II (S /C) Click on the Resources tab.

A. In the Locations section

1. Click on the New Location link

- **a.** Notice that only the Name field is required but the product demonstrates better if all fields are filled in on this form.
- **b.** This is a self-explanatory form. Enter the information for a location.
- **c.** Use the Search feature to add a Contact by clicking on the **Search** action button.
  - 1) Enter the wildcard character, "*", in the User ID field
  - 2) Click **Search**
    - a) Select a user from the list.
    - b) Click **OK** when finished to return to the previous form.
- **d.** Click **Save**
- **e.** Click **Done** at the confirmation screen to return to the **Resources** tab.

2. Click on the Manage Location link.

- **a.** The Search tool loads.
  - 1) Use the wildcard character **"*"** in the Name field since it is the only required field when creating a Location and guaranteed to return a result.
  - 2) Select a Location from the search results.
  - 3) Click **Continue**.
- **b.** The Location view loads.
  - 1) Notice that you have an Access Control tab here that can be used to specify which users or groups can access this Location.
  - 2) Click the **Edit** action button to modify the Location Details.
    - a) The Location fields can now be modified.
    - b) Make a couple of changes or add data to any unfilled fields.
  - 3) Click **Save**
- **c.** Click **Done** at the confirmation screen to return to the **Resources** tab.

B. In the Rooms Section

1. Click on the New Room link

- **a.** The product will demo better if you fill in all the fields.
  - 1) Enter a Name
  - 2) Use the **Find Location** action button to specify a location
  - 3) Specify the Room type using the drop down list.
  - 4) Enter a Capacity
  - 5) Enter the number of Computers available in the room
  - 6) Click **Add** to specify the Available Equipment for this room.
    - a) A popup window will appear.
    - b) Enter the equipment name in the open text field. (Example: "Overhead projector"
    - c) Click **OK**
    - d) Repeat if desired to add as many resources as are available for this room

7) Use the **Find User** action button to search for a contact, or enter the name of an external person.
   a) If you added a user from your LDAP, then the next two fields may automatically populate based on the data stored in that user directory.
   b) Otherwise enter an email address and phone number.
8) Add comments in the open text field. This could be used to specify unique characteristics associated with this room such as handicap accessibility.

b. Click **Save** when finished.

c. Click **Done** at the confirmation screen to return to the Resources tab.

2. Click on the Manage Room link

a. Search for a Room
1) Use the dropdown menu to select the Room Type as **Classroom**.
2) Click
3) Select a Room from the search results
4) Click **Continue**.

b. The View Room screen loads.

c. There are four tabs here:
1) **Room Details**
2) **Access Control**
3) **Calendar**
4) **Reserve a Room**

d. In the default tab, Room Details, there is an **Edit** button to modify the Room Details in the same way you were able to modify the Location in the previous section.

e. Click on the Access Control tab
1) Notice that there is an Inherited Access Control based on the Location chosen.
2) You can **Add** additional users or groups to the ACL for this Room
3) Once a new access control has been added you can edit or delete both the Level and the Entries.

f. Click on the Reserve a Room tab.
1) Enter a Reservation Name.
2) Enter a Description
3) Accept the default fields for
   a) Start Date
   b) Start Time
   c) End Time
   d) Duration
4) Interesting point before we continue is this could be used by the Facilities manager to block off a room from use by the e-learning community when needed. For example: If a new rug is scheduled to be installed, then you may want to mark that room as unavailable for a period.
5) Click **Save** when done.

g. Click on the Calendar tab
1) You are allowed to see all calendar entries for the room you have selected by or Month (default), Week, or Day by clicking on the appropriate link in the upper right hand corner of the Calendar.
   a) In the Upper left hand corner of the Calendar there is a second navigation tool.
      i) Depending on the selection of Month, Week, or Day you will be able to use it to navigate to the previous or next section.
      ii) You can also click on the Calendar icon ☐ to select a specific date.
2) Notice that your room reservation is represented by a link – 1 Item.
   a) Click on that link to navigate to the Week view that provides a little more detail.
   b) Click on the Day link in the upper right hand corner.
      i) Notice that more detail is provided.
      ii) Select the item.
      iii) Click **Delete** to remove it.
      iv) You are returned to the Monthly Calendar view.
3) To return to the Resources Menu click on the **Resources** tab.

C. In the Vendors[1] Section

1. Click on the New Vendor[2] link.
   a. The product will demo better if you fill in all the fields
   b. This is a self-explanatory form.
      1) Fill in all the fields
      2) Click **Save** when finished.
   c. Click **Done** at the confirmation screen to return to the **Resources** tab.

2. Click on the Manage Vendors link.
   a. Search for a Vendor.
      1) We used the wildcard character "*" in the Name field since it is the only required field when creating a Vendor.
      2) Select a Vendor from the search results
      3) Click **Continue**
   b. You can **Edit** the Vendor Details, or **Delete** the Vendor
   c. Do not do either.
   d. To Return to the Resources Menu click on the **Resources** tab[3]

1 When demonstrating this feature if you believe your client will be interested in the Edit and Delete functions, then it is a good idea to have populated the items before hand so that you can demo the Add, Delete, and Edit functions efficiently.

2 Skip the New Instructor and Manage Instructors modules for now.

3 The help files define a "vendor" as a resource that provides instructors and rooms such as a department within a company, or another company such as an educational agency. But in reality a vendor could be any department or 3rd party vendor. For example the IT Department that maintains the computer equipment, or the local coffee shop that provides coffee and donuts to your morning class

D. In the Instructors Section

1. **Click on the Manage Skills link.**
   - **a.** Click **Add**.
     1) Enter a Skill Name -
     2) Enter a Description,
     3) Click **OK**.
   - **b.** Repeat previous steps to add more Skills if desired.
   - **c.** Notice that you can now Edit/Delete items.
2. **Click** Done **when finished to return to the Resources Menu.**
3. **Click on the Manage Zones link.**
   - **a.** Click **Add**.
     1) Enter a Zone Name
     2) Enter a Description
     3) Click **OK**.
   - **b.** Repeat previous steps to add more Zones if desired.
   - **c.** Notice that you can now Edit/Delete items.
   - **d.** Click **Done** when finished to return to the Resources Menu.
4. **Click on the Manage Instructor Groups link.**
   - **a.** Click **Add**.
     1) Enter an Instructor Groups Name
     2) Enter a Description
     3) Click **OK**.
   - **b.** Repeat previous steps to add more Groups if desired.
   - **c.** Notice that you can now Edit/Delete items.
   - **d.** Click **Done** when finished to return to the Resources Menu.
5. **Click on the New Instructor link.**
   - **a.** Select Instructor Type as **Internal**[4]
   - **b.** Click on **Find User**
     1) Search for an Instructor by entering the wild card character in the User ID field
     2) Click **Search**.
     3) Select a user from the result set.
     4) Click **OK** to return to the previous form.
   - **c.** Notice that the instructor's name and contact information is populated.
     1) The amount of data populated for the instructor will depend on what has been entered in the LDAP.
   - **d.** Click on the **Find Vendor** button.
     1) Enter the wild card character in the Name field
     2) Click **Search**
     3) Select a Vendor from the list
     4) Click OK to return to the previous form.
   - **e.** Select a Group from the drop down list.
   - **f.** Click **Add** to add a Skill(s) for this Instructor
     1) Select a Skill(s) from the list and click **OK**

4 By selecting your Instructor Type as Internal you can demonstrate the ability to search for users. If External is selected you will need to manually enter the field values.

- **g.** Click **Add** to add a Zone(s) for this Instructor
  1) Select a Zone(s) from the list
  2) Click **OK**
- **h.** Click **Save** when finished filling in all of the fields.
- **i.** Click **Done** at the confirmation screen to return to the Resources Menu.

6. Click on the Manage Instructor link.

- **a.** Search for an Instructor.
  1) Select an Instructor Group from the dropdown menu
  2) Click Search
  3) Select an Instructor from the search results
  4) Click **Continue**
  5) Instructor Details tab
     a) You can **Edit** the Instructor details or **Delete** the Instructor.
     b) Do neither
- **b.** Click on the Calendar tab
  1) You are allowed to see all calendar entries for the room you have selected by or Month (default), Week, or Day by clicking on the appropriate link in the upper right hand corner of the Calendar.
     a) In the Upper left hand corner of the Calendar there is a second navigation tool.
        i) Depending on the selection of Month, Week, or Day you will be able to use it to navigate to the previous or next section.
        ii) You can also click on the Calendar icon to select a specific date.
- **c.** To return to the Resources Menu click on the **Resources** tab.

End of Resources Tab