Manual

Workforce Toolkit 2.0

Administrative User’s Guide

Prepared for
American Association of State and Highway Transportation Officials

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1.0 Preface

The Workforce Toolkit Administrative User’s Guide is designed to help you use the Administrative site for the Workforce Toolkit. A PDF of this guide is also available from the menu bar on the left side of the screen in the Workforce Toolkit Administrative User site.

1.1 About You

We assume that you are an American Association of State Highway Transportation Officials (AASHTO) staff member who has been given access to and responsibility for updating and maintaining the Workforce Toolkit.

We also assume you are busy, that maintaining this Toolkit is only a portion of your job, and that you would like to know how to perform the tasks required of you as quickly as possible.

1.2 About This User’s Guide

This Administrative User’s Guide will teach you how to use the Workforce Toolkit Administrative Site and will also serve as a reference when you have questions about how to perform certain activities.

Chapter 2, Introducing the Workforce Toolkit Administrative Site, provides an overview of the user’s site and the administrative user’s site to help you understand how this tool is being employed by the transportation professionals and how they will benefit from your work. This chapter introduces the terms and concepts you will need to help you maintain and update the site effectively.

Chapter 3, Software Requirements, provides information on the database and Web software used to build the administrative and user sites. If operating systems, Web servers, databases or other software elements are upgraded or modified, this chapter assists technical staff in making and troubleshooting any changes in software environment. You do not need to read this chapter to perform day-to-day administrative activities.

Chapter 4, Site Guide, provides step-by-step training for all of the site’s functions. You can read through the entire guide to understand all features of the site, or refer to the section you need to quickly get you up and running on the administrative site.
1.3 Additional Resources

The Workforce Toolkit user's site and Workforce Toolkit Administrative Site have user guide available from their menus on the left side of the screen. Technical questions regarding either site should be directed to your information technology help desk.

If you have any other questions about the site, you may use the “contact us” button that appears at the top of each page of the Administrative User’s site.

1.4 Project Background

The Workforce Toolkit Administrative User’s Guide was developed as part of NCHRP 20-72: Tools to Aid State DOTs in Responding to Workforce Challenges. The objective of this project was to produce a guide to selection and application of practical management tools that DOT leadership, managers, and human resources (HR) staff can use to address workforce challenges in several key areas:

- Characterizing and assessing core competencies of the agency’s personnel, which are likely to be influenced by changing demographics, staff turnover, attrition, and competition from other employers.
- Characterizing and assessing the need to preserve institutional history and other mission-critical knowledge held by current personnel.
- Recruiting diverse staff to ensure needed competencies are in place to meet future demands.
- Educating, training, and developing staff to attain needed competencies, institutional history, and other mission-critical knowledge.
- Succession planning to ensure availability of highly competent and qualified personnel to fill key management and leadership roles at all levels of the organization.
- Retaining staff to maintain productivity.
- Ensuring an adequate and diverse supply of qualified entry-level personnel to meet mission-critical requirements in the future.

The tool developed for this project is the Workforce Toolkit. This tool has a companion tool, the Workforce Toolkit Administrative Site, which is used to add, delete, or edit the site itself and resources within the site, as well as to review, edit, accept, or delete resources submitted by Toolkit users. This guide is for the Workforce Toolkit Administrative Site.

The two sites are complementary; both are required to ensure lasting value of this tool for transportation professionals. However, the primary function of the User Site is for transportation professionals to obtain resources that will assist them in addressing HR challenges; the site contains a “add resource” option which will be available, with login access, to some Workforce Toolkit users. This option is the only aspect of the User Site that requires a login.
The primary function of the Administrative Site is to keep the search views and resources current and of interest to the users. Access to any part of this site requires login.
2.0 Introducing the Workforce Toolkit Administrative User’s Site

2.1 Workforce Toolkit Overview
The Workforce Toolkit contains tools and methods that can be used by DOTs to deal with the key workforce challenges cited above. These resources, which include websites, books, publications, state DOT practices, and other educational resources, have been pre-screened to assess their relevancy and value to DOT managers both now and 5 to 10 years into the future.

2.2 Workforce Toolkit Administrative User Site Basics
This website provides the ability to manage the Workforce Toolkit site. Using this site, you can:
- List, add, delete and edit resources
- List, add and delete facets on resources
- List, add, delete and edit facets and facet types
- List, add, delete and edit the text (top ten categories, FAQs and functional areas) of the top ten FAQ and functional pages
- List, add and delete the row and column facts on the top ten, FAQ, and functional pages
- Test URLs currently on the site

To rearrange the order of view elements such as the Top Ten Needs or FAQs, you will need understanding of and access to the Toolkit database. The administrative site provides a limited feature to reorder elements, but reordering is best done through the SQL Server Management Studio. This guide provides instructions on how to do this.

This section outlines some terms and concepts you need to understand to be effective and efficient at managing the Workforce Toolkit Administrative User Site.

Resources
Resources are the books, articles, software applications, policies, procedures, methodologies, etc. contained in the Workforce Toolkit. The Toolkit already has over 200 resources. As an Administrative User, you will accept, reject, or edit resources suggested by Toolkit users and add new resources. Each resource has room to add a title, short description, long description, author,
reference (e.g. where and when the resource was published), organization generating the resource, contact information, website, cost, other known users, format, resource application, and other information.

It is not necessary for you to find all of this information to enter a resource on the site; a title and short description are sufficient. However, the more information you can include, the more information the site’s users will have to address their needs.

**Functions**

The functions referred to in the Functional View are the specific duties HR professionals are required to perform, such as managing employee performance or compensating and rewarding employees. Users find explanations of the functions on the User Site by selecting any of the functions listed on the Functional View page.

The Functional View currently contains:

1. Strategic Workforce Planning Definition
   1.1 Human Capital Planning
   1.2 Workforce Planning
      1.2.1 Succession Planning
2. Operational Human Resources
   2.1 Organizing Work
      2.1.1 Tasks and Positions
      2.1.2 Career Ladders and Paths
      2.1.3 Position Prioritization
   2.2 Recruiting and Retaining Talent
      2.2.1 Needs Identification
      2.2.2 Competencies and Education
      2.2.3 Recruitment Planning and Process
   2.3 Compensation and Rewarding Employees
      2.3.1 Compensation Philosophies
      2.3.2 Compensation Systems
      2.3.3 Reward Programs
      2.3.4 Benefits Administration
      2.3.5 Benefits Planning
      2.3.6 Workman’s Compensation
   2.4 Managing Employee Performance
      2.4.1 Performance Appraisal
      2.4.2 Performance Metrics
      2.4.3 Career Development
      2.4.4 Mentoring
      2.4.5 Coaching
2.4.6 Employee and Labor Relations
2.4.7 Discipline
2.5 Human Resources Services
  2.5.1 Processing Personnel Actions
  2.5.2 Processing Pay Actions
  2.5.3 Other Backroom Operations

Views
The User Site provides nine options or views for finding resources relating to issues impacting state DOT workforces. Five of the views access a database containing the selected resources mentioned above. These views are:

- Top Ten DOT Needs
- Frequently Asked Questions (FAQ)
- Functional View (which searches for resources based on the function the user is trying to accomplish)
- Faceted Search (which searches based on “facets” or identifiers that have been associated with the resources)
- Text Search

Two views access a database containing data from previous NCHRP studies on human resources. These views are:

- Geographic View, which contains information by state
- State Practices, which summarizes, by state, findings from NCHRP studies on recruitment, retention, succession planning, training, and change management

The final two views are links to sites with related information:

- Forum, which connects the users to the Federal Highway Administration (FHWA) Knowledge Sharing site
- Video, which connects to AASHTO YouTube videos

Options to return to the site’s Home page, Add a resource, run reports, or view the User Guide are also provided on the main navigation bar.

On the Administrative Site, you will be able to make changes to the Top Ten DOT Needs, Frequently Asked Questions View, and Functional View. The other views cannot be modified. The Administrative User does not have the ability to add or delete views.

Facets
Facets are simply aspects or characteristics of the resources. All resources have facets attached to them, and these facets are what the Web site uses to search for and retrieve resources that are relevant to the user’s needs. There are facet types, which are the categories or groups of facets, and facets, which
are more specific identifiers within the category. For example, “audience” is a facet type, and “transportation professional” is a facet.

Facets types (underlined) and facets included with Workforce Toolkit 2.0 are:

**Audience**
- General Private Sector
- General Public Sector
- Human Resources
- State DOT
- Training and Development
- Transportation Professionals
- Other
- Other Industry

**DOT role**
- Human Resources
- Line managers/workgroup supervisors
- Senior managers (division chiefs and district administrators)
- Top agency executives (CEOs)
- Other

**Resource type**
- Case
- Consulting Services
- General Resource
- Measurement/Assessment Tool
- Methodology/Guide/Model
- Organization
- Policy/Procedure
- Software Application
- Other

**Source**
- Journal/publisher
- National Academy of Public Administration (NAPA)
- National Association – human resources
- National Association – public administration
- National Association – transportation
- State Department of Transportation
- Transportation Research Board/National Highway Cooperative Research Program/Transit Cooperative Research Program
- United States Department of Transportation
- University Research Center
- Other
- Other State Agency

**Workforce challenge or need type**

- Compensation and Benefits
- Competencies
- Downsizing
- Employee Conflict
- HR Function
- HR Information Systems
- HR Planning
- Knowledge management
- Leadership Development
- Organizational Change
- Organizational Development
- Organizational Performance
- Outsourcing/Contract Management
- Performance Management
- Recruitment
- Reductions in Staff
- Retention
- Retirement
- Strategic Planning
- Succession Planning
- Training and Development
- Workforce Planning/Development
- Other

Each facet has a FacetID. These facet IDs are presented as letters and numbers. The letters indicate facet type, while the numbers are consecutive for each facet within that type. For example, the facet type Audience contains eight facets; the FacetIDs for those facets are at1 – at8. The administrator can add, edit or delete facet types and facets.

**NOTE:** FacetIDs and not the same as ResourceIDs. The former is used to refer to a resource’s facets; a resource can have multiple facets, so there can be multiple FacetIDs associated with it. The latter is used to refer to the resource. Each resource has a unique ResourceID.

### 2.4 Getting Started

You will need to get the URL and login access from your system administrator in order to access the Administrative Site for the Workforce Toolkit.

After 20 minutes of inactivity, you are automatically logged out of the site. There is no logout page or process.

### 2.5 Wrap Up

This chapter has provided an overview of the concepts and capabilities of the Workforce Toolkit Administrative User site. If you want to learn more about the technical aspects of the sites, please read chapter 3. To try out the features of the program, move on to the Quick Start Tutorial in Chapter 4, where you will apply these concepts and capabilities hands on.
3.0 Software Environment

This section provides a technical description of the Workforce Toolkit User Site and Administrative Site software.

3.1 User Site

3.1.1 Software Environment

The Web site is implemented in Microsoft ASP.NET 3.5 as the Web environment and SQL Server 2008 as the database environment. It was implemented and tested under Microsoft Windows XP Professional Service Pack 3 as the operating system and Internet Information Server (IIS) 6.0 as the Web server.

SQL Server 2008 provides basic database features and is also used for full text search. The Web application uses an OLE DB connection string to the database.

Full text search is implemented using SQL Server 2008. It uses the NEAR, FORMSOF and INFLECTIONAL keywords, and it guards against ‘noise’ search words. It trims the search phrase and performs the usual preprocessing for full text search. It does not use frequency ranking or other advanced features. All fields in the Resources table except tool cost, status and user (who entered the data) are included in the full text index. No other tables are in the full text index. The full text index is rebuilt automatically whenever resources are added, edited or deleted. It may take a minute or two after the resource is changed before the change is made in the full text index.

Logins and passwords are available from the system administrator. The user and administrative sites are hosted by a third party.

ASP.NET membership controls are used for logins in both the user and administrative sites. A separate database, which uses the default name aspnetdb, is used to hold the membership (username and password) information; the membership information is not contained in the Workforce Toolkit database. The standard ASP.NET membership controls and database tables are used; no modifications were made. The standard ASP.NET Configuration Tool is used to manage users and roles.

The AJAX toolkit is used for two Web pages, Faceted Search and Geographic View. This is necessary to implement the complex user interface on these pages.

3.1.2 Application Environment

The Top Ten, FAQ and Functional views are dynamically generated from database tables. The administrative site is used to configure these, as described in Chapter 4.
The resources displayed by the site can be entered either by a user on the user site, or by the administrator on the administrative site. The administrator can also edit user-submitted resources. Both users and administrators can associate facets with resources; only the administrative site allows facets to be added or deleted for a resource.

The Faceted and Text Search views return lists of resources to the user. They cannot be modified in the administrative site.

The State Practices and Geographic pages return data on workforces from a series of database tables; they do not return resources. They cannot be modified in the administrative site. The workforce database tables cannot be edited in the administrative site; they can only be edited from the SQL Server management studio client.

The user site uses a single master page to control the appearance of all but two pages on the site. The principal master page, StatePractices.master, contains formatting for all pages. It also has the breadcrumb navigation control (SiteMapPath). The Faceted Search and Geographic views do not use StatePractices.master due to space constraints. The SiteMapPath control uses custom software, as described below.

The site uses nchrp.css page as the single CSS style sheet, used by the master page. This external CSS page is used to format all pages in the site. There is one user interface element that is visually awkward: When dropdown controls are used in read-only mode, they appear with a greyed-out dropdown box. This is how Microsoft implements the feature and it is not possible to change the behavior.

The ‘Contact us’ link will create an email to toolkit@spypondpartners.com or toolkitadmin@spypondpartners.com using Outlook or whatever default mail client is configured on the laptop.

When a user, on the user site, exports a list of resources or the detailed data on a single resource to Excel, a warning is generated by Excel 2007. The user may ignore it. This is a known Microsoft issue with no reasonable resolution.

Technical aspects of the Web site, listed here as a reference only, include:
- All pages are .aspx pages; there are no plain .html pages. ASP.NET GridView, FormView, and DetailView controls are used extensively on these pages.
- ASP.NET SqlDataSource controls are used to connect to database tables in each page.
- Methods are coded in C#. Most are included at the top of the .aspx page. In a few complex pages, code-behind is used.
• The App_Code folder contains C# code for:
  o DeleteButtonField.cs: Displays popup confirmation before deleting
  o GridviewExportUtil.cs: Prepares Gridviews for export to Excel
  o NationalInfo.cs: Used to display icons on Geographic view
  o SmartSiteProvider.cs: Overrides default SiteMap control, to store
    and use querystring/URL values in backtracking to previous pages
  o StateInfo.cs: Used to query tables for data in Geographic view

• The images used on the master page and geographic view are in the ‘images’ folder.

• The ‘bin’ folder contains files needed for AJAX and full text search. These have not been modified.

• The AJAX control toolkit is implemented and used for the Faceted and Geographic views. The ASP.NET 3.5 version is used; it was obtained at http://www.codeplex.com/AtlasControlToolkit/Release/ProjectReleases.aspx

• Output caching is used to improve the performance of the Geographic view.

3.1.3 Database Design

The diagram below shows the database tables that support the Top Ten, FAQ, Functional, Faceted Search, Text Search and Geographic views (pages).
The FacsetType table contains 6 rows of data currently:

- Audience
- DOT role
- Item type
- Source
- Workforce category
- All resources. Every resource has this tag as a convenience in constructing the FAQ and Functional pages, as explained below.

Additional facet types can be added.

The Facet table contains the facet values that can be used to tag resources. There are currently 57 rows in the table. Rows can be added, deleted or updated.

The Resources table contains the workplace resources. The FacetResources table contains the list of facets for each resource; it contains as many as required.
The View table contains the views in the Web application. There are currently 5 views. The ViewField table contains each field in each view. View 1, for example, the Top Ten DOT Needs, has 80 fields containing data. View 2, the FAQ, has 13 fields, one per question. View 3, the Functional view, has 32 fields, one per function. Views 4, Faceted Search, and 5, Geographic, do not need any fields in this table. View 4 uses a more complex SQL query than the View table model supports; this SQL is generated in the code-behind page for the Faceted view. View 5 displays state practices tables using a simple SQL query to display just the selected state. The full text search view, uses a complex SQL full text query rather than the View table; it is also generated in a code-behind page.

The FacetViewFieldRow table contains the facet values that are used to locate resources to display in each table row. This contains as many facet values as required. It is used for the Top Ten, FAQ, and Functional views.

The FacetViewFieldColumn table contains the facet values that are used to locate resources to display in each table column. It is used for the Top Ten, FAQ and Functional views.

In view 1, Top Ten, a resource is listed only if its facets are present in both the row and column in which it is located. The facet values in the FacetViewFieldRow table have an ‘OR’ relationship with one another, as do the facet values in the FacetViewFieldColumn table. The resource’s facet value must be a required row facet value ‘AND’ a required column facet value to be displayed in the cell defined by the row and column.

The same logic is implemented in views 2 and 3. In the FAQ View (2) and Functional View (3), a resource is displayed only if it has a required row facet value AND a required column facet value. In views 2 and 3, if there is no AND clause needed for an FAQ or Functional field (called a view field), the FacetViewFieldColumn table contains the facet ‘All resources’ for that field, which matches every resource in the Resource table. (The SQL query intersects the results from SELECT queries WHERE the facet is in the column table and the facet is in the row table.)

The next diagram shows the relationships between the state practices tables and the state table.
The 65 tables in state practices are essentially independent. They each have the two character state code as their primary key, which is also a foreign key (validated against the state table.)

The diagram also shows the Tables and TableName tables, which are not used directly in the application. The TableName table has the list of all state practices tables; the Tables table has the list of all attributes (column names) in each table, and the source document from which the table was drawn.

Tables for LaborUnions and Contacts were added for the Geographic View but contain no data. They illustrate the information that can be provided.

3.2 Administrative Site

This section briefly describes the Workforce Toolkit Administrative Web site.

3.2.1 ASP.NET Configuration Tool

The ASP.NET Configuration Tool is used to create and manage users and roles for the user and administrative Web site. The ASP.NET Configuration Tool is
accessed from Visual Studio or Visual Web Developer Express; please see
standard Microsoft and hosting site documentation on how to access and use it.

3.2.2 Administrative Site Access
After entering the URL of the Workforce Toolkit Administrative site,
administrative users are brought to the login page. After logging in, the user can
navigate to all pages on the site. There is also a logout page and a home page
with a small amount of descriptive text.

If a user is not logged in, there is no access to any page of the Web site. The login
credential is saved in a cookie (managed by the ASP.NET membership service)
that expires in 20 minutes, when the user must log in again.

3.2.3 Software Environment
The software environment is identical to the user site. The same database is used
as the user site. The site design and implementation follow the same pattern as the
user site. Additional items include:
- The site does not support concurrent editing. ‘Optimistic concurrency’ can be implemented in the future if needed, but is not implemented now.
- All pages in the administrative site are accessed from the left navigation bar, contained in the Admin.master page.

3.2.4 URL Checker
Workforce Toolkit 2.0 uses Xenu Link Sleuth to find broken links on the Toolkit site. You can download this tool to your desktop by going to

You must configure the following features in Link Sleuth:
- Set Options->Preferences->Maximum level= 0
- Check "Treat Redirections as Errors".

After running the URL Test page in the Administrative site and downloading the URL file to be checked:
- Double click on the Xenu icon on your desktop to run the application.
- Select File->Check URL List (Test)
Xenu Link Sleuth will display the results of the link test in a window. You can use your browser’s “Find” feature on the URL Test page to associate the resource and resource ID with the URL that must be edited. After finding the correct URL for a resource by researching it on the Web, use the Edit Resources page to enter the correct URL for the resource. See Chapter 4 for more details.
Step 4: Select a Review Status from the drop-down menu. If you want the resource added to the site immediately, choose “OK.” If you want the resource to be held for further approval, choose “Submitted.”

Step 5: Click Insert to add the resource to the site, or select Cancel if you do not want to add this resource after all.

TIP: If you want to add a resource that has been submitted by a Workforce Toolkit user, see section 4.1.3.

TIP: As you write resource descriptions, keep in mind that the Text Search view in the Workforce Toolkit searches for user-entered keywords in resource titles, short descriptions and long descriptions. Draft your descriptions using common search terms to assist users in finding resources.

4.1.2 Delete a Resource

Step 1: Use the Edit Resources button, located at the top of the menu on the left side of the page.

Step 2: Click on Select next to the resource you would like to edit. This action will open a box containing the Resource ID and title of the resource you selected. If the resource was entered by user, the username is displayed.

Step 3: Select Delete from the newly opened box containing the resource title and ID

Step 4: Select Ok if you are certain you want to delete the resource, or Cancel if you have changed your mind.

4.1.3 Edit or Make Visible a Resource Submitted by a Toolkit User

Step 1: Click the Edit Resources button, located at the top of the menu on the left side of the page.

Step 2: Click on ReviewStatus to sort the resources (Denied, OK, Submitted) by status or use Title to sort the resources by title. User-entered resources appear with status ‘Submitted’ and are not displayed in the user Web site. You must change the status to ‘OK’ for the resource to display on the user Web site. A resource with status ‘Declined’ is not displayed. Resources can also be deleted.

Step 3: Click on Select by the submitted resource you want to add to the site

Step 4: Select Edit and scroll to ReviewStatus, located at the bottom of the form. Using the drop-down menu, you can change the resource status to OK or Declined

Step 5: Select Update or Cancel.
4.0 Site Guide

This section provides hands-on experience using the Workforce Toolkit Administrative User site by providing step-by-step guidance through all of the site’s features. Following these steps will help you become familiar with important features of the software.

As you work through these tasks, it will be helpful to keep in mind the difference between a resource, a view, and a facet. These concepts are related. For example, if you add a resource to the Workforce Toolkit but do not assign facets to it, it will not appear in response to a search in any of the views. Since facets are used to generate each list of resources in the Top Ten, Frequently Asked Questions, and Functional Views, making changes to these views will likely result in the need to make changes to the row and column facets.

The guide does not contain screen shots. We assume that you will be working with the Administrative site on your computer while following the steps in this document.

4.1 Edit Resources

This section shows you how to add, delete or edit a resource, including resources submitted by Workforce Toolkit users. For security purposes, the username of the person adding a resource is stored in the Resources table and is displayed in Edit Resources. It is not displayed in the main site. If an administrator adds a resource, his or her name is not placed in the database; only resources entered on the user site have a username.

4.1.1 Add a New Resource

► Step 1: Use the Edit Resources button, located at the top of the menu on the left side of the page

► Step 2: Select “Add a New Resource” located just above the box containing resources.

► Step 3: Add information about the new resource into the appropriate text boxes (e.g. title, short description, long description, source author, reference, organization, contact address, etc.). You do not need to enter information for all of these fields if you don’t have it. However, the more information you can add, the more useful the Workforce Toolkit will be for transportation professionals.
4.1.4 Edit a Resource

➤ Step 1: Use the Edit Resources button, located at the top of the menu on the left side of the page.

➤ Step 2: Click on Select next to the resource you would like to edit. This action will open a box containing the Resource ID, title and status of the resource you selected.

**TIP**: You can sort the resources alphabetically by clicking on **Title**. If you want to edit or review resources that have been submitted but are not yet approved, click on **ReviewStatus** to sort resources by OK, Submitted, or Declined.

➤ Step 3: Select **Edit** from the newly opened box containing the resource title and ID.

➤ Step 4: Make desired changes in the screen that appears.

➤ Step 5: Select **Update** to add the changes to the Toolkit or **Cancel** if you have changed your mind about these changes.

**NOTE**: If your edits need to be approved by someone else or you would like to return to them later for additional editing, you can select “Submitted” from the Review Status drop-down menu.

4.2 Edit Resource Facets

Facets are the identifiers the Workforce Toolkit uses to retrieve resources in response to the different views. From this page, you can add or delete facets already associated with a particular resource.

4.2.1 Add a Facet to a Resource

➤ Step 1: Select Edit Resource Facets from toolbar on the left side of the page.

➤ Step 2: Click **Select** next to the resource you need. All the existing information for that resource is displayed, including facets already associated with this resource. This helps you decide what facets are appropriate for the resource.

➤ Step 3: Select **Add New Facet**, located beneath the resource information. This adds a drop down menu containing all the currently available facets.

➤ Step 4: Click on the facet you would like to add.

➤ Step 5: Select **Insert** or **Cancel**.
NOTE: The administrator is responsible for adding the ‘All resources’ facet to all resources. Without this facet, the resource may not display in the FAQ and Functional views.

NOTE: Repeat this action to add more facets. The more accurately you associate facets with resources, the more relevant the information retrieved will be for people who are using the Toolkit.

4.2.2 Delete a Facet From a Resource

►Step 1: Select Edit Resource Facets from toolbar on the left side of the page.
►Step 2: Click Select next to the resource you need. All the existing information for that resource is displayed, including facets.
►Step 3: Select Delete next to the facet you want to delete.
►Step 4: Choose Ok or Cancel.

4.3 Edit Facet Types

While Section 4.2 explained editing a resource’s facets, this section explains how to add (create) or delete a facet type or group. Once you have created a new facet type, you can add new facets of that type; these facets can, in turn, be associated with resources. If you want to delete a facet type, you must delete all facets of that type first. To be able to delete a facet, it must be not be attached to any resources; thus, the facet must be removed from all resources first. Use the Faceted Search view in the user site to find all resources with a given facet.

There is no limit to the number of facet types you create.

The facet types delivered with the Toolkit are:
   • Audience
   • DOT Role
   • Item Type
   • Source
   • Workforce Category
   • All resources.

4.3.1 Add a New Facet Type

►Step 1: Select Edit Facet Types from the toolbar on the left side of the screen.
►Step 2: Click on Add New Facet Type.
4.3.2 Delete a Facet Type

- **Step 1**: Select Edit Facet Types from the toolbar on the left side of the screen.
- **Step 2**: Click on Select next to the facet type you would like to delete. This opens a box on your screen confirming which type you have selected and giving you the option to delete the facet type.
- **Step 3**: Click on Delete.
- **Step 4**: Select OK or Cancel.

4.4 Edit Facets

This function allows you to add a new facet to the program, edit an existing facet, or delete an existing facet. If you want to change the facets associated with a resource, please see section 4.2. Facets delivered with the system are:

- **Facet type: Audience**
  - General Private Sector
  - General Public Sector
  - Other
  - Other Industry
  - State DOT
  - Training and Development

- **Facet Type: DOT Role**
  - Human Resource
  - Line managers/workgroup supervisors
  - Other
  - Senior managers (division chiefs, district administrators)
  - Top agency executives (CEOs)

- **Facet Type: Item Type**
  - Case
  - Consulting Service
  - General Resource
  - Measurement/Assessment Tool
  - Methodology/Guide/Model
  - Organization
  - Other
  - Policy/Procedure
  - Software Application

- **Facet Type: Source**
- Journal/Publisher
- National Association – Human Resources
- National Association – Public Administration
- National Association – Transportation
- Other
- Other State Agency
- State DOT
- TRB/NCHRP/TCRP
- University Research Center
- USDOT

**Facet Type: Workforce Category**
- Compensation and Benefits
- Competencies
- Downsizing
- Employee Conflict
- HR Function
- HR Information Systems
- HR Performance
- HR Planning
- Knowledge Management
- Leadership Development
- Organizational Change
- Organizational Development
- Organizational Performance
- Other
- Outsourcing/Contract Management
- Performance Management
- Recruitment
- Retention
- Retirement
- Strategic Planning
- Succession Planning
- Training and Development
- Workforce Planning/Development

**Facet Type: All resources**
- All resources. This facet must be assigned by the administrator to every resource in the database. All resources delivered with the toolkit have this facet.

### 4.4.1 Add a Facet to the Toolkit

▶ **Step 1:** Select Edit Facets from the toolbar on the left side of the screen.

▶ **Step 2:** Click on Add New Facet; a new box opens at the bottom of your screen.
Step 3: Assign a Facet ID. Facet IDs must be assigned manually; the system does not do this automatically.

**TIP:** The program will not allow you to enter a duplicate FacetID. Nor will it allow this field to be left blank.

**TIP:** A Facet ID begins with two letters to indicate the facet type. The toolkit uses the following convention: “at” for audience type, “dr” for DOT role, “it” for item type, “so” for source, “wc” for workforce category and “all” for all resources. The facet ID ends with the next highest number for the facet type. To determine the next number within a facet type, you can sort the FacetIDs by clicking on FacetID.

- **Step 4:** Name the facet (e.g., “it9”, “wc25”)
- **Step 5:** Select a facet type from the drop-down menu
- **Step 6:** Select insert to enter the new facet in the program

### 4.4.2 Delete a Facet from the Toolkit

- **Step 1:** Select Edit Facets from the toolbar on the left side of the screen.
- **Step 2:** Choose Select next to the facet you want to delete. Information appears at the bottom of the screen to confirm the facet you have chosen and to give you the option to edit or delete the facet.
- **Step 3:** Select Delete.
- **Step 4:** Choose Ok or Cancel

### 4.4.3 Edit a Toolkit Facet

- **Step 1:** Select Edit Facets from the toolbar on the left side of the screen.
- **Step 2:** Choose Select next to the facet you want to edit. Information appears at the bottom of your screen that confirms the facet you have chosen
- **Step 3:** Select Edit; a box opens that contains fields for facet and facet type.
- **Step 4:** Make your desired changes. You can rename or edit the name of an existing facet, create a new facet name, or assign a new facet type to a facet using this screen. You cannot, however, change the FacetID number.
- **Step 5:** Select Update or Cancel

### 4.5 Edit Top Ten View

This view allows you to make changes to the Top Ten DOT Needs view of the Workforce Toolkit. You can add, delete, or edit row text (“My organization needs to address:”) or cell text (“Resource List”). Row numbers cannot be changed.
If you want to modify the resources that are retrieved in response to the Top Ten DOT Needs view, see sections 4.6 and 4.7 on how to change the facets associated with each cell.

### 4.5.1 Add a New Row

These instructions are for adding a row at the bottom.

**TIP:** Although the system will allow more than ten workforce needs, the name of the view cannot be changed. Therefore, do not have more than ten rows in this view.

- **Step 1:** Choose Edit Top Ten View from the toolbar on the left side of the screen.
- **Step 2:** Select Add New Row. Text boxes for Row Number, Row Text, Cell Text and View Field Row appear on your screen.
- **Step 3:** Add the next highest number in "RowNumber" (e.g. if there are 10 rows, enter 11). The row number must be an integer and must be unique. This field must be used.
- **Step 4:** Add the new text for your row. Include the row number at the beginning of the text.
- **Step 5:** Enter the Cell Text (e.g. Resource list)
- **Step 6:** Enter the View Field Row. This should be the same as the row number, unless you wish to use this feature to rearrange rows in the Top Ten view. Having a different row number and view field row is not recommended. If you do so, the view field row will be the identifier that determines which row and column facets are used to generate the resource list to be displayed for this row.
- **Step 7:** Select Insert
- **Step 8:** Add new grid cells for the row using the lower portion of the screen. Each row is automatically tied to grid cells with the same view field row number, not row number. For example, if you add row 11, you will also need to add grid cells for 11a, 11b, 11c and 11d. The grid cell text is displayed on the Workforce Toolkit user site as a hyperlink (Resource List).
- **Step 9:** Enter the data for the new grid cells, four per row. See section 4.5.4 below for details.

### 4.5.2 Delete a Row

- **Step 1:** Choose Edit Top Ten View from the toolbar on the left side of the screen.
Step 2: Select Delete.

Step 3: Select Ok to delete the row or Cancel.

Step 4: Delete the grid cells associated with the row using the lower part of the page. See section 4.5.6.

If a row is deleted, the other row numbers are not changed and their associated view field and grid cells are not changed. For example, if row 5 were deleted, the next row would be number 6, with view field 6 and cells 6a, 6b, 6c and 6d. There would be a gap in row numbers from row 4 to row 6. You can change the row text in row 6 to read “5”, and the row text in row 7 to read “6”, etc.

If you do delete a row cell, keep in mind that the associated grid cells are not deleted automatically. You must do this yourself using the lower portion of the page.

Deleting, moving or adding several rows in a complex pattern is best done directly in the SQL Server database, described in section 4.5.7.

4.5.3 Edit a Row

Step 1: Choose Edit Top Ten View from the toolbar on the left side of the screen.

Step 2: Choose Select for the row number you want to edit. A box appears confirming your selection and giving you the option to edit or delete the row.

Step 3: Select Edit. Text boxes containing the current row text and cell text appear.

Step 4: Type in your changes.

Step 5: Select Update to save your changes or Cancel to discard them.

Step 6: Edit the grid cells associated with the row. See section 4.5.5 below.

ADVANCED: The Edit Top Ten View page allows you to rearrange the rows in the Top Ten view. Rearranging rows is a complex operation because each row is also tied to the grid cells in the Top Ten view; the association uses the view field, not the row number. For example, if row number 8 had a view field 6, it would be associated with grid cells 6a, 6b, 6c and 6d. Reordering rows is most easily done directly in the SQL Server database, where the row numbers can be changed (Section 4.5.7).

4.5.4 Add New Grid Cell

The Top Ten view is arranged in columns and rows, forming a grid. A grid cell is the cell where the rows and columns intersect. These grid cells have View Field IDs, which are the row number and the column number. For
example, the View Field ID for the grid cell Strategic workforce planning (row 1) and Understand issues and trends (column A) is 1a.

The rows in the Top Ten view in Workforce Toolkit 2.0 are:
1. Strategic workforce planning
2. Attracting and retaining talent
3. Retooling the workforce to meet evolving business needs
4. Grooming the next generation of leaders
5. Downsizing
6. Preserving institutional knowledge
7. Employee conflicts and performance issues
8. Outsourcing
9. Organizational change – reengineering and reorganization
10. Improving efficiency and effectiveness of the HR function
The row text can be edited in the administrative site, as described above.

The columns are:
A. Understand issues and trends
B. Learn about peer agencies
C. Assess our situation
D. Implement programs, policies, procedures
The column text cannot be edited in the administrative site.

◆ Step 1: Select Edit Top Ten View from the toolbar on the left side of the screen.
◆ Step 3: Enter the ViewFieldID. This corresponds to the row in which the grid cell will be displayed in the Top Ten view.
◆ Step 4: Enter Overview. This field can be left blank.

**TIP:** Overviews explain the issues covered by the resources retrieved by clicking on Resource list within a Grid Cell. They appear at the top of the retrieved resources page.

◆ Step 5: Enter the topic, which is typically the row text followed by the column text. This is used as the header or title at the top of the retrieved resources page.
◆ Step 6: Enter Grid Cell Number. This is used to display the grid cells in a natural order on the Edit Top Ten View page.
◆ Step 7: Select Insert or Cancel
◆ Step 8: Repeat the above steps for all four grid cells in a row.
Step 9: Test your work. Go to the user site and select the Top Ten View. The new or changed rows should be visible. Click on the grid cells (usually with a Resource List hyperlink) and examine that the resource list has the correct topic (title) and overview. The resource list will be empty if you have not assigned facets to the grid cell yet.

4.5.5 Edit a Grid Cell

Step 1: Select Edit Top Ten View from the toolbar on the left side of the screen.

Step 2: Click on Select next to the ViewFieldID of the grid cell you want to edit. Text appears at the bottom of your screen to confirm your choice and give you the option of editing or deleting your selection.

Step 3: Click on Edit. Text fields appear at the bottom of your screen that allow you to edit the Overview, Topic, and Grid Cell Number of the grid cell you selected.

Step 4: Enter a text for the Overview field, which is an explanation of the issues covered by resources retrieved in response to a search from this grid cell. This field may be left blank.

Step 5: Enter text for the Topic field. This is the header or title on the resource list.

Step 6: Enter a grid cell number to place the grid cell in the correct order on the Top Ten Edit view

Step 7: Select Update or Cancel.

4.5.6 Delete a Grid Cell

Step 1: Select Edit Top Ten View from the toolbar on the left side of the screen.

Step 2: Click on Select next to the ViewFieldID of the grid cell you want to delete. Text appears at the bottom of your screen to confirm your choice and give you the option of editing or deleting your selection.

Step 3: Click on Delete.

Step 4: Select Ok or Cancel.

4.5.7 Change the Order in Top Ten View in SQL Server Database

Deleting, moving, or adding rows in a complex pattern is best done directly in the SQL Server database, using the Edit Top 200 Rows feature in the SQL Server Studio interactive user interface to change the row numbers in the TopTen and ViewField tables. The ViewFieldID fields in the ViewField table allow cascade
update, which means that the facets associated with these rows (in the FacetViewFieldRow and FacetViewFieldColumn tables) will also be renumbered and remain associated with the row being moved. You will need to contact the database administrator to make the changes or to give you access to the database.

You or the database administrator must change the primary keys as desired in both the TopTen and ViewField tables; these two tables do not have a relationship. The changes in the ViewField table cascade to the FacetViewFieldRow and FacetViewFieldColumn tables automatically.

Once the database changes have been made, you can make any remaining changes in the Edit Top Ten View page. These include adding new rows at the bottom, deleting rows from the bottom, or editing existing rows. The steps below are a short recap of the steps to add, delete or edit rows and grid cells in the Top Ten view:

►**Step 1:** Select Edit Top Ten View from the toolbar on the left side of the screen.

►**Step 2:** At the bottom of the page, add, delete or edit cells, four per row, as needed. If you are adding grid cells, each grid cell’s ViewFieldID must be the row’s ViewFieldRow followed by ‘a’, ‘b’, ‘c’, or ‘d’, corresponding to the four columns in the Top Ten Page.

**TIP:** This page does not check that ViewFieldRow and row number correspond; this is your responsibility. If you create a new row, you must also create four cells with that row number, followed by ‘a’, ‘b’, ‘c’ and ‘d’.

**TIP:** If you delete a row, you will also need to delete its grid cells. This page does not check that you have made the deletion; this is your responsibility.

►**Step 3:** For each grid cell, enter a topic. The topic is the title that is displayed in a header font at the top of the Top Ten Resource List page corresponding to this grid cell.

►**Step 4:** For each grid cell, enter an overview. The overview is text that is displayed in a header font at the top of the Top Ten Resource List page corresponding to this grid cell.

►**Step 5:** For each grid cell, enter a grid cell number. The grid cells display in grid cell number order on the Edit Top Ten View page; this is a convenience for the administrator. The grid cell number is not used in the Top Ten View page.

### 4.6 Edit Top Ten Row Facets

Facets must be associated with each of the Top Ten View Rows (and columns—see below); these facets have also been associated with resources. When a user selects Resource List from a grid cell in the Top Ten view, the resources retrieved are those that have the facets attached to that grid cell. Each cell in a row can have a different set of row facets, although typically they all have the same row facets. These are the facets that a resource must have to display in this grid cell (in this row). The resource must also have the
facets required by the column in which the grid cell is; these are called column facets and are described in section 4.7.

4.6.1 Add a New Facet to Top Ten DOT Needs Row

► Step 1: Select Edit Top Ten View Row Facets from the toolbar on the left side of the screen.

► Step 2: Click on Select next to the grid cell to which you want to add a facet. The grid cell’s topic (title) is shown for information. A list of row facets currently associated with that topic is displayed.

► Step 3: Click on Add New Facet. A dropdown list of facets is displayed.

► Step 4: Select the facet you want to add from the list and then click on Insert or click on Cancel if you’ve changed your mind.

► Step 5: Repeat these steps to add more row facets.

4.6.2 Delete a Facet from the Top Ten DOT Needs Row

► Step 1: Select Edit Top Ten View Row Facets from the toolbar on the left side of the screen.

► Step 2: Click on Select next to the grid cell and topic from which you want to delete facets. The grid cell’s topic (title) is shown for information. A list of row facets currently associated with that topic is displayed.

► Step 3: Select Delete next to the facet you want to delete.

► Step 4: Choose OK or Cancel.

► Step 5: Repeat these steps to delete more row facets.

4.7 Edit Top Ten Column Facets

Editing both row facets and column facets allows you to refine searches performed in the Top Ten Views so that the resources retrieved are more tailored to the subject. When you open the Edit Top Ten View Column Facets, you will see a grid identical to the one that appears when you open Edit Top Ten View Row Facets. When you begin editing, however, you will see that the column facets are different from the row facets. The combination of the row facets and the column facets determine the retrieved resources.

Each cell in a column can have a different set of column facets. These facets are connected with OR keywords in the SQL SELECT statements used by the site. This set of column facets is connected with an AND keyword with the row facets for the grid cell. Thus, a resource displayed for a grid cell must
have at least one of the facets associated with its row AND at least one of the facets associated with its column.

4.7.1 Add a New Facet to Top Ten DOT Needs Column

►Step 1: Select Edit Top Ten View Column Facets from the toolbar on the left side of the screen.

►Step 2: Click on Select next to the grid cell to which you want to add a facet. The grid cell’s topic (title) is shown for information. A list of column facets currently associated with that topic is displayed.

►Step 3: Click on Add New Facet. A dropdown list of facets is displayed.

►Step 4: Select the column facet you want to add from the list and then click on Insert or click on Cancel if you’ve changed your mind.

►Step 5: Repeat these steps to add more column facets.

4.7.2 Delete a Facet from a Top Ten DOT Needs Column

►Step 1: Select Edit Top Ten View Column Facets from the toolbar on the left side of the screen.

►Step 2: Click on Select next to the grid cell and topic from which you want to delete facets. The grid cell’s topic (title) is shown for information. A list of column facets currently associated with that topic is displayed.

►Step 3: Select Delete next to the column facet you want to delete.

►Step 4: Choose OK or Cancel.

►Step 5: Repeat these steps to delete more column facets

4.8 Edit Frequently Asked Questions (FAQ) View

From this page, you can add, delete or edit a frequently asked question topic or overview. There is no limit to the number of questions you can add to the site. The View Field ID cannot be changed; all other data can be changed. The FAQs display in row number order (not View Field ID order) on the FAQ View in the user site.

4.8.1 Add a New Question to FAQ View

These instructions are for adding a row at the bottom of the view.

ADVANCED: If a row must be inserted between other rows, all rows below the insertion point must have their row number changed (increased by one) to allow the next row to be inserted. Changing the order of rows, or inserting a question, is best done by the database administrator in the SQL Server database (see Section 4.8.4). The database administrator can change the
ViewField ID and row number to keep them the same; the Administrative site does not allow the administrator to change the View Field ID.

➤ Step 1: Select Edit FAQ View from the toolbar on the left side of the screen.

➤ Step 2: Click on Add New Row. Text boxes for ViewFieldID, Overview, Topic, and Row Number appear.

➤ Step 3: Add a ViewFieldID. This is a required field. The ID must be an integer and should be the next highest number in the sequence (e.g. 14 if there are currently 13 questions on the site). The system will not allow you to add a ViewFieldID that is currently in use.

➤ Step 4: Add an overview (optional). This displays at the top of the resource list for this FAQ.

➤ Step 5: Type the new FAQ question into the Topic field.

➤ Step 6: Enter a row number. This field must be entered; it determines the order in which the FAQs are displayed in the FAQ View in the user site.

4.8.2 Delete a Question from FAQ View

If a row is deleted, the facets associated with the row are also deleted automatically (unlike the Top Ten Edit page). Deleting a row does not change other row numbers. For example, if row 5 were deleted, the next row would be number 6, leaving a gap in row numbers between row 4 and row 6.

ADVANCED: Changing the topic for row 6 to start with 5 is not recommended, since what displays as row 5 would be associated with ViewFieldID 6 and its labels. While the Toolkit Web site handles this correctly, this is a confusing situation for the administrator. If you need to remove a row, the row numbers and associated labels of all succeeding rows should also be changed. This is best accomplished using the SQL Server database directly (see section 4.8.4).

➤ Step 1: Select Edit FAQ View from the toolbar on the left side of the screen.

➤ Step 2: Click on Select by the question you want to delete. Information appears on your screen confirming your choice.

➤ Step 3: Select Delete.

➤ Step 4: Select OK or Cancel.

4.8.3 Edit a Question in FAQ View

➤ Step 1: Select Edit FAQ View from the toolbar on the left side of the screen.

➤ Step 2: Click on Select by the question you want to edit. Information appears on your screen confirming your choice.

Step 4: Edit the overview, beginning with the row number. Entering information in this field is optional.

Step 5: Edit the question in the Topic text box.

NOTE: If you substitute another question, it will retain the facets associated with the old question and produce irrelevant resources unless you change the facets in Edit FAQ Row Facets and Edit FAQ Column Facets. This is an advanced function.

Step 6: Edit the RowNumber, if necessary. This is discouraged.

Step 7: Select Update or Cancel.

4.8.4 Change the Order of FAQs
Deleting, moving, or adding rows in a complex pattern is best done directly in the SQL Server database, using the Edit Top 200 Rows feature in the SQL Server Studio interactive user interface to change the View Field ID and Row Numbers in the ViewField table. The ViewFieldID fields in the ViewField table allow cascade update, which means that the facets associated with these rows (in the FacetViewFieldRow and FacetViewFieldColumn tables) will also be renumbered and remain associated with the row being moved. You will need to contact the database administrator to make the changes or to give you access to the database.

Once the database changes have been made, you can make any remaining changes in the Edit FAQ View page. These include adding new rows at the bottom, deleting rows from the bottom, or editing existing rows, as described above.

4.9 Edit Frequently Asked Questions (FAQ) Row Facets
This view allows you to add or delete the facets for a row/question. Note that if the option to delete a facet does not display, it means there are no facets associated with that question.

A resource displayed in the list for the FAQ must have at least one facet from the FAQ row facets AND at least one facet from the FAQ column facets.

Typically, the FAQ column facet is set to ‘All resources’, which is a facet that every resource has. In this typical case, the resources displayed for the FAQ are determined only by the row facets.

4.9.1 Add a New Facet to FAQ View Row
Step 1: Select Edit FAQ Row Facets from the toolbar on the left side of the screen.

Step 2: Click on Select next to the topic you want to edit. New text appears on your screen confirming your choice.
Step 3: Click on Add New Facet. A field for ViewFieldID and a drop-down menu containing available facets appear.

Step 4: Select the facet you want to add and then click on Insert.

Step 5: Repeat these steps to add more facets.

4.9.2 Delete a Facet from FAQ View Row

Step 1: Select Edit FAQ Row Facets from the toolbar on the left side of the screen.

Step 2: Click on Select next to the topic you want to edit. Information appears on your screen, including a drop-down menu of available facets.

Step 3: Select Delete next to the facet you want to delete.

Step 4: Choose OK or Cancel.

Step 5: Repeat these steps to delete additional facets.

4.10 Edit FAQ Column Facets

Each row can have a different set of column facets. These column facets are connected with OR keywords in the SQL SELECT statements used by the site. This set of column facets is connected with an AND keyword with the row facets for the row.

4.10.1 Add a New Facet to FAQ View Column

The facets in the FAQ View Column must be identical to the facets in the FAQ View Rows.

Step 1: Select Edit FAQ Row Facets from the toolbar on the left side of the screen.

Step 2: Click on Select next to the topic you want to edit. New text appears on your screen confirming your choice.

Step 3: Click on Add New Facet. A field for ViewFieldID and a drop-down menu containing available facets appear.

Step 4: Select the facet you want to add and then click on Insert.

Step 5: Repeat these steps to add more facets.

4.10.2 Delete a Facet from FAQ View Column

The facets in the FAQ View Column must be identical to the facets in the FAQ View Rows.

Step 1: Select Edit FAQ Row Facets from the toolbar on the left side of the screen.
►Step 2: Click on Select next to the topic you want to edit. Information appears on your screen, including a drop-down menu of available facets.

►Step 3: Select Delete next to the facet you want to delete.

►Step 4: Choose OK or Cancel.

►Step 5: Repeat these steps to delete additional facets.

4.11 Edit Functional View
This section will show you how to add, delete, or edit information in the Functional View.

4.11.1 Add a Function
Within this view, you can easily add a row to the bottom. Inserting a row between other rows requires that all rows below the insertion point have their row numbers changed. This operation is best performed in the SQL Server database (see Section 4.11.4)

►Step 1: Select Edit Functional View from the toolbar on the left side of the screen.

►Step 2: Click on Add New Row. Text boxes appear for ViewFieldID, Overview, Topic, Row Number and Indentation.

►Step 3: Add ViewFieldID. There are multiple levels of function. Subfunctions are indicated through the numbering system and the level of indentation that appears on the site. Make sure the level of ID you add is consistent with the level you want.

►Step 4: Enter an overview for the function. Overviews explain the function to help users understand what topics the retrieved resources will cover. Overviews are optional.

►Step 5: Enter a topic (function). The text should begin with the same number you used for the ViewFieldID.

►Step 6: Enter a row number. This is a required field. The row number must be an integer and must be unique. Rows will display in row number on the main site. Row number ensures rows display in the desired order. (Due to the way computers alphabetize numbers, function 10.1 would appear before 1.1, for example, if row number was not used to prescribe the correct order.)

►Step 7: Enter the indentation you need for the level of function or subfunction you are entering. You will need to use the HTML code &nbsp; to indicate indentation. One command is equal to one space, so if you want to indent five spaces (for 1.1, 1.2, 1.3, etc. level), you will need to enter the code five times: &nbsp;&nbsp;&nbsp;&nbsp;&nbsp;.

►Step 8: Select Insert or Cancel.
4.11.2 Delete a Function

If a row is deleted, the facets associated with the row are also deleted through a cascade update. This is the same as the Edit FAQ View page. If you delete a row, the other row numbers are not changed. For example, if you deleted row 5, the next row would be row number 6. There would be a gap in row numbers from row 4 to row 6. Changing the text for row 6 to start with "5. ..." would result in row 5 being associated with ViewField ID 6 and its labels. If rows are to be re-arranged, this is best done directly in the database, as in the FAQ view.

► Step 1: Select Edit Functional View from the toolbar on the left side of the screen.

► Step 2: Click on Select opposite the topic you want to delete. New information appears on the screen confirming your choice and offering you the option to edit or delete.

► Step 3: Select Delete.

► Step 4: Select OK or Cancel.

4.11.3 Edit a Function

This feature allows you to edit the overview, topic, indentation and row number.

► Step 1: Select Edit Functional View from the toolbar on the left side of the screen.

► Step 2: Click on Select opposite the topic you want to delete. New information appears on the screen confirming your choice and offering you the option to edit or delete.

► Step 3: Select Edit, which opens a screen containing the ViewFieldID (which cannot be changed), and fields for Overview, Topic, Row Number and Indentation (all of which can be edited).

► Step 4: Make your changes in the appropriate field.

TIP: You will need to use the HTML code &nbsp; to indicate indentation. One command is equal to one space, so if you want to indent five spaces (for 1.1, 1.2, 1.3, etc. level), you will need to enter the code five times: &nbsp; &nbsp; &nbsp; &nbsp; &nbsp;

► Step 5: Choose Update or Cancel.

4.11.4 Change the Order of Functions

Deleting, moving, or adding rows in a complex pattern is best done directly in the SQL Server database, using the Edit Top 200 Rows feature in the SQL Server Studio interactive user interface to change the View Field ID and Row Numbers in the ViewField table. The ViewFieldID fields in the ViewField table allow cascade update, which means that the facets associated with these rows (in the FacetViewFieldRow and FacetViewFieldColumn tables) will also be renumbered.
and remain associated with the row being moved. You will need to contact the database administrator to make the changes or to give you access to the database. Once the database changes have been made, you can make any remaining changes in the Edit Functional View page. These include adding new rows at the bottom, deleting rows from the bottom, or editing existing rows, as described above.

4.12 Edit Functional Row Facets

This section shows you how to add, delete, and edit facets in rows associated with the Functional View. Each row can have a different set of row facets. Theses facets are connected with OR keywords in the SQL SELECT statements used by the site. This set of facets is connected with an AND keyword with the column facets for the row.

4.12.1 Add a Facet to Functional View Row

► Step 1: Select Edit Functional Row Facets from the toolbar on the left side of the screen.

► Step 2: Click Select opposite the Topic to which you want to add a new facet. New information appears on your screen, confirming your choice and listing the facets currently associated with the topic.

► Step 3: Click on Add New Facet. A field appears with the current ViewFieldID and a drop-down menu of available facets.

► Step 4: Select the Facet you want to add.

► Step 5: Click on Insert or Cancel.

► Step 6: Repeat these steps to add more facets.

4.12.2 Delete a Facet from Functional View Row

► Step 1: Select Edit Functional View Row Facets from the toolbar on the left side of the screen.

► Step 2: Click Select opposite the Topic from which you want to delete a facet. New information appears on your screen, confirming your choice and listing the facets currently associated with the topic.

► Step 3: Select Delete opposite the facet you want to delete.

► Step 4: Choose OK or Cancel.

► Step 5: Repeat these steps to delete additional facets.

4.13 Edit Functional Column Facets

This section shows you how to add, delete, and edit facets in columns associated with the Functional View. In the original delivered version of the Workforce Toolkit, there is only a single column facet in the Functional View for each function, ‘All resources’.
4.13.1 Add a Facet in Functional View Column

► Step 1: Select Edit Functional View Column Facets from the toolbar on the left side of the screen.

► Step 2: Click Select opposite the Topic from which you want to delete a facet. New information appears on your screen, confirming your choice and listing the facets currently associated with the topic.

► Step 3: Click on Add New Facet. A field appears with the current ViewFieldID and a drop-down menu of available facets.

► Step 4: Select the Facet you want to add.

► Step 5: Click on Insert or Cancel.

► Step 6: Repeat these steps to add more facets.

4.13.2 Delete a Facet in Functional View Column

► Step 1: Select Edit Functional View Column Facets from the toolbar on the left side of the screen.

► Step 2: Click Select opposite the Topic from which you want to delete a facet. New information appears on your screen, confirming your choice and listing the facets currently associated with the topic.

► Step 3: Select Delete opposite the facet you want to delete.

► Step 4: Choose OK or Cancel.

► Step 5: Repeat these steps to delete additional facets.

4.14 Test URLs

This function allows you to quickly check the resource websites. It provides a report listing which URLs are ok and which have been moved or are broken. It only checks URLs listed in a resource’s website field. As a result, it’s best to put a specific URL in the website field for a resource, and not within the resource descriptions or other fields.

4.14.1 Running a URL Test

► Step 1: Select Test URLs from the toolbar on the left side of your screen. A screen appears with the resource ID, website, and title of the resources in the database. This screen will be useful to you when you have located a broken URL and want to determine which resource it belongs to.

► Step 2: Select Export URLs to File. When a textbox appears in your browser, choose Save File and OK. Remember where you saved the file on your computer.
Step 3: Open Xenu by double-clicking the Xenu icon on your desktop. (See section 3.2.4 for how to download, install and configure Xenu.)

Step 4: Select File from the Xenu menu and click on Open. Navigate to the folder where you saved the file downloaded from the administrative site.

Step 5: Select the Xenu file with the highest number from the list that appears and click open.

Step 6: The URL checker runs; you will receive a prompt asking if you want a report.

- Select Yes for a broken link report that provides information on broken links, including a statistical summary detailing number and percentage of links that are ok, not found, permanently moved, temporarily moved, require authorization, have no object data, do not exist, or were timed out or not available for connection.
- If you select No, you are given a list of findings relating to the URLs in the Xenu window. These findings can be sorted by address, status, type, size, title, date, server, error type, etc.

TIP: Sorting by Status allows you to quickly determine which links need further follow-up for updating on the Workforce Toolkit site.

4.14.2 Fixing Links
Repairing a link may require some sleuthing. The following tips may help.

- Double click on the link in Xenu. In some cases, you will be redirected to the correct site. You will need to copy and paste the correct URL into the website field in the resource form (see section 3.1.4 Edit a Resource.)

- Copy the broken link from Xenu and return to the URL test screen with ResourceID, Website, and Title (see Step 1, Section 3.14.1). In your browser, select “Edit” and then “Find” and paste the broken URL into the Find: box. This allows you to locate the ID number and the Title that correspond to the URL. You can then refer to the resource details for additional information, such as author, reference, or title, that may help you find the new link for the resource.

4.15 Wrapping Up the Site Guide
In this section, you learned how to use each of the features available on the Workforce Toolkit Administrative Site.