EMS Campus Configuration Guide

EMS Campus 4.0

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

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Preface

Welcome to the *EMS Setup Guide*. The purpose of the *EMS Setup Guide* is to answer your questions and guide you through the procedures necessary to configure and administer the EMS application efficiently and effectively.

Using the manual

You will find the *EMS Setup Guide* easy to use. You can simply look up the topic that you need in the table of contents or the index. 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 Setup Guide* 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 Setup Guide* uses the following conventions:

- The tab, field, and menu labels that are described in this Setup Guide are those used in the standard implementation of EMS. As the EMS administrator, you might have customized some of these labels to better suit your organization's business needs. Therefore, the labels that are referenced in this Setup Guide might be different than what your users observe for your implementation.

- The colors that are shown in this Setup Guide for the windows and their components (for example, a reservation in the Reservation Book) are those used in the standard implementation of EMS. As the EMS administrator, you might have customized some of these colors to better suit your organization's business needs. Therefore, the colors that are shown in this guide might be different than what your users observe for your implementation.

- The EMS application provides multiple ways of accessing the same EMS functions. Typically, this manual references only one method (the menu bar) for accessing functions; however, if a toolbar button is available, then the manual references the button instead. You can choose whatever method best suits your working needs.

- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Calendar Name>. Do not type the angle brackets when you specify the variable information.

- 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 index.

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 and Index entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

Assumptions for the manual

The *EMS Setup Guide* assumes that:

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

Organization of the manual

* Chapter 1, "EMS Campus," details the synchronization of the information in your Student Information System, or SIS, with the information in your EMS database as well as the configuration of campus-specific data items.

Chapter 1
EMS Campus

Academic Planning is an optional component of the EMS software that provides all the functionality that is necessary for Domain Schedulers to ensure that every class meets in a location and at a time that is acceptable to departments and professors. The system provides automatic room assignment within user-supplied parameters, integration with your SIS/ERP software, and efficient online collaboration tools. It also simplifies final exam scheduling and offers a selection of reports to streamline and analyze the room scheduling process. When added to the functionality that meeting and event staff already have access to, it provides a complete campus-wide space management package referred to as EMS Campus. This chapter details the synchronization of the information in your Student Information System, or SIS, with the information in your EMS database as well as the configuration of campus-specific data items for EMS Campus.

This chapter covers the following topics:

Overview of Synchronization

Your *Student Information System*, or *SIS*, contains a wealth of information about your buildings, room types, rooms, instructors, course types, subjects, and terms. The process of importing this SIS data into your EMS database is referred to as *synchronization*. When you import campus-specific data (instructors, course types, subjects, and terms), you create the data items in your EMS database. When you import facility data (buildings, room types, and rooms), you must either create the data items in your EMS database, or if the facility data already exists in your EMS database, then you must link the SIS facility data to the corresponding facility data in your EMS database.

Before you can carry out synchronization, the Campus Planning Interface must be installed and configured. Refer to the EMS Installation instructions for details.

Campus-specific data synchronization

When you import your campus-specific SIS data, all the SIS data items are flagged with a status of New. To create these items in your EMS database, you select the items, click Create, and then Process. After you create these items in your EMS database, the status of the items is set to Synchronized to indicate that the SIS data has been synchronized. If you do not want to create the SIS data item in your EMS database (for example, you are importing an Instructors list and an instructor is on sabbatical and unavailable to teach classes), then you can select the item and click Do Not Import. Previously synchronized items can be unsynchronized by selecting the item or items, and then clicking Unsynch.

You can select a single data item at a time for processing, you can select multiple items for processing using the CTRL-click or SHIFT-click functions, or you can select all items in a single step by clicking Select All.

Figure 1-1: EMS Campus Instructors window showing SIS data
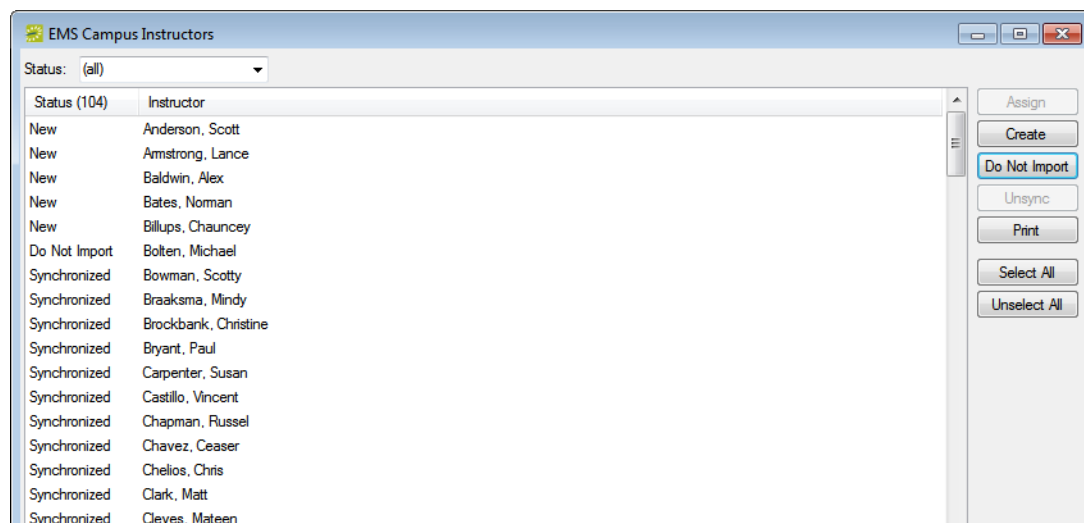
Facility data synchronization

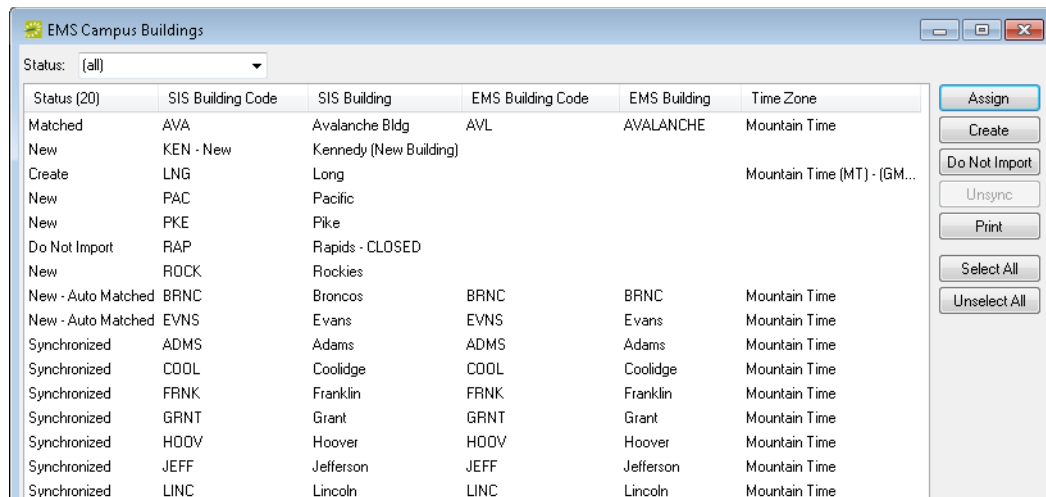When you import facility SIS data, the actions that you must carry out are different if you do not have the facility data (building, room type, or room) already configured in your EMS database versus if you do have the data already configured.

- If you have not configured the necessary data items in your EMS database, then all data items that are imported from your SIS are flagged with a status of New. To configure these items in your EMS database, you must select the item and then click Create. (Depending on the item that you select, another window might open with additional configuration options that are required to completely configure the item in your EMS database.) For example, in Figure 1-2 below, the PAC-Pacific building, the PKE-Pike building, the ROCK-Rockies building, and the LNG-Long building exist in the SIS, but not in the EMS database. The status of the PAC-Pacific building, the PKE-Pike building, the ROCK-Rockies building is therefore set to New. The status of the of the Long building was set to Create by selecting the building, and then clicking Create.

Figure 1-2: EMS Campus Buildings window showing SIS data

- If you have configured the necessary data items in your EMS database, and you have named *and/or* coded them consistently between your EMS database and your SIS, then these data items are automatically matched and flagged with a status of New—Auto Matched. For example, in Figure 1-2 above, the Evans building and the Broncos building were configured in the EMS database prior to synchronization. Because the Evans building was named *and* coded identically as the same building in the SIS, EMS auto-matched the record for this building. Even though the Broncos building was named differently, it was coded identically as the same building in the SIS, and therefore, it was auto-matched as well.

  Auto-matching can occur only if each SIS facility data item can be matched to one and only one EMS data item. For example, if Softball Field and Soccer Field are separate buildings in the SIS, they cannot both be synchronized with Fields in the EMS database.

464

Likewise, if Discussion Room and Conference Room are separate room types in the SIS, then the both cannot be synchronized to Meeting Room in the EMS database. In this case, the data items that are imported are with a status of New, and you must select each New item and assign it to the appropriate corresponding item in your EMS database. (See the bullet below.)

- If you have configured the necessary data items in your EMS database, but you have not named or coded these items consistently between your EMS database and your SIS, then the data items in your SIS are imported and also flagged with a status of New. You must select each New item and assign it to the appropriate corresponding item in your EMS database to set the status to Matched. For example, in Figure 1-2 on page 464, the Avalanche building was imported from an SIS. The corresponding building in the EMS database was neither named nor coded identically. As a result, when it was imported, its status was set to New. After the record was selected and Assign clicked, and the building matched to an existing building in the EMS database, the status was set to Matched. When you manually match items, as is the case with Auto-Matching, each SIS facility data item can be matched to one and only one EMS data item.

- Just as with campus-specific data, you can also flag items from the SIS with a status of Do Not Import if you do not want the item to be configured in your EMS database, for example, a building on campus that has been permanently closed or a dormitory building that does not have space that can be scheduled. For example, in Figure 1-2 on page 464, the RAP (CLOSED) - Rapids building has been permanently closed, so its status was set to Do Not Import. After a status has been set for all facility data, (New - Auto Matched, Matched, Create, or Do Not Import), you must click Process to complete synchronization. If you do not click Process, then the data items are not configured in your EMS database. After you create these items in your EMS database, the status of the items is set to Synchronized to indicate that the SIS data has been synchronized.

You must synchronize your facility data in the following order—Buildings, Room Types, and Rooms. The synchronization process does not update existing facility records after they have been imported and linked. For example, if a room's code, description, or capacity is changed in the SIS after it has been imported and linked, this information is not changed in the EMS database. Previously synchronized items can be unsynchronized by selecting the item or items, and then clicking Unsynch. You must unsynchronize items in the reverse order in which they were synchronized. For example, you cannot unsynchronize buildings if the buildings have rooms that are still synchronized. You must first unsynchronize the rooms, and then you can unsynchronize the buildings. Likewise, you cannot unsynchronize room type if rooms are still synchronized with the room type. You must first unsynchronize the rooms, and then you can unsynchronize the room types. In addition, you cannot unsynchronize any facility data if courses that are synchronized use the buildings or rooms.

Synchronizing Campus-Specific Data

When you synchronize your campus specific SIS data (Instructors, Course Types, Subjects, and Terms), all the SIS data items are flagged with a status of New. To create these items in your EMS database, you select the items, click Create, and then click Process.

To synchronize campus-specific data

The following procedure is written from the perspective of synchronizing Instructors, but, by analogy, you can follow this procedure to synchronize course types, subjects, and terms.

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Instructors.

    The EMS Campus Instructors window opens.

    Figure 1-3: EMS Campus Instructors window
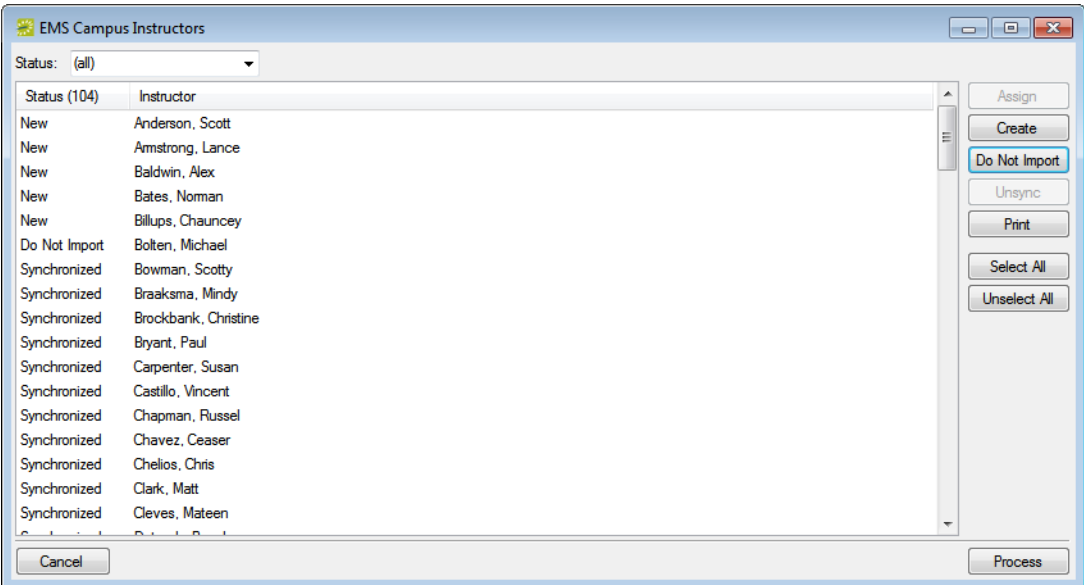
2. Select the SIS data item, or CTRL-click to select the multiple data items that you are creating in your EMS database, click Create, and then click Process.

If you do not want to create an SIS data item in your EMS database, select the item, and then click Do Not Import.

A message opens indicating that the data items were successfully processed.

3. Click OK to close the message and return to the EMS Campus Instructors window.

    The status of the data items is set to Synchronized to indicate that the SIS data has been synchronized.

4. Click Cancel or Close (x) to close the window.

Synchronizing Facility Data

You must synchronize your facility data in the following order—Buildings, Room Types, and Rooms. The synchronization process does not update existing facility records after they have been imported and linked. For example, if a room's code, description, or capacity is changed in the SIS after it has been imported and linked, this information is not changed in the EMS database.
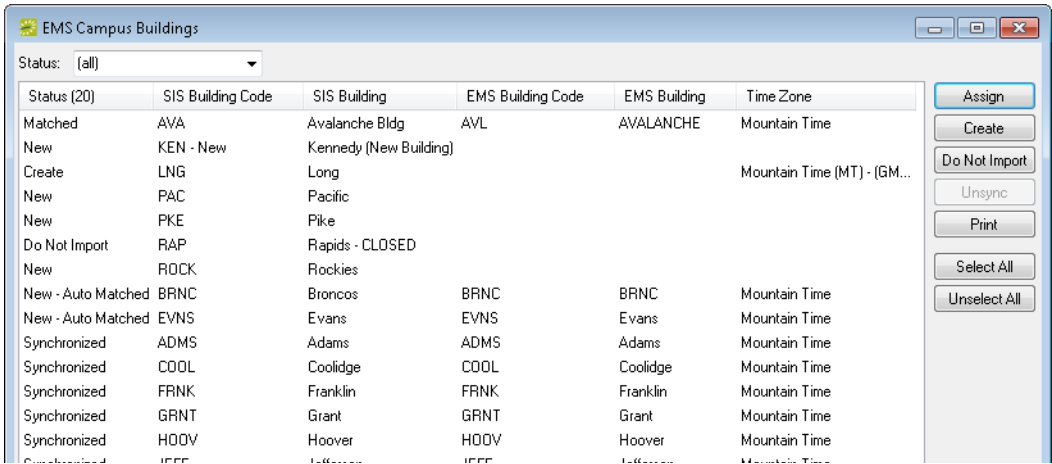
To synchronize buildings

When you synchronize buildings, the values for Building Code and Description in the SIS are used for any new buildings that are configured in your EMS database. You can edit these values if needed in EMS. (See "Configuring Buildings" on page 91.)

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Buildings.

    The EMS Campus Building window opens.

Figure 1-4: EMS Campus Buildings window

2. Set the status of the imported buildings (New - Auto Matched, Matched, Create, or Do Not Import) as described in "Facility data synchronization" on page 464.

    A window opens that requires you to select a time zone for the referenced buildings.

3. Select the correct time zone, and then click Close to return to the EMS Campus Buildings window.

4. Click Process.

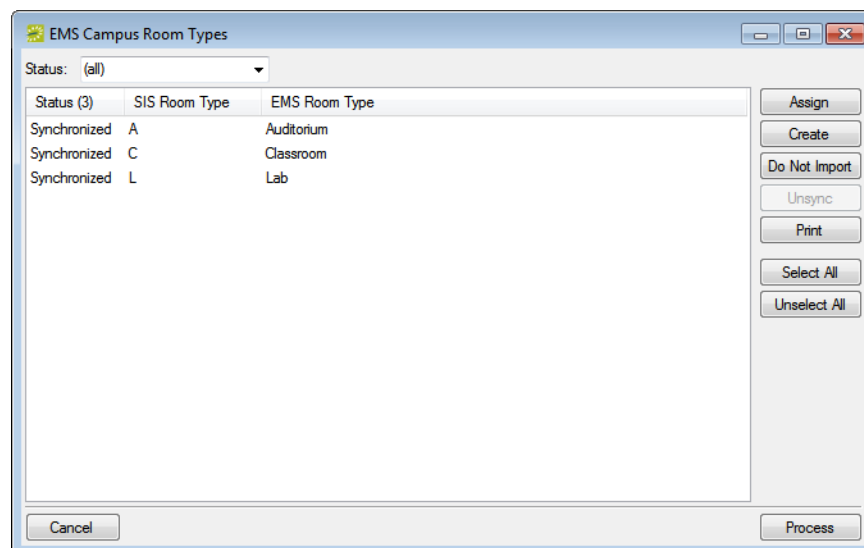   A message opens indicating that the buildings were successfully processed.

5. Click OK to close the message and return to the EMS Campus Buildings window.

6. Click Cancel or Close (x) to close the window.

To synchronize room types

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Room Types.

   The EMS Campus Room Types window opens.

Figure 1-5: EMS Campus Room Types window

2. Set the status of the imported room types (New - Auto Matched, Matched, Create, or Do Not Import) as described in "Facility data synchronization" on page 464.

3. Click Process.

   A message opens indicating that the room types were successfully processed.

4. Click OK to close the message and return to the EMS Campus Room Types window.

5. Click Cancel or Close (x) to close the window.

After you have synchronized the room types, you can edit the names as needed. See "Configuring Room Types" on page 89.
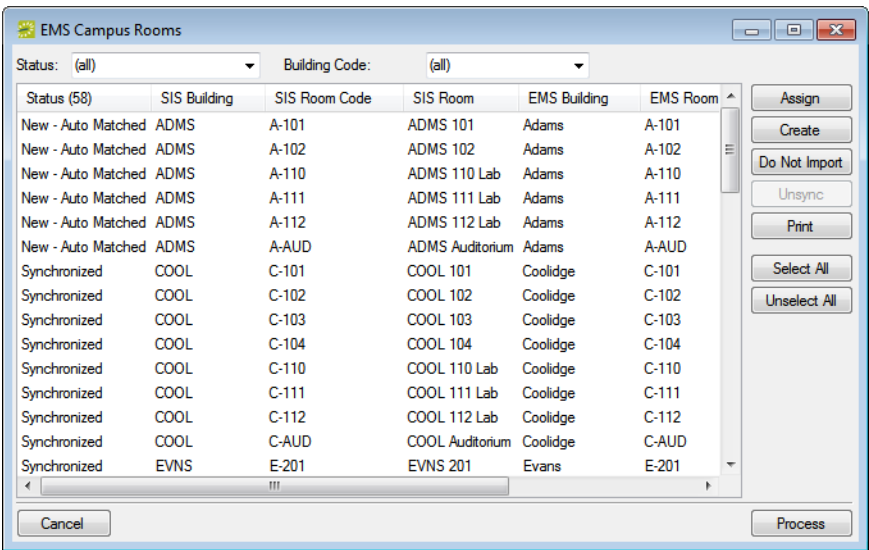
To synchronize rooms

Before you can synchronize room data, at least one setup type must be configured in your EMS database (for example, academic setup), or the synchronization process cannot correctly import the room capacity. To configure a setup type, or confirm that one already has been configured in your EMS database, see "Configuring Setup Types" on page 87. After you have configured or confirmed this setup type, set the value for the following EMS system parameter (Area: Campus, Description: Default Setup Type) to this setup type. See "Editing System Parameters" on page 311.

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Synchronize Rooms.

    The EMS Campus Rooms window opens.

Figure 1-6: EMS Campus Rooms window

2. Set the status of the imported rooms (New - Auto Matched, Matched, Create, or Do Not Import) as described in "Facility data synchronization" on page 464.

3. Click Process.

    A message opens indicating that the rooms were successfully processed.

4. Click OK to close the message and return to the EMS Campus Rooms window.

5. Click Cancel or Close (x) to close the window.

After you synchronize the rooms, you can edit the names as needed. See "To configure one room at a time" on page 110.

Configuring Domains

A *domain* is a level of organization within an institution that defines scheduling responsibility. Functions such as synchronizing, optimizing, and running reports are carried out on a per domain basis. When you configure your domain, you must identify the subjects that are offered in the domain and you must also specify the rooms that are controlled by the domain. The subjects that are defined within a domain determine the courses listed for the domain. The rooms that are defined within a domain determine all spaces that are potentially scheduled by the courses. Subjects can belong to only one domain. Rooms can belong to multiple domains.

> *The term "domain" is controlled by an EMS system parameter (Campus: Domain Title Singular and Campus: Domain Title Plural), and it is often changed to Campus or School to better describe how course scheduling is divided. See "Editing System Parameters" on page 311.*

To configure a domain

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Domains.

   The Domains window opens. This window lists all the domains that are currently configured in your EMS database.

Figure 1-7: Domains window
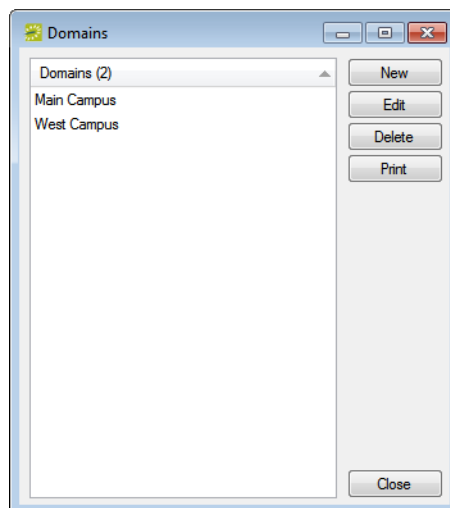
2. Click New.

The Domain dialog box opens. The Domain tab is the active tab.

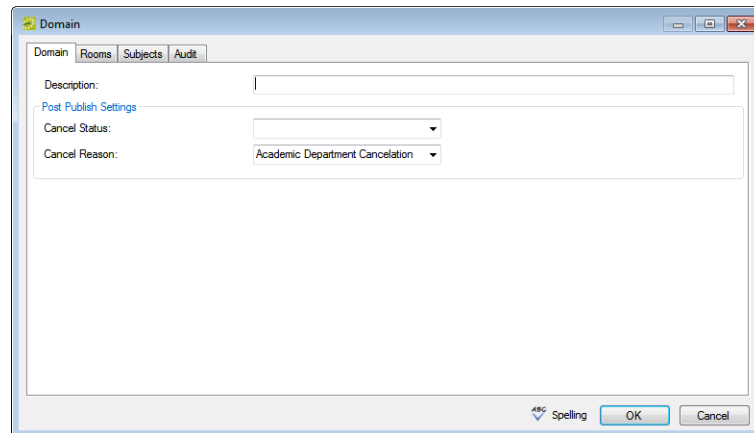*Figure 1-8: Domain dialog box, Domain tab*

3. In the Description field, enter a name or description for the new domain.

The description can be a maximum of 50 characters, including spaces.

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4. On the Cancel Status dropdown list, select the status that is to be used for canceling the room bookings in EMS when a course date is canceled in the SIS after publishing.

5. On the Cancel Reason dropdown list, select the reason that is to be used for cancellations after publishing.

6. Open the Rooms tab, and optionally do one or both of the following:

   • On the Building dropdown list, select (all) buildings, or select a specific building.

   • On the Room type dropdown list, leave the value set to (all), or select a specific room type.

   All rooms that meet your search criteria are displayed in the Available list.

7. On the Available list, select the room, or CTRL-click to select the multiple rooms that are controlled by the campus, and then click the Move (>) button to move the selected rooms to the Selected list.

8. Open the Subjects tab, and on the Available list, select the subject, or CTRL-click to select the multiple subjects that are offered by the campus, and then click the Move (>) button to move the selected subjects to the Selected list.

9. Optionally, click Spelling to spell check the domain before you save it.

10. Click OK.

   The Campus dialog box closes. You return to the Domains window the newly configured domain automatically selected.

Configuring Academic Units

An *academic unit* is a level of organization within an institution that defines responsibility for making schedule requests for a portion of a domain. Academic units are used when assigning permissions to academic users and when filtering reports. When you configure your academic units, you must specify the event type that is to be used when you publish your courses in EMS, the group for which the course reservation is to be made, the rooms that the units control, and the subjects that are associated with the units. The rooms that are defined within an academic unit give the unit the ability to require these spaces during optimization. The subjects that are defined within an academic unit determine the courses that are listed when filtering by the unit. Both subjects and rooms can belong to more than one academic unit.

> *The term "domain" is controlled by an EMS system parameter (Campus: Academic Unit Title Singular and Campus: Academic Unit Title Plural), and typically, it is changed to Department or Division to better describe how course scheduling requests are divided. See "Editing System Parameters" on page 311.*

To configure academic units

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Academic Units.

   The Academic Units window opens. This window lists the units that are associated with a specific domain.

Figure 1-9: Academic Units window
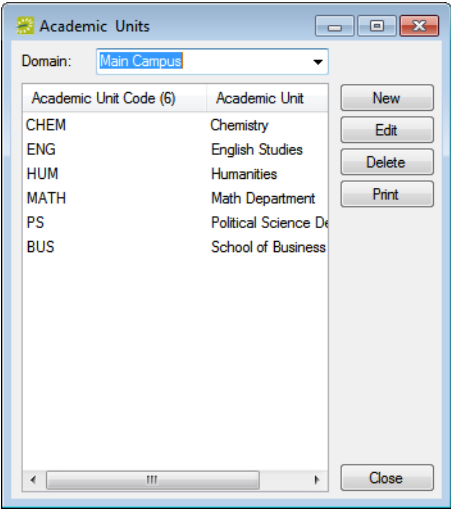
2. On the Domain dropdown list, select the domain for which you are configuring the units, and then click New.

    The Academic Unit dialog box opens. The Academic Unit tab is the active tab.

Figure 1-10: Academic Unit dialog box, Academic Unit tab

3. Enter the information for the new academic unit.

Option	Description
Academic Unit Code	Required field. Abbreviated text that conveys the unit name or description. For example, if a unit is named Department of Life Science, then a code for the unit could be LIFESCI. **Note:** The code can be a maximum of 10 characters, including spaces.
Academic Unit	Required field. The name of the unit. **Note:** The name can be a maximum of 30 characters, including spaces.
Domain	The domain with which the units are associated. **Note:** The value that is displayed here is the value that you selected in Step 2 but you can select a different value if needed.
Building Preference	You can leave the building preference set to the default value of (no preference), or you can select a specific building, area, or view. If you select a specific building, area, or view, then this specific building, area, or view is set to the default value for all courses that are held in this academic unit during Set Preferences mode, but a user can select a different value if needed. If you select Required, then the specific building, area, or view is the only value that is allowed for all courses that are held in this academic unit during Set Preference modes.

Option	Description
Event Type	The event type that is to be used for the room bookings when publishing your courses in EMS for the unit.
	Note: You can also specify the event type at the course type level. The event type specified here is used if you choose not to associate course types with event types. See "Configuring Course Types" on page 481.
Virtual	
Web User Web Process Template	Optionally, you can select a web user for this academic unit and a default web process template. After the term is published, this web user will see the courses that are associated with this academic unit in the View My Requests section of VEMS. To select a web user, click the Search icon 🔍 to open the Web Users dialog box and search from a list of registered web users. • You can search by User Name or Email Address. • To search a list of all available web users, leave the Search field in the Web Users dialog box blank, and then click Display. • To search for a specific web user, enter a search string in the Search field, and then click Display. **Note:** The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of **bob** returns **bob**.worth@dea.com but not dbobbett@dea.com. To return these fields to their default values at any time, click Reset.

4. Open the Rooms tab, and optionally do one or both of the following:

    • On the Building dropdown list, select (all) buildings, or select a specific building.

    • On the Room type dropdown list, leave the value set to (all), or select a specific room type.

    All rooms that meet your search criteria are displayed in the Available list.

5. On the Available list, select the room, or CTRL-click to select the multiple rooms to which the academic unit should have access, and then click the Move (>) button to move the selected rooms to the Selected list.

6. Open the Subjects tab, and on the Available list, select the subject, or CTRL-click to select the multiple subjects that are associated with the academic unit's schedule, and then click the Move (>) button to move the selected subjects to the Selected list.

    The Academic Unit dialog box closes. You return to the Academic Units window the newly configured academic unit automatically selected.
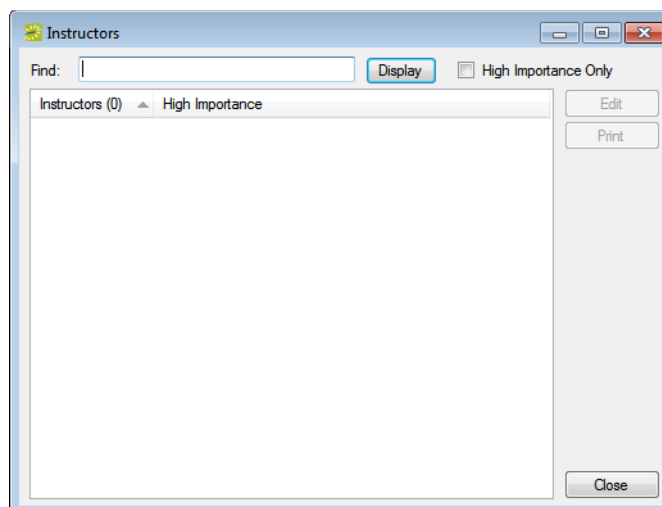
Configuring Instructors

When you configure the instructors for your courses, you have the option of designating an instructor as one of "High Importance."

To configure instructors

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Instructors.

   The EMS Campus Instructors window opens.

   Figure 1-11: EMS Campus Instructors window

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

   • To display a list of all your synchronized instructors, click Display.

   • To filter the list by instructor name (last name, then first name), in the Find field, enter a search string.

   • To filter the list by instructor status, select High Importance Only.

   *The search string 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, a search string of **Scott** returns **Scott**, Todd, but not Bowman, Scott.*

   The optional "High Importance" designation is used during optimization. Courses that are taught by instructors with this designation have the potential to be given room preference priority.

3. Select the instructor whom you are configuring, and then click Edit.

The Instructor dialog box opens. The Instructor field displays the name of the selected instructor and you cannot edit this value.

Figure 1-12: Instructor dialog box
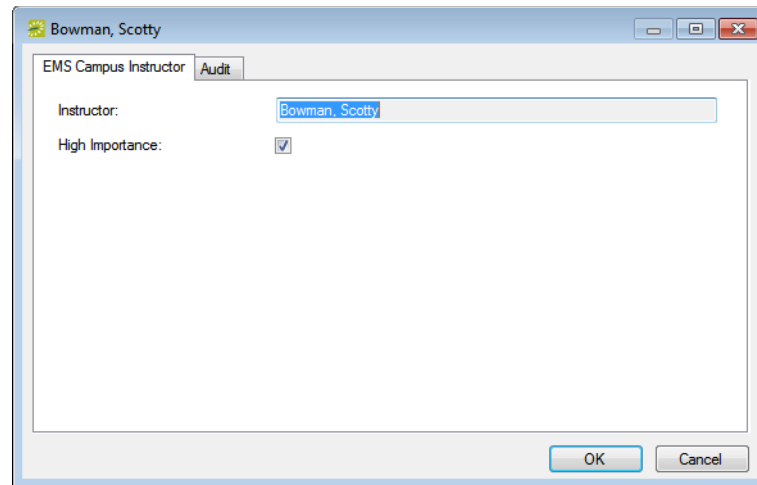
4. Select or clear the High Importance option for the instructor as appropriate, and then click OK.

The Instructor dialog box closes. You return to the EMS Campus Instructors window with the newly configured instructor automatically selected.

Configuring the Primary Academic Unit for a Subject

Typically, a subject is associated with a single academic unit; however, there might be times when you must assign a subject to multiple academic units, or departments. For example, you might need to assign a History class to a department in the College of Arts and Sciences and to a department in the College of Liberal Arts. In this case, you must configure a *primary* academic unit for the subject. A primary academic unit for a subject ensures the following:

- When EMS assigns a building preference to a course that belongs to a shared subject, it uses the building preference for the primary academic unit.

- When EMS publishes a course that belongs to a shared subject, it uses the Group, Event Type, and Reservation Source for the primary academic unit.

- When a course that belongs to a shared subject is displayed in the Navigator or Course Navigator, the primary academic unit for the course is displayed on the Course Info tab.

To configure a primary academic unit for a subject

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Subjects.

   The Subjects window opens. This window lists all the subjects that are currently configured in your EMS database for the indicated domain.

Figure 1: Subjects window
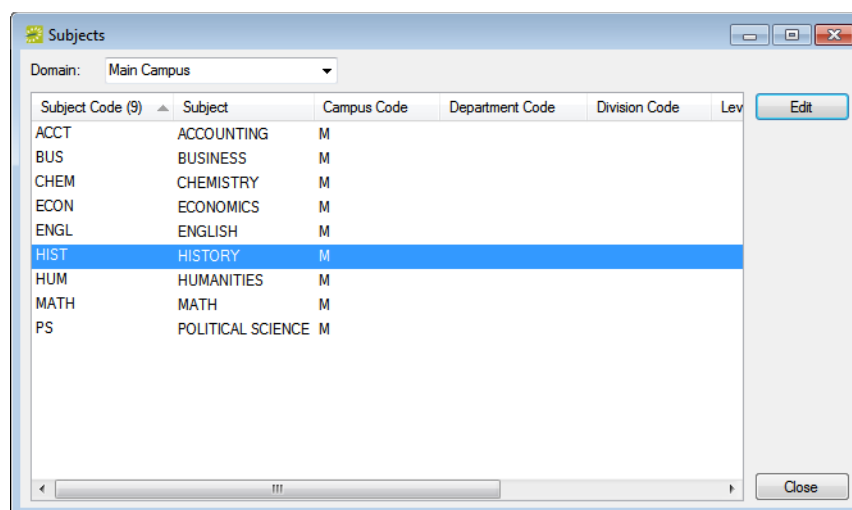
2. On the Domain dropdown list, select the domain for which you are configuring the subject, select the appropriate subject, and then click Edit.
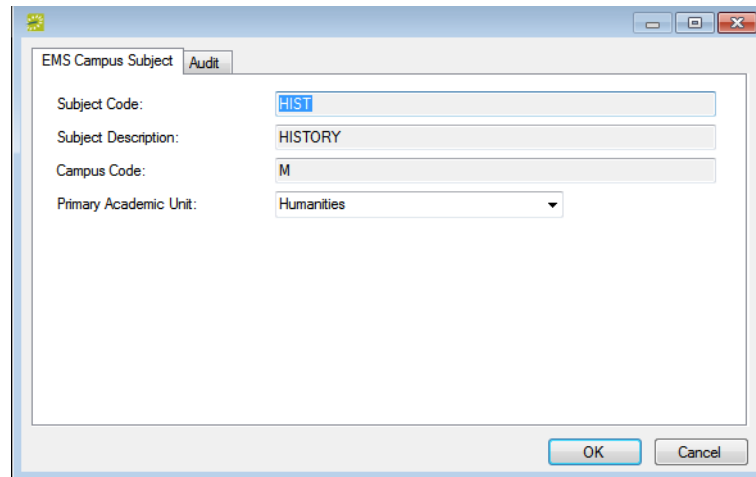
   The Subject dialog box opens. This dialog box lists the code and description for the selected subject and the code for the selected domain.

   This information was imported from your SIS and you cannot edit it.

Figure 1-14: Subject dialog box

3. Select the primary academic unit for the subject. (The default value is None.)

4. Click OK.

   The Subject dialog box closes. You return to the Subjects window with the newly configured subject automatically selected.

Configuring Course Types

When you configure your course types, you have the option of assigning an event type at the course type level. If you do not select an event type at the course type level, then the event type that you selected at the academic unit level will be assigned to room bookings that are created for courses scheduled in EMS.
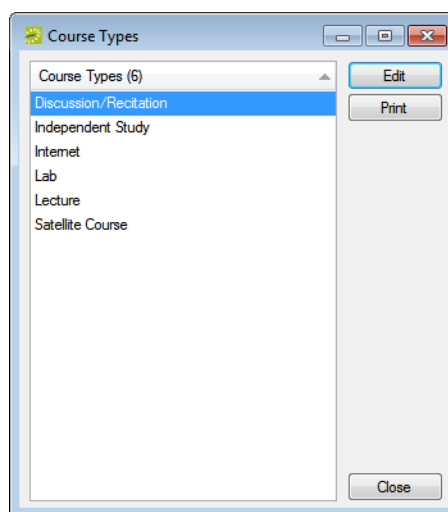
For information about event types at the academic unit level, see "Configuring Academic Units" on page 474.

To configure course types

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Course Types.

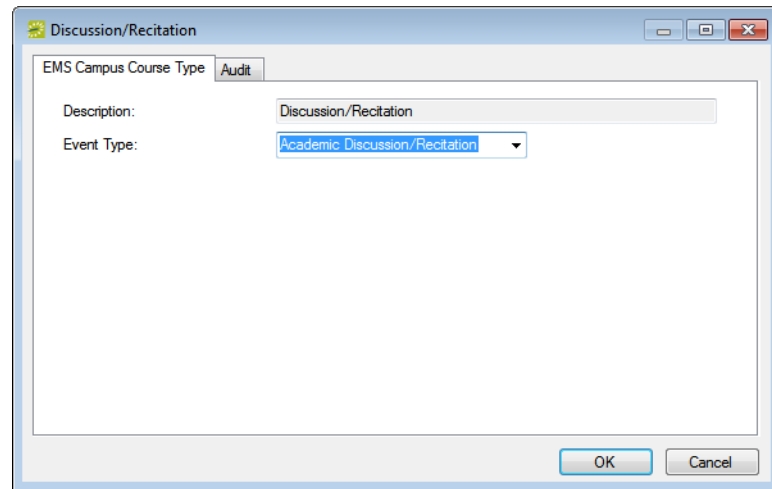   The Course Types window opens. This window lists all your synchronized course types.

Figure 1-15: Course Types window

2. Select the course type that you are configuring, and then click Edit.

   The Course Type dialog box opens. The Description field displays the description for the selected course type, and you cannot edit this value. See Figure 1-16 on page 482.

Figure 1-16: Course Type dialog box

3. On the Event Type dropdown list, select the event type for the course type, and then click OK.

    The Course Type dialog box closes. You return to the Course Types window with the newly configured course type automatically selected.

    If the appropriate event type is not available, you can configure it. See "Configuring Event Types" on page 43.

Configuring Course Types/Room Types Matches

When you configure course types/room types matches, you are indicating what room types are appropriate for what course types. For example, a laboratory room type is appropriate for a laboratory class, but not for a general lecture class. The matches that you configure are used for the optimization process. When you are configuring course type/room type matches, you can approach it from either end—that is, you can select a specific course type and then select the room types that are appropriate for the course type, or you can select a specific room type and then select the course types that are appropriate for the room type.

## To configure course types/room types matches

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Match Course Types/Rooms Types.

   The Match Course Types/Room Types dialog box opens. By default, Course Type is selected and all the active room types that are currently configured in your EMS database are displayed in the Room Type list.

   If the appropriate room type is not available, you can configure it. See "Configuring Room Types" on page 89.

   Figure 1-17: Match Course Types/Room Types dialog box
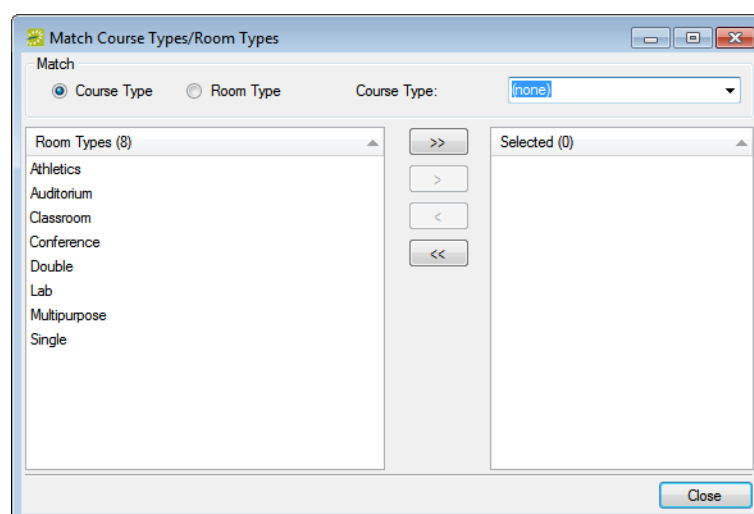
2. Do one of the following:

- To match a course type to one or more room types:

    - Select the course type on the Course Type dropdown list.

    - On the Room Types list, select the room type, or CTRL-click to select the multiple rooms types that are appropriate for the selected course type.

    - Click the Move (>) button to move the selected room types to the Selected list. For example, if you select Discussion/Recitation for the Course Type, then appropriate room types could be Classroom or Conference Room.

- To match a room type to one or more course types:

    - Click Room Type, and on the Room Type dropdown list, select the room type.

    - On the Course Types list, select the course type, or CTRL-click to select the multiple course types that are appropriate for the selected room type.

    - Click the Move (>) button to move the selected course types to the Selected list. For example, if you select Classroom as the room type, then appropriate course types could be Discussion/Recitation, Lecture, or Independent Study.

3. Click Close.

Working with Time Block Templates

A *time block template* is an aggregate of individual, unique meeting patterns for a course, for example, MWF from 2:00 to 2:50 pm, TR from 1:30 to 2:50 pm, and M from 1 to 3:50 pm. You can use time block templates to limit the meeting patterns that are available during Define & Edit mode or Dual mode, to add weight to courses that comply with the template during optimization, and in academic reporting. You can manually configure time block templates, or if time block patterns from a previously configured term meet your needs, then you can import these time patterns and make a new template. During the configuration of time block patterns, or after importing time block patterns, if any of these patterns are the ones that are the most frequently requested and/or used for courses, then you can designate these patterns as *prime time*.

To work with time block templates

1. On the EMS Campus menu bar, click Academic Planning > Configuration > Time Block Templates.

   The Time Block Templates window opens. This window lists all the time block templates that are currently configured in your EMS database. The window also shows the total number of class meetings possible for each template according to the time block (day and time) pattern for the template.

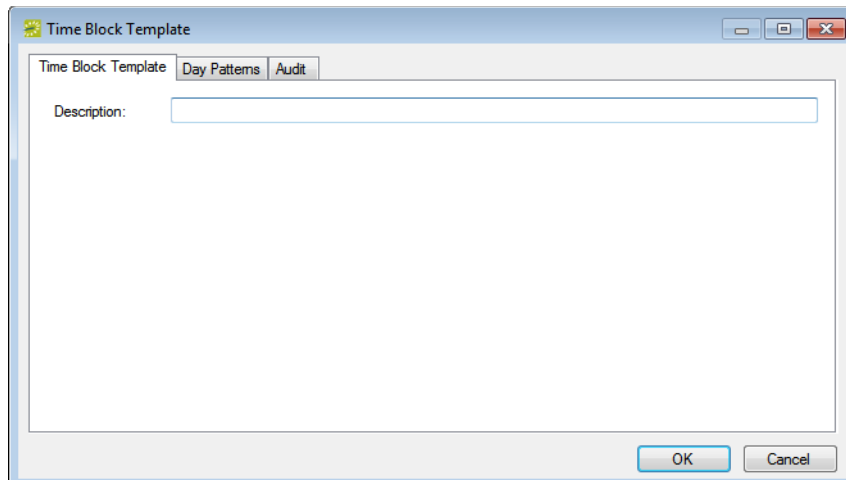*Figure 1-18: Time Block Templates window*
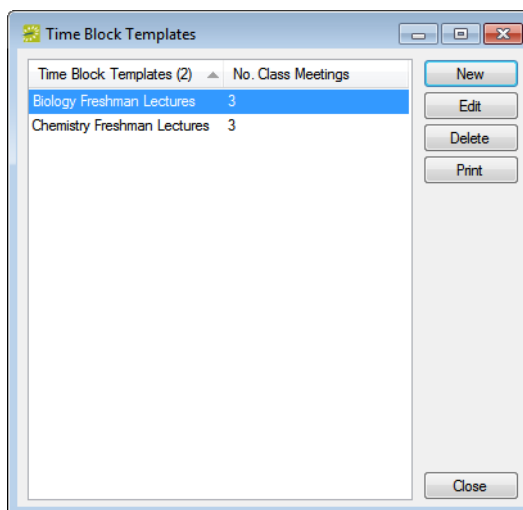
2. Click New.

The Time Block Template dialog box opens. The Time Block Template tab is the active tab.

Figure 1-19: Time Block Template dialog box, Time Block Template tab

3. In the Description field, enter a name or description for the new time block template.

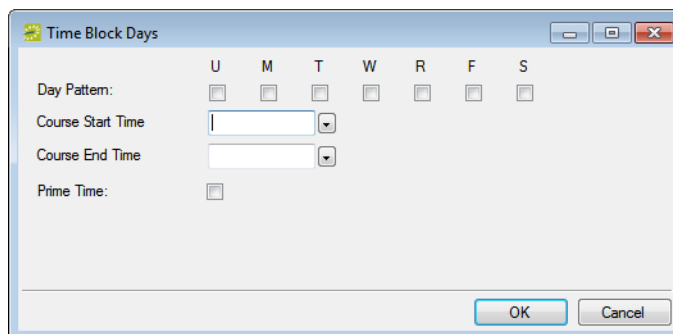*The description can be a maximum of 50 characters, including spaces.*

4. Continue to one of the following:

   • "To configure time block templates" below.

   • "To import time block patterns for a template" on page 488.

To configure time block templates

1. Open the Day Patterns tab, and then on the tab, click New.

   The Time Block Days dialog box opens.

Figure 1-20: Time Block Days dialog box

2. On the Time Block Days dialog box, select the day pattern for the course, and then select a start time and an end time.

3. Optionally, if the day and time pattern that you are configuring is one that is the most commonly requested and/or used for courses, then select Prime Time.

> *As described here, you can individually specify a day and time pattern as Prime Time, or after you configure multiple patterns for a course, you can select them on the Day Patterns tab and mark them all as Prime Time in a single step. See Step 6.*

4. Click OK.

   The Time Block Days dialog box closes. You return to the Day Patterns tab with the newly configured pattern automatically selected.

Figure 1-21: Time Block Template dialog box, Day Patterns tab
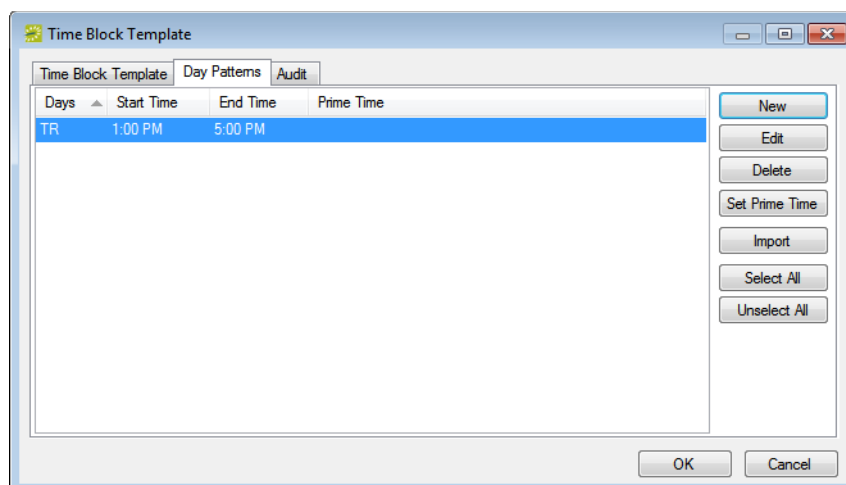
5. Repeat Step 1 through Step 4 until you have configured all the needed time block patterns.

6. Optionally, if multiple patterns that are displayed on the Day Patterns tab are ones that are the most commonly requested and/or used for courses, and you want to set these courses as Prime Time, go to Step 7; otherwise, go to Step 9.

7. CTRL-click to select these patterns, and then select Set Prime Time.

   A message opens, asking you if it is OK to set the selected days as Prime Time.

8. Click OK.

   The message closes and you return to the Day Patterns tab.

9. Click OK.

   The Time Block Template dialog box closes. You return to the Time Block Templates window with the newly configured time block template automatically selected.

487

To import time block patterns for a template

1. Open the Day Patterns tab, and on the tab, click Import.

    The Term Picker dialog box opens. This dialog box lists all active terms by domain.

*Figure 1-22: Term Picker dialog box*
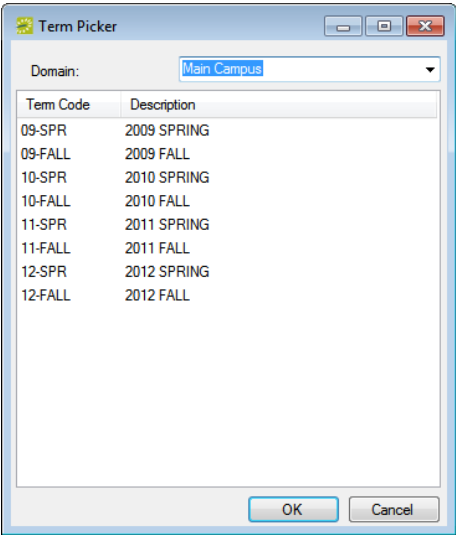
2. On the Domain dropdown list, select the appropriate domain, select the term for the domain that contains the time block patterns that you are importing, and then click OK.

    A message opens indicating that the import was successful.

3. Click OK to close the message and return to the Day Patterns tab.

    The time block template is created. All the imported time patterns for the template are displayed on the tab.

Figure 1-23: Time Block Template dialog box, Day Patterns tab
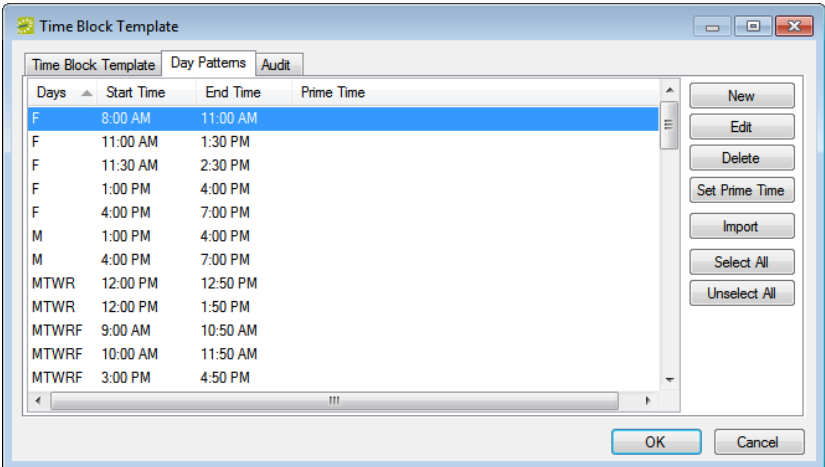
4. Optionally, do one or both of the following:

    •   If any of the patterns that are displayed on the Day Patterns tab are ones that are not needed for the template that you configuring (for example, a non-standard pattern), and you want to delete these patterns, then do the following:

        •   Select the pattern, or CTRL-click to select multiple patterns, and then click Delete.

            A message opens asking you if it is OK to delete the selected patterns.

        •   Click Yes to delete the selected patterns.

            The message closes and you remain on the Day Patterns tab.

    •   If any of the patterns that are displayed on the Day Patterns tab are ones that are the most commonly requested and/or used for courses, and you want to set these courses as Prime Time, then do the following:

        •   Select the pattern, or CTRL-click to select multiple patterns, and then click Set Prime Time.

            A message opens, asking you if it is OK to set the selected days as Prime Time.

        •   Click Yes to set the selected patterns as Prime Time.

            The message closes and you remain on the Day Patterns tab.

5. Click OK.

    The Time Block Template dialog box closes. You return to the Time Block Templates window with the newly configured time block template automatically selected.