsing for Courses will allow you to set room preferences for the class.
   d. Note: you only have edit access to your department.
Sorting and Filtering

5) The Top Blank Row is for Searching.

![Image of a table with columns for Course, CRN, Shares Space, PeopleSoft XList, CRN, Course Title, Course Type, Instructor, Start Date, End Date, Days, Start Time, and End Time. The first row is blank, and the second row contains data for a course.]

a. Blank fields- Enter a specific value in one or more of the blank fields then hit the Tab key (e.g., to find a Course Title, enter the specific title [or part of the title] in the Course Title field).
b. Drop down menus- To search for a specific instructor, utilize the drop down menu.
c. To search for courses that have multiple meeting patterns (e.g., mini sessions, hybrid classes, five-day-a-week classes), type “Multiple” in the Days search box.
i. Hint: this will only work if you’re Browsing for Courses. If you’re Browsing for Course Dates, then all meeting patterns will appear in an individual row.
d. Click Clear Filter at the top of the table if you want to view all results again.

6) You can sort the columns by clicking on a column header or:
   a. To rearrange the columns, drag a column to a new location using the column heading (look for the double arrows as shown below).

   ![Image of a column being dragged to a new location.]

   b. To group results by a specific column, drag the column header to the top of the table (as shown below). In the example below, Instructor was dragged to the top, giving you a list of instructors with associated courses by clicking the plus sign (+).
Setting Preferences

7) To set preferences for a class, highlight the class and click *Set Preferences*.
   a. Note: Don’t double click the class, this may cause the CPI to freeze.
   b. If you want to set the same preferences for multiple classes use the *Ctrl-click* option: hold down the control key and click on the courses you want to set preferences for.
8) Settings To Be Updated: **no changes need to be made**
   a. Leave the default *Seat Fill Percentage* checkbox blank and the default at 100.
   b. Leave the *Ignore Term Excluded Dates* checkbox blank.
   c. See Appendix for specifics about using the *Notes* checkbox.

9) Room Settings: **do not change.** This should remain on *Set Standard Room Preferences.*
10) To select Building/View preferences choose from the drop down menu. Reminder: **Do not use the Area tab.**

a. If you will be using a Registrar room, we recommend selecting one of the following views:
   
i. Classrooms Scheduled by the Registrar’s Office
   ii. Downtown Classrooms Scheduled by the Registrar’s Office
   iii. Health Sciences Classrooms Scheduled by the Registrar’s Office
   iv. Uptown Classrooms Scheduled by the Registrar’s Office

b. Keep in mind if you are a downtown or health science department and a class needs to be on one of those specific campuses please select that view and click the Required checkbox. Departments can also indicate if a class needs to be on the Uptown campus.

c. You may select up to three specific room preferences. Keep in mind, the more preferences you indicate the less room options will be available.

d. Reminder: **do not use the Room Types drop down menu.** Leave it defaulted to Limit by Course Type.

11) To select room **Features** choose Preferred/Required radio buttons.

a. Features default to **Do Not Use.**

b. An explanation of the Technology Packages can be found on our [website](#).
   
i. **There are 3 new technology packages** to choose from in the CPI if an instructor will need the ability to synchronously broadcast their class to students.

c. **If you need a computer lab** select one of the Tech Features: **Computer Workstations-MAC or Computer Workstations-PC.** Indicate this Tech type as Required.
If you need a Collaborative Classroom select one of the seating features: **Round Tables, Tablet Arm Chairs w/ Wheels (Node Chair), or Moveable Tables/Chairs**. Indicate this seating type as Required/Preferred.

**Hint:** if you are not seeing a feature listed you may need to adjust your Building or View.

**Reminder:** Indicating a room preference for a class as Required will put limitations on the number of rooms available. Only indicate a room preference as Required if it’s necessary. Otherwise, it’s better to indicate features as Preferred.

**Matching Rooms**: Do not try to select a room from this box (it just shows you room information). This is simply to show you if there is a room matching the criteria you have selected.

**Once you have indicated all your preferences you must choose 1 of 2 options.** You can Add to your Existing Preferences or Override your Existing Preferences. Click Save.

- **Add to Existing Preferences**: Choose this option if you already added preferences to a class and you are adding more preferences.

- **Override Existing Preferences**: Choose this option if you have not added preferences to a class or if you added preferences to a class, but now want to replace them with different preferences.

**Viewing Preferences for a Class**

- **If you want to view the preferences selected for a particular class you can navigate back to the Academic Browser, highlight the class, and select Open.** The preferences for the class will be listed.

  - You can also navigate to the Set Preferences page from this screen
Cross Listed/Shared Resources Classes

15) You can also view Cross Listed/Shared Resources Classes on this screen. Click the Shared Space Courses tab to identify classes that are cross listed/shared resources. You can also identify which class is the Parent.

   a. Reminder: For cross listed/shared resources courses in the CPI, you will need to set the preferences for the section that is deemed the Parent.
b. You can also find the parent cross listed/shared resources class by navigating to the Academic Browser. It will say Parent in the Shares Space column. Child courses will have one of the cross listed/shared resources classes listed in the Shares Space column.

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Running Course Preferences Report

16) Once you have entered all your classroom preferences you should run a report to review all preferences and/or to Save for your records. To run a report navigate to Reports. Click on Course Preferences Report.
17) Choose the Term you were working on, the Scenario as PeopleSoft, the Format as By Course and the Output Format as PDF. You may input a Report Comment if you want it to print on the report.

18) Navigate to the Academic Departments tab and highlight your department. Choose the singular arrow to select the department.
19) Navigate to the *Course Types* tab. Choose the double arrow to select all course types.

20) Navigate to the *Buildings* tab. Choose the double arrow to select all buildings.
21) Navigate to the *Room Types* tab. Choose the double arrow to select all room types.

22) Click *Generate Report*. 
23) Review the room preferences in the report for accuracy. Make changes in the CPI if necessary.

Appendix – Helpful Tips:

- The **Notes** field in the CPI should only be used to indicate a departmentally managed room and/or a medical/reasonable accommodation. All other room preferences must be selected in the **Views** and/or **Features** of the Set Preferences screen. If you indicate your preferences in the **Notes** field, the class may not be scheduled properly.
  - Courses already scheduled in a computer lab or a room managed by your department can be left as is unless a change needs to be made. Tell us the change in the **Notes** field, but also indicate the room preferences in the **Views** and/or **Features**.
• **Cross listed courses**: For cross listed/shared resources courses, you will need to set the preferences for the section that is deemed the *Parent*.
  - If the *Parent* is in another department, contact the other department to assign the class preferences.

<table>
<thead>
<tr>
<th>Course</th>
<th>Shares Space</th>
<th>PeopleSoft XList</th>
<th>CRN</th>
</tr>
</thead>
<tbody>
<tr>
<td>AANT 220 L003</td>
<td><em>Parent</em></td>
<td><em>Yes</em></td>
<td>3426</td>
</tr>
</tbody>
</table>

• **Do not** use the **Area** tab in the drop down menu:

• **Do not** use the **Room Types** drop down menu:
• **Downtown Classrooms** - If a room on the downtown campus is required, please select the View “Downtown Classrooms Scheduled by the Registrar’s Office” and select the required box.

• **Health Science Classrooms** - If a room on the Health Science Campus is required, please select the View “Health Science Classrooms Scheduled by the Registrar’s Office” and select the required box.

• **Uptown Classrooms** - If a room on the Uptown Campus is required, please select the View “Uptown Classrooms Scheduled by the Registrar’s Office” and select the required box.
• **Computer Lab Classrooms** - Select one of the Tech Features: *Computer Workstations-MAC* or *Computer Workstations-PC*. Indicate this Tech type as **Required**.
  - Hint: if these Features are not appearing you may need to adjust your Building or View.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Do Not Use</th>
<th>Preferred</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech - Computer Workstations - MAC</td>
<td>☑</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tech - Computer Workstations - PC</td>
<td></td>
<td>☑</td>
<td></td>
</tr>
</tbody>
</table>

• **Collaborative (team based) Classrooms** - Select one of the seating Features: *Round Tables*, *Tablet Arm Chairs w/ Wheels (Node Chair)*, or *Moveable Tables/Chairs*. Indicate this seating type as **Required/Preferred**.
  - Hint: if these Features are not appearing you may need to adjust your Building or View.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Do Not Use</th>
<th>Preferred</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seating - Moveable Tables/Chairs</td>
<td>☑</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seating - Round Tables</td>
<td></td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Seating - Tablet Arm Chairs w/ Wheels (Node Chair)</td>
<td>☑</td>
<td></td>
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</table>

• There are three new technology packages to choose from in the CPI. One of these should be selected if an instructor will need the ability to synchronously broadcast their class to students.