# Queen Mary University of London

*Training guide for local (departmental) timetablers:*

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

## *Introduction*

This training worksheet is intended for department administrators to work through staff 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 resource records and amend the details of existing resource owned by your department. You will not be able to delete, or modify the resource records of other departments.

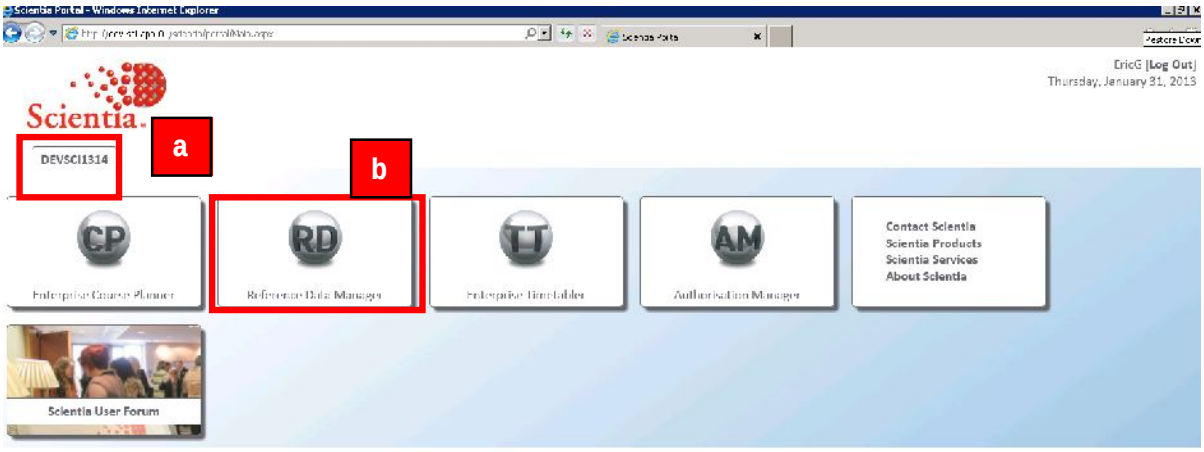
## *1. Loading the Reference Data Manager application*

After logging in successfully, the Enterprise Portal screen illustrated in figure 3 below will become visible. Follow the steps below to open the EDRDM application.

a. Ensure you have selected the correct database/academic year by single left clicking on the 'SCI1314' tab at the top of the screen. The name of the selected database will turn white after it has been selected.

b. To load EDRDM single left click on the Reference Data Manager icon as illustrated in figure 3 below.

**Figure 3: The Enterprise portal**

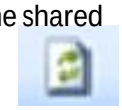



c. If the EDRDM application is being run for the first time the software will need to be installed on your machine, click install if needed.

d. A series of loading screens will then appear and after a few minutes EDRDM will load as illustrated in figure 4 below.

**Figure 4: The main EDRDM screen**

## 2. *Writing back and refreshing the data*

- 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.

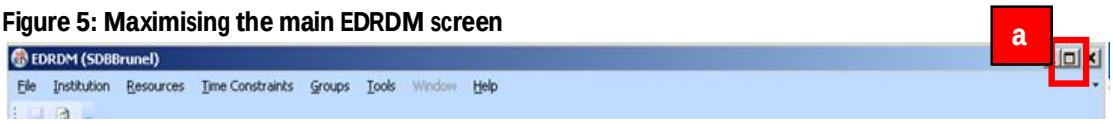
Note: Changes are not safe until they have been written back to the server which is backed up on a nightly basis.

## 3. *Viewing staff records in EDRDM*

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

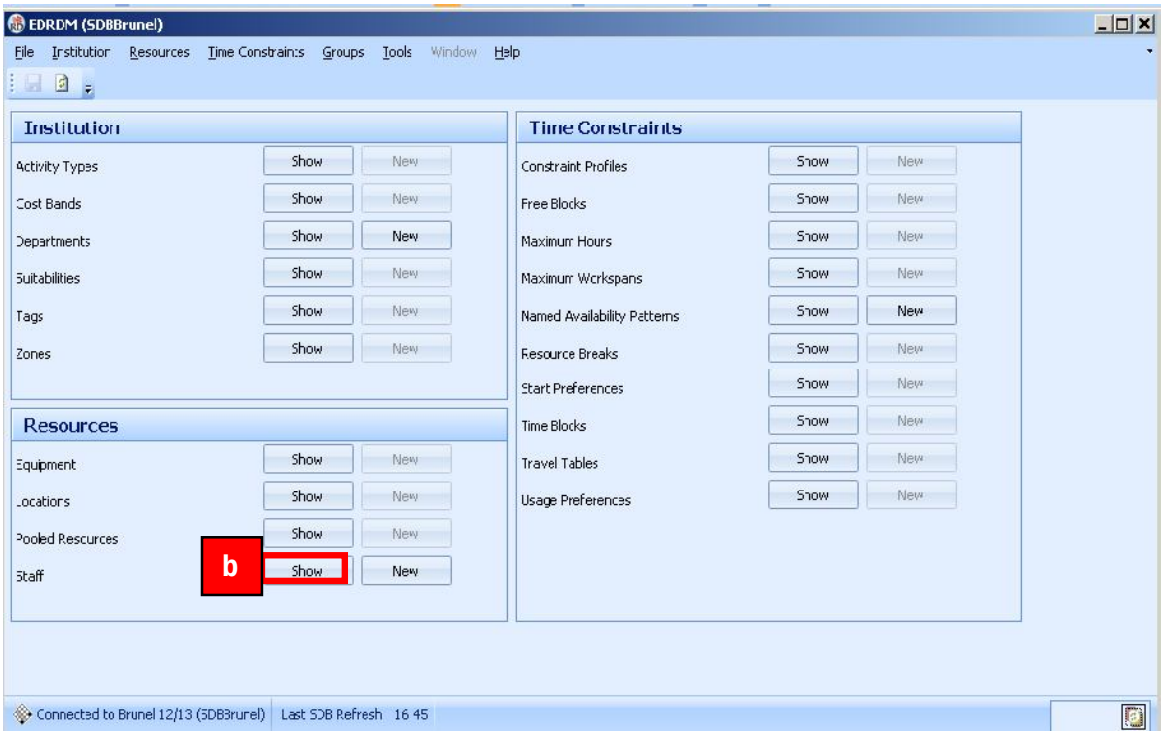
a. Maximise the main EDRDM screen by clicking on the maximise icon as illustrated in figure 5 below.

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




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

**Figure 6: Viewing the staff list**

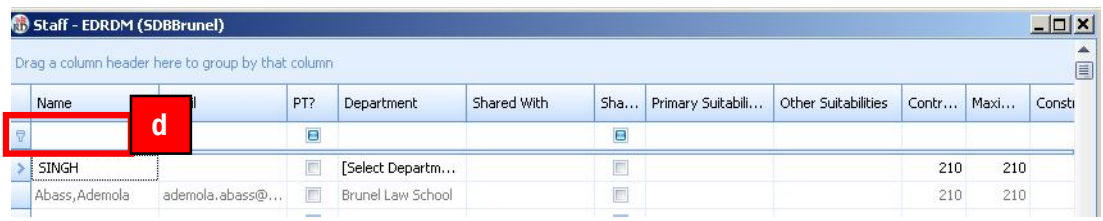



c. The staff screen will appear detailing a list of all of the members of staff that are currently stored in the timetabling system for the selected academic year. Click on the maximise icon to maximise the staff screen as detailed in figure 7 below.

**Figure 7: Maximising the staff screen**

g. To find a specific member of staff , left click in the blank Filter input box in the 'Name' column and type the staff member's surname as illustrated in figure 8 below. Or use the department column filter to find all the staff members 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 members of staff for your own department(s). These members of staff will be highlighted in bold. Members of staff from other departments will be greyed out and are view only.

**Figure 8: Filtering to a specific member of staff**



d. Select the member of staff that has been returned in the filter by left clicking on their name, as illustrated in figure 9 below. Their record will turn blue once selected.
e. With the staff member selected click on the 'Form View' button

**Figure 9: Selecting a specific member of staff**

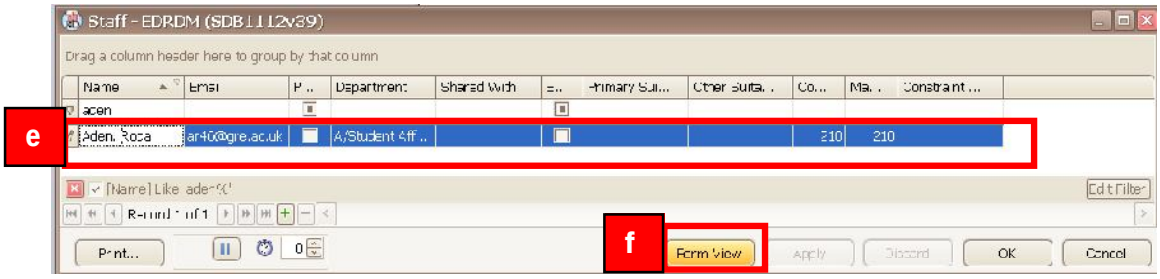
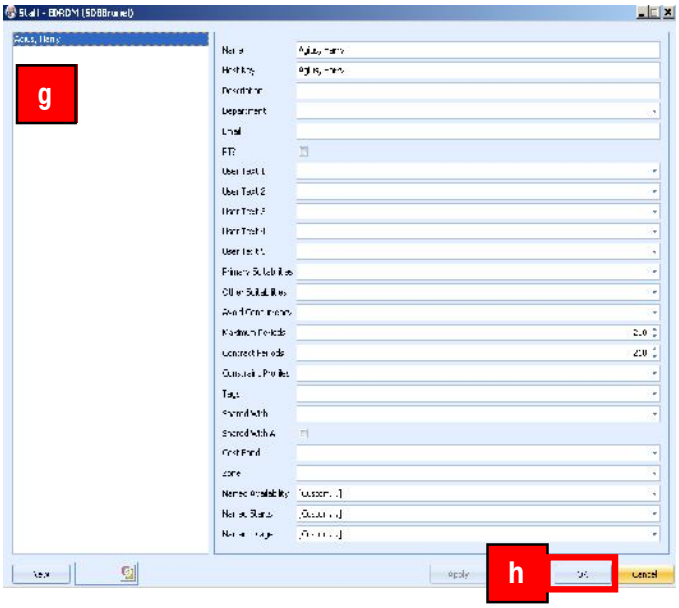



**Figure 10: Viewing staff details in the form view**




g. The staff record will then be displayed in the form view.

h. Click Ok to close the staff form view and return to the staff list.

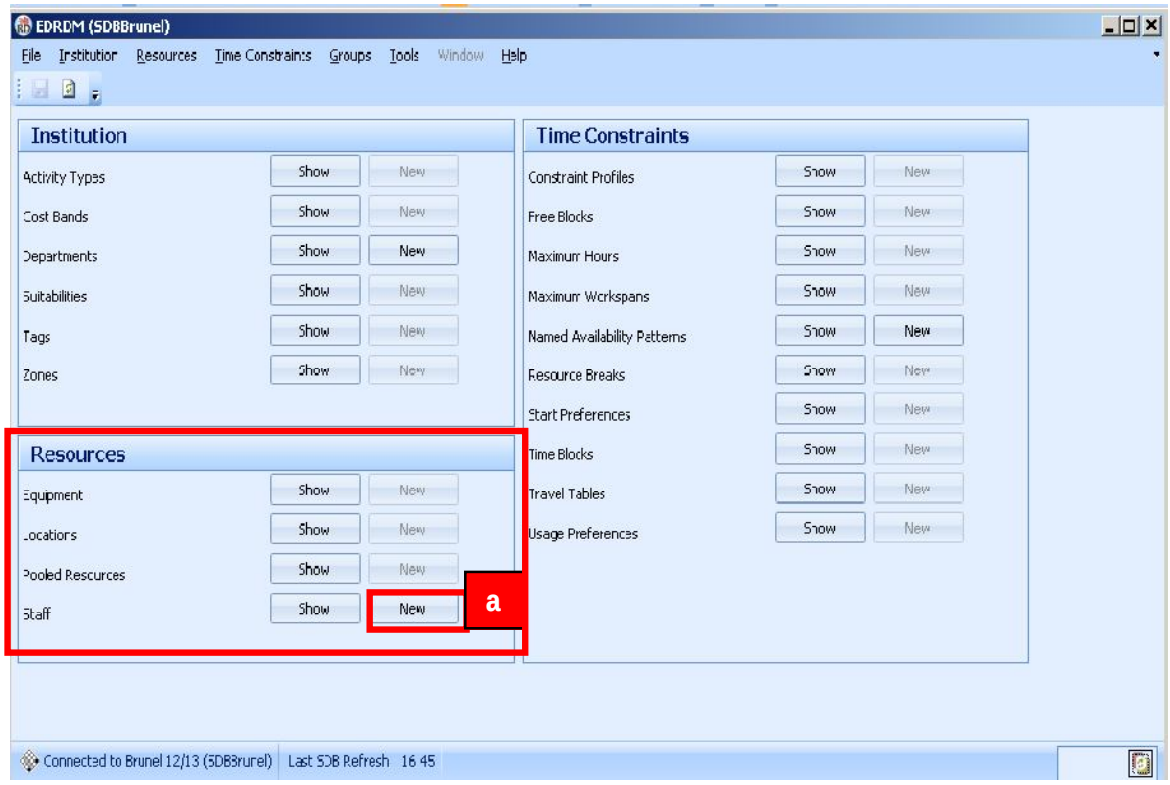
## 4. *Creating new staff records in EDRDM*

To create a new member of staff for your department follow the steps detailed in this section.

a. In the main EDRDM screen press the 'New' button next to staff in the 'Resources' panel as illustrated in figure 11 below.

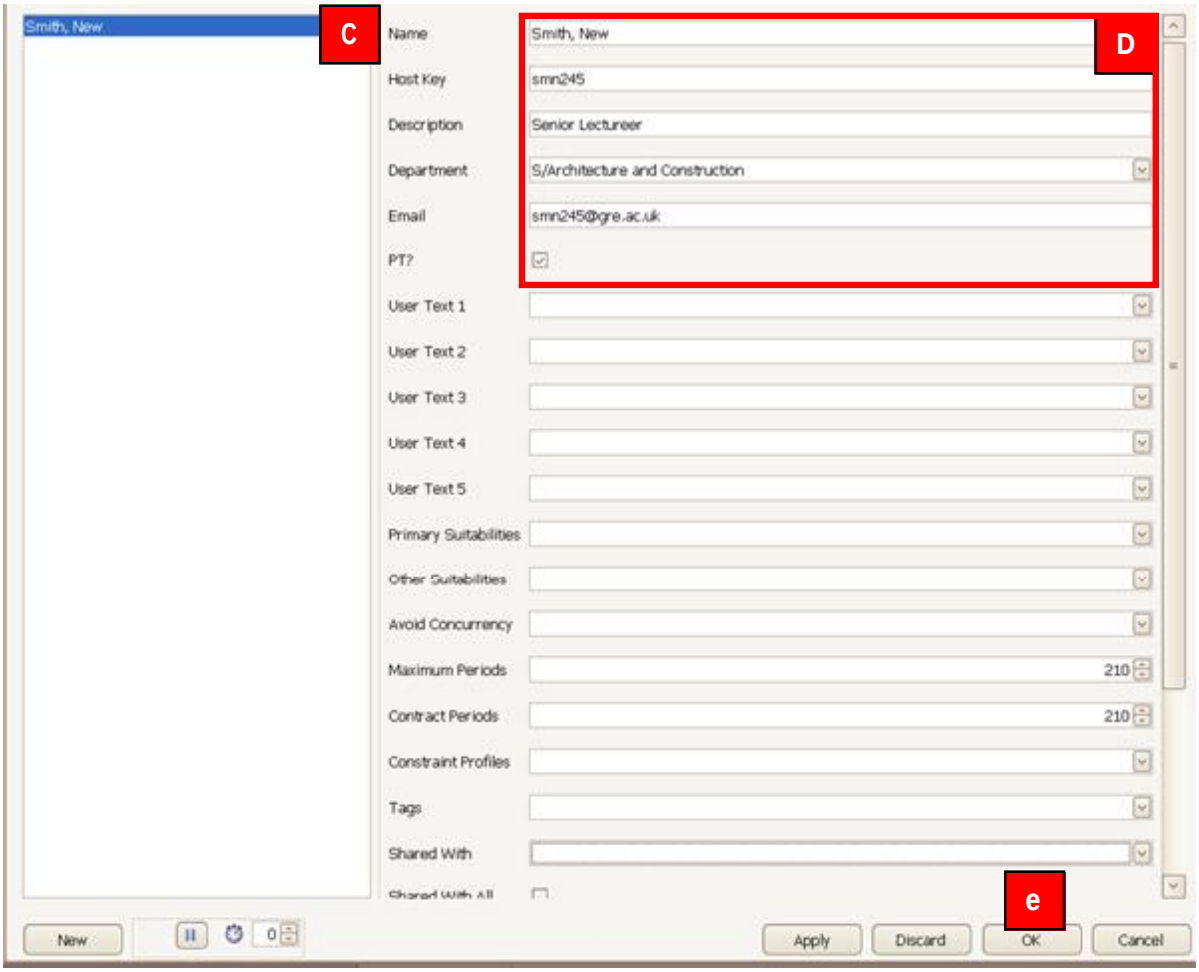
b. A blank record has been created.

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




c. A blank staff form will then open for your new member of staff. As illustrated in figure 12 overleaf.

**Figure 12: Creating a new staff record –Step 2**




d. Enter the member of staff's details as illustrated in figure 12 above. A name, hostkey, description, department and e-mail are the most important staff attributes to specify. ***Note:*** *Staff details must be entered in a consistent manner as detailed in table 1 overleaf.* Click Ok to apply the change and close the staff form window.

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

e. Click Ok in the main EDRDM staff screen to close apply the change and close the EDRDM staff 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 staff details**

| Staff data attribute | Data entry example | Explanation |
|---|---|---|
| **Name** | Smith, John | Surname then a ',' then first name. This makes it easy to find staff using the filters. |
| **HostKey** | 558855 | Enter the staff members HR id as the Hostkey. If the staff member is not permanently contracted or you do not know their HR id then leave the hostkey blank and the system will generate a unique host key for you. |
| **Description** | Dr John Smith | |
| **Department** | School of Law | Select the department the member of staff is associated with. 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 staff record once it has been created. |
| **E-mail** | Sjm245@gre.ac.uk | Enter the member of staff's email address |
| **Part time (PT?)** | Tick or leave blank | If the member of staff is part time tick the PT? box, if not leave the box un-ticked and they will be classified as full time. |
| **User Text 2** | Exam999 | Enter the staff members QMUL user id here (Active Directory user name). This will enable the publication of personal web timetables for the staff. This information will be uploaded from another University system if you do not know it. |
| **Shared with departments** | School of History | If the member of staff teaches for other specific departments select them here. |
| **Shared with all** | Tick or leave blank | If the member of staff teaches across all departments in the university, tick the "shared with all" box |

- All other information is optional

## 5. *Amending staff records in EDRDM*

To amend a staff member's record follow the steps detailed in this section.

a. Click on Show staff button on the 'Resources' panel.

b. Find and then select the staff record you wish to amend.

c. Click on the 'Form View' button.

d. Amend the details.

e. Click Ok and close the staff form view.

f. Click Ok and close the main staff screen.

g. Save the change to the database using the button.

## 6. *Amending staff availability in EDRDM*

To capture and amend the teaching availability of the academic members of staff from your department follow the steps detailed in this section as illustrated in figures 13 to 16.

Teaching availability is the weeks of the year the member of staff is available to teach and the day or days of the week **they are not available to teach.** This should be aligned with the University's HR policy and staff contracts and is a crucial constraint to ensure the timetable meets staff availability requirements.

a. Click on Show staff button on the 'Resources' panel.
b. Filter to your staff member's department as required.
c. Find and then select the staff record you wish to amend.
d. Click on the 'Form View' button.
e. Scroll down to the 'Named Availability' attribute and click on the drop down arrow.
f. The 'Named Availability' window will then open.
g. **Please note:** If the 'Use custom availability' tick box is ticked used the software is expecting you to create a custom (bespoke) availability pattern for the individual member. If this box is not ticked the software is expecting you to select one of the named availability patterns (a pre-saved availability pattern, such as All Year or Term 1).

**Figure 13: Entering staff availability**

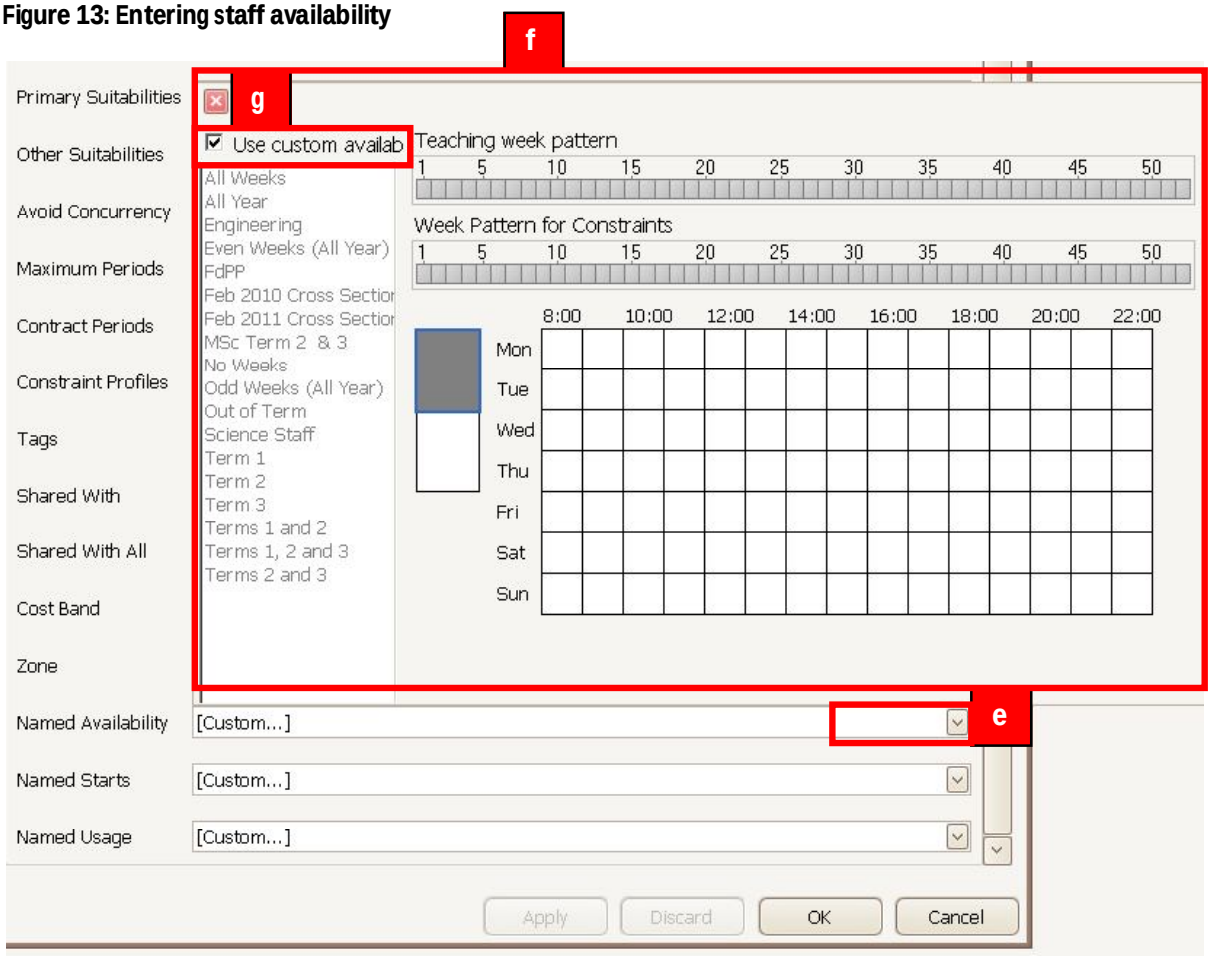
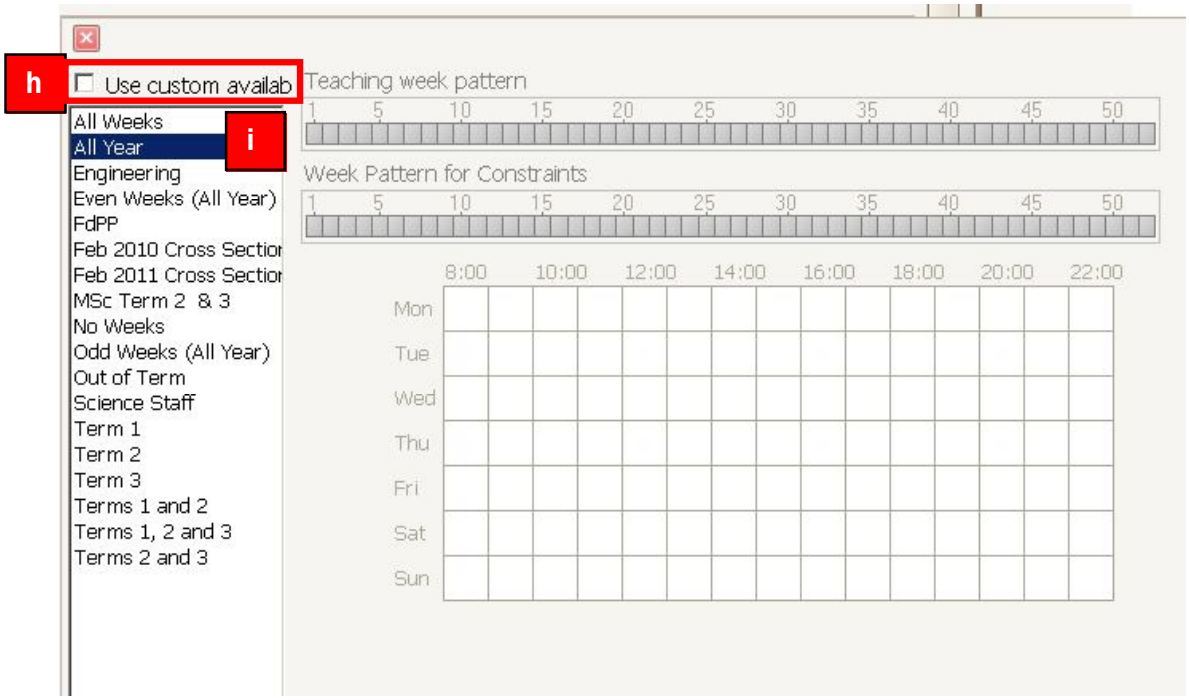
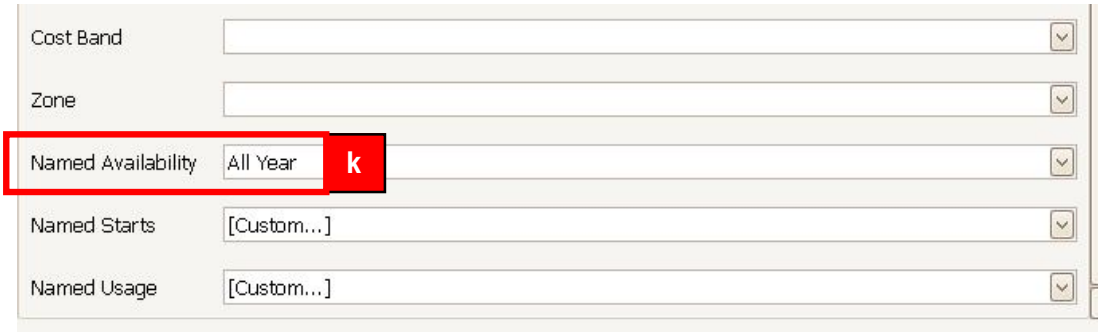


**Figure 14: Using a Named Availability to define staff availability**




h. To choose a 'Named Availability' Untick the 'Use Custom Availability' box.
i. Select the relevant Named Availability.
j. Click on the staff form (behind the Named Availability window) to apply the change.
k. Review the change to double check it has saved as expected

**Figure 15: Using a Named Availability to define staff availability**




l. Click Ok and close the staff form view.
m. Click Ok and close the main staff screen.
n. Save the change to the database using the button.
o. Note steps M to O can be performed on batches of staff records with the change being confirmed and written back in one action for multiple records.

**To define a custom availability pattern for staff members follow the steps below:**

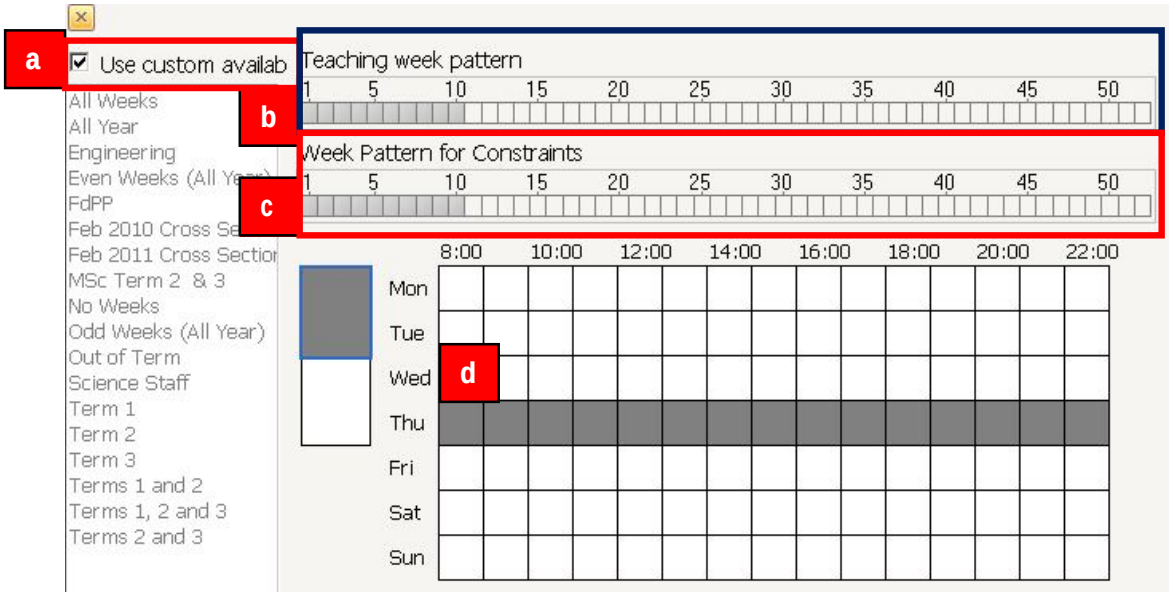
a. Tick the 'Use custom availability' box.

b. Single right click on the 'Teaching Week Pattern' bar and then select the 'Teaching week pattern' (the weeks) the member of staff is available to teach, by left clicking or dragging across in the relevant week cells. The staff member in the example below is available for weeks 1-10. (Grey blocks are available weeks, white blocks are weeks the staff member is not available for teaching).

c. Adjust the 'Week Pattern for Constraints' bar to match the Teaching week pattern bar (b).

d. Select the grey square in the colour palette and paint the timetable grid grey on the days and times the staff member is unavailable for teaching. (Grey blocks are unavailable timeslots; white blocks are timeslots the staff member is available for teaching).

**Figure 16: Using a Custom Availability to define staff availability**



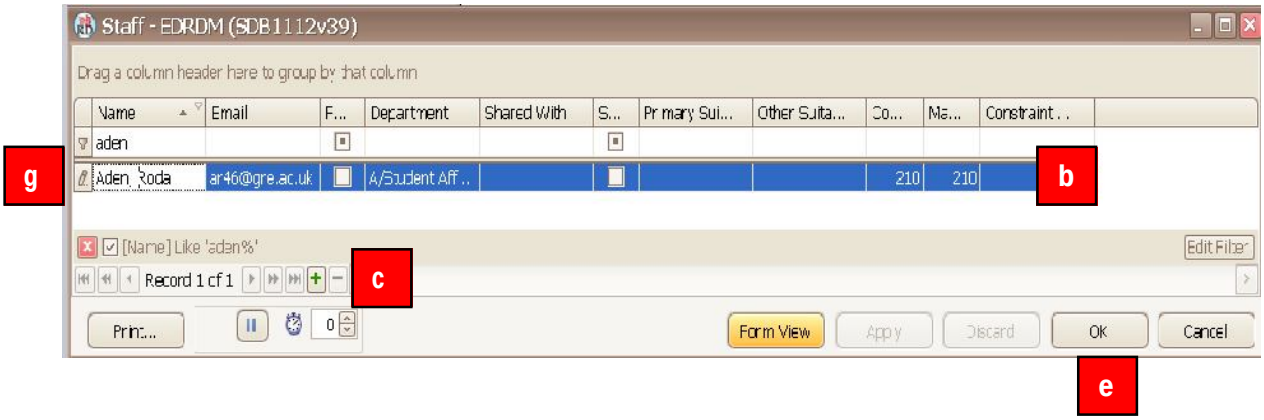

e. Click on the staff form (behind the Named Availability window) to apply the change.
f. Click Ok and close the staff form view.
g. Click Ok and close the main staff screen.
h. Save the change to the database using the button.
i. Note steps G to I can be performed on batches of staff records with the change being confirmed and written back in one action.

**Note**: For some SMD staff you will need to filter the staff list by the "SMD to review" department to view staff records that could not be mapped to a genuine department. These staff members either: no longer work at the university and should be deleted from the system as detailed overleaf, or they need to be connected to the relevant department and removed from the SMD to review department.

## 7. Deleting staff records in EDRDM

To delete obsolete staff records from the database follow the steps detailed in this section as illustrated in figure 17 below. **Note**: Once the record has been deleted and the changes have been written back to the server they cannot be undone.

**Figure 17: Deleting obsolete staff records**




a. Filter to the relevant staff record
b. Select the staff record(s) by left clicking on it
c. Click on the minus button on the footer of the staff window
d. The record will vanish from the screen
e. Click OK to confirm the deletion and apply the change
f. Save the change to the database using the write back button.
g. **Note:** if there is a pencil icon on the grey box to the left of the staff member's name the application is expecting you to edit and won't let you delete. Left click on the pencil icon and a **>** symbol will appear in place of the pencil symbol. You will now be able to delete the record.
   **Note:** If the staff member does not belong to your department in the system you will not have permission to delete it.