

Adding Vendors and Trainers

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Introduction

Vendor - a training company or provider (can include units within the University of York for internal training)

Trainer - a specific person who provides the training, associated with a particular vendor.

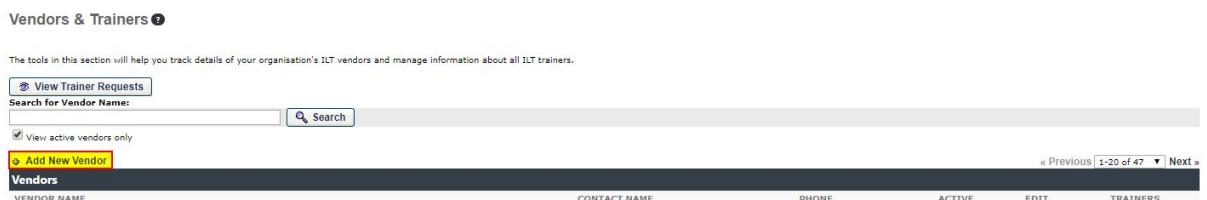
To select a particular trainer for an event or session, that trainer must be associated with the vendor selected for that event or session.

This guide is intended to show you how to manage, add and edit Vendors and Trainers in the LMS

Vendors

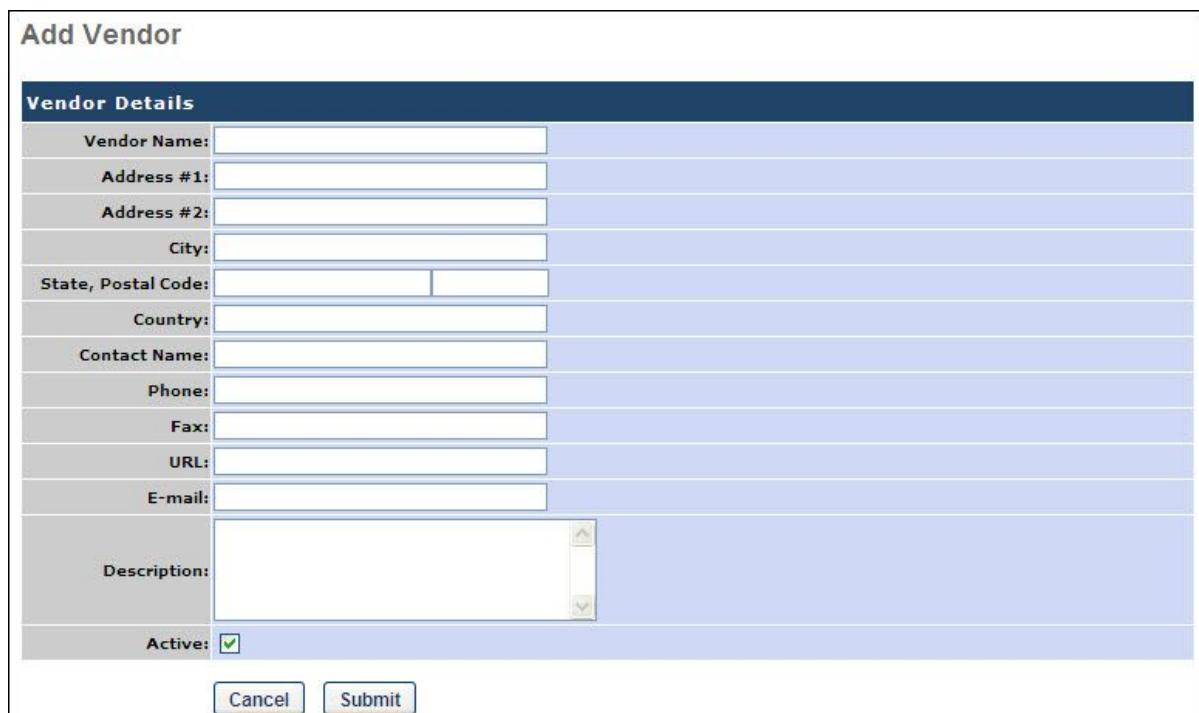
Adding a New Vendor

1. Select the **Classroom Events > Vendors & Trainers** menu item
2. Click on **Add New Vendor**



The screenshot shows a web-based application interface for managing vendors and trainers. At the top, there is a header with the title 'Vendors & Trainers'. Below the header, there is a search bar with a placeholder 'Search for Vendor Name' and a 'Search' button. There are also buttons for 'View Trainer Requests' and 'View active vendors only'. A prominent yellow button labeled 'Add New Vendor' is highlighted with a yellow box. The main content area is a table with columns 'VENDOR NAME', 'CONTACT NAME', 'PHONE', 'ACTIVE', 'EDIT', and 'TRAINERS'. The table has a single row with the text 'Vendors'. At the bottom right of the table, there are links for '« Previous', '1-20 of 47', and 'Next »'.

Vendor Details



The screenshot shows a 'Add Vendor' form with a title bar 'Add Vendor'. The form is divided into sections: 'Vendor Details' (containing fields for Vendor Name, Address #1, Address #2, City, State, Postal Code, Country, Contact Name, Phone, Fax, URL, E-mail, and Description), and 'Active' (with a checked checkbox). At the bottom are 'Cancel' and 'Submit' buttons.

Vendor Details	
Vendor Name:	<input type="text"/>
Address #1:	<input type="text"/>
Address #2:	<input type="text"/>
City:	<input type="text"/>
State, Postal Code:	<input type="text"/> <input type="text"/>
Country:	<input type="text"/>
Contact Name:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>
URL:	<input type="text"/>
E-mail:	<input type="text"/>
Description:	<input type="text"/>
Active:	<input checked="" type="checkbox"/>

Fill in the following fields, as required:

- **Vendor Name**
This is required. The character limit is 100.
- **Address # 1**
- **Address # 2**
- **City**
- **State, Postal Code**
- **Country**

- **Contact Name**
- **Phone**
- **Fax**
- **URL**
- **E-mail**
- **Description**
- **Active**

Select this option to make this vendor active

Trainers

Adding a New Trainer

1. Select the **Classroom Events > Vendors & Trainers** menu item
2. From the list of Vendors displayed, click on **Trainers**:

Vendors & Trainers

The tools in this section will help you track details of your organisation's ILT vendors and manage information about all ILT trainers.

<input type="button" value="View Trainer Requests"/> <input type="button" value="Search for Vendor Name:"/> <input type="button" value="Search"/>					
<input type="checkbox"/> View active vendors only					
<input type="radio"/> Add New Vendor					
Vendors					
VENDOR NAME	CONTACT NAME	PHONE	ACTIVE	EDIT	TRAINERS
Robertson Cooper Ltd			Yes		Trainers
St Johns Ambulance			Yes		Trainers
Suzy Lamplugh Trust			Yes		Trainers
The Work Foundation			Yes		Trainers
University of York			Yes		
Voice Matters Ltd			Yes		Trainers
YCL			Yes		Trainers

3. A list of trainers for this vendor will be displayed. Click on the Add New Trainer link:

Trainers

<input type="button" value="View Trainer Requests"/> <input type="button" value="Search for Trainer Name:"/> <input type="button" value="Search"/>					
<input type="checkbox"/> View active trainers only					
<input type="radio"/> Add New Trainer					
Trainers					
<input type="button" value="View Trainer Requests"/> <input type="button" value="Search for Trainer Name:"/> <input type="button" value="Search"/>					
<input type="checkbox"/> View active trainers only					
<input type="radio"/> Add New Trainer					
Trainers					

Trainer Details

If you are adding an existing user as an instructor, click the pop-up icon to the right of the Last Name field. **NB: If the instructor you are adding is a user in the system, it is a best practice to select them from the system. Existing users selected as instructors can perform Instructor actions immediately within the system.**

Add Instructor

Edit Instructor		
Instructor Name:	First Name	Last Name
	<input type="text"/>	<input type="text"/>  (select an existing user)
Home Location:	<input type="text"/> 	
Phone:	<input type="text"/>	
Fax:	<input type="text"/>	
E-mail:	<input type="text"/>	
Language(s) Spoken:	<input type="text"/>	
Education:	<input type="text"/>  	
Biography:	<input type="text"/>  	
Certifications:	<input type="text"/>	
Active:	<input type="checkbox"/>	
<input type="button" value="Cancel"/> <input type="button" value="Submit"/>		

Otherwise, enter the following information for the trainer, as required:

- **First Name**
- **Last Name**
- **E-mail**
- **Active**

Check the Active option to make the trainer active and available for selection.

If a trainer is deactivated for a vendor, the trainer remains active for any other vendors with which they are associated.

All other details are optional.

