

**Dynamic Works Institute**

**Best Practices Document Archive**

**User Guide**

**February 2009**

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## User Guide

### Introduction

#### Primary Objective

The primary objective of this tool is to create a comprehensive online database and repository for workforce-related electronic documents, submitted by members across the United States.

Documents may include training matrices, actual proposals and contracts, spreadsheet tools, or marketing materials, just to name a few examples.

#### Restrictions of Use

Users may submit a document for inclusion in the repository, or download a document for use. There is no fee for storage or download, nor is there any limit on the number of documents that can be submitted or retrieved.

The only requirement for use is membership. This policy allows Dynamic Works Institute, Inc. to put in place some minimal safeguards:

- Make it one step harder to prevent the those in the general public with malicious intent from uploading harmful or inappropriate materials, such as pornography or commercial advertisements
- Provide contact information for other users, in case of questions

All document formats are permitted with the sole exception of executable files, to prevent viruses, worms, directory deletes or other harmful programs. When uploaded, the server firewall scans the document and if a worm or virus is detected, the upload is prevented. Permissible file types include: xls, rtf, doc, snp, pdf, zip, and so on.

There is no limit on file size except that imposed by the user's own network or connection speed.

Any member in the United States may take advantage of this repository.

## Overview

This Guide will explain to you how to upload or download a document, search for a document by keyword, filter on a particular category, or view a list of all documents.

First, you must be a member. You must either register or logon. Once logged on, the web site automatically takes you to your “My Learning” page. On that page, there is a link to the Sample Documents Clearinghouse. (See Figure 1, below, for a screen shot of the page and link.)

**My Learning Pages**  
**Mel Gibson**

**Welcome to your Learning Pages**

These pages are created specifically for you, to display the learning opportunities you have completed through Dynamic Works Institute, provide resource links, list courses purchased by or for you, and display a personalized stat block where, at a glance, you can view your progress.

**Knowledge Corner**

Building partnerships does not happen overnight. To create positive relations between businesses and One-Stops, establishing rapport with an employer is the first step.

From course: [Successful Partnerships Make for Successful Service](#)

**My Statistics:** Membership No.: DW20171 Member Since: 2007 Tests Passed: 0 Certifications: 0

**My Personal Links**

<a href="#">My Courses</a>	The status of progress you have made toward completing packages purchased
<a href="#">My Transcript</a>	Displays the tests you have completed as well as on-site events you've attended
<a href="#">My Profile</a>	Modify your contact information, subscription choices and logon
<a href="#">My Support Questions</a>	Support tickets providing individual answers to your personal questions

**My Resources**

<a href="#">Webinars</a>	Sign up now to participate in live training and informational sessions over the Internet – spaces are limited
<a href="#">Other Vendor Solutions</a>	Link to other resources provided by industry experts to support your lifelong learning
<a href="#">Best Practices Document Archive</a>	A repository of best practices and sample documents - such as contracts, RFPs and business plans - from workforce organizations across the country

**Figure 1. My Learning Page**

Clicking on the link for the Best Practices Document Archive brings you to the landing page, as shown below in Figure 2. By default, the documents you see listed initially are always the five most recent submissions to the repository.


From here, you may search for a document, download one or filter on a specific category of documents.

*Best Practices Document Archive*

**Welcome to the Dynamic Works Best Practices Document Archive**

This repository will provide you with an online resource for best practices, sample procedures, contracts, proposals, and other items from your colleagues across the country. Check out the last five submissions below. Or, you can search by keyword using the Keyword Search or by topic on the left-hand menu. Submit your practices here to so others can benefit from your knowledge and experiences.

Information provided herein is shared for the purpose of reuse and is available to the public. Dynamic Works Institute makes no warranties, express or implied, about the use of these documents, the information contained within, or their results.

Keyword Search    [Submit a Document](#) [User Guide](#)



Document Selection	Title	Description of Contents	Formats Avail.	Doc. Date	Point of Contact
<b>Disaster Recovery</b>					
<a href="#">List All Documents</a>	<b>Analysis of the 2004 hurricanes and the impact on the workforce and business activity</b>	Analysis of "before/after" hurricane impacts on the workforce and business activity.	 <a href="#">(629 KB)</a>	15-Sep-05	<a href="#">Mike Switzer</a> Workforce Florida, Inc.
<b>Demand-Side</b> <a href="#">Employer Services</a> <a href="#">One-Stop Services</a>	<b>Florida's Disaster Manual</b>	This manual was assembled last year after Florida was hit by 4 major hurricane. It is arranged as a checklist of bullet-like items to check/do in preparing for a hurricane or similar disaster, immediate steps to take during/after the	 <a href="#">(129 KB)</a>	14-Sep-05	<a href="#">Mike Switzer</a> Workforce Florida, Inc.
<b>Governance/Mgmt</b> <a href="#">Disaster Recovery</a> <a href="#">Miscellaneous</a> <a href="#">Policies &amp; Procedures</a> <a href="#">Procurement</a>					
<b>Supply-Side</b> <a href="#">Faith-Based Initiatives</a>					

Figure 2. Landing Page

## View All Documents

To view all documents in the Document Archive, simply click the left-hand link shown below.

[List All Documents](#)

Every active document will be listed by category and then alphabetically by name. The figure below demonstrates the results of listing all documents.



Title	Description of Contents	Formats Avail.	Doc. Date	Point of Contact
<b>Business Service Plans</b>				
Brevard Workforce Development Board Corporate Plan	BWDB's current Corporate Plan	<a href="#">PDF (424 kb)</a> <a href="#">Zip (116 kb)</a> <a href="#">.doc (347 kb)</a>	16-Dec-03	<a href="#">Lisa Rice</a> FL13 (321) 504-2060
Brevard Workforce Development Board's Strategic Plan	BWDB's Strategic Plan	<a href="#">PDF (258 kb)</a> No Zip Avail. <a href="#">.doc (91 kb)</a>	16-Dec-03	<a href="#">Mary Ross</a> FL13 (915) 795-4301
<b>Contracting</b>				
Brevard Workforce Development Board's Business Services Unit's Contract Module	Business Services Unit One Stop Contract Module	<a href="#">PDF (885 kb)</a> <a href="#">Zip (99 kb)</a> <a href="#">.doc (671 kb)</a>	16-Dec-03	<a href="#">Lisa Rice</a> FL13 (321) 504-2060
<b>Employer Services</b>				
Employer Survey	Employer Survey	<a href="#">PDF (996 kb)</a> <a href="#">Zip (332 kb)</a> <a href="#">.doc (1,131 kb)</a>	16-Dec-03	<a href="#">Mary Ross</a> FL13 (915) 795-4301
<b>Faith-Based Initiatives</b>				
Brevard Workforce Development Board's Faith Based MOU	United Way Faith Based MOU	<a href="#">PDF (96 kb)</a> <a href="#">Zip (13 kb)</a> <a href="#">.doc (86 kb)</a>	16-Dec-03	<a href="#">Lisa Rice</a> FL13 (321) 504-2060
<b>Miscellaneous</b>				
Brevard Job Link Deliverable Tracking Tool	Excel spreadsheet developed to track contract deliverables	<a href="#">PDF (88 kb)</a> <a href="#">Zip (83 kb)</a> <a href="#">.xls (516 kb)</a>	16-Dec-03	<a href="#">Lisa Rice</a> FL13 (321) 504-2060
Customer Satisfaction Survey	Survey to record Customer Satisfaction	<a href="#">PDF (64 kb)</a> No Zip Avail. <a href="#">.xls (152 kb)</a>	16-Dec-03	<a href="#">Lisa Rice</a> FL13 (321) 504-2060

**Figure 3. Results of List All**

## Download a Document

Descriptive information about the document is provided, such as:

- Document Title
- A brief description of the document
- Upload date
- Point of contact's name
- Organization

<b>NEG Worksite Agreement</b>	Sample contract for National Emergency Grant funds to set up worksites	 <a href="#">(64 KB)</a>	17-Sep-04	<a href="#">Alice Cobb</a>
		 <a href="#">(64 KB)</a>		Workforce Central Florida

**Figure 4. Descriptive Document Information**

If you would like to contact someone who can provide more information about the document, an email hyperlink is provided as well, using the name of the contact person.

Note that for each document, you are provided with up to three possible download formats:

- The original or native format (.doc, .xls, .rtf and so on)
- Compressed format for large files (.zip)
- PDF to allow a universal method for viewing

<a href="#">PDF (885 kb)</a>
<a href="#">Zip (99 kb)</a>
<a href="#">.doc (671 kb)</a>

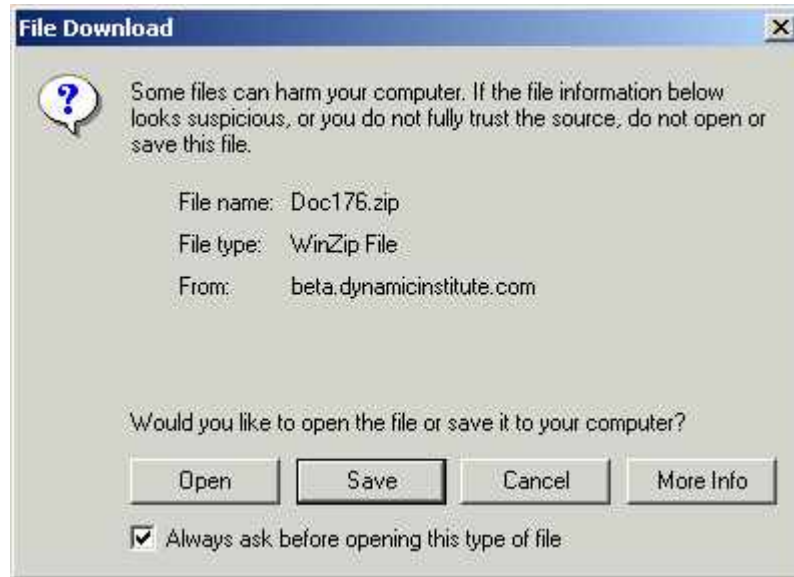
(Note: If you do not have the capability to view PDF documents, you can obtain the Adobe Acrobat Reader free by clicking on this the Adobe link shown below.)



You will also be shown the size of the document in kilobytes (kb). This is provided as a guide to estimate how long downloading the document may take, depending on your network connection speed.

You may download any or all of the available formats simply by clicking on the link for your chosen format.

Depending on any firewalls you may have installed, or your browser settings, you may or may not see a warning pop-up confirming that you wish to proceed, as shown below:



**Figure 5. Save Confirmation/Warning**

Click the save button and you will see the typical Windows Explorer window to select the file location. You may have noticed that the file names are very generic, such as shown above, "Doc176.zip". Of course, you may rename the file anything you wish on your own saved copy.

Documents that are provided to members are free to use as you wish without restriction or copyright.

Contents are not warranted; use them as you wish at your own risk. Dynamic Works does not vouch for their efficacy or accuracy.

## List Documents by Category

By selecting any one of the categories on the left-side menu, the displayed list will show (that is, filter to) only those documents in that category. The screen shot below shows documents filtered to the **Procurement** category.







Document Selection	Title	Description of Contents	Formats Avail.	Doc. Date	Point of Contact
<a href="#">List All Documents</a>	<b>Procurement</b>				
Demand-Side	Brevard Workforce Development Board RFP for One Stop Contractor	General Contractor Module One of BWDB's One Stop Contractor RFP	 <a href="#">(586 KB)</a>  <a href="#">(95 KB)</a>  <a href="#">(586 KB)</a>	16-Dec-03	<a href="#">Lisa Rice</a> Brevard Workforce Development Board
Governance/Mgmt	Brevard Workforce Development Board's Full RFP - All Modules	Five Module RFP for BWDB's One Stop Center	 <a href="#">(245 KB)</a>  <a href="#">(62 KB)</a>  <a href="#">(245 KB)</a>	16-Dec-03	<a href="#">Lisa Rice</a> Brevard Workforce Development Board
Supply-Side					

Figure 6. Documents Listed by a Category

There are three type of documents:

1. Demand-side (business and industry related)
2. Supply-side
3. Governance/management Process

Each type has its own categories, as shown in Appendix A.

There are many more categories available than those shown on the left-side menu. However, you will only see the category on the left if there are actually documents that belong to it. In other words, if a category is empty it is not displayed in this list.

When you upload a document, you choose the category at that time.







## Search Documents by Keyword

Searching for documents by keyword allows you to find documents without necessarily knowing to which category they belong. The process is quite straightforward:

1. Type in a short phrase or key word
2. Click the Search button

The site will search all documents that contain your key word(s) in either the title or the description of the document. Note. The document's contents are *not* searched.

The figure below shows the results of a search for documents with key word "One Stop".

Document Selection		Search results for keyword or phrase: <b>One Stop</b>				
<a href="#">List All Documents</a> Demand-Side <a href="#">Employer Services</a> <a href="#">One-Stop Services</a> Governance/Mgmt <a href="#">Disaster Recovery</a> <a href="#">Miscellaneous</a> <a href="#">Policies &amp; Procedures</a> <a href="#">Procurement</a> Supply-Side <a href="#">Faith-Based Initiatives</a>		Title	Description of Contents	Formats Avail.	Doc. Date	Point of Contact
<b>Procurement</b>						
		Brevard Workforce Development Board RFP for One Stop Contractor	General Contractor Module One of BWDB's One Stop Contractor RFP	 (586 KB)  (95 KB)  (586 KB)	16-Dec-03	<a href="#">Lisa Rice</a> Brevard Workforce Development Board
		Brevard Workforce Development Board's Full RFP - All Modules	Five Module RFP for BWDB's One Stop Center	 (245 KB)  (62 KB)  (245 KB)	16-Dec-03	<a href="#">Lisa Rice</a> Brevard Workforce Development Board

**Figure 7. Search Results**

Some tips for searching:

- The shorter your keyword, the more "hits" you will get
- Punctuation can skew your results, as in the above example, "One-Stop" (with a hyphen) would not have yielded any results.
- If you get no hits, try another phrase or spelling.

## Submit a Document

As mentioned earlier, as a Dynamic Works member, you may submit as many documents as you desire. You may do so by clicking the “Submit a Document” link next to the yellow Adobe icon.

Next you will see an input and upload form, as shown below. Note that the contact information defaults to your profile data as a convenience. There may be times when, although you are the one submitting the document, you wish for another person to be the point of contact. In that case, simply overtype the contact information.

Please be aware that:

- All fields on this form except remarks are required
- Documents are inactive until processed.
- We will create PDF and zip versions where necessary and activate the file for display.
- You are responsible for removing any proprietary information prior to upload.
- Documents will be posted as-is. You are responsible for any editing or proofreading.
- Documents are open to the membership without restriction.
- Any member of Dynamic Works may use the document in any way he or she sees fit.

**Submit a Document**

Use this form to upload a document to the Best Practices Document Archive. For detailed instructions, see our free [User Guide](#).

- Documents are inactive until processed.
- We will create PDF versions and zip versions where necessary and activate the file for display.
- You are responsible for removing any proprietary information prior to upload.
- Documents will be posted as-is. You are responsible for any editing or proofreading.
- Documents are open to the public and will be shared with any member of Dynamic Works.

Document Title:

File Name:

Document Description (max. 250 characters):

Category:

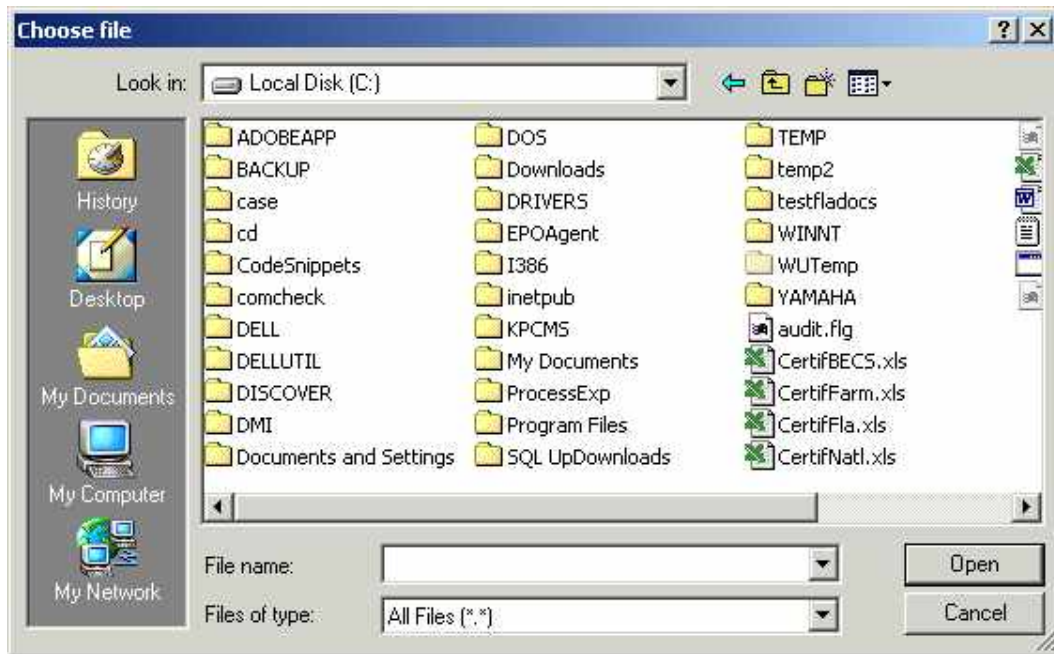
Contact Info: First:  Last:   
 Organization:   
 Phone:  Email:

Remarks:

**Figure 7. Submit a Document**

Begin by inputting the necessary descriptive data about the document, and confirm or revise the contact information.

Next, click the “Browse” button to locate the document you wish to upload, as shown in the figure below. Once again, you will see the Windows Explorer window, only this time you will be selecting a document to upload (rather than download), as shown in Figure 8, below.



**Figure 8. Select Document to Upload**

Remember that you may upload nearly any file type, such as Word documents, spreadsheets, rich-text files, ASCII files, and even small databases. The only restricted file types are those that can potentially be used to trigger programs to execute, such as file types “exe” or “bat” or other executables.

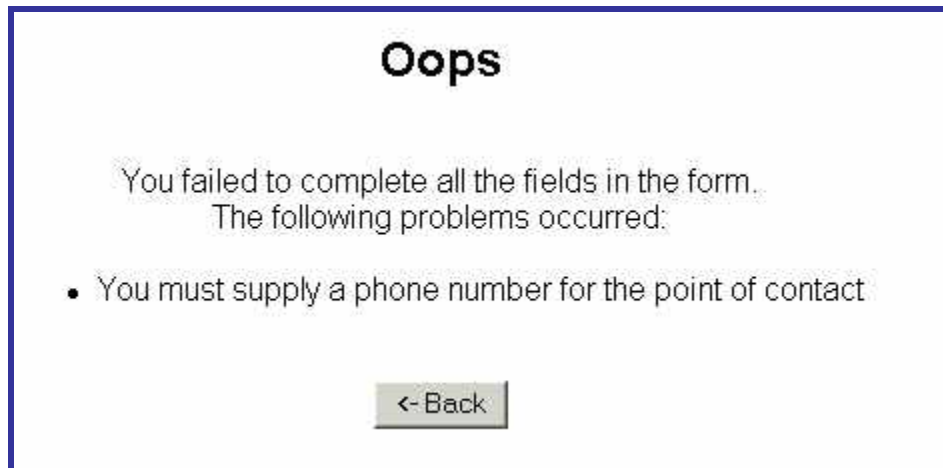
When you have selected your document, you will see its name and Windows path plugged into the filename field:



When you are done, click on the Upload File Now button:

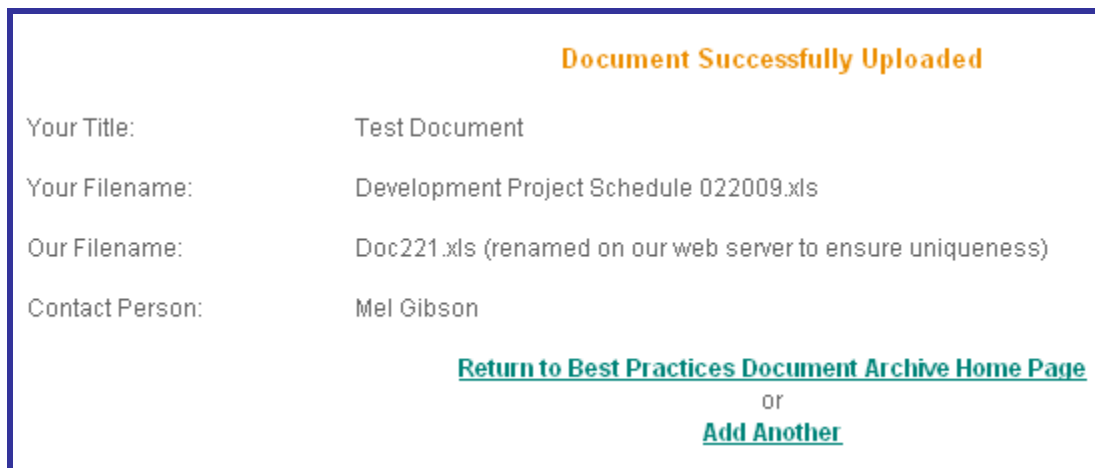
Upload File Now

If you forget any required field, you will see an error message like the one below. Just click the back button, type in what you forgot, and click the Upload button again.



**Figure 9. Error Message**

When your document uploads, you will see a “success” message, indicating that your file and your data were both successfully saved, as shown in the figure below.



**Figure 10. Success Message**

At this point, you are done, and you may return to the display page, or click the link to upload another document.

However, the document will not show up on the display list until it is activated. The staff of Dynamic Works must perform the following housekeeping tasks:

- Review content to ensure only appropriate material is available for members to download
- Convert the document to PDF format for universal use, if not submitted as a PDF originally
- For large documents (over 1 meg), put the document through a compression utility such as Zip
- Activate the document

## Support

Any problems or questions about this tool may be directed to Dynamic Works Technical Support at (321) 205-1590, email [support@dynamicinstitute.com](mailto:support@dynamicinstitute.com) or by completing a Contact Me form online.

## Appendix 1. Document Types and Categories

<u>Document Type</u>	<u>Category</u>
<i>Demand-Side</i>	Business Partnership Career Education Customized Training Economic Development Employer Services Entrepreneurship Literacy One-Stop Services Revenue-Generation Rural Initiatives Worker Shortages Workplace Readiness
<i>Governance/Mgmt</i>	Business Service Plans Contracting Grants Marketing and PR Miscellaneous Policies & Procedures Procurement
<i>Supply-Side</i>	Apprenticeships Child Welfare Services Digital Divide Disability Programs Employed-Worker Ex-Offender Programs Faith-Based Initiatives Homelessness Housing Job Corps Marriage and Family Migrant Education Partnerships Senior Work Programs Veterans Programs Welfare Reform WIA Implementation Youth Programs