C

Managing Resources

Lesson 1 Managing Locations

Lesson 2 Managing Rooms

Lesson 3 Managing Vendors

Lesson 4 Managing Instructors

Managing Locations

Locations are buildings and campuses where course delivery occurs. A location can be a building or group of buildings which contain training rooms, conference rooms, auditoriums, or labs.

Lesson topics

This lesson presents the following topics:

- Adding a new location
- Modifying a location record

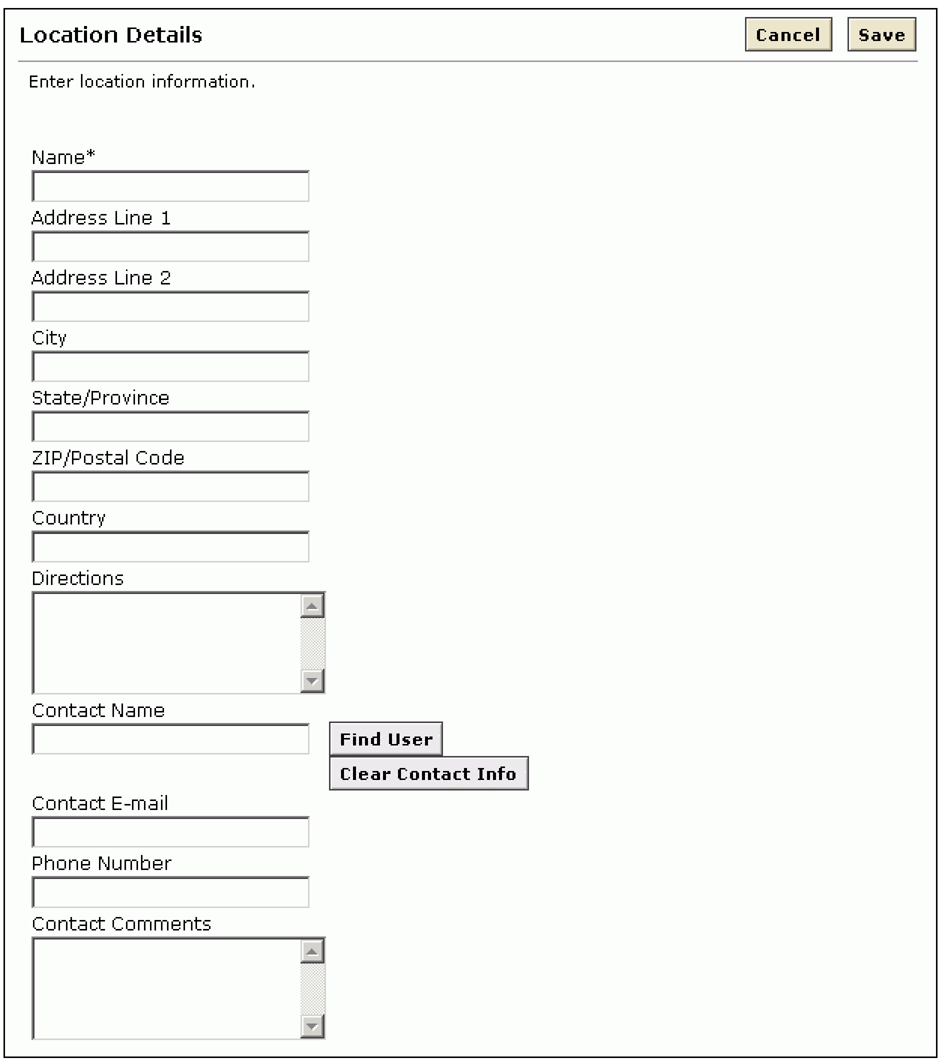
Adding a New Location

Locations are managed in the Resource module. The location is stored as a record in the LMM database. The location record minimally contains the location name and can also include the location address, directions, person who manages the space, and comments about the physical space.

Add a new location

Follow these instructions to add a new location.

1. From the **Resources** tab, click the **New Location** link.
2. Enter information into the **Location Details** form and click **Save**. The following figure shows the **Locations Details** form.



Adding a New Location...*(continued)*

Create a location (optional exercise)

Create a location record.

Modifying a Location Record

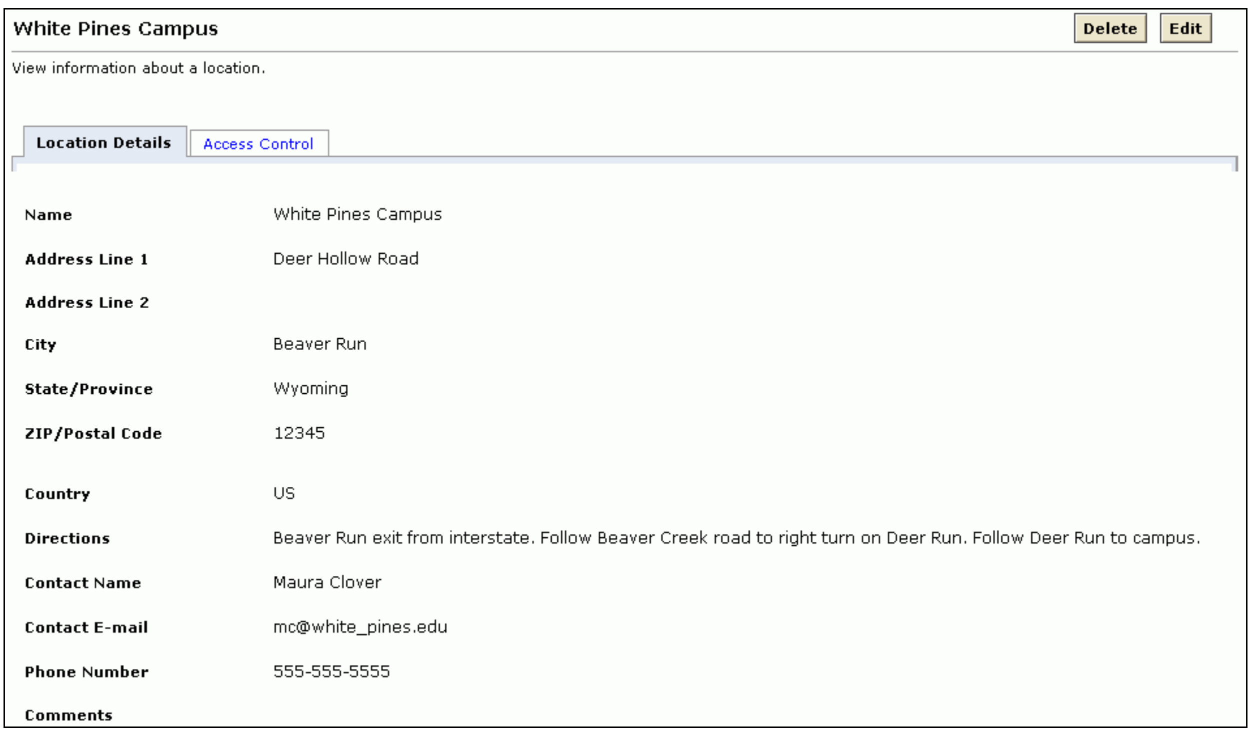
After a new location has been created, the administrator can modify the location record.

Modify a location record

Follow these instructions to modify a location record.

1. From the **Resource** tab, click the **Manage Location** link.
2. Search to and select the location. You can search the location using its name or address.
3. Click **Continue**.
4. Use the tabbed pages to edit the location details and click **Save**.

   The figure below shows an example of a location record.



Managing Rooms

Rooms are physical spaces where course delivery occurs. A room can be a training room, conference room, lab, or other space that would be used for preparation and delivery of a course. Rooms may provide students a place to complete courseware independently, for example a lab. Rooms may provide a common space for instructors and students to meet, for example, a classroom.

Lesson topics

This lesson presents the following topics:

- Adding a new room
- Modifying a room record

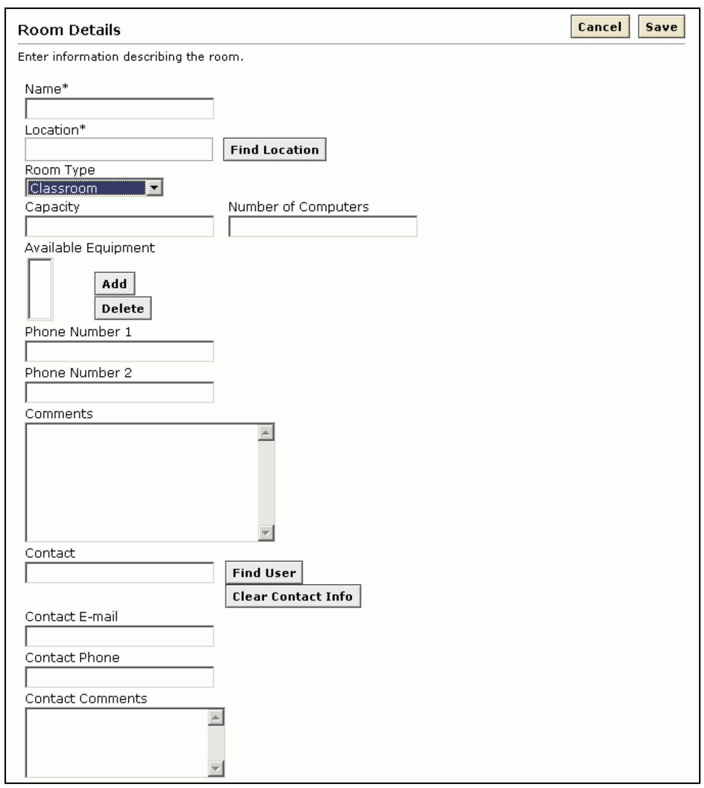
Adding a New Room

Rooms are managed in the Resource module. The room is stored as a record in the LMM database. The room record minimally contains the room name and location and can also include the room address, directions, person who manages the space, and comments about the physical space.

Add a new room

Follow these instructions to add a new room.

1. From the **Resources** tab, click the **New Room** link.
2. Enter information into the **Room Details** form and click **Save**. The following figure shows the **Room Details** form.



Tips:

- Before you begin to create room records, create a list of all the equipment that could possibly be requested. Then survey each room contact to get a list of equipment supplied in the room.
- Redistribute the survey regularly and update room records accordingly.

Adding a New Room...*(continued)*

Create a room (optional exercise)

Create additional rooms.

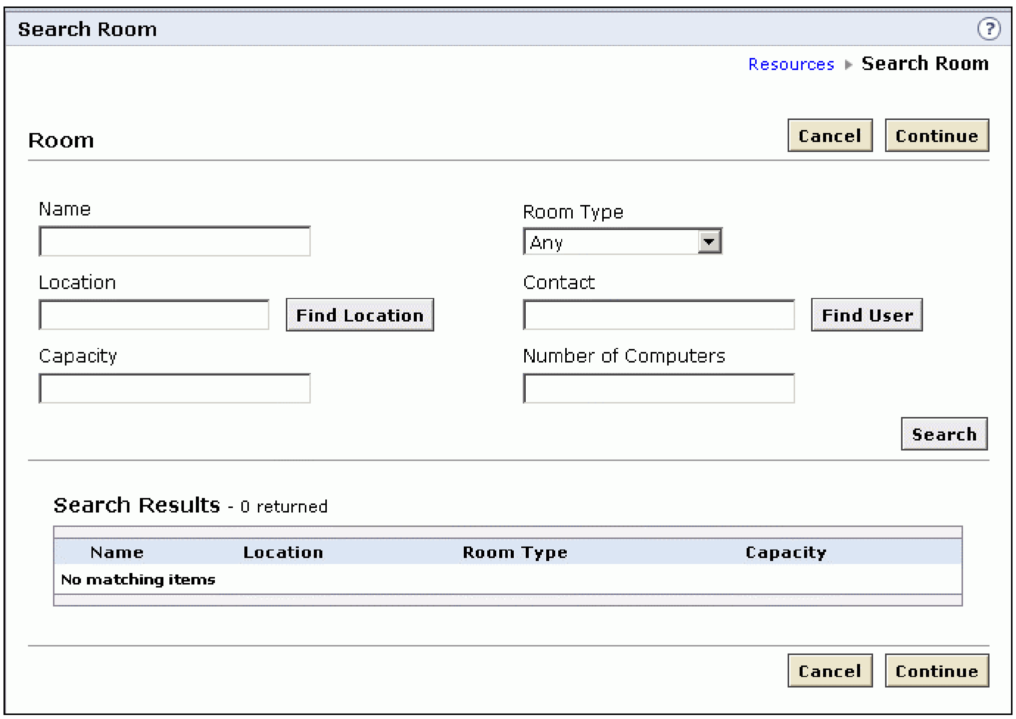
Modifying a Room Record

After a new room has been created, the administrator can modify the room record.

Modify a room record

Follow these instructions to modify a room record.

1. From the **Resources** tab, click the **Manage Room** link. The following figure shows the **Search Room** window.



2. Search to and select the room. You can search for the room using its name or address.
3. Click **Continue**.
4. Edit the **Room Details** page and click **Save**.

Managing Vendors

Vendors are organizations from which you rent, lease, hire, or purchase services or products. Vendors can be internal organizations of external companies from whom you hire resources. For example a training vendor may provide you with course developers and instructors, course materials, classroom space, and other delivery resources.

Lesson topics

This lesson presents the following topics:

- Adding a new vendor
- Modifying a vendor record

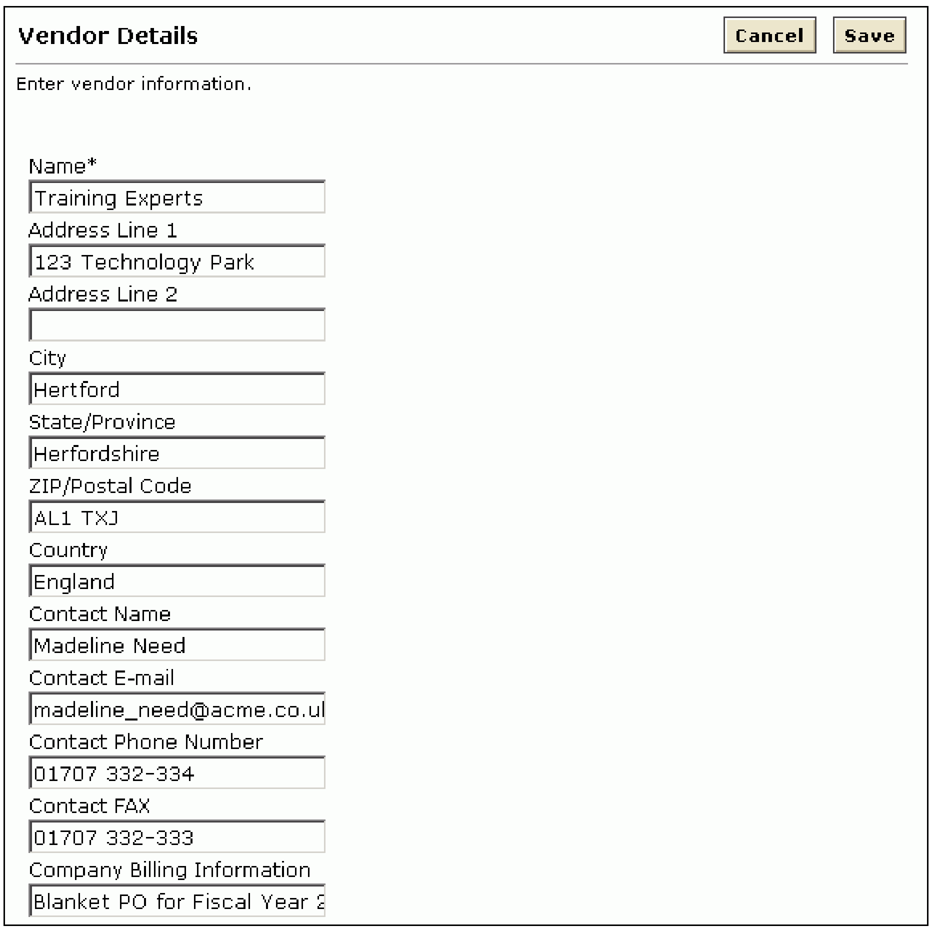
Adding a New Vendor

Adding a new vendor creates a vendor record in the LMM database. This record can be modified to update the information contained in it.

Add a new vendor

Follow these instructions to add a new vendor.

1. From the **Resources** tab, click the **New Vendor** link.
2. Enter information into the **Vendor Details** form and click **Save**. The following figure shows and example of a completed **Vendor Details** form.


Vendor Details
Cancel
Save
Enter vendor information.
Name*
Training Experts
Address Line 1
123 Technology Park
Address Line 2
City
Hertford
State/Province
Herfordshire
ZIP/Postal Code
AL1 TXJ
Country
England
Contact Name
Madeline Need
Contact E-mail
madeline_need@acme.co.ul
Contact Phone Number
01707 332-334
Contact FAX
01707 332-333
Company Billing Information
Blanket PO for Fiscal Year 2

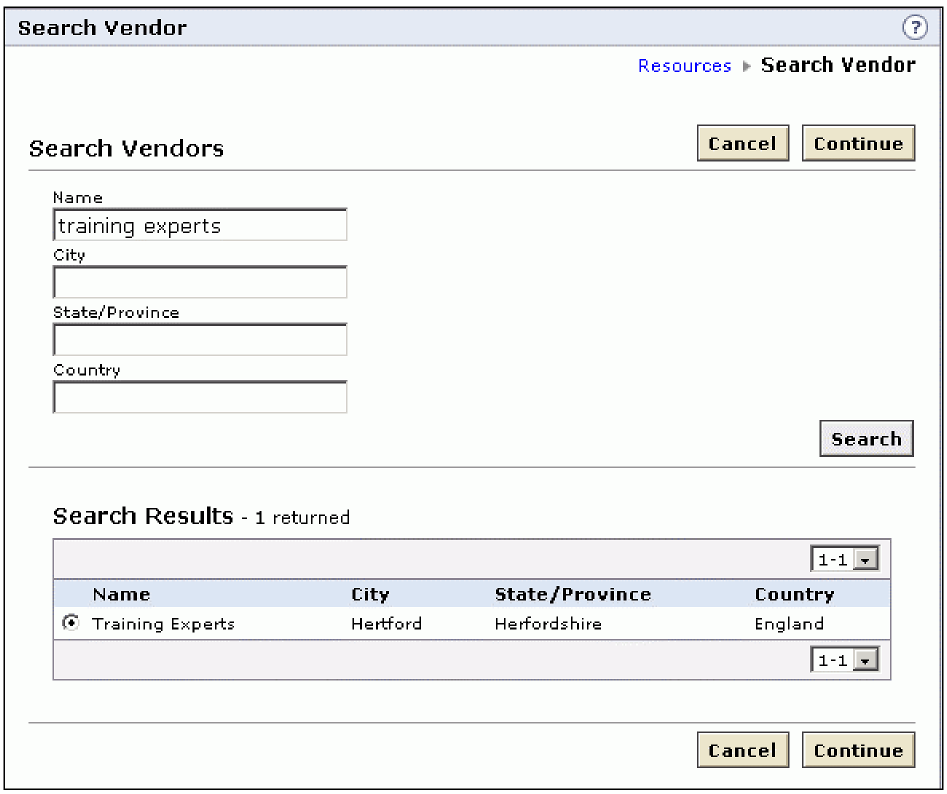
Modifying a Vendor Record

After a new vendor has been created, the administrator can modify the vendor record.

Modify a vendor record

Follow these instructions to modify a vendor record.

1. From the **Resources** tab, click the **Manage Vendors** link. The following figure shows an example of the **Search Vendor** window.



2. Search and select the vendor. You can search for the vendor using its name or address. Wildcards can also be used in a text search.
3. Click **Continue**.

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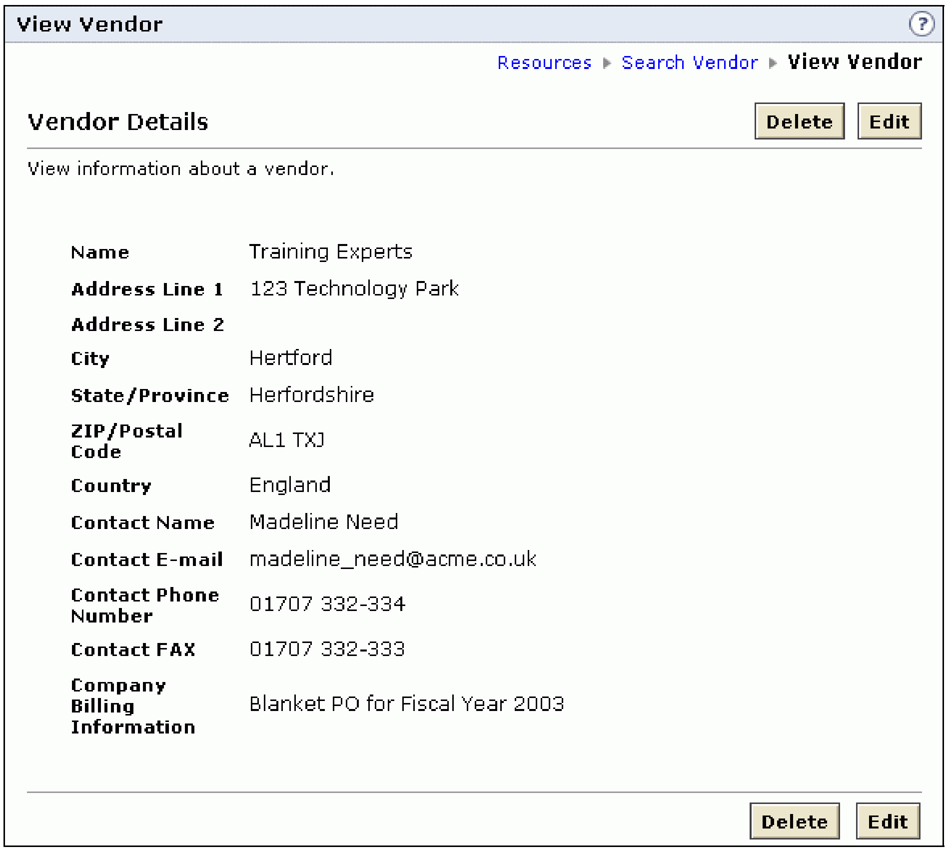
Modifying a Vendor Record...*(continued)*

Modify a vendor record…

Result: The vendor information displays as shown in the example in the following figure.


View Vendor

Resources ▸ Search Vendor ▸ View Vendor

Vendor Details

Delete Edit

View information about a vendor.

Name	Training Experts
Address Line 1	123 Technology Park
Address Line 2	
City	Hertford
State/Province	Herfordshire
ZIP/Postal Code	AL1 TXJ
Country	England
Contact Name	Madeline Need
Contact E-mail	madeline_need@acme.co.uk
Contact Phone Number	01707 332-334
Contact FAX	01707 332-333
Company Billing Information	Blanket PO for Fiscal Year 2003

Delete Edit

4. View the vendor details and click **Edit**.

   Result: The **Vendor Details** form displays.

5. Modify the **Vendor Details** form as needed and click **Save**.

Managing Instructors

Instructors are people who have the abilities, skills, and knowledge to teach one or more courses. Instructors may be employees of the organization or may be employed by a contracted vendor.

LMS provides tools for searching and selecting instructors who are qualified and available to teach a course offering.

When an instructor is assigned to teach a course, several factors are considered. The instructor must possess the skills and knowledge particular to the course. Generally, it is more cost effective to assign qualified instructors who are geographically closest to the course site. And the instructor must be available to teach the scheduled offering.

The Learning Management System allows you to create instructor groups for simpler searching and management. For example, you could create a group of instructors who speak Hausa.

This lesson presents the tasks required to define and assign the instructor base.

Lesson topics

This lesson presents the following topics:

- Identifying instructor skills
- Defining instructor zones
- Instructor groups
- Adding a new instructor
- Modifying an instructor record

Identifying Instructor Skills

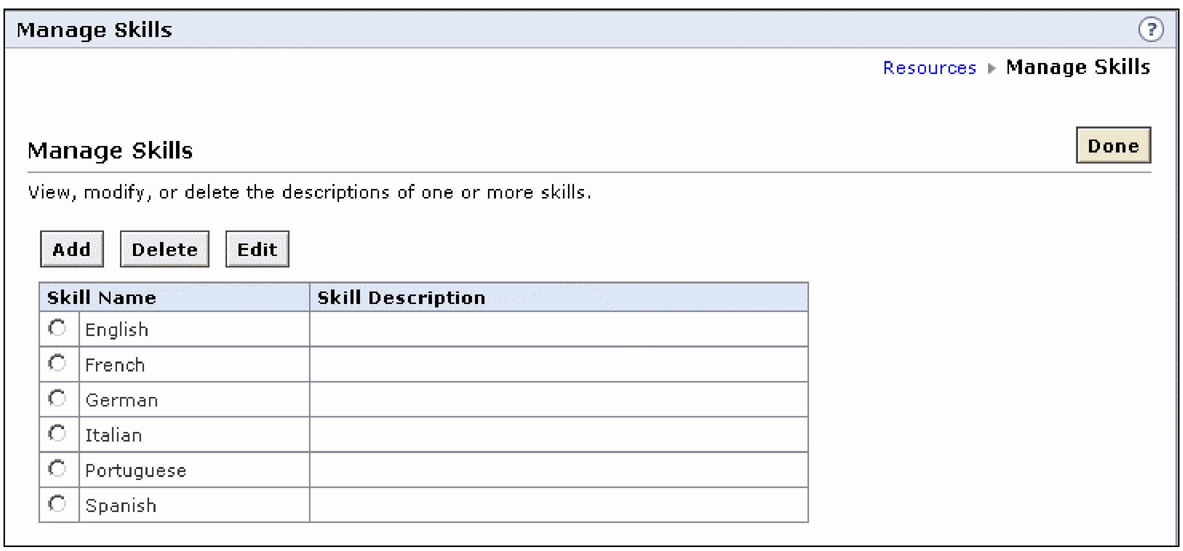
Most instructors posses a minimal level of teaching skills used to present a course. For example, some instructors are experienced in e-learning teaching and online tools. Other abilities and knowledge define an instructor and are important considerations when assigning course responsibilities.

LMS provides the structure to define a multitude of skills, abilities, and knowledge that can be used to define an instructor. When the instructor record is created, the relevant skills are selected and stored in the record. However, before you can select a skill, you must define the skill and create the skill record.

Identify an instructor skill

Follow these instructions to identify an instructor skill.

1. From the **Resources** tab, click the **Manage Skills** link. The following figure shows an example of the **Manage Skills** window. It shows some language skills that have already been added by the administrator.



2. Click **Add**.

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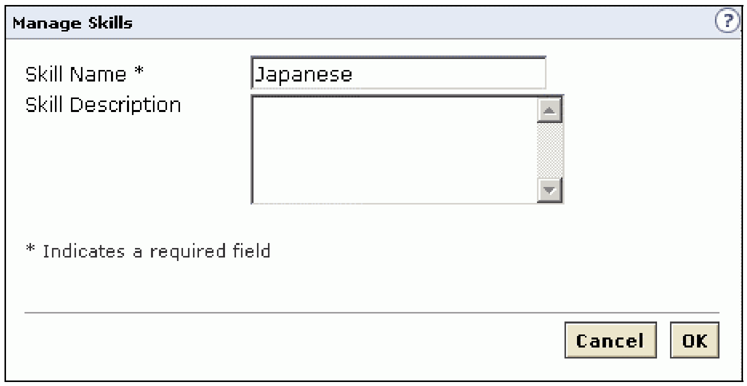
Identifying Instructor Skills...*(continued)*

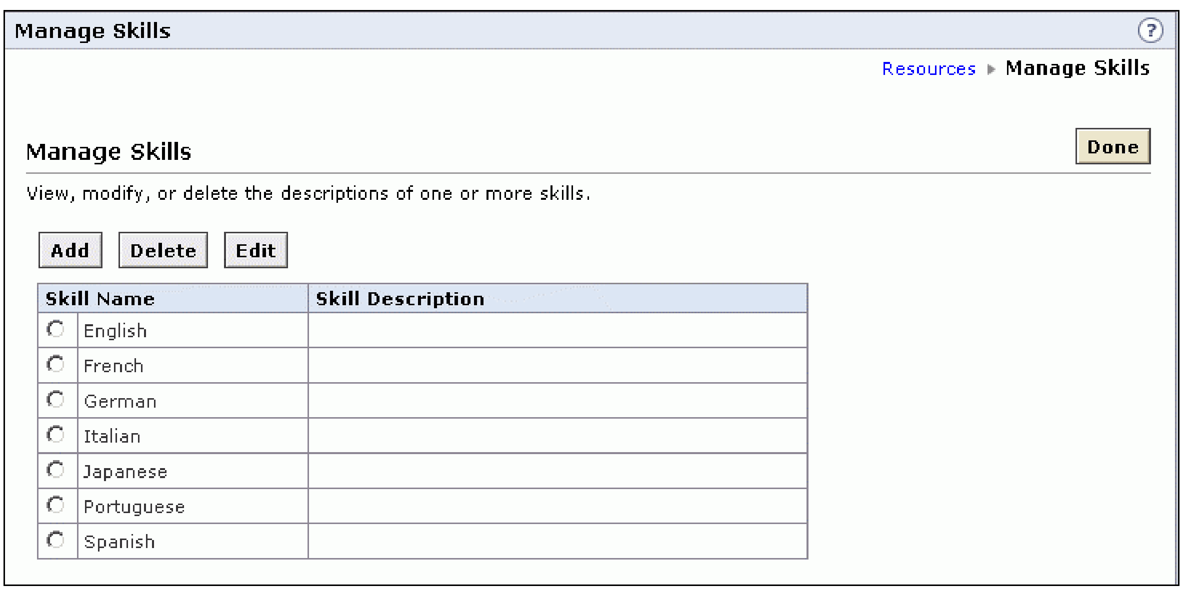
Identify an instructor skill…

The following figure shows the form that displays.



3. Enter a **Skill Name** and, optionally, a **Skill Description** and click **OK**.

   Result: The new skill displays in the **Manage Skills** window as shown in the figure below.



4. Click **Done**.
5. To edit the skill, select the skill and click **Edit**.

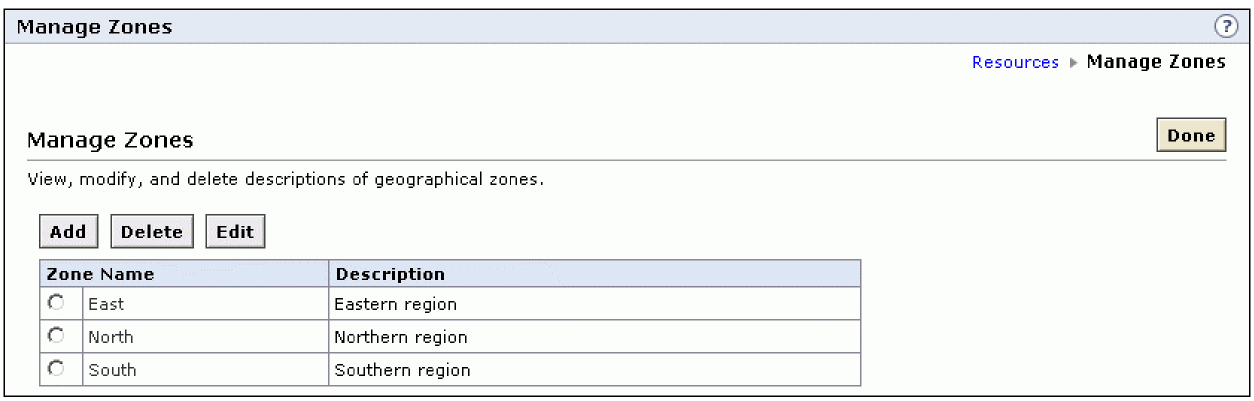
Defining Instructor Zones

Zones are geographic areas in which instructors can be assigned. In general it is more cost-effective to assign instructors to teach courses in their own zone because it requires less travel. For e-learning course delivery, where travel is not an issue, zones are less important. When you create an instructor record, you can assign multiple zones to the instructor.

Define an instructor zone

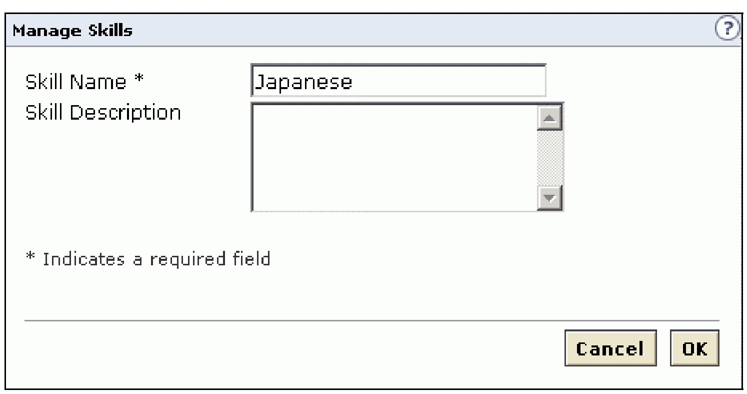
Follow these instructions to define an instructor zone.

1. From the **Resources** tab, click the **Manage Zones** link. The following figure shows an example of the **Manage Zones** window. It shows some zones that have already been added by the administrator.



2. Click **Add**.

   The following figure shows the form that displays.



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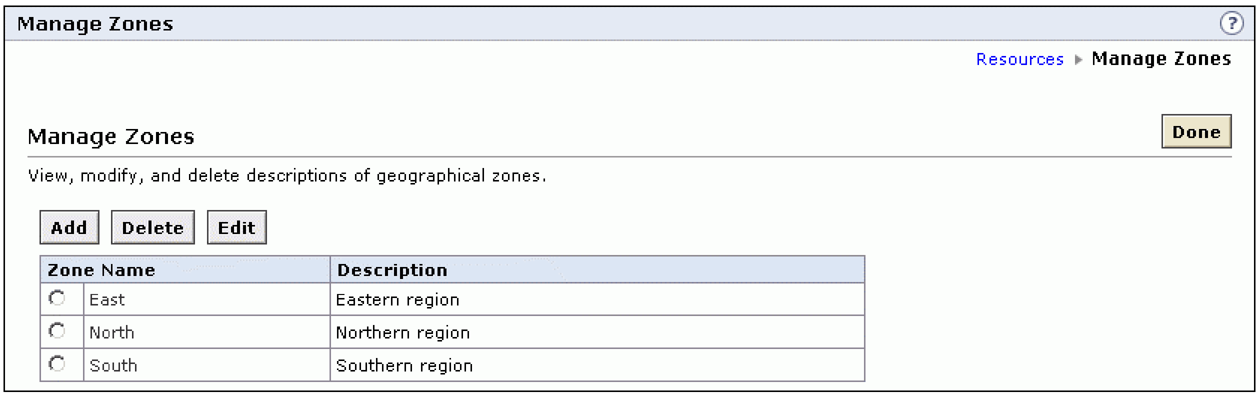
Defining Instructor Zones...*(continued)*

Define an instructor zone…

3. Enter a **Zone Name** and, optionally, a **Description** and click **OK**.

   Result: The new zone displays in the **Manage Zones** window as shown in the figure below.



4. Click **Done**.
5. To edit the zone, select the zone and click **Edit**.

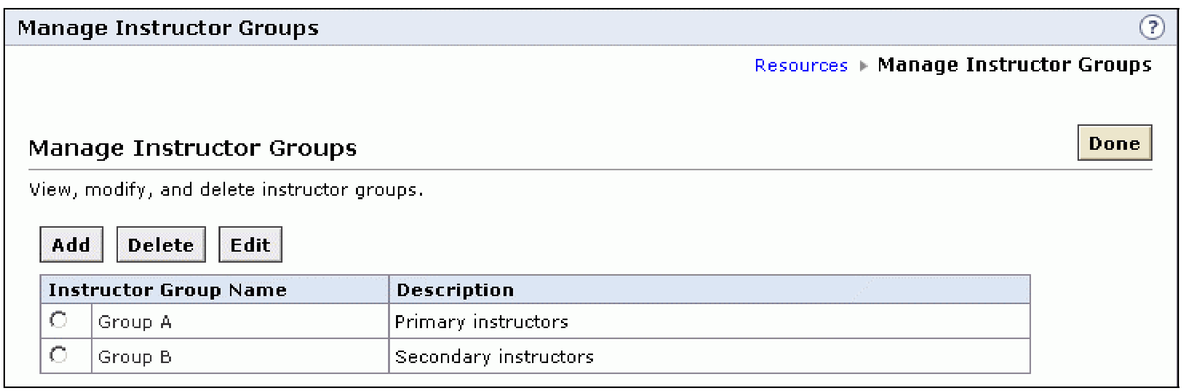
Instructor Groups

Instructors can be grouped for simplified searching and report generation. Instructors can be grouped by major skill sets. For example, instructors who teach technical courses and instructors who teach business skills courses might be two separate groups. Groups are used to search for instructors for the purposes of course assignment and report generation.

Create an Instructor Group

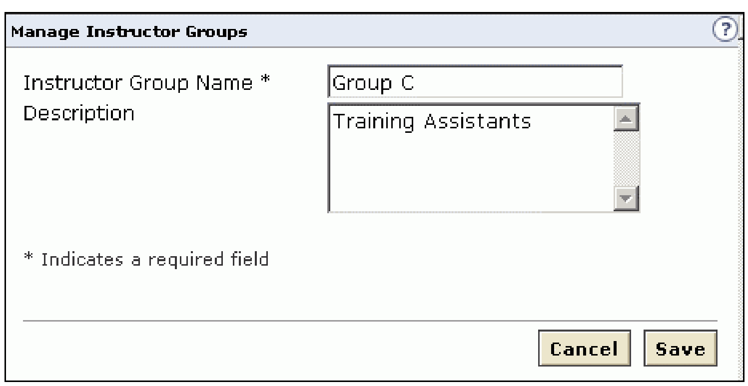
Follow these instructions to create an Instructor Group.

1. From the **Resources** tab, click the **Manage Instructor Groups** link. The following figure shows an example of the **Manage Instructor Groups** window. It shows some instructor groups that have already been added by the administrator.



2. Click **Add**.

   The following figure shows the form that displays.



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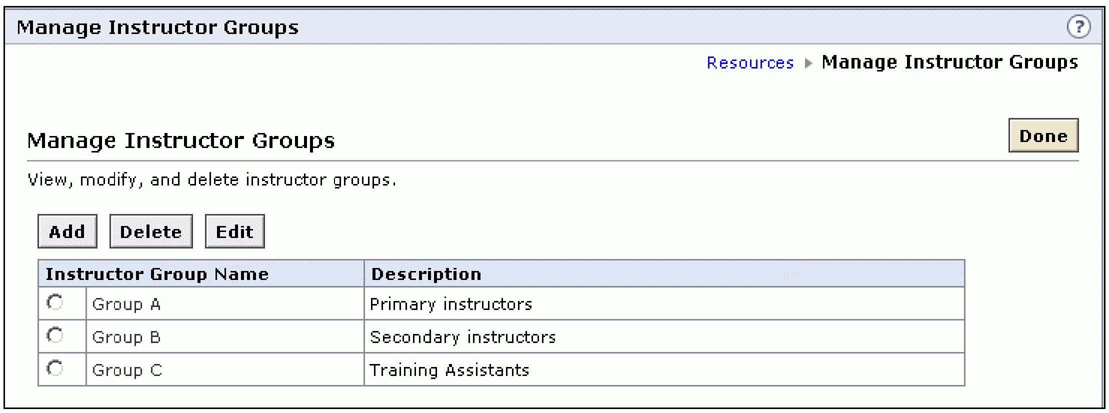
Instructor Groups...*(continued)*

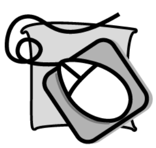
Create an Instructor Group…

3. Enter an **Instructor Group Name** and, optionally, a **Description** and click **Save**.

   Result: The new instructor group and its description are used to create an instructor group record. The new group displays in the **Manage Instructor Groups** window as shown in the figure below.



4. Click **Done**.
5. To edit the Instructor Group, select the group and click **Edit**.



Create instructor skills, zones, and groups (optional)

Create the following:

- Instructor skill
- Instructor zone
- Instructor group

Add your initials to the records you create, for example, instructor skill: French *EAJ*.

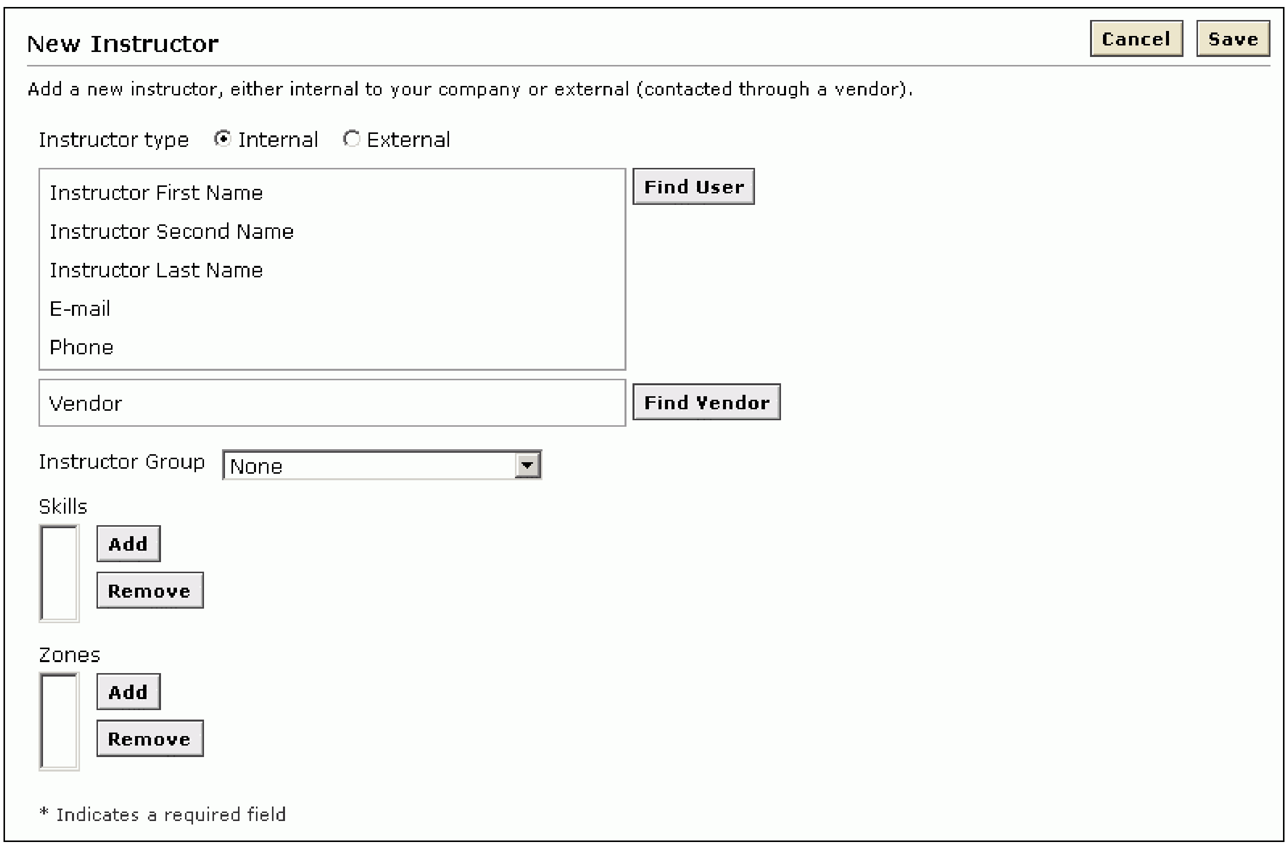
Adding a New Instructor

Instructors are users who can be managed as a resource. Instructors can be associated with defined skills and geographic locations. As a resource, instructors can be scheduled. An instructor's calendar is managed to prevent scheduling conflicts.

Add a new instructor

Follow these instructions to add a new instructor.

1. From the **Resources** tab, click the **New Instructor** link. The following figure shows the **New Instructor** window.



2. Click **Find User** to search and select a user from the LDAP directory.
3. Select **External** to add an instructor who does not have an entry in the LDAP directory.

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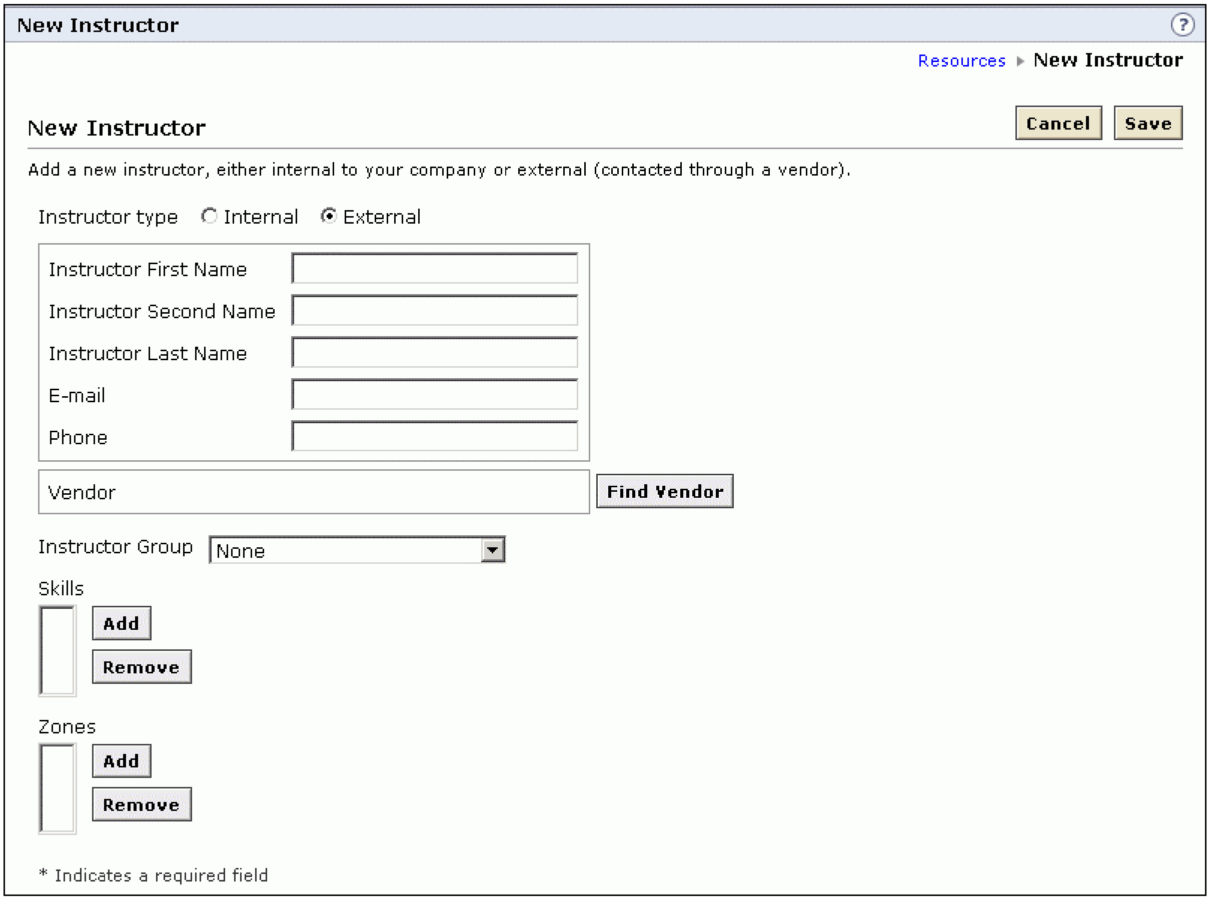
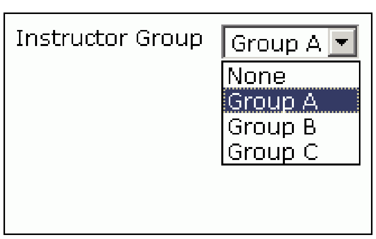
Adding a New Instructor...*(continued)*

Add a new instructor…

The following figure shows the **Add Instructor** form, when **External** has been selected.



4. Click **Find Vendor** to search and select the instructor vendor, if applicable.
5. Click the **Instructor Group** selection arrow to display and select an instructor group as shown in the figure below.



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Adding a New Instructor..._(continued)_

Add a new instructor…

6. In the **Skills** section, click **Add**. The following figure shows the pop-up window that displays.

7. Select the relevant skills for the new instructor and click **OK**.

Tips:

- To select multiple skills, hold the CTRL key and click to select.
- To select a range of skills, hold the SHIFT key and click the first and last list item in the range.

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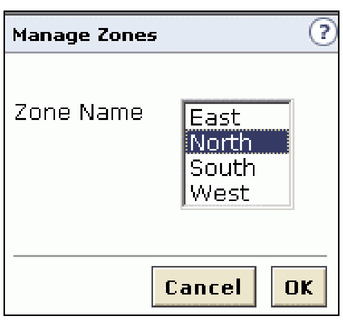
8. In the **Zones** section, click **Add**. The following figure shows the pop-up window that displays.



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Adding a New Instructor...*(continued)*

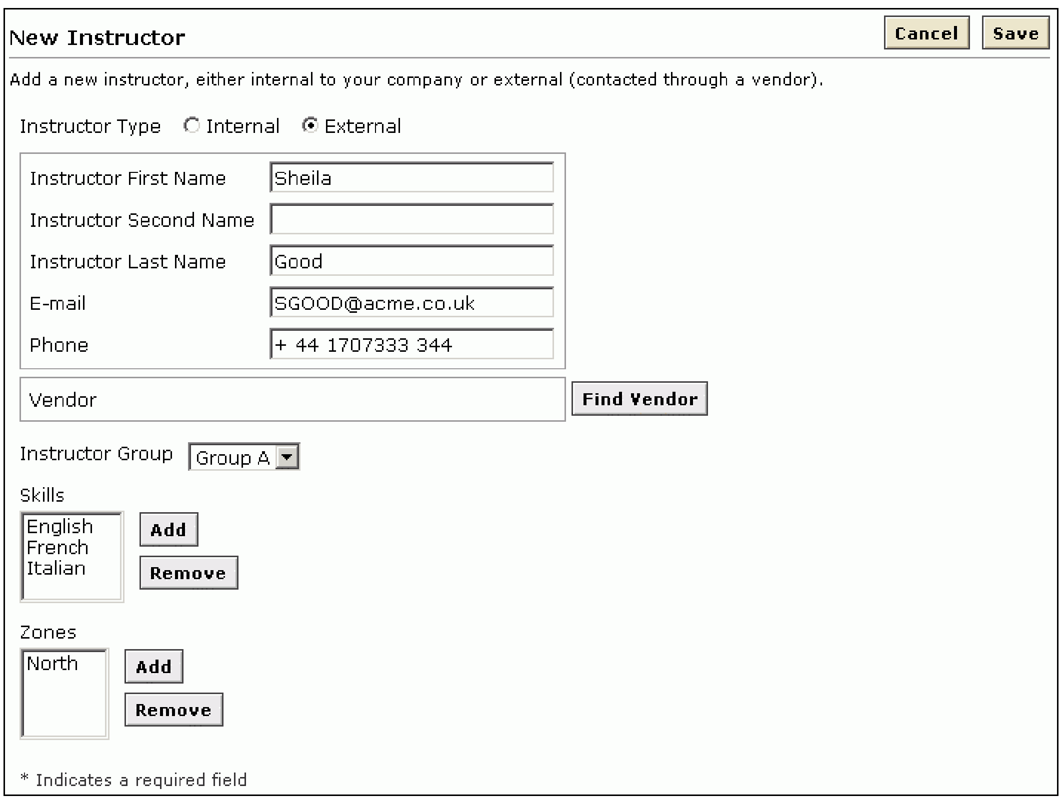
Add a new instructor…

9. Select the relevant zones for the new instructor and click **OK**.

Tips:

- To select multiple zones, hold the CTRL key and click to select.
- To select a range of zones, hold the SHIFT key and click the first and last list item in the range.

The following figure shows an example of a completed **New Instructor** form.



10. Click **Save**.
11. Click **Done** on the confirmation screen.

Note: If the instructor is an internal user who will use the LMS to deliver courses, track, and enroll students in courses, you must also assign that user the **Instructor** role. For more information about assigning user roles, see *Module B: Managing Users*.

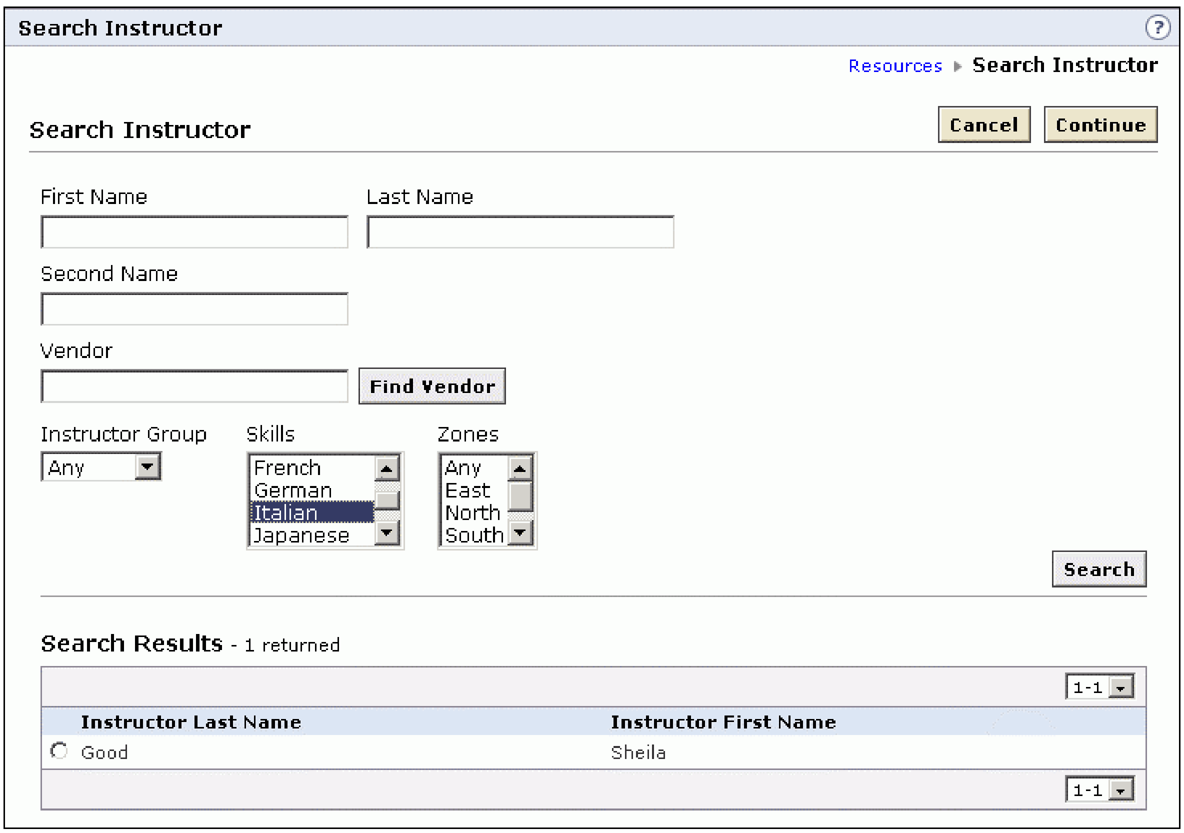
Modifying an Instructor Record

When a new instructor is added to LMS, an instructor record is created and stored in the LMS database. Administrators can edit the record to modify it.

Modify an instructor record

Follow these instructions to modify an instructor record.

1. From the **Resources** tab, click the **Manage Instructor** link to display the Search Instructor window as shown in the figure below.



2. Search and select an instructor and click **Continue**.

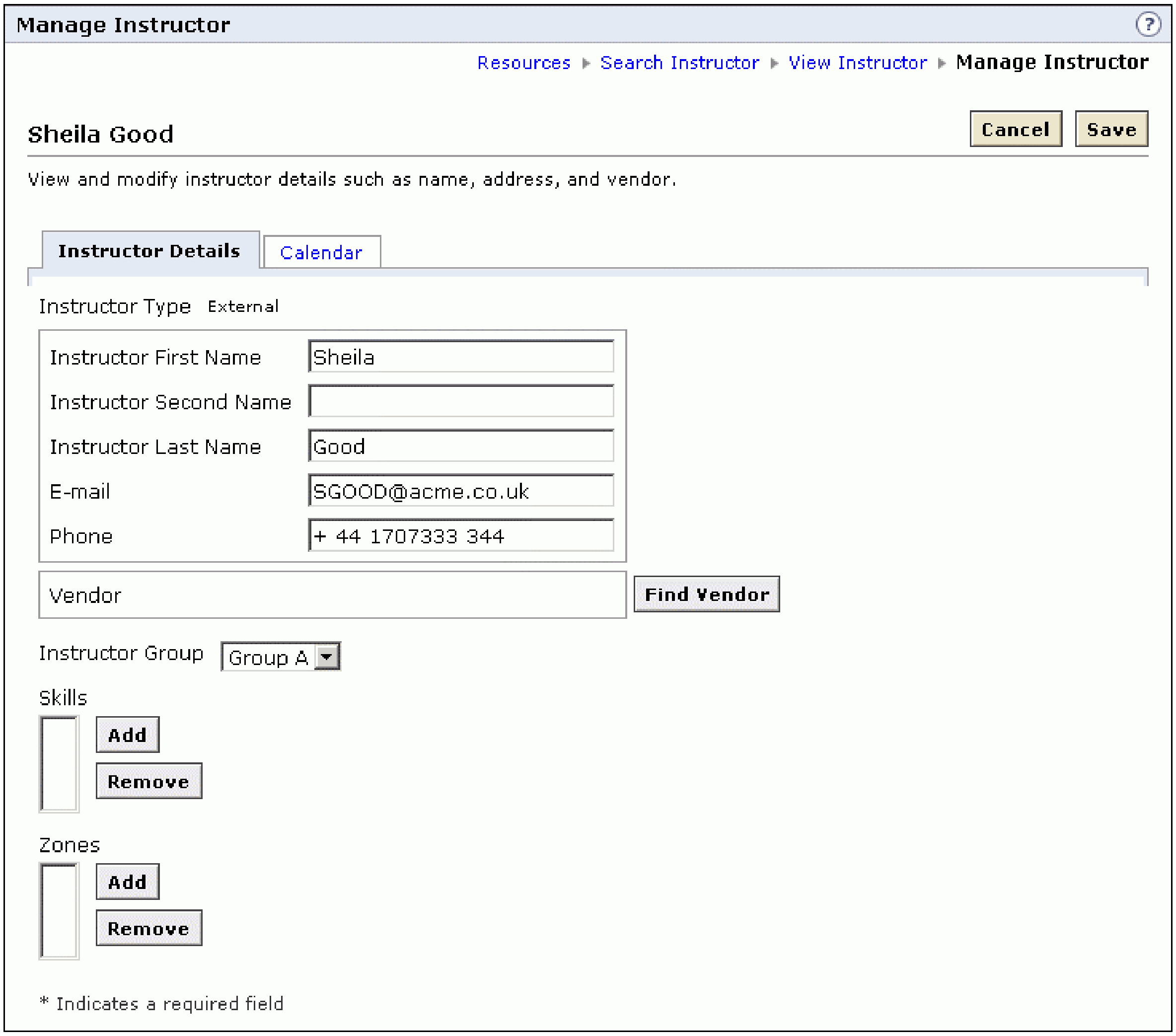
   Result: The **Instructor Details** page displays.

   Note: You can use one of several search parameters including the instructor's name, vendor affiliation, instructor group, skills, and zones.

Modifying an Instructor Record...*(continued)*

Modify an instructor record…

3. Click **Edit** to modify the record as shown in the example in the figure below.



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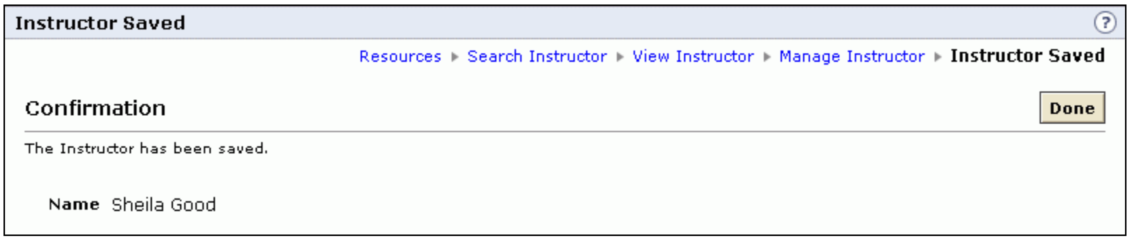
Modifying an Instructor Record...*(continued)*

Modify an instructor record…

4. Click **Save**.

   Result: The confirmation window displays, confirming the changes were saved. The following figure shows the confirmation window.



5. Click **Done**.