

# Managing the Resource Library

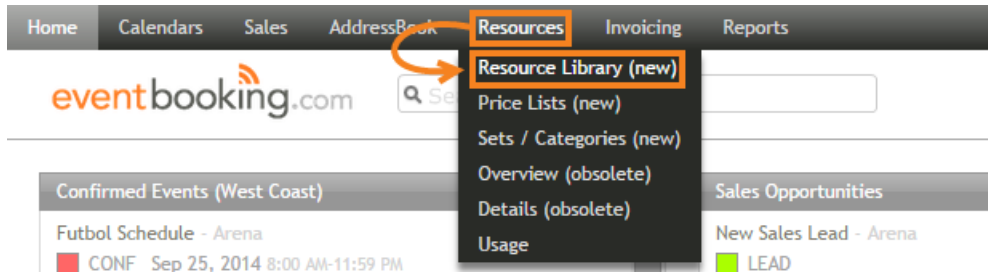
Updated: September 28, 2014

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## Navigating to the Resource Library

1. Hover over **Resources**.
2. Click **Resource Library (new)**.



## Selecting a Resource Library View

There are three ways to view the resource library:

1. Click **Info** to view basic information about the resource items.

The screenshot shows the 'Resource Library' interface. On the left, under 'VIEW RESOURCES BY', the 'Pricing' option is selected and highlighted with a blue border. Below it, the 'FILTERING' section shows 'Active' as the selected filter. The main content area is titled 'PRICING VIEW' and displays a table of resource items with columns for PATH, ITEM, UNIT, COST, and PRICE. The table lists various items such as 'Deposit', 'Insurance', 'Payment Received', 'Shipping', '1000W Stereo w/ Mic', 'Mixer', '120" Screen', and 'HD Projector'.

PATH	ITEM	UNIT	COST	PRICE
Administrative/Deposits	Deposit	ea	\$0.00	\$0.00
Administrative/Insurance	Insurance	ea	\$0.00	\$0.00
Adminis.../Payments Received	Payment Received	ea	\$0.00	\$0.00
Administrative/Shipping	Shipping	ea	\$0.00	\$0.00
Audio Visual/PA Systems	1000W Stereo w/ Mic	dy	\$0.00	\$200.00
Audio Visual/PA Systems	Mixer	hr	\$0.00	\$0.00
Audio Visual/Projectors/TV	120" Screen	ea	\$0.00	\$50.00
Audio Visual/Projectors/TV	HD Projector	ea	\$0.00	\$200.00

2. Click **Pricing** to view the cost and price of each resource. For more on managing prices, please see [the full article](#).

The screenshot shows the 'Resource Library' interface with the 'Info' view selected. The 'VIEW RESOURCES BY' section on the left has 'Info' highlighted. The main content area is titled 'INFO VIEW' and displays a table of resource items with columns for PATH, ITEM, QUANTITY, STOCK TYPE, STATUS, GL ACCOUNT, SERIAL NUMBER, and DESCRIPTION. The table lists the same items as the Pricing view, but with additional details like 'QUANTITY' and 'STOCK TYPE'.

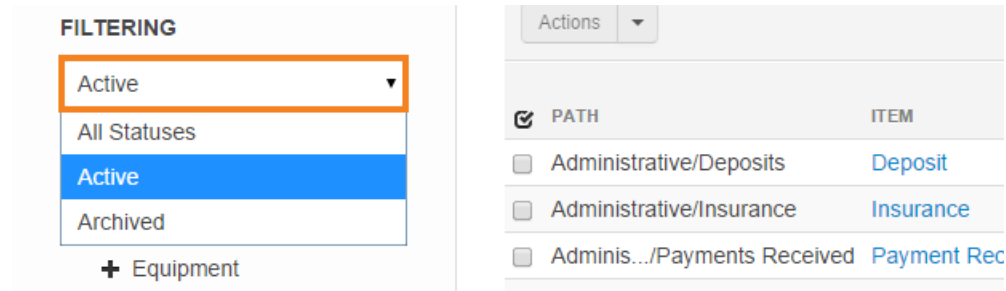
PATH	ITEM	QUANTITY	STOCK TYPE	STATUS	GL ACCOUNT	SERIAL NUMBER	DESCRIPTION
Administrative/Deposits	Deposit	0	Unlimited	Active			
Administrative/Insurance	Insurance	0	Unlimited	Active			
Adminis.../Payments Received	Payment Received	0	Unlimited	Active			
Administrative/Shipping	Shipping	0	Unlimited	Active			
Audio Visual/PA Systems	1000W Stereo w/ Mic	4	Limited - durable	Active			
Audio Visual/PA Systems	Mixer	0	Limited - durable	Active			
Audio Visual/Projectors/TV	120" Screen	0	Limited - durable	Active			
Audio Visual/Projectors/TV	HD Projector	0	Limited - durable	Active			



## Filtering Resources

There are three ways to filter resources:

1. The status drop-down allows you to select whether you would like to view active and archived resources, only active resources or only archived resources.



2. The sets and categories hierarchy has the following options:
  - **All** displays all resources in the library.
  - **Expand** expands the entire hierarchy, making all sets and categories visible.
  - **Collapse** collapses the entire hierarchy, making only sets visible.
  - **Manage** opens the sets and categories page. For more information, please see [the full article](#).
  - You can also click a single set or category to show only the resources in that set or category. Clicking the plus signs will expand that section of the hierarchy to show any categories underneath.

**FILTERING**

Active ▾

[All](#) [Expand](#) [Collapse](#) [Manage](#)

- Administrative
  - Deposits**
  - Insurance
  - Payments Received
  - Shipping
- + Audio Visual
- + Electrical
- + Equipment
- + Food and Beverage
- + Furniture
- + Labor
- + Space Rental
- + Services

<input checked="" type="checkbox"/>	PATH	ITEM
<input type="checkbox"/>	Administrative/Deposits	<a href="#">Deposits</a>

- 3. The resource search allows you to type in a word or phrase and filter out any resources that do not match.
  - The magnifying glass icon will search for your word or phrase. You can also simply press **Enter** on your keyboard.
  - The X icon will clear the search field.
  - The gear icon will bring up the search options window.

**INFO VIEW**

All Sets and Categories

Beer

Actions <input type="button" value="v"/>						
<input checked="" type="checkbox"/>	PATH	ITEM	QUANTITY	STOCK TYPE	STATUS	GL ACCOUM
<input type="checkbox"/>	Food and Beverage/Alcohol	<a href="#">Beer, domestic bottle</a>	0	Unlimited	Active	
<input type="checkbox"/>	Food and Beverage/Alcohol	<a href="#">Beer, import bottle</a>	0	Unlimited	Active	
<input type="checkbox"/>	Food and Beverage/Alcohol	<a href="#">Beer, Keg</a>	0	Unlimited	Active	

The resource library will display fifty resources at once. If there are more than fifty resources that meet your criteria, you will be able to click **Next** and **Previous** to navigate between the pages of results.

**INFO VIEW**

All Sets and Categories

Search

Page 1 of 2

Actions

<input checked="" type="checkbox"/>	PATH	ITEM	QUANTITY	STOCK TYPE
<input type="checkbox"/>	Administrative/Deposits	<a href="#">Deposit</a>	0	Unlimited
<input type="checkbox"/>	Administrative/Insurance	<a href="#">Insurance</a>	0	Unlimited
<input type="checkbox"/>	Adminis.../Payments Received	<a href="#">Payment Received</a>	0	Unlimited
<input type="checkbox"/>	Administrative/Shipping	<a href="#">Shipping</a>	0	Unlimited
<input type="checkbox"/>	Audio Visual/PA Systems	<a href="#">1000W Stereo w/ Mic</a>	4	Limited - durable

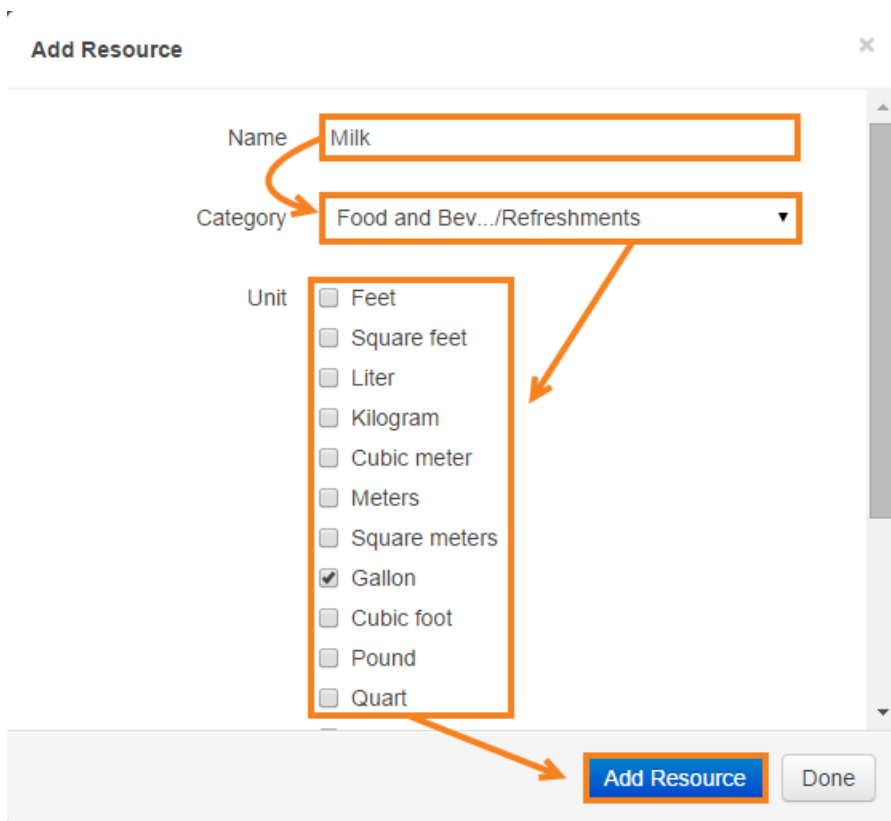


## Adding Resource Items

1. Click **Add Resource** in the upper-right corner.



2. Type the desired name of your resource item.
3. Select the category your resource should be under.
4. Check the units by which your resource will be measured. For more information on inventory units, please read [the full article](#).
5. Click **Add Resource** or press **Enter**.



The screenshot shows the 'Add Resource' dialog box. It has a title bar with 'Add Resource' and a close button. The form contains three main sections: 'Name', 'Category', and 'Unit'. The 'Name' field contains 'Milk'. The 'Category' dropdown menu is set to 'Food and Bev.../Refreshments'. The 'Unit' section is a list of units with checkboxes: Feet, Square feet, Liter, Kilogram, Cubic meter, Meters, Square meters, Gallon (checked), Cubic foot, Pound, and Quart. At the bottom of the dialog, there are two buttons: 'Add Resource' (highlighted with a red border) and 'Done'.

6. If you would like to add another resource, enter the needed information and click **Add Another Resource** or press **Enter**.
7. When you are done adding resources, click **Done**.

**Add Another Resource** [Close]

Name

Category

Unit

- Feet
- Square feet
- Liter
- Kilogram
- Cubic meter
- Meters
- Square meters
- Gallon
- Cubic foot
- Pound
- Quart

## Editing Resources

1. Click **Edit** in the upper-right corner of the resource list.

								Edit
	QUANTITY	STOCK TYPE	STATUS	GL ACCOUNT	BRAND	SERIAL NUMBER	DESCRIPTION	
	0	Unlimited	Active					
	0	Unlimited	Active					

2. Use **Tab** or the arrow keys to move between the fields, entering or selecting the proper information.
3. Click **Save** to save your changes or **Cancel** to cancel all of the changes you've made.

Edit Info

PATH	ITEM	STOCK TYPE	STATUS	GL ACCOUNT	BRAND	SERIAL NUMBER	DESCRIPTION
Administrative/Deposits	<input type="text" value="Deposit"/>	Unlimited	Act	In	<input type="text"/>	<input type="text"/>	<input type="text"/>
Administrative/Insurance	<input type="text" value="Insurance"/>	Unlimited	Act	In	<input type="text"/>	<input type="text"/>	<input type="text"/>
Adminis...Payments Received	<input type="text" value="Payment Received"/>	Unlimited	Act	In	<input type="text"/>	<input type="text"/>	<input type="text"/>
Administrative/Shipping	<input type="text" value="Shipping"/>	Unlimited	Act	In	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Moving Resources

1. Check the resource items you would like to change or click the checkbox icon to check all the items.

Actions ▾

<input checked="" type="checkbox"/>	PATH	ITEM	QUANT
<input checked="" type="checkbox"/>	Administrative/Deposits	Deposit	0
<input type="checkbox"/>	Administrative/Insurance	Insurance	0
<input checked="" type="checkbox"/>	Adminis.../Payments Received	Payment Received	0
<input checked="" type="checkbox"/>	Administrative/Shipping	Shipping	0

2. Click **Actions**.
3. Click **Move**.

**FILTERING**

Active

All Expand Collapse M

- + Administrative
- + Audio Visual
- + Electrical
- + Equipment

Actions ▾

Move

Change status to Archived

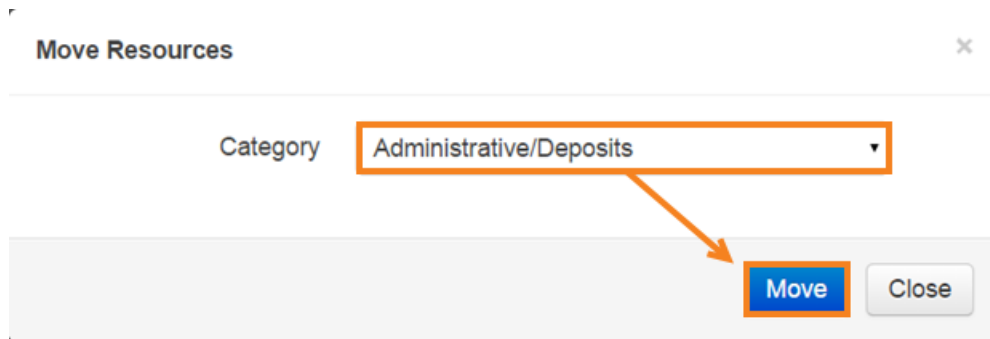
Delete

Administrative/Deposits

Administrative/Insurance

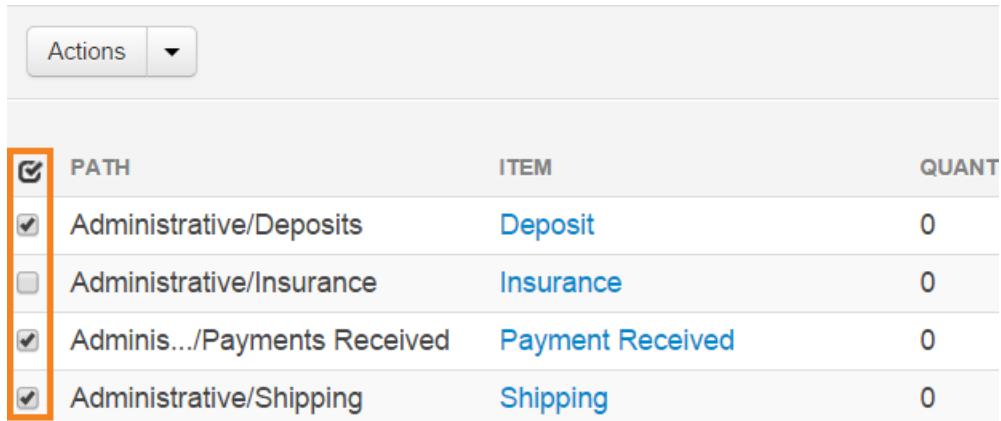
Adminis.../Payments Recd

4. Use the drop-down to select the category to which you would like to move the resource item(s).
5. Click **Move**.



## Archiving Resources

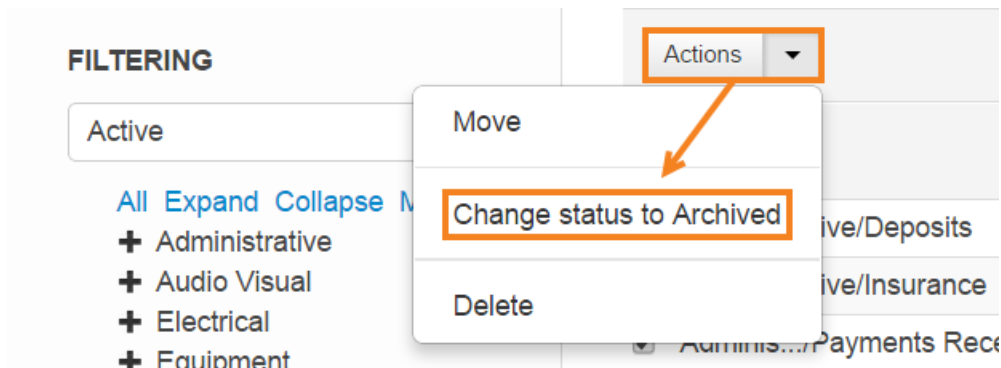
1. Check the resource items you would like to change or click the checkbox icon to check all the items.



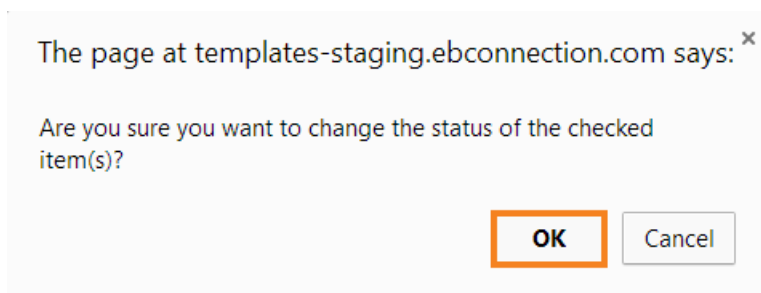
The screenshot shows a table with four columns: a checkbox column, a 'PATH' column, an 'ITEM' column, and a 'QUANT' column. The 'Actions' dropdown menu is open, and the first checkbox in the table is highlighted with an orange box.

<input checked="" type="checkbox"/>	PATH	ITEM	QUANT
<input checked="" type="checkbox"/>	Administrative/Deposits	Deposit	0
<input type="checkbox"/>	Administrative/Insurance	Insurance	0
<input checked="" type="checkbox"/>	Adminis.../Payments Received	Payment Received	0
<input checked="" type="checkbox"/>	Administrative/Shipping	Shipping	0

2. Click **Actions**.
3. Click **Change status to Archived**.



4. Click **OK** to confirm that the checked items should be archived.



## Deleting Resources

1. Check the resource items you would like to delete or click the checkbox icon to check all the items.

<input checked="" type="checkbox"/>	PATH	ITEM	QUANT
<input checked="" type="checkbox"/>	Administrative/Deposits	Deposit	0
<input type="checkbox"/>	Administrative/Insurance	Insurance	0
<input checked="" type="checkbox"/>	Adminis.../Payments Received	Payment Received	0
<input checked="" type="checkbox"/>	Administrative/Shipping	Shipping	0

2. Click **Actions**.
3. Click **Delete**.

**FILTERING**

Active

All Expand Collapse M

- + Administrative
- + Audio Visual
- + Electrical
- + Equipment

Actions

- Move
- Change status to Archived
- Delete**

4. Click **OK** to confirm that the checked items should be deleted completely.

The page at templates-staging.ebconnection.com says: ✕

Are you sure you want to delete the selected item(s)?

**OK** Cancel

If any of the resource items you selected are currently in use, an alert will prevent you from deleting them. You will need to deselect any in-use resources in order to delete the rest.

