

# *Queen Mary University of London*

*Training guide for local (departmental) timetablers:*

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## *Working with Location Records in Enterprise Desktop Reference Data Manager (EDRDM)*

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## Introduction

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This training worksheet is intended for department administrators to work through location resource creation and amendment process in Enterprise Reference Data Manager (EDRDM) in a simple, step-by-step manner from which the underlying principles of EDRDM that were explained and demonstrated in the introductory training session should be reviewed and practiced.

It assumes that users are familiar with the basic concepts outlined in the introductory training session, and have been set up appropriately in Authorisation Manager. It is designed to supplement the existing Enterprise user documentation. You will be able to create new location records and amend the details of existing resources owned by your department. You will not be able to delete, or modify the location records of other departments or centrally owned space.

### 1. Writing back and refreshing the data

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- As you make any changes in EDRDM you will need to write them back to the database to commit them to the server by pressing the write back button. 
- To view the changes that your colleagues have made and written back to the shared database you must refresh your view of the system by pressing this button 
- If the Write back icon is greyed out there are no changes to save and send to the server.

Note: Changes are not safe until they have been written back to the server which is backed up on a nightly basis.

## 2. Viewing location records in EDRDM

To view and edit your department's location information follow the steps detailed in this section.

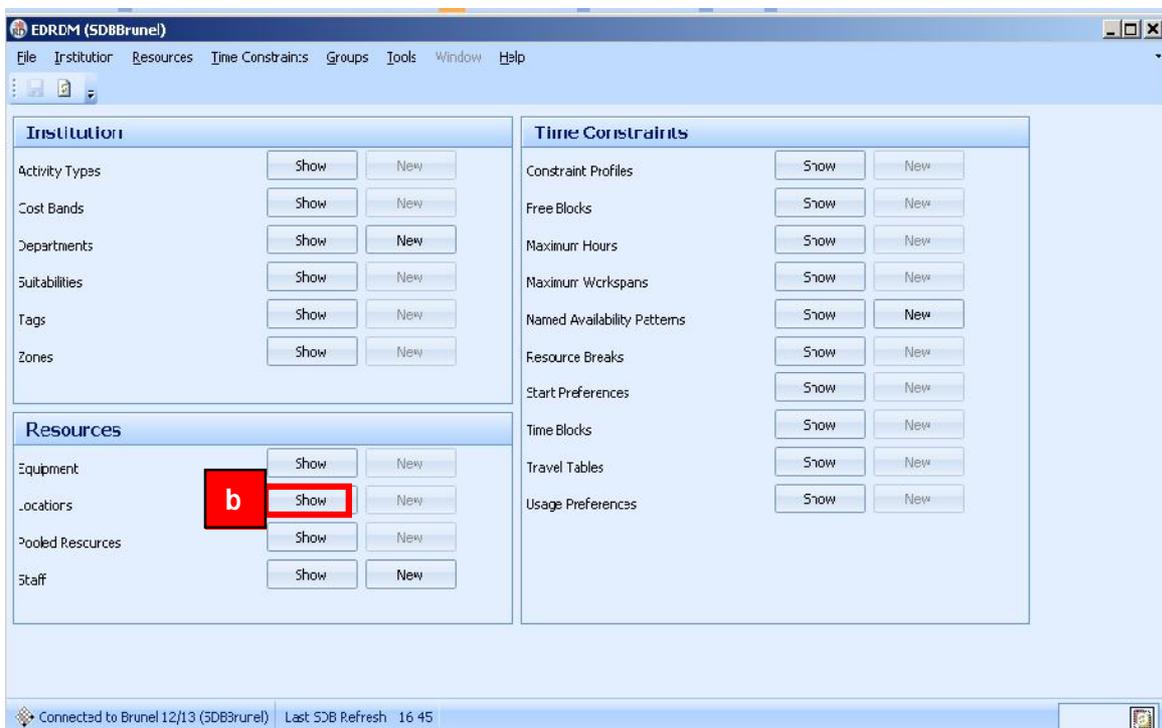
- a. Maximise the main EDRDM screen by clicking on the maximise icon as illustrated in figure 5 below.

**Figure 5: Maximising the main EDRDM screen**



- b. Left mouse click on the 'Show' button next to Location on the 'Resources' panel as illustrated in Figure 6 below.

**Figure 6: Viewing the location list**



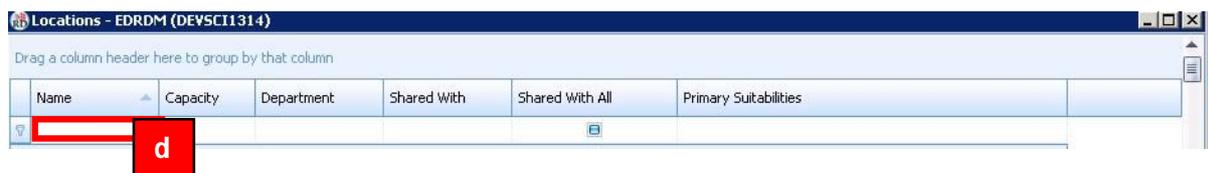
- c. The location screen will appear detailing a list of all of the locations that are currently stored in the timetabling system for the selected academic year. Click on the maximise icon as detailed in figure 7 below.

**Figure 7: Maximising the location screen**



- d. To find a specific location, left click in the blank Filter input box in the 'Name' column and type the first few characters of the location name as illustrated in figure 8 below. Or use the department column filter to find all the location associated with your academic department by clicking in the filter input box in the department column and select your department from the list. **Note:** you can only modify and create locations for your own department(s). These locations will be highlighted in bold. Locations from other departments will be greyed out and are view only.

**Figure 8: Filtering to a specific location**



- e. Select location that has been returned in the filter by left clicking on its name, as illustrated in figure 9 below. Their record will turn blue once selected.
- f. With the location selected click on the 'Form View' button

**Figure 9: Selecting a specific location**

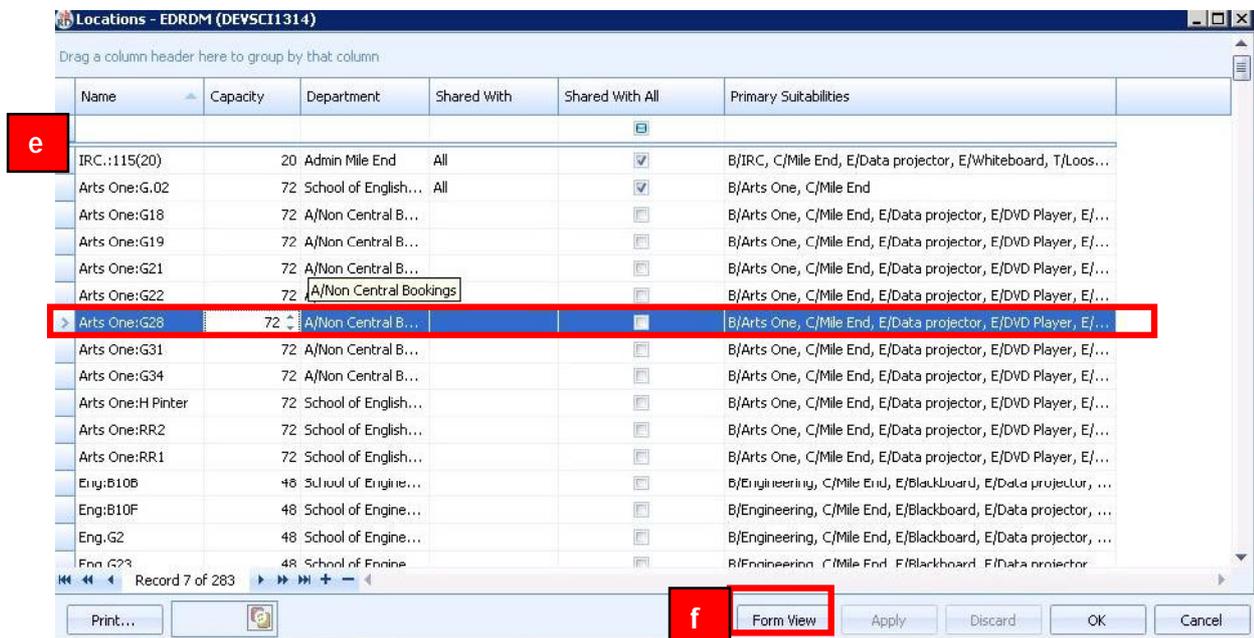


Figure 10: Viewing location details in the form view

The screenshot shows a software window titled "Location - EDRDM (DEVSCI1314)". The main area is a form for editing a location record. The form has a left-hand pane with a tree view showing "Arts One:G.02" selected. The right-hand pane contains the following fields:

|                       |                                     |
|-----------------------|-------------------------------------|
| Name                  | Arts One:G.02                       |
| Host Key              | #SPPLUSDEC80                        |
| Description           |                                     |
| Department            | School of English and Drama         |
| Capacity              | 72                                  |
| Area                  | 0                                   |
| User Text 1           | A                                   |
| User Text 2           |                                     |
| User Text 3           |                                     |
| User Text 4           | ME-                                 |
| User Text 5           |                                     |
| Primary Suitabilities | B(Arts One, C)Mile End              |
| Other Suitabilities   |                                     |
| Avoid Concurrence     |                                     |
| Maximum Periods       | 196                                 |
| Contract Periods      | 196                                 |
| Constraint Profiles   |                                     |
| Tags                  |                                     |
| Shared With           | all                                 |
| Shared With All       | <input checked="" type="checkbox"/> |
| Zone                  | Mile End Campus                     |
| Named Availability    | [Custom...]                         |
| Named Starts          | [Custom...]                         |
| Named Usage           | [Custom...]                         |
| Cost Band             |                                     |

At the bottom of the form are buttons for "New", "Apply", "Discard", "OK", and "Cancel". The "OK" button is highlighted with a red box. A red box with the letter 'i' is placed below the "OK" button.

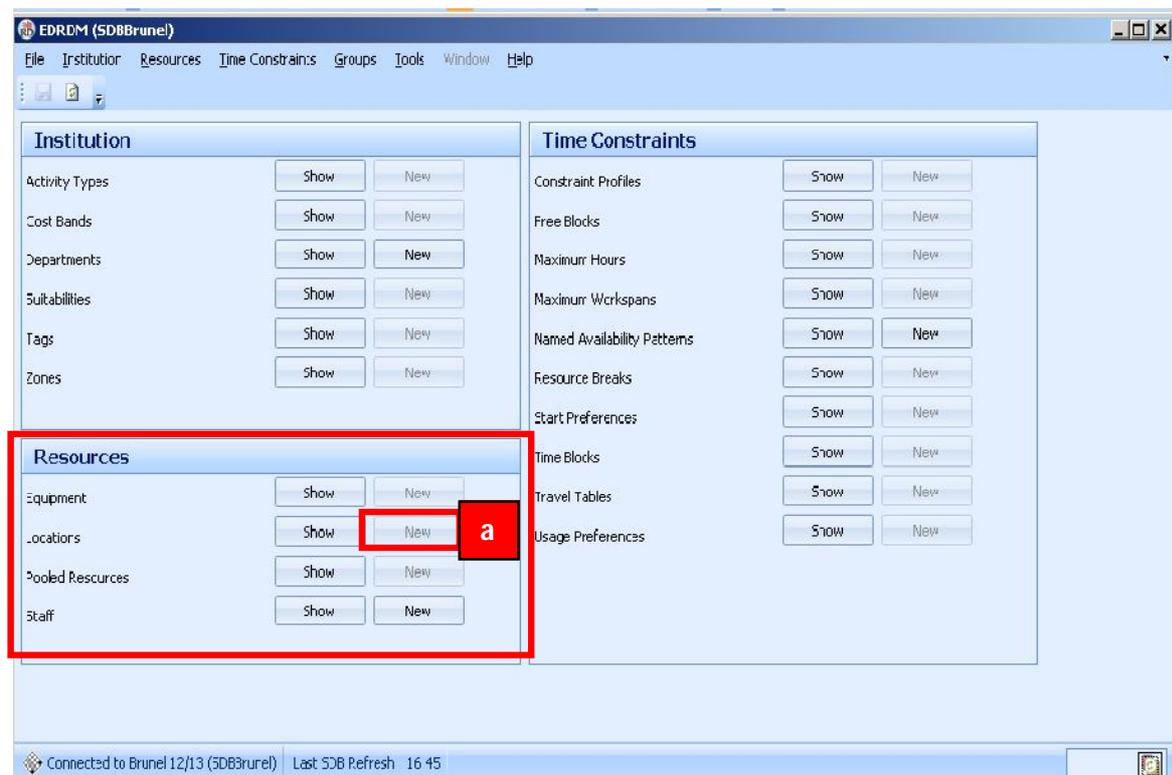
- g. The location record will then be displayed in the form view
- h. Review the room details. If there are in data inaccuracies you can amend them if your department owns the location if it does not own the location you will need to email the central timetabling team (Martin Cole or Paul Kent) and they will amend the details. You may wish to review the following location attributes:
  - a. Capacity
  - b. Suit abilities (Room features and attributes)
  - c. Location name
  - d. Zone (the location's campus)
- i. Click Ok to close the location form view and return to the location list applying any changes you have made to your department's locations.

### 3. Creating new location records in EDRDM

To create a new location for your department follow the steps detailed in this section.

- a. In the main EDRDM screen press the 'New' button next to Location in the 'Resources' panel as illustrated in figure 11 below.
- b. A blank record has been created.

**Figure 11: Creating a new location record –Step 1**



- c. A blank location form will then open for your "New location". As illustrated in figure 12 overleaf.

Figure 12: Creating a new location record –Step 2

- d. Enter the location’s details as illustrated in figure 12 above. A Name, Hostkey, Description, Department, Capacity (number of students the room can accommodate), primary suitabilities and Zone are the most important location attributes to specify.

**Note:** Location details must be entered in a consistent manner as detailed in table 1 overleaf. Click Ok to apply the change and close the location form window.

**Note:** Apply will apply the changes to the location record and keep the form open for further changes. Discard will undo the changes made to the location record and keep the form editor open. Cancel will close the window and undo the location creation.

- e. Click Ok in the main EDRDM location screen to close apply the change and close the EDRDM location screen.
- f. Click on the writeback  icon to save the change to the database on the server.

**Table 1: Rules and data conventions for entering location details**

| Location data attribute      | Data entry example   | Explanation  |
|------------------------------|--|--|
| <b>Name</b>                  | Arts New: G35  | The official name of the location, it usually includes the building name as the prefix. This must be unique: there should be no other rooms in the system or at the University with this location name.  |
| <b>Host Key</b>              | Arts New: G35  | This should be the same as the location name and must be unique.   |
| <b>Description</b>           | G35 – Third floor of the arts building                         | This could be a brief description of where the room is located.  |
| <b>Department</b>            | School of Law  | Select the department that “owns” the location (authorises room bookings). You must select your department from this list straight away. If you select another department in error you will not have access rights to change the location record once it has been created.   |
| <b>Capacity</b>              | 40   | The number of students that can be taught in the room.   |
| <b>Primary Suitabilities</b> | C/Mile End<br>B/Arts One<br>E/Data Projector<br>T/Seminar Room | Add the room features and attributes (suitabilities). There should be at least 3 suitabilities associated with each room: One for the campus prefixed with a C/, one for the Building prefixed with a B/ and one for the Type of room, prefixed with a T.<br>The fixed equipment items that are permanently located in the room can also be added and are prefixed with an E/. |
| <b>Zone</b>                  | Mile End   | This is the campus the location is situated at.  |

- All other location information is optional