

## 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



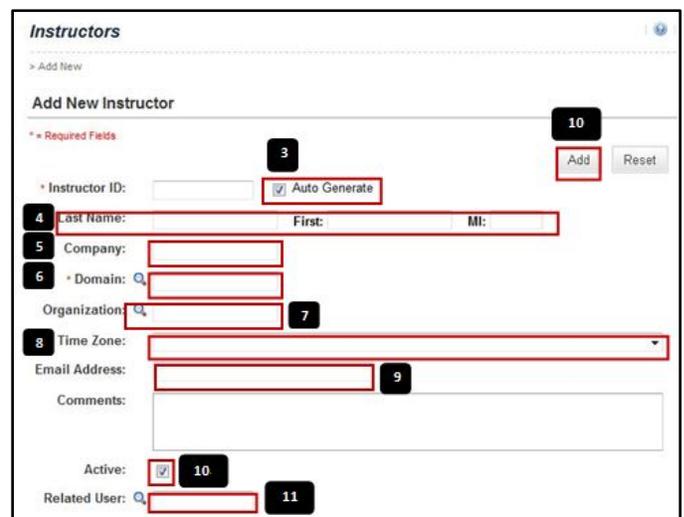
### Task A. Add Instructors

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

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



3. Verify **Auto Generate** is checked for the Instructor ID.
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. Enter an organization key or click the **Search** icon to search for and select 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**.



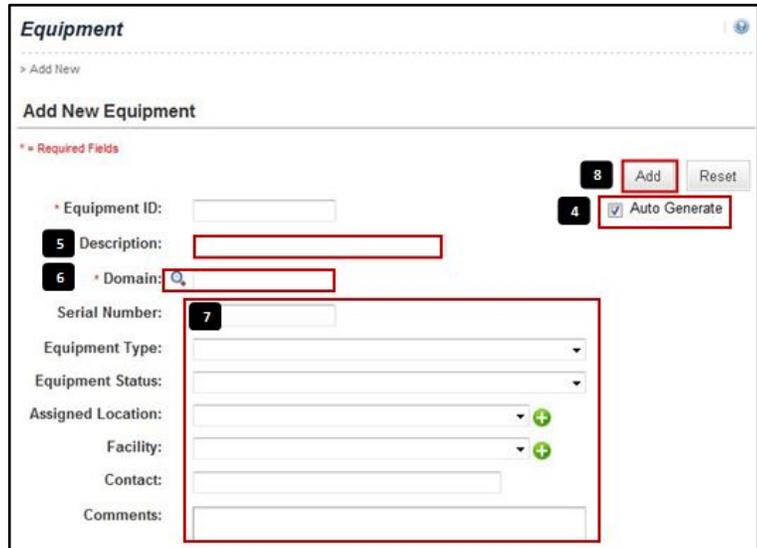
## Task B. Add Equipment

**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** button in the Equipment pop-up window.



4. Verify **Auto Generate** is checked for the Equipment ID.
5. Enter a **Description** for the equipment.
6. Click the **Search** icon to choose a **Domain**.
7. Complete remaining fields as needed:
  - Enter the equipment's **Serial Number**.
  - Select **Equipment Type** from the drop-down menu.
  - Select **Equipment Status** from the drop-down menu.
  - Select **Assigned Location** from the drop-down menu.
  - Select a **Facility** from the drop-down menu.
  - Enter a **Contact** email address.
  - Add **Comments**.

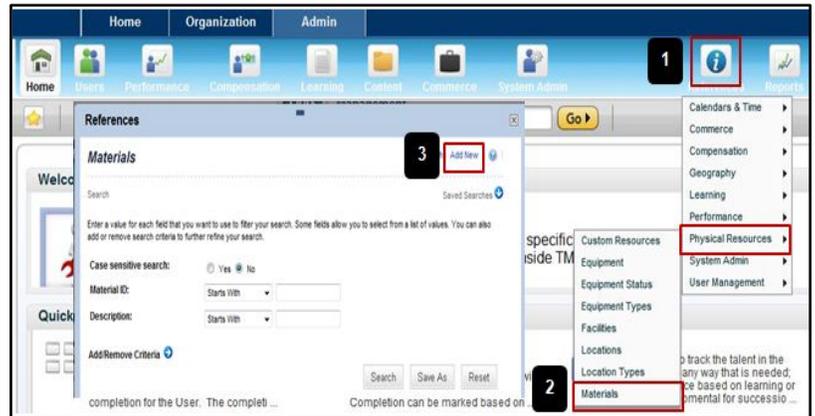


8. Click **Add**.

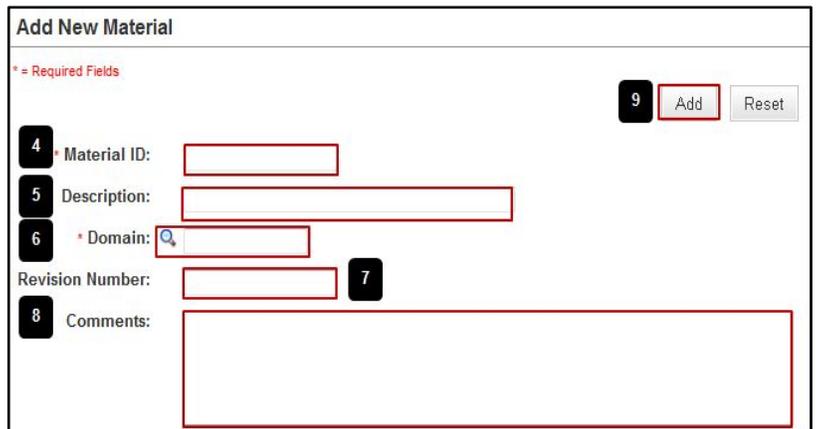
## Task C. Add Materials

**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** button on the Materials pop-up.



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**.

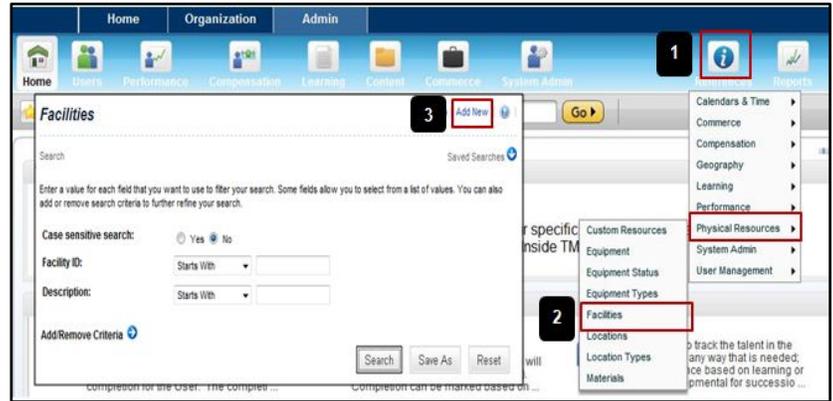




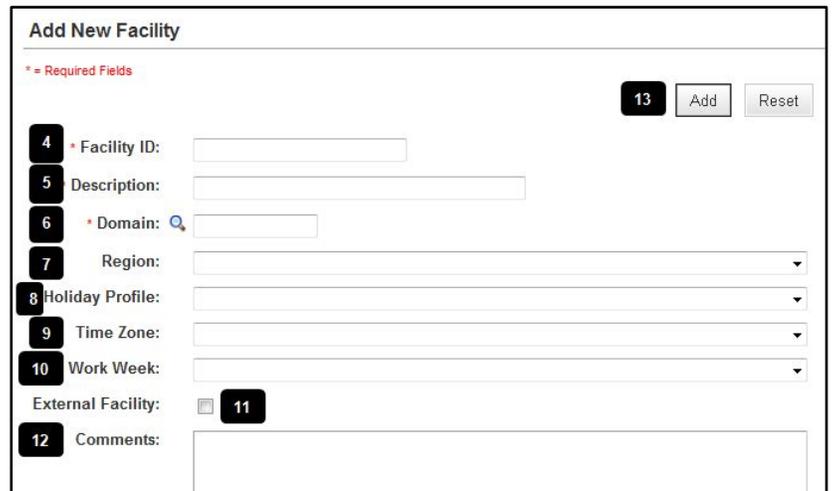
## Task D. Add Facility

**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** button on the Facilities pop-up.



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**.



## 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** button on the Locations pop-up.



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**.