



# **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

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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.

Location Details

CancelSave

Enter location information.

Name\*

Address Line 1

Address Line 2

City

State/Province

ZIP/Postal Code

Country

Directions

Contact Name

Contact E-mail

Phone Number

Contact Comments

Find User

Clear Contact Info

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



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**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.

**White Pines Campus**

View information about a location.

Location Details
Access Control

<b>Name</b>	White Pines Campus
<b>Address Line 1</b>	Deer Hollow Road
<b>Address Line 2</b>	
<b>City</b>	Beaver Run
<b>State/Province</b>	Wyoming
<b>ZIP/Postal Code</b>	12345
<b>Country</b>	US
<b>Directions</b>	Beaver Run exit from interstate. Follow Beaver Creek road to right turn on Deer Run. Follow Deer Run to campus.
<b>Contact Name</b>	Maura Clover
<b>Contact E-mail</b>	mc@white_pines.edu
<b>Phone Number</b>	555-555-5555
<b>Comments</b>	



# 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

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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.



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### 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.

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



### **Create a room (optional exercise)**

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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.

**Search Room** Resources > Search Room

Room Cancel Continue

Name  Room Type

Location  Find Location Contact  Find User

Capacity  Number of Computers

Search

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**Search Results** - 0 returned

Name	Location	Room Type	Capacity
No matching items			

Cancel Continue

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 or 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

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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 an example of a completed **Vendor Details** form.

Vendor Details		Cancel	Save
Enter vendor information.			
Name*	<input type="text" value="Training Experts"/>		
Address Line 1	<input type="text" value="123 Technology Park"/>		
Address Line 2	<input type="text"/>		
City	<input type="text" value="Hertford"/>		
State/Province	<input type="text" value="Hertfordshire"/>		
ZIP/Postal Code	<input type="text" value="AL1 1XJ"/>		
Country	<input type="text" value="England"/>		
Contact Name	<input type="text" value="Madeline Need"/>		
Contact E-mail	<input type="text" value="madeline_need@acme.co.uk"/>		
Contact Phone Number	<input type="text" value="01707 332-334"/>		
Contact FAX	<input type="text" value="01707 332-333"/>		
Company Billing Information	<input type="text" value="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.

**Search Vendor** ?

Resources > Search Vendor

**Search Vendors** Cancel Continue

Name  
training experts

City

State/Province

Country

Search

**Search Results - 1 returned**

Name	City	State/Province	Country
Training Experts	Hertford	Hertfordshire	England

Cancel Continue

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**.

(continued on next page...)

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

### Modify a vendor record...

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

The screenshot shows a web application window titled "View Vendor" with a help icon in the top right corner. Below the title bar is a breadcrumb trail: "Resources > Search Vendor > View Vendor". The main content area is titled "Vendor Details" and includes "Delete" and "Edit" buttons. Below this title is a subtitle: "View information about a vendor." The vendor information is displayed in a list format with labels in bold and values to the right. At the bottom of the form, there are "Delete" and "Edit" buttons.

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

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

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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 possess 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.

Skill Name	Skill Description
<input type="radio"/> English	
<input type="radio"/> French	
<input type="radio"/> German	
<input type="radio"/> Italian	
<input type="radio"/> Portuguese	
<input type="radio"/> Spanish	

2. Click **Add**.

*(continued on next page...)*



## Identifying Instructor Skills...(continued)

### Identify an instructor skill...

The following figure shows the form that displays.

Manage Skills

Skill Name \* Japanese

Skill Description

\* Indicates a required field

Cancel OK

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.

Manage Skills

Resources > Manage Skills

Done

Manage Skills

View, modify, or delete the descriptions of one or more skills.

Add Delete Edit

Skill Name	Skill Description
<input type="radio"/> English	
<input type="radio"/> French	
<input type="radio"/> German	
<input type="radio"/> Italian	
<input type="radio"/> Japanese	
<input type="radio"/> Portuguese	
<input type="radio"/> Spanish	

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.

Zone Name	Description
<input type="radio"/> East	Eastern region
<input type="radio"/> North	Northern region
<input type="radio"/> South	Southern region

2. Click **Add**.

The following figure shows the form that displays.

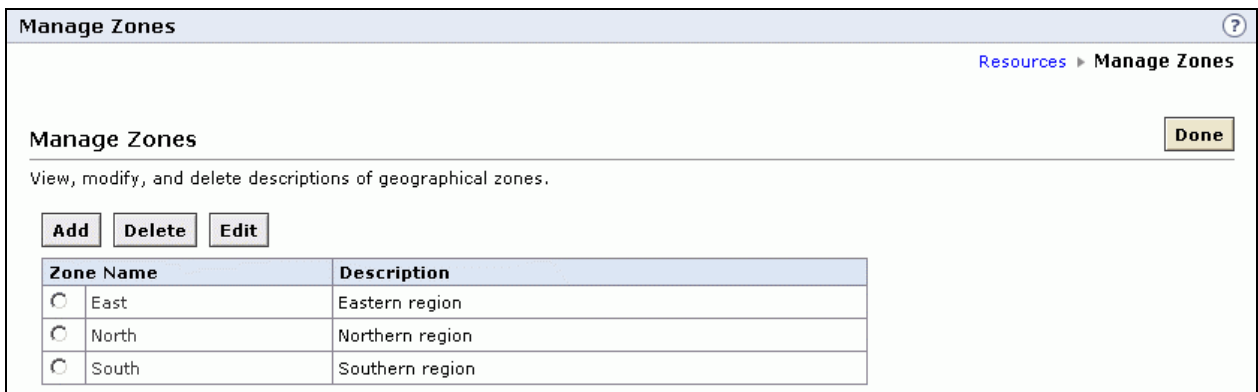
(continued on next page...)

## 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.



The screenshot shows a web application window titled "Manage Zones". In the top right corner, there is a breadcrumb trail "Resources > Manage Zones" and a help icon. Below the title bar, the window content is titled "Manage Zones" with a "Done" button on the right. A descriptive text reads: "View, modify, and delete descriptions of geographical zones." Below this text are three buttons: "Add", "Delete", and "Edit". At the bottom, there is a table with two columns: "Zone Name" and "Description". The table contains three rows, each with a radio button in the first column.

Zone Name	Description
<input type="radio"/> East	Eastern region
<input type="radio"/> North	Northern region
<input type="radio"/> South	Southern region

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.

Instructor Group Name	Description
<input type="radio"/> Group A	Primary instructors
<input type="radio"/> Group B	Secondary instructors

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.

Instructor Group Name	Description
<input type="radio"/> Group A	Primary instructors
<input type="radio"/> Group B	Secondary instructors
<input type="radio"/> Group C	Training Assistants

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.

**New Instructor** Cancel Save

Add a new instructor, either internal to your company or external (contacted through a vendor).

Instructor type ☒ Internal ☐ External

Instructor First Name Find User

Instructor Second Name

Instructor Last Name

E-mail

Phone

Vendor Find Vendor

Instructor Group None

Skills

Add

Remove

Zones

Add

Remove

\* Indicates a required field

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.

**New Instructor** Resources > New Instructor

**New Instructor** Cancel Save

Add a new instructor, either internal to your company or external (contacted through a vendor).

Instructor type ☐ Internal ☒ External

Instructor First Name

Instructor Second Name

Instructor Last Name

E-mail

Phone

Vendor  Find Vendor

Instructor Group None

Skills

Add Remove

Zones

Add Remove

\* Indicates a required field

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.

Instructor Group Group A

None

Group A

Group B

Group C

(continued on next page...)

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

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### **Add a new instructor...**

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



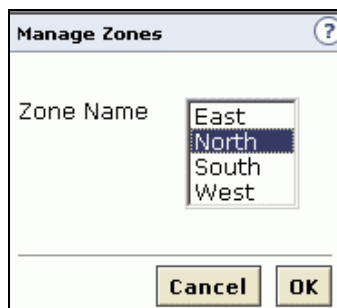
7. Select the relevant skills for the new instructor and click **OK**.

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#### **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.

**New Instructor** Cancel Save

Add a new instructor, either internal to your company or external (contacted through a vendor).

Instructor Type ☐ Internal ☒ External

Instructor First Name

Instructor Second Name

Instructor Last Name

E-mail

Phone

Vendor  Find Vendor

Instructor Group

Skills

English	<span>Add</span> <span>Remove</span>
French	
Italian	

Zones

North	<span>Add</span> <span>Remove</span>
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\* Indicates a required field

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.

**Search Instructor** ?

Resources > Search Instructor

Cancel Continue

Search Instructor

First Name Last Name

Second Name

Vendor Find Vendor

Instructor Group Skills Zones

Any French German Italian Japanese Any East North South

Search

Search Results - 1 returned

Instructor Last Name	Instructor First Name
Good	Sheila

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.

The screenshot shows a web application window titled "Manage Instructor" with a help icon in the top right corner. A breadcrumb trail at the top reads "Resources > Search Instructor > View Instructor > Manage Instructor". The main heading is "Sheila Good", followed by "Cancel" and "Save" buttons. Below this is a description: "View and modify instructor details such as name, address, and vendor." There are two tabs: "Instructor Details" (active) and "Calendar". Under the "Instructor Details" tab, the "Instructor Type" is set to "External". A form contains the following fields: "Instructor First Name" (Sheila), "Instructor Second Name" (empty), "Instructor Last Name" (Good), "E-mail" (SGOOD@acme.co.uk), and "Phone" (+ 44 1707333 344). Below these is a "Vendor" field and a "Find Vendor" button. The "Instructor Group" is a dropdown menu currently showing "Group A". There are two sections for "Skills" and "Zones", each with an empty list box, an "Add" button, and a "Remove" button. At the bottom, a note states: "\* Indicates a required field".

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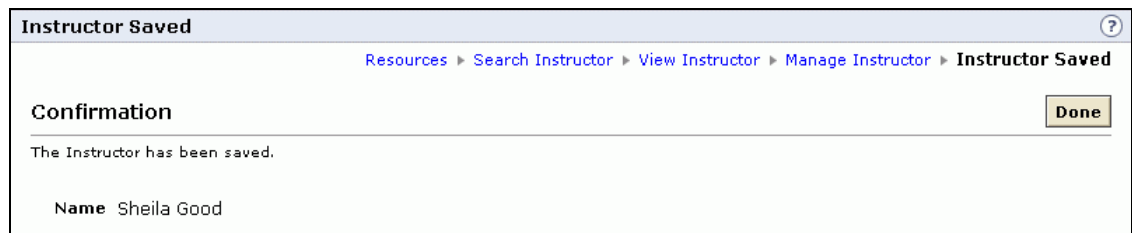
## Modifying an Instructor Record...(continued)

### Modify an instructor record...

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4. Click **Save**.

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



5. Click **Done**.