USING THE RESOURCE MANAGER

The LearningSpace system’s Resource Manager makes it possible to measure usage for resources that are maintained in the system. Resources include rooms, simulators, SPs, stations, cameras and other user defined resources.

A Resource can either be a system recognized resource or a user defined resource.

- **System recognized resources** are resources plugged in and automatically managed by the LearningSpace system (e.g., simulators, rooms, SPs, cameras, stations).

- **User defined resources** are resources not plugged in or automatically managed by the LearningSpace system. System Administrators define, categorize and specify how the system tracks these resources (e.g., medical supplies, artificial blood, computer accessories, room supplies).

For system recognized resources, usage captures occur during a scheduled event, a non-scheduled event or during a video recording session outside of an event.

**NOTE:** Resource usage cannot be measured automatically if there is no video recording and no event. Manual registration of usage is possible for these types of unregistered sessions.

To access LearningSpace resource usage information:

1. Log in to LearningSpace and click **Resources**.
The Resource Manager screen appears.

From the Resource Manager, users can manage the following usage options through the Usage tabs:

- Recent Usage
- Resource Register
- Clients
- Resources
- Reports
Manage Recent Usage

The Recent Usage tab of the Resource Manager contains the resources most currently logged in the system as well as a view of resources saved as favorites.

To view a list of Recent Usage:

1. Access the Resource Manager screen by clicking the **Resources** icon on the LearningSpace dashboard.

   The Resource Manager screen appears.

2. Select the **Recent Usage** tab, if it is not already displayed.

   The Recent Usage and Favorite Resources panels populate with the latest entries.
Navigating the Recent Usage Panel

The Recent Usage panel accesses resource management tools in three ways:

- Selecting recent date intervals
- Checking recent usage by event
- Checking recent usage by session

Selecting Recent Date Intervals

To change the time interval shown under Recent Usage:

1. From the Recent Usage tab on the Resource Manager screen, click the Recent Usage cogwheel.
   
   The Recent days window appears within the Recent Usage panel.

2. In the Recent Days window, select the desired radio button to specify the recent time frame.
   
   The recent usage list automatically reflects the selected time interval.
Checking Recent Event Usage

To check recent usage by event:

1. From the Recent Usage tab on the Resource Manager screen, click the **Details** link after the event’s name.
   
The Resource Register appears for the selected event.

   ![The Resource Register](image)

   **The Resource Register**

   All the resource usage for events that fall within the recent time frame settings is displayed in the event usage list.

2. Click on the drop-down menus along the top to further filter the Resource Register.
Checking Recent Session Usage

To check recent usage by session:

1. From the Recent Usage tab on the Resource Manager screen, click the event name or the arrow in front of it.
   
The sessions for the selected event appear.

2. Click the Details link after the desired session.
   
The Resource Register appears with the selected session displayed.

3. Click on the drop-down menus along the top to further manipulate the session usage list.

   All the resource usage for sessions that fall within the recent time frame settings is displayed in the session usage list.
Navigating the Favorite Resources Panel

The Favorite Resources panel allows users to:

- Select favorite cabinets
- Check favorite cabinet usage
- Display a pie chart of favorite resource usage

Selecting Favorite Cabinets

To change the cabinets shown under Favorite Resources:

1. From the Recent Usage tab on the Resource Manager screen, click the Favorite Resources cogwheel.
   
   The Recent days window appears.

2. Select the desired radio button to specify the recent time frame.
   
   The list of favorite usage automatically reflects the selected time interval.

   NOTE: The Favorite Cabinets field only partially displays the first two entries before it is selected and opened.

3. Select the Favorite Cabinets drop-down menu and choose the desired favorite cabinets.

   All the resource usage for the selected cabinets that fall within the recent time frame settings is displayed.
Checking Favorite Cabinet Usage

To check usage by favorite resource:

1. From the Recent Usage tab on the Resource Manager screen, click on the cabinet name.
   The cabinet’s table of resources appears.

![The Favorite Resources Panel]

   The **Cabinet** name

   The **Cabinet** table of resources

   The **Details** links

   All the usage for a resource that falls within the recent time frame settings is displayed.

2. Click on the **Details** link after the desired resource.
   The Resource Register appears.

![The Resource Register]

   The cabinet usage list

   The filter drop-down menus

   All the usage for the selected resource that fall within the recent time frame settings is displayed.

3. Click on the filter drop-down menus along the top to further manipulate the Resource Register.
Displaying Favorite Resource Usage Pie Chart

To check recent usage in a pie chart format:

1. Select a favorite cabinet from the Recent Usage tab on the Resource Manager screen.
2. Click on the **Diagram** icon next to the selected resource.

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**The Favorite Resources Panel**

The pie chart for the selected cabinet of resources appears.

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**The Selected Cabinet’s Pie Chart**
Manage the Resource Register

The Resource Register contains all the resource usages in the system. Administrators search, review and edit all usage within the system using the Resource Register.

To begin managing the Resource Register:

1. Access the Resource Manager screen by clicking the Resources icon on the LearningSpace dashboard.
2. Select the Resource Register tab.
   The Resource Register appears.

3. Choose the desired usage item:
   - Select the Calendar icon, if filtering search for an event related resource usage.
   - Select the Video Recording icon to filter search for video recording related resource usage.

**NOTE:** By default, event resources are displayed showing quantity, cabinet and client information.
Searching Events in the Resource Register

When accessing the Resource Register, events are displayed on the page by default. Drop-down menus and text-fields provide filtering options for further refining the list of resources.

To filter a search for event related resource usage:

1. From the Resource Manager screen, select the **Resource Register** tab.
   
   The Resource Register appears.

2. Select the **Calendar** icon, if not already displayed (it is the default option).

3. Use the **Events**, **Cabinets**, **Sessions** and **Client** drop-down menus to filter event related resource usages.

   **NOTE:** All drop-down menus, except for Sessions, can individually filter listed items. The Sessions drop-down menu is active only when used in conjunction with with the Events drop-down menu, resulting in a more specific list of resources.

4. Specify the date intervals for any subset of the four filter drop-down menus.

   **NOTE:** The content of each drop-down list updates according to the selections made on other drop-down lists.

5. Scroll up or down the Resource Register by using the mouse wheel or by hovering over the right margin of the list and finding the scroll bar.
Searching Videos in the Resource Register

When accessing the Resource Register, Events are displayed on the page by default.

To filter a search for video recording related resource usage:

1. From the Resource Manager screen, click the Resource Register tab. The Resource Register appears.

2. Click on the Video icon. The Resource Register updates.

3. Click on the Get video list link.
A list of all video recordings created in LearningSpace appears.

**The Video Recordings**

The details provided are: **Date** (start date and time of recording), **Room**, **Learner** (name of the learner for whom the recording has been made), **Score** (the Case Total score of the learner, if this is available), **Event**, **Case** and the **Video Info** (the duration and the size of the recording).

4. Search for a video recording by entering a keyword in the Quick search field.
   
The results are displayed immediately.

5. Change the order of the list by clicking on the column header for the sorting criteria desired (e.g., select the Date header to sort according to when the video was recorded).

To select a video recording’s list of resource usage:

   a. Check the box for the desired video recording.

   b. Click the **Select** button.

   The Resource Register appears displaying the quantity, cabinet and client information for each resource.

   c. If desired, refine the resource list further by using the drop-down menus for clients and cabinets or the Quick search fields.
Controlling Resource Register Entries
Resource usage entries are controlled by deleting, editing or adding items.

To begin controlling an existing resource:

1. From the Resource Manager screen, click the **Resource Register** tab.
   The Resource Register appears.

2. If changing an existing entry, select the Event or Video resource desired.
   Once the resource is selected, users have access to resource management options by clicking the **Information** icon (to delete or edit a resource) or the **Add New Resource Usage** button (to enter a new resource).
Deleting Resource Register Entries

To delete resource usage from the Resource Register:

1. From the Resource Manager, open the Resource Register tab.
   
   The Resource Register appears.

2. Select the Information icon for the desired resource.
   
   The Resource Register updates with a list for the selected resource and control options.

3. Click on the red Delete icon for the resource to be deleted.
   
   A confirmation window appears to verify the deletion.

4. Click OK.
   
   The selection is deleted from the list.
Using the Resource Manager

**Editing Resource Register Entries**

To edit resource usage from the Resource Register:

1. From the Resource Manager, open the **Resource Register** tab.
   The Resource Register appears.

2. Select the **Information** icon for the desired resource.
   The Resource Register updates with a list for the selected resource and control options.

3. Click the **Edit** icon to enable editing of the selected resource.
   An editable new line appears and the original is highlighted in yellow.

4. Change the resource as desired.
   The Quantity, Event, Session, Timeslot and Video columns are all editable.

5. Click on the check mark (**Save** icon) to implement the update to the entry or the X mark (**Cancel** icon) to retract it.

   **NOTE:** By adding or changing a resource event, the clients assigned to the event automatically change. For changes assigned to a video recording, the system automatically registers that usage. The duration of the video is used to compile resource usage data.
Adding Resource Register Entries

New resource usage is added to the Resource Register both through the event and video selection options. Resource usage can be added on the main page or on the detailed resource page.

To add resource usage from the Resource Register:

1. From the Resource Manager, open the Resource Register tab.
   
The Resource Register appears.

2. Select Add New Resource Usage.
   
A blank edit line appears.

3. Select the desired elements from the drop-down lists on the new line.

4. Select the check mark (Save icon) to implement the update to the entry or the X mark (Cancel icon) to retract it.

   NOTE: By adding or changing a resource event, the clients assigned to the event automatically change. For changes assigned to a video recording, the system automatically registers that usage. The duration of the video is used to compile resource usage data.
Manage Clients

Clients are organizations, departments, individuals or virtual entities. Administrators specify Resource usage for each client and compile client specific resource usage reports using the Resource Manager.

To begin managing client usage:

1. Access the Resource Manager screen by clicking the Resources icon on the LearningSpace dashboard.
2. Select the Client tab.
   The Client list appears.

   All clients are listed. Information entered and saved for each client includes: Client Name, Short Name, Address, Contact persons and Owner Group.

   **NOTE**: If no specific client is selected and saved for the event, the Client setting defaults to Internal. Each resource used in the event assigned to a client is accounted to that client.

3. Search and control client entries as desired.
Searching Clients

To perform a client usage search:

1. From the Resource Manager, open the Client tab.

2. Enter a keyword in the Quick Search field.

   **NOTE:** A keyword can be any word or part of a word related to a client (e.g., part of the Short Name, Client Addresses, etc.). The more keywords entered, the further refined the list of clients becomes.

   A list of clients related to the search appears immediately.

3. Direct a keyword search by specifying data field sets. Enter search words as follows:

   Name: “client name”
   Short name: “client short name”
   Address: “client address”
   Contact: “client contact”
   Group: “client group”

   **NOTE:** The search is not case sensitive; however, the format of the search label is important (i.e., a colon after the criteria, a space and the searched information within quotation marks).

4. Change the order of the list by clicking on the column header for the sorting criteria desired (e.g., select the Date header to sort according to when the video was recorded).

   Users with appropriate administrative privileges have access to the client control options.
Controlling Clients

Client entries are controlled by deleting, editing or adding them.

To begin controlling existing clients:

1. From the Resource Manager screen, click on the **Client** tab.

   The Client list appears.

2. If changing an existing client, search and select the desired client.

   Once the client is selected, users have access to resource management options.
Deleting Clients

To delete an existing client:

1. From the Resource Manager Client tab, search for the client to be deleted.
2. Select the Client cogwheel in the Controls column for the desired Client. The Edit Client window appears.

3. Select Delete.
   A warning message appears.

4. Select OK.
   The client is deleted from the list.
Editing Clients

To edit information for an existing client:

1. From the Resource Manager **Client** tab, search for the client to be edited.
2. Select the **Client** cogwheel in the Controls column for the desired client. The Edit Client window appears.

   ![The Edit Client Window](image)

3. Change text fields and drop-down menu options as desired.
4. Select **Save**.

   The client changes are incorporated into the system.
Adding Clients

To add a client to the Resource Manager:

1. From the Resource Manager Client tab, select the **Add Client** button.
   The Add Client window appears.

2. Enter the desired information in the appropriate fields.
   The fields marked with an asterisk (*) are required for creating a new client (i.e., name, short name and contact name).

3. Select **Add**.
   The client is added to the system.
Manage Resources

Each resource (whether a system recognized resource or user defined resource) is categorized by type, name and unit of measure. Names for system recognized resources are predefined by LearningSpace. Administrators define the names for user defined resources.

To begin managing resources:

1. Access the Resource Manager screen by clicking the Resources icon on the LearningSpace dashboard.
2. Select the Resources tab.

The Resources List appears.

All resources are listed. Information entered and saved for each resource includes: Name, Unit of Measure, Cabinets, and Type.

3. Search and order the list as desired to find the desired resource.
Searching Resources
To perform a search for a particular resource:

1. From the Resource Manager Resources tab, enter a keyword in the Quick Search field.
   
   **NOTE:** A keyword can be any word or part of a word related to a Resource (e.g., part of the Name, Unit of Measure, etc.). The more keywords entered, the further refined the list of clients becomes.

   A list of resources related to the search appears immediately.

2. Direct a keyword search by specifying data field sets. Enter search words as follows:
   
   - **Name:** “resource name”
   - **Unit of Measure:** “unit”

   **NOTE:** The search is not case sensitive. However, the format of the search label is important (i.e., a colon after the criteria, a space and the searched information within quotation marks).

3. Change the order of the list by clicking on the column header for the sorting criteria desired (e.g., select the Name header to sort alphabetically according to resource name).

4. Select from the Cabinet drop-down menu to further refine the displayed list.

   Users with appropriate administrative privileges have access to the resource control options.
Controlling Resources

Resources are controlled from the Resource tab on the Resource Management screen.

To begin controlling an existing resource:

1. From the Resource Manager screen, click on the **Resources** tab.
   
   The Resources List appears.

2. If changing an existing entry, search for the resource.

   Once the resource is found, users can access resource management options.
Deleting Resources

To delete resource usage from the Resource tab.

1. From the Resource Manager, open the Resources tab.
2. Find the resource to be deleted.
3. Select the Resources cogwheel in the Controls column for the desired resource.
   **NOTE:** Only user defined resources can be deleted.
   The Edit Resources window appears.

   ![The Edit Resources Window]

   The Edit Resources Window

   4. Select Delete.
   The confirmation message appears to verify the deletion.

   ![The Confirmation Message]

   The Confirmation Message

   5. Select OK.
   The Resource is deleted from the list.
Editing Resources

To edit resource usage from the Resources tab:

1. From the Resource Manager, open the Resources tab.
2. Find the resource to be edited.
3. Select the Resources cogwheel in the Controls column for the desired resource.
   
   The Edit Resources window appears.

4. Edit the Resource drop-down menus and fields as desired.
5. Select Save.

   **WARNING:** Changing the unit of measure for an existing Resource could cause unexpected consequences in reporting.
Adding Resources

To add resources from the Resources tab:

1. From the Resource Manager, open the Resources tab.
2. Select Add New Resource at the bottom of the Resource list.
   The Add Resource window appears.

   ![The Add Resource Window]

3. Select the desired cabinet from the Cabinet drop-down menu.
4. Enter a name in the Name field.
5. Select a unit of measure from the Unit of measure drop-down menu.
6. Enter a value for availability.
   **NOTE:** The Availability field specifies the maximum daily use in the unit of measure selected and indicated in the Unit of measure option.
   **ATTENTION:** If availability is reached (i.e., the entered value for the given resource is met) the current resource usage is at 100%. Specifying availability is important for calculating, accounting and reporting resource usage.
7. Select Add.
   The new resource is listed alphabetically and categorized with the given specifications.
Managing Cabinets

Resources are categorized into cabinets. System recognized resources are automatically categorized. User defined resources are categorized into user created cabinets or placed in a default cabinet.

To manage cabinets from the Resources tab:

1. From the Resource Manager, open the Resources tab.
2. Select the Manage Cabinets button at the bottom of the Resources List.
   The Manage Cabinets window appears.
3. Select the red Delete icon next to the name, if deleting the cabinet.
   NOTE: System cabinets cannot be deleted.
4. If creating a new cabinet, enter a name in the field provided and select the Add Cabinet button.
   NOTE: Although only user defined cabinets can be created manually, the name of any cabinet can be edited, both for system cabinets and user defined cabinets.
5. To edit a cabinet name, select the name to activate an editable field and enter the new name.
6. Select Close to return to the Resources List.
Manage Reports

The Resource Manager provides detailed and versatile reporting options. Administrators choose from resource types and dates to compile a variety of reports, available in PDF, HTML, XLSX and CSV formats.

To begin managing Reports:

1. Access the Resource Manager screen by selecting the Resources icon on the LearningSpace dashboard.
2. Open the Reports tab.
   The Reports options appear.
3. Select the desired time frame from the Timeframe drop-down calendars.
4. Select the output format from the Report Format drop-down menu.
5. Choose from the three report types available:
   - Resource Usage Totals
   - Resource Utilization
   - Center Resource Usage Overview
Reporting Resource Usage Totals

A Resource Usage Totals report provides information on the usage of particular resources during given events and sessions.

To create a Resource Usage Totals report:

1. From the Resource Manager Reports tab, set the Timeframe and Report Format.
2. Navigate to the Resource Usage Totals panel.

3. Set the parameters of the report by selecting any combination from the drop-down menus:
   - Clients - to set center or group
   - Events - to set event
   - Sessions - to set sessions
   - Cabinets - to set cabinet

   **NOTE:** The Sessions drop-down menu will activate only when used together with the Events drop-down menu, resulting in more specific list of resources.

4. Select the Breakdown to Resources checkbox to display the Client(s), the Event(s), the Session(s) of an event, the Cabinets (containing the used Resources by items) and all used Resources and related quantity units.

5. Select Print Resource Usage Report to display the selected report.

The report appears and is ready to be printed or downloaded. The report displays in full screen mode and can be sized for presentation purposes.
Reporting Resource Utilization

A Resource Utilization report provides information on the resource usage over a given period of time for a particular client.

To create a Resource Utilization report:

1. From the Resource Manager Reports tab, set the Timeframe and Report Format.
   
   **NOTE:** The Timeframe must be specified, otherwise the print options remain inactive (greyed out).

2. Navigate to the Resource Utilization panel.

3. Set the parameters of the report by selecting any combination from the drop-down menus:
   
   - Cabinets - to set cabinet
   - Resources - to set item
   
   **NOTE:** Multiple choices under each drop-down menu can be checked.

4. Select **Print Resource Utilization Report** to displays the selected report.

   The report appears and is ready to be printed or downloaded. The report displays in full screen mode or zoomed for presentation purposes.

5. Select the **Print Center Breakdown Report** for additional information on specific center usage allocation.
Reporting Center Resource

A Center Resource Report provides information on a center’s resource usage for a particular period of time.

To create a Center Resource Report:

1. From the Resource Manager **Reports** tab, set the Timeframe and Report Format.
   
   **NOTE:** The Timeframe must be specified, otherwise the print option remains inactive (greyed out).

2. Navigate to the **Center Resource Usage Overview** panel.

3. Set the parameters of the report by selecting any combination from the drop-down menus:
   - Cabinets - to set cabinet
   - Resources - to set item
   - Number of business days - to set the work days

4. Specify the **Number of business day(s)** if different from the automatically calculated business days.
   
   **NOTE:** The pre-calculated number of days represents weekdays for the selected timeframe (not excluding holidays). If a resource is used during a weekend or a holiday, manually adjust the number of days.

5. Select **Print Resource Allocation Report** to displays the selected report.

   The report appears and is ready to be printed or downloaded. The report displays in full screen mode or zoomed for presentation purposes.
Manage Options Outside the Resource Manager

The Resource Manager connects to other LearningSpace applications in order to track usage:

- Unit Measurement is controlled through **System Management**.
- Default Resource Usage is set up through the **Case Manager**.
- Resources for sessions are visible through a link in the **Event Scheduler**.
- Resources for videos are visible through a link in the **Video Record** List.

**The LearningSpace Dashboard**

**NOTE:** Navigate from one application to another using the **Back to Home** link or **Home** icon at the bottom of most pages.
Controlling Units of Measure

The Resource Manager uses the units of measure provided automatically by the LearningSpace system and those defined by users. Units of measure are controlled from the System Management screen.

Editing Units of Measure

To edit user defined units of measure:

1. Select the **System** icon on the LearningSpace Dashboard screen.
   
   The System Management screen appears.

2. Open the **Units** tab.

   The Units tab lists all Units saved in the LearningSpace system.
3. Change the order of the list by clicking on the column header for the sorting criteria desired (e.g., select the Abbreviation header to sort according to an alphabetical list of the unit abbreviations).

Users with appropriate administrative privileges have access to the deleting, editing and adding options.

**NOTE:** System defined units cannot be edited; user defined units can.

4. Select the desired **Units** cogwheel in the Controls column for the unit to modify.

   The Units window appears.

   ![The Units Window](image)

   **The Units Window**

   The Units window has fields and drop-down menus to edit:
   - Unit name
   - Unit abbreviation
   - Measure type
   - Conversion value

5. Select **Delete**, if removing the unit.

6. If making changes, modify the fields in the Units window as desired and select **Save**.

   The unit changes are activated.
Adding Units of Measure

To create a new unit of measure:

1. From the System Management screen, open the **Units** tab.
2. Select **Add**.
   
   The Units window appears.

   ![The Units Window](image)

   The **Save** button

   **The Units Window**

   The Unit window has fields and drop-down menus to define:
   
   - Unit name
   - Unit abbreviation
   - Measure type
   - Conversion value

3. Fill out the Units window as desired.
4. Select **Save**.
   
   The new unit is added to the list.
Setting Up Default Resource Usage for Cases

A list of common resources can be defined for each case. This list contains two types of items:

- Items used generally for the case (e.g., 1 whiteboard, 2 monitors)
- Items used by individual learners (e.g., 2 needles, 0.5 L of artificial blood)

Commonly use items entered in the Case Manager are added to Resource Register automatically.

Viewing Resources Assigned to Cases

To view resources assigned to a particular case:

1. Select the **Cases** icon on the LearningSpace Dashboard screen.
   
The Case Manager appears.

2. Select **CaseFinder** and navigate to the desired case.
The Basic Properties appear for the selected case.

3. Select the **Resource Usage** tab.
The resources assigned to the selected case appear.

The Resource Usage Tab

- The **Per Session Resources** panel displays any currently assigned resources to the case.
- The **Per Learner Resources** panel displays any currently assigned resources to the Learners participating in the case.

**NOTE:** Session items are automatically measured only during scheduled events.
Managing Resources Assigned to Cases
To set up or change default resource usage for a particular case:

1. Choose the desired case and navigate to the Case Manager’s Resource Usage tab.
2. Go to the desired Per Session Resources or Per Learner Resources panel.

3. To delete a resource from a case, select the Remove button for the item.
4. To add or edit a resource:
   a. Select the desired cabinet from the Cabinets drop-down menu.
   b. Select the desired resource from the Resource drop-down menu.
   c. Enter the desired value in the Quantity text field to specifying the amount of the assigned resource.
   d. Select Add.

The specified resource is updated for the case.
Linking to Session Resource Register from Event Scheduling

The Resource Register tracks the usage for all scheduled sessions automatically. The Event Scheduler organizes the sessions and provides access to the Resource Register.

To link to the Resource Register from the Event Scheduler:

1. From the LearningSpace Dashboard screen, open the Schedule icon.
2. Select an event and access its Session Setup screen.
3. Select the Resource Usage button.
   The Resource Register appears.
4. Manage the resource usage as desired.
Linking to Session Resource Register from Video Record

The Resource Register tracks the usage for video recordings. The Video Review screen organizes the videos and provides access to the Resource Register.

To Link to the Resource Register from the Video Review screen:

1. From the LearningSpace Dashboard screen, open the Video Review icon.
   The Video Review screen appears.

2. Check the desired recording.

3. Select the Resource Usage icon.
   The Resource Register appears.

4. Manage the resource usage as desired.