

Job Aid: Resource Management

Purpose

The purpose of the Resource Management job aid is to guide you through the step-by-step process of creating resource-related records in the Talent Management System.

In this Job Aid, you will learn how to:

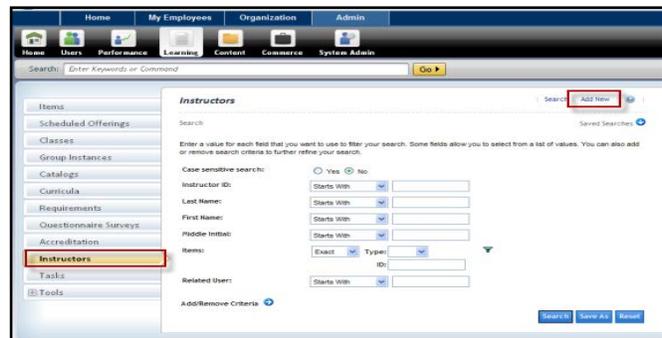
- Add Instructors
- Add Equipment
- Add Materials
- Add Facility
- Add Location



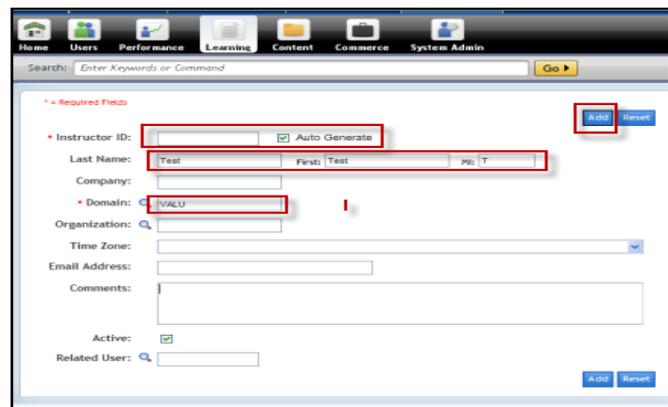
Task A. Add Instructors

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Learning > Instructors**.
2. Click the **Add New** link.



3. Enter an **Instructor ID** or leave the field blank and click the **Auto Generate** checkbox.
4. Complete the **Last Name, First, and MI** fields for the instructor.
5. Enter the **Company** the instructor works for, if applicable.
6. Click the **Search** icon to choose a **Domain**, or enter "VALU".
7. Click the **Search** icon to search for and select an organization or enter an organization. "
8. Select a **Time Zone** from the drop-down menu.
9. Enter a contact **Email Address**.
10. Ensure the **Active** check box is selected.



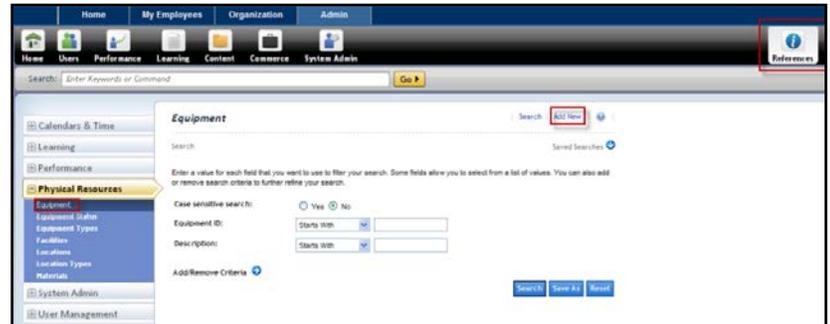
11. Select a **Related User**, if applicable.
12. Click **Add**.



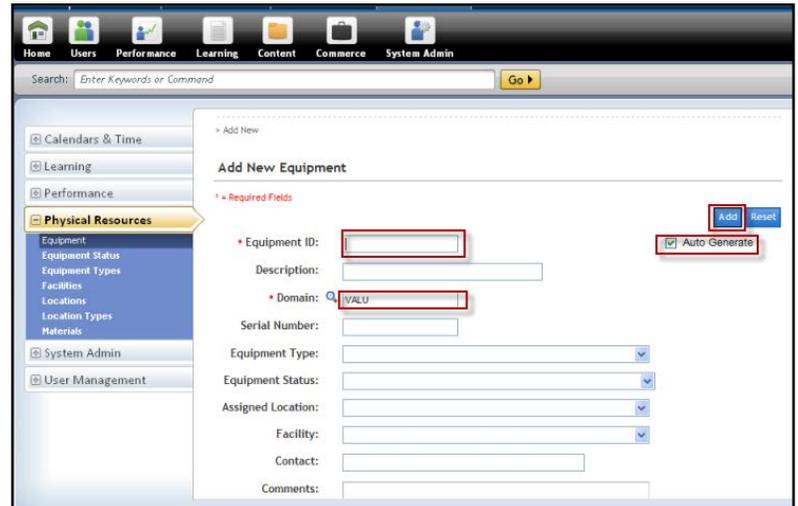
Task B. Add Equipment

Note: Verify that the **Admin** tab is selected.

1. Click the **References** button on the button bar.
2. Navigate to **Physical Resources > Equipment**.
3. Click the **Add New** link.



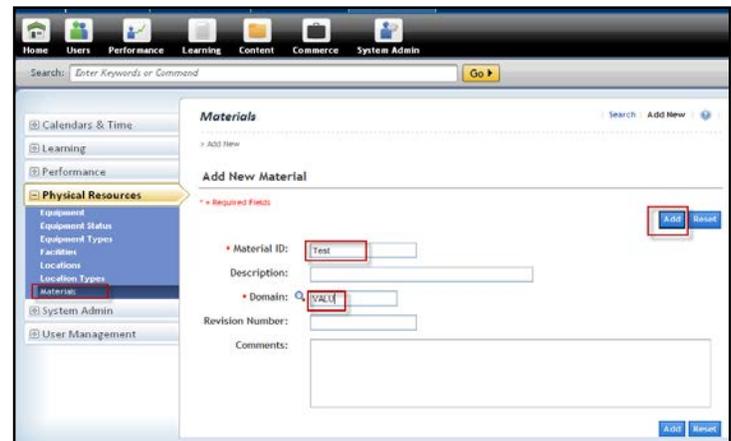
4. Enter an **Equipment ID** or leave the field blank and click the **Auto Generate** checkbox.
5. Enter a **Description** for the equipment.
6. Click the **Search** icon to choose a **Domain**.
7. Enter the equipment's **Serial Number**.
8. Select **Equipment Type** from the drop-down menu.
9. Select **Equipment Status** from the drop-down menu.
10. Select **Assigned Location** from the drop-down menu.
11. Select a **Facility** from the drop-down menu.
12. Enter a **Contact** email address.
13. Add **Comments**, if necessary.
14. Click **Add**.



Task C. Add Materials

Note: Verify that the **Admin** tab is selected

1. Click the **References** button on the button bar.
2. Navigate to **Physical Resources > Materials**.
3. Click the **Add New** link.
4. Enter a **Material ID**.
5. Enter a **Description** for the material.
6. Click the **Search** icon to choose a **Domain**.
7. Enter the material's **Revision Number**.
8. Enter comment, if necessary.
9. Click **Add**.

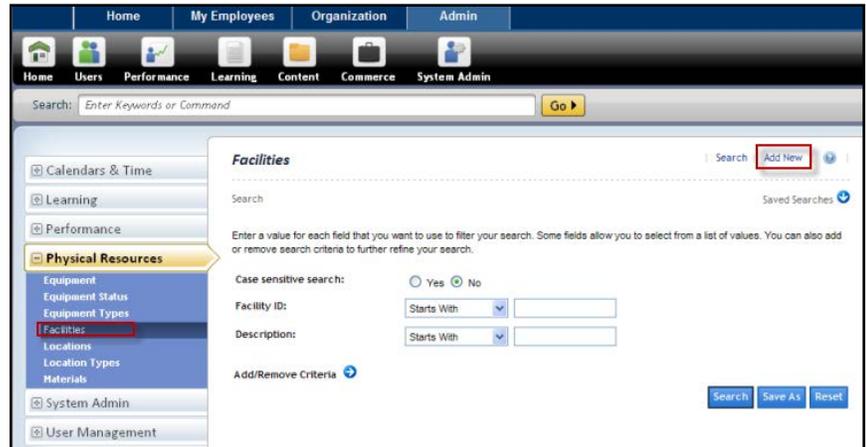




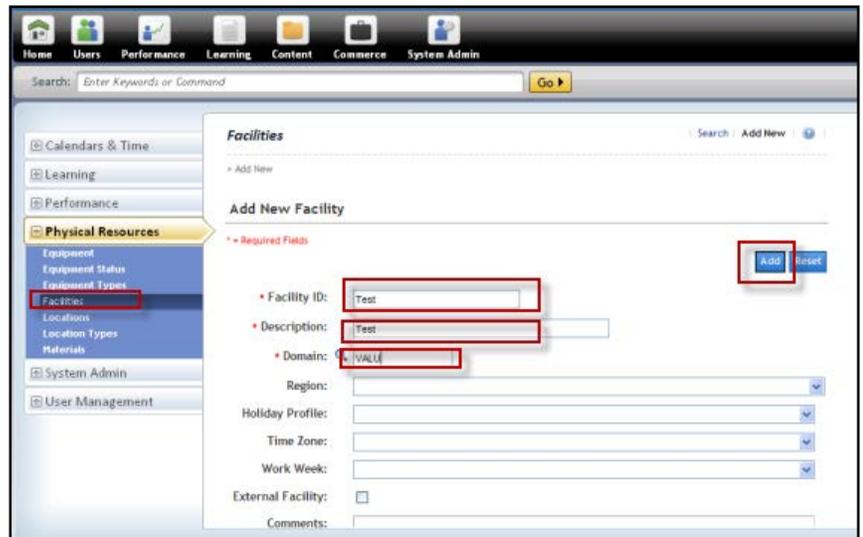
Task D. Add Facility

Note: Verify that the **Admin** tab is selected.

1. Click the **References** button on the button bar.
2. Navigate to **Physical Resources > Facilities**.
3. Click the **Add New** link.
4. Enter a **Facility ID**.
5. Enter a **Description** for the facility.
6. Click the **Search** icon to choose a **Domain**.
7. Select a **Region** to which the facility belongs from the drop-down menu.
8. Select a **Holiday Profile** from the drop-down menu.
9. Select a **Time Zone** from the drop-down menu.
10. Select a **Work Week** from the drop-down menu.
11. If this facility is an **External Facility**, ensure the checkbox is selected.
12. Enter any **Comments**.
13. Click **Add**.



The screenshot shows the TMS Admin interface. The top navigation bar includes 'Home', 'My Employees', 'Organization', and 'Admin'. The left sidebar shows a tree view with 'Physical Resources' expanded and 'Facilities' selected. The main content area displays the 'Facilities' page with a search bar and an 'Add New' button highlighted with a red box. Below the search bar, there are fields for 'Facility ID' and 'Description', each with a 'Starts With' dropdown menu. There are also radio buttons for 'Case sensitive search' (Yes/No) and an 'Add/Remove Criteria' link. At the bottom right, there are 'Search', 'Save As', and 'Reset' buttons.



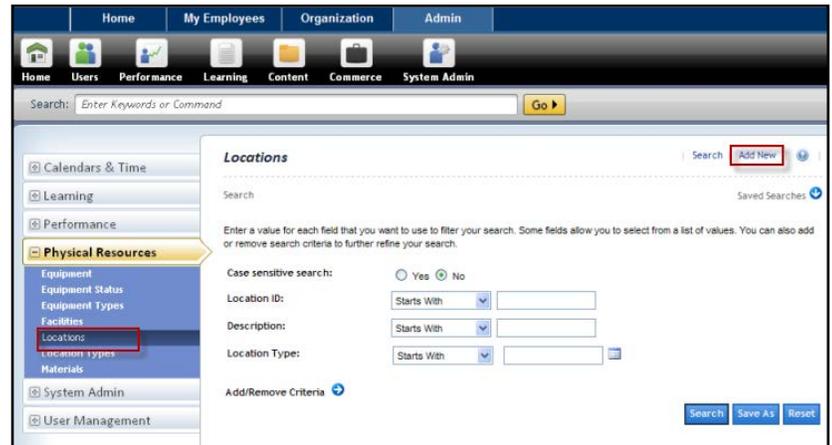
The screenshot shows the 'Add New Facility' form in the TMS Admin interface. The form is titled 'Add New Facility' and includes a red asterisk indicating required fields. The 'Facility ID' field contains the text 'Test', the 'Description' field contains 'Test', and the 'Domain' dropdown menu is set to 'VALU'. Other fields include 'Region', 'Holiday Profile', 'Time Zone', 'Work Week', 'External Facility' (checkbox), and 'Comments'. The 'Add' button is highlighted with a red box. The 'Reset' button is also visible.



Task E. Add Location

Note: Verify that the **Admin** tab is selected.

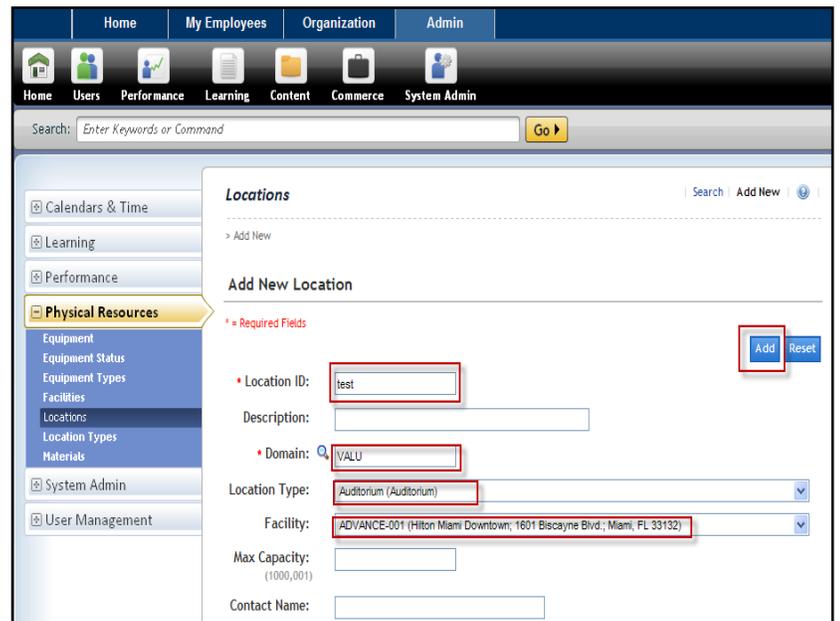
1. Click the **References** button on the button bar.
2. Navigate to **Physical Resources > Locations**.
3. Click the **Add New** link.



The screenshot shows the TMS Admin interface. The top navigation bar includes 'Home', 'My Employees', 'Organization', and 'Admin'. The left sidebar has a tree view with 'Physical Resources' expanded, and 'Locations' selected. The main content area shows the 'Locations' page with a search bar and an 'Add New' link highlighted in a red box.

Talent Profile: Adding

4. Enter a **Location ID**.
5. Enter a **Description** for the location.
6. Click the **Search** icon to choose a **Domain** or enter "VALU."
7. Select a **Location Type** from the drop-down menu.
8. Select the **Facility** to which the location is associated from the drop-down menu.
9. Enter the **Maximum Capacity** for the location.
10. Complete the **Contact Name** and **Email** fields for the location.
11. Enter any **Comments**.
12. Click **Add**.



The screenshot shows the 'Add New Location' form in the TMS Admin interface. The form fields are: Location ID (text input with 'test'), Description (text input), Domain (search dropdown with 'VALU'), Location Type (dropdown with 'Auditorium (Auditorium)'), Facility (dropdown with 'ADVANCE-001 (Hilton Miami Downtown; 1601 Biscayne Blvd; Miami, FL 33132)'), Max Capacity (text input with '(1000,001)'), and Contact Name (text input). The 'Add' button is highlighted in a red box.