

Resources Management

Purpose:

The TRAIN Resources Management feature allows administrators to create, publish, and handle visibility of resources.

Administrative Roles with Access:

- **Resource Manager**

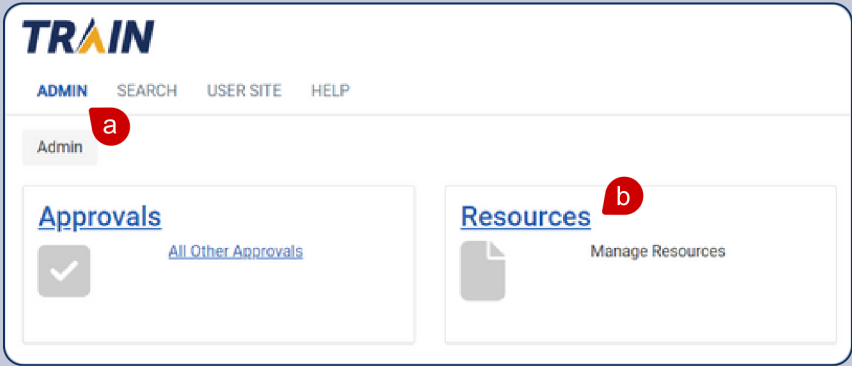
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Navigate to Resources

Go to the (a) **Admin** menu and click the (b) **Resources** tile.



Search Existing Resources

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Type keywords into the (a) **search bar** and click the (b) **magnifying glass** to view the relevant search results. Click a (c) **category or resource title** to view its details.



Categories and Resources

Categories and subcategories help administrators keep track of resources by filing them under certain labels. Resources cannot exist without a category.



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Add and Edit Categories

Add new categories and edit existing categories.

- (a) Click the **Add Category** button on the upper right hand side of the Resources page.

The screenshot shows the 'Resources' page. At the top right, there is a navigation bar with 'ADMIN', 'SEARCH', 'USER SITE', and 'HELP'. Below this is a search bar and a button labeled 'Add Category' with a red circle 'a' next to it. The main content area has a search bar and a 'Show inactive' link. Below that is a 'Hint' section and a table of categories. The table has columns for 'Category' and a three-dot menu icon. The categories listed are '10 TRAIN Tips for TRAIN Administrators', '2008 Kentucky Return on Investment (ROI)', and '2015 E-Learning Institute'.

The screenshot shows the 'Add category' form. It has a 'Cancel' button at the top left and a 'Save' button at the top right with a red circle 'd' next to it. The form has a 'Title' field with a red circle 'b' next to it and a 'Category Title' field. Below these is an 'Active' checkbox. The 'Availability' section has a dropdown menu showing 'West Virginia' and an 'Add' button with a red circle 'c' next to it.

- (b) Give the Category a **Title** here.
- (c) In the Availability section, click the blue **Add** button to select the Group(s) that can access this category.
- (d) Click the green **Save** button to finish adding the new category.

- (e) To edit your category, click the three-dot action menu on the Resources page.

- Select the **Edit** option to make changes to your category title and/or group.
- Select the **Add sub-category** option to create a sub-category attached to the main one.
- Select the **Delete** option to delete the category.

The screenshot shows the 'Resources' page with a table of categories. The table has columns for 'Category/Resource', 'Type', and 'Updated'. The categories listed are 'category', 'Category Title', and 'Test New Category'. The 'category' row has a three-dot menu icon with a red circle 'e' next to it. The menu is open, showing options: 'Open', 'Edit', 'Add sub-category', 'Move To', and 'Delete'.

4 record(s) found. [Show inactive](#)

Category/Resource	Type	Updated
Category Title	Category	Feb 27, 2024 8:10 PM EST

Click on a category title to view, add, or edit its resources.

- (a) Click the **Add Resource** button.
- (b) Give your resource a **Title** here.
- (c) Type a **description** of the resource here. You can also add attachments, hyperlinks, and images to your resource using the toolbar.
- (d) Click the blue **Preview** button to see how your resource description will appear to TRAIN users.
- (e) **Viewing Options:**
 - When checked, the **Active** box means TRAIN users can view the resource.
 - When checked, the **Available only to administrators** box means the resource will only be visible to administrators, not learners.
 - When checked, the **Searchable** box means the resource will appear in search results.
- (f) To upload a file, ensure the Upload File box is checked, then click the red **Upload File** button.
- (g) To provide a URL, ensure the **URL to browse** box is checked, then paste the URL in the text box.

[Back](#)

Category Title

Edit Settings

[Categories](#)

☒ Notify me about changes in this category

You must opt-in to receive emails under Your Profile to use this functionality

Groups

National/West Virginia

Resources (0)

Add Resource

There are no resources in this category

Cancel

Save

Add resource

(Fields marked below are required)

Title

Resource Title

Description

B I H [List Icons] [Quote Icon] [Link Icon] [Image Icon] [Attachment Icon]

Preview

Attach a file

☒ Active

☐ Available only to administrators

☒ Searchable

This resource will appear in search results.

Content

☒ Upload File

☐ URL to browse

The following list of file extensions are allowed:
.doc, .docx, .xls, .xlsx, .xlr, .ppt, .zip, .rtf, .txt, .gif, .jpeg, .jpg, .bmp, .html, .pdf, .csv, .pptx, .png

Allowed file size up to 12 MB

Upload File

Content

☐ Upload File

☒ URL to browse

URL to browse

Add and Edit Resources (continued)

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- (h) On the category details page, click this button to receive notifications about any changes made to the category.

- (i) To edit your resource, click the three-dot action menu on the Resources page.
 - >> Select the **Edit** option to make changes to your resource.
 - >> Select the **Move To** option to move your resource to a different category.
 - >> Select the **Delete** option to delete the resource.

- (j) Click the green **Save** button to finish adding or editing a resource.

Publicly Accessible Resources

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To make a resource publicly accessible to learners without requiring login to TRAIN, ensure the resource and its corresponding category have the following settings:

- (a) The category's group setting must be at the highest state or affiliate level.

- (b) The Resource must be marked as **Active**.
- (c) The **Searchable** box must be **unchecked**.