

6. RESOURCES

The Resource Library includes three category types: General Resources (Public and Private), Investment Resources, and Portfolio Resources. Public General Resources are accessible to all users and can be viewed from the Home Page before signing into eCPIC. Private General Resources are accessible to users with the ‘Read’ RIGHT to the Resource Library and are viewed from the Resource Module. Only users with an eCPIC login and password that have appropriate privileges can access Private Resources. The Investment and Portfolio Resources are found in each respective module.

Users with the ‘Create’ RIGHT to the Resource Library can associate their Resource with an Investment or Portfolio from within either module. However, only the System Administrator has the ability to associate resources with the General Resource Library. System Administrators also have the ability to associated resources with Processes and Sections for all Investments.

6.1 Overview

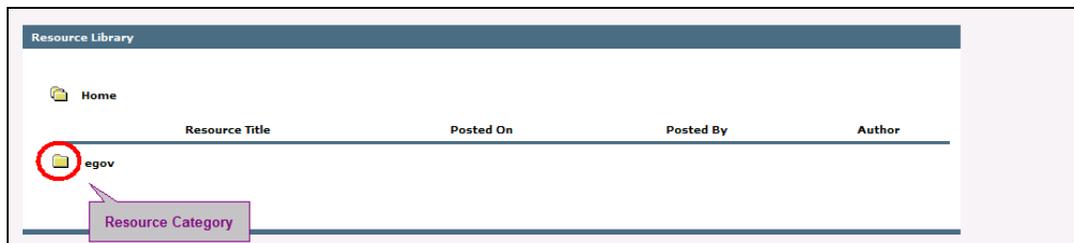
The General Resource Library shows a listing of General Resources that can be Public or Private. Users can select an Investment or Portfolio Resource by clicking on the respective drop-down list to select investments or portfolios for which they have access.



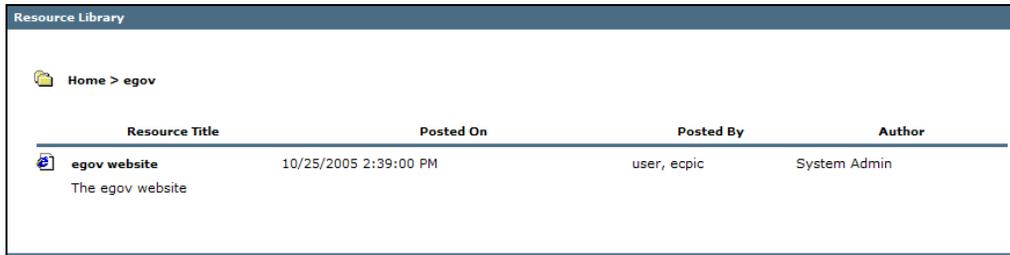
6.2 Access Resources

To Access Resources (Public or Private):

1. Click on the **Resources** module. This will open a pop-up window that contains a list of Resource Categories.

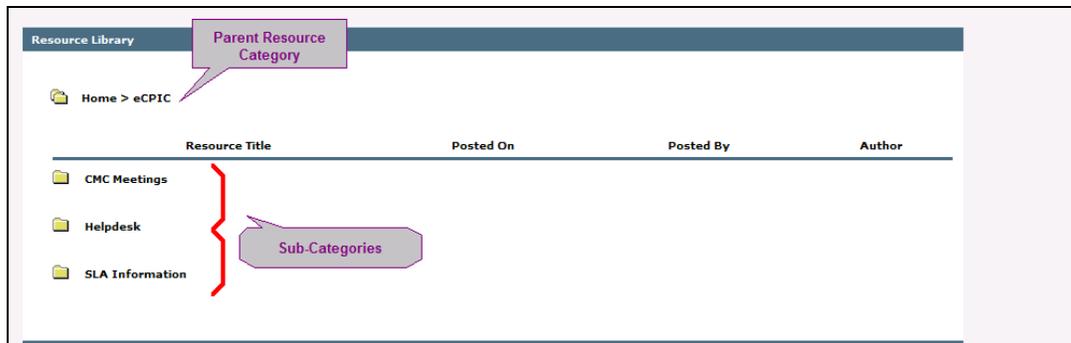


2. Click on a **Resource Category** to view the items that have been associated with it. All Resource Categories are defined by the System Administrator.

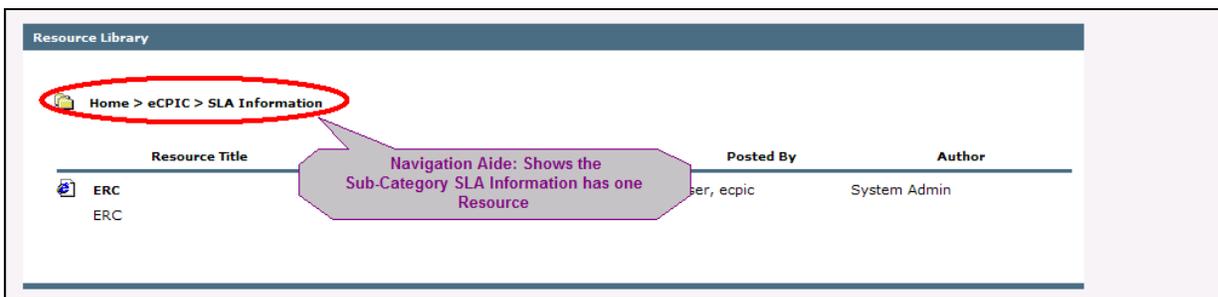


Each reference shows the type of resource (*Excel document, Website, Word document, etc*), the title of the resource, the date it was posted, the name of the person who posted the resource, and the Author of the Resource.

Resource Categories may also include sub-categories. Sub-categories can be nested many levels deep.



Navigation aides have been added to the top of the pages to show users what sub-category they are currently working on.



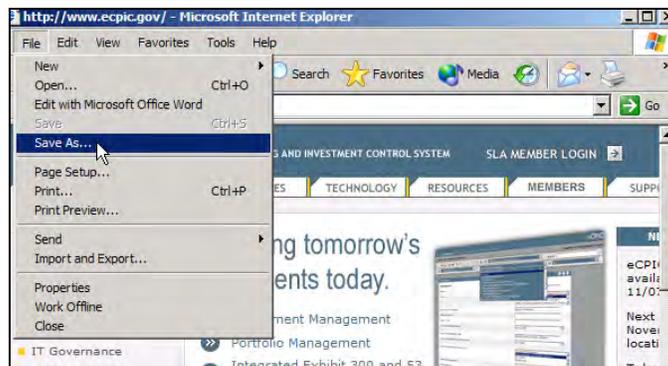
3. Click on the **Resource’s Title** to open it within another browser window.



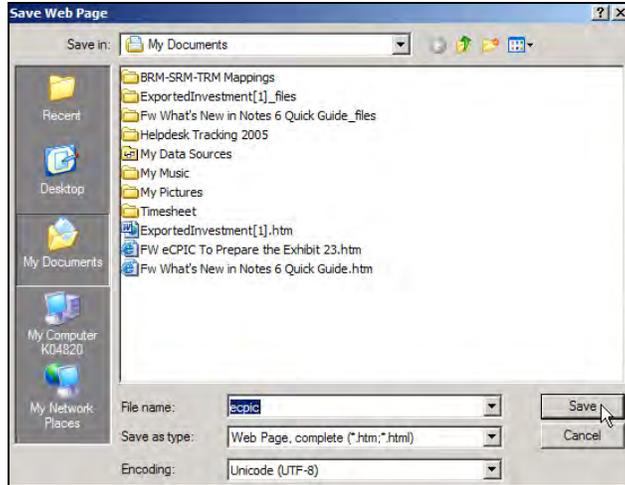
- To download the resource, highlight the **Resource's Title** in the Address box.



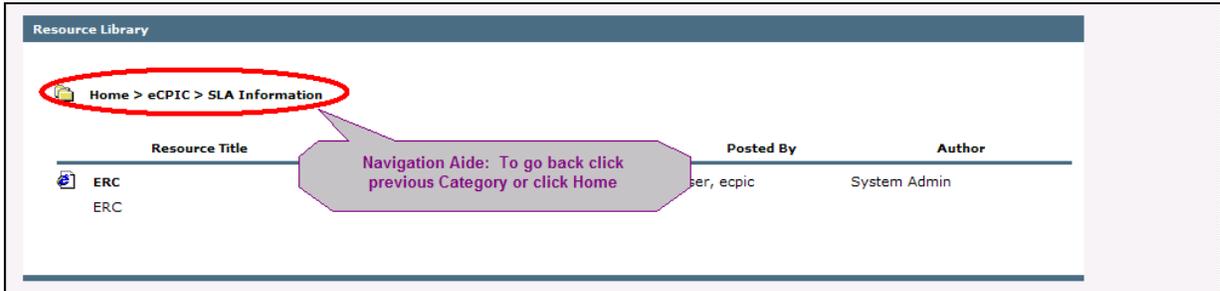
- From within the new window, click **File**.
- Select **Save As**.



- Enter the **Name** of the Resource and specify where to save it.
- Click **Save**.



In order to go back a page at any time, click on the previous Resource Category, Resource Title or Home.



6.3 Add Resources

Adding resources has been simplified for the end-user, and expanded for the System Administrator. Non-admin users can now only add resources to any investment or portfolio to which they have been granted access to do so. They cannot add resources to the General Library, or make any association that has a system-wide effect (*such as adding resources to entire sections of investments or to processes.*)

***Please see the Investment or Portfolio sections of this guide for instructions on how to add resources.*

6.4 Edit Resources

End-users also have a Resource Management interface, enabling a user to manage resources that they have added to the system. Available as a link from the General Resource Library, a user may edit or delete any resources they added themselves.

1. Click on the **Resources** module.
2. From within the Resources Library, users will see text that reads, “To edit or delete resources belonging to the user, click **Here**”. ‘Here’, is link to the *My Resources* form.



3. Click on the **Here** link. The My Resources Form will appear:



4. Click on the **Edit** link for the Resource that will be edited. The Edit My Resource form will appear:

5. Make the appropriate changes.
6. Click **Save** to save the data or **Cancel** to undo any data entered.

6.5 Delete Resources

To Delete a Resource:

1. Click on the **Resources** module.

- From within the Resources Library, click on the link “To edit or delete resources belonging to the user, click **Here**.” ‘Here’, is link to the *My Resources* form.



- Click on the **Here** link. The My Resources Form will appear:



- Click on the **Delete** link for the Resource that will be deleted.
- Confirm deletion of the Resource. Select **OK**.

