Compliance Reporting Center
v. 3.0
User's Manual

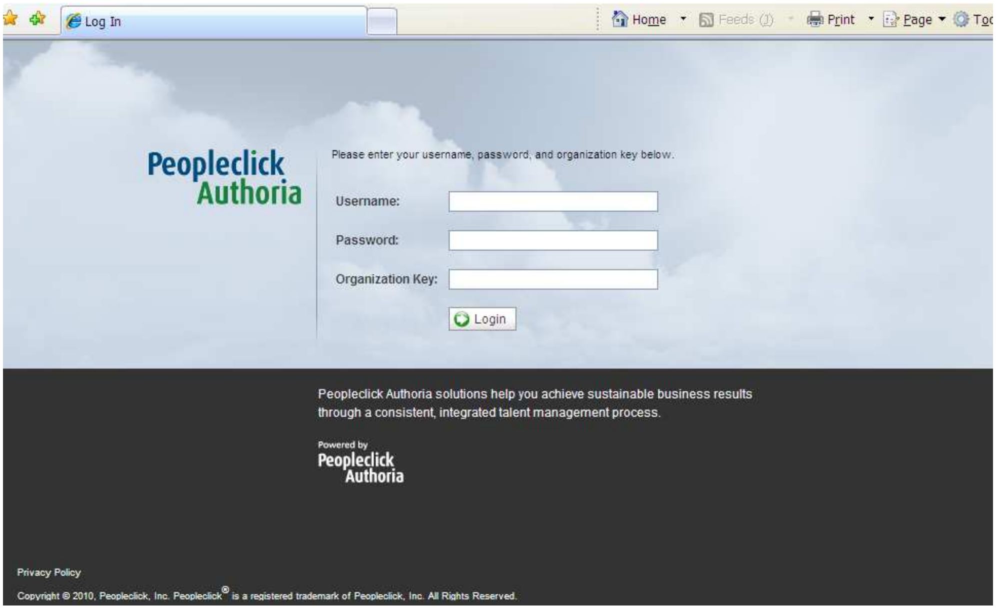
Table of Contents

Introduction

What is the Compliance Reporting Center?

Peopleclick Compliance Reporting Center (CRC) is a comprehensive report and documentation management system. It provides an efficient way to store and distribute the numerous reports generated by Peopleclick CAAMS® or other applications to the responsible managers. CRC is a web-based application that provides secure, paperless publishing of reports and charts in PDF format through the internet/intranet. Report recipients (managers, human resource staff, and anyone else needing access to Affirmative Action reports) can view and download reports, graphs, and charts they have been granted permission to see from this central location.

Login and navigate

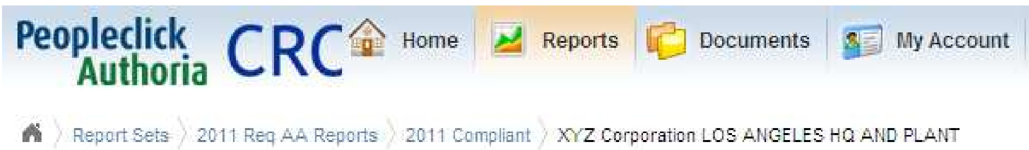


1. To log in, enter the **Username:** and **Password:** provided by your CRC Administrator. The **Organization Key:** will be provided for you and cannot be edited.

2. Click on **Login** 

.

3. Navigate CRC by clicking on a module icon or a link on the home page.



4. The breadcrumb links, found in the upper left of the page, display the path you took to get to the current page. Click one of the links to go back to that page.

Modules overview

CRC modules take you to major functional areas of CRC.

- 

The **Reports** module allows you to view, download, and print report sets that have been loaded into CRC, and their associated plan definitions and documents.

- 

The **Documents** module allows you to load and work with documents in addition to CAAMS reports in CRC.

- 

The **My Account** module allows you to view your own active jobs (processes that are currently executing or pending) and completed tasks (such as loading documents). You can also change your password and send suggestions for improving the CRC application to Peoplefluent.

CRC Basic

The CRC 3.0 basic license allows you to both load and view reports, documents, and other artifacts and to easily share those items throughout your organization. With CRC being web-based, granting wide-spread access is made simple with nothing to install on a user's computer. Report recipients (managers, human resource staff, and anyone else needing access to Affirmative Action reports) can view, download or print reports, graphs, and charts. Furthermore, permissions to specific reports and plans can be controlled via security settings in the administrator module.

Reports Module

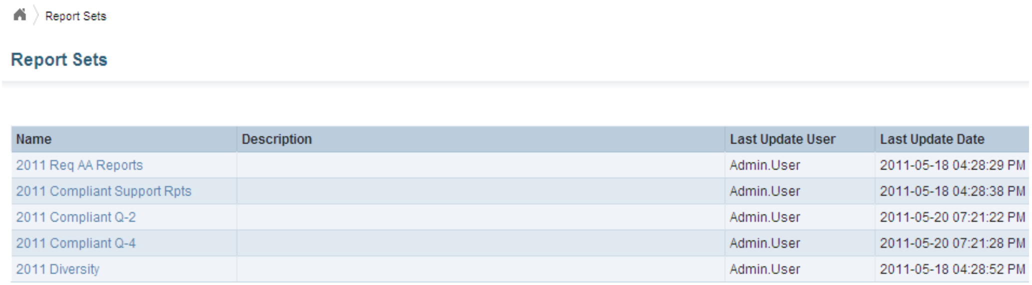
The **Reports** 

module allows you to view report sets that have been loaded into CRC, and their associated plan definitions and documents.

View report sets

1. To view report sets, click **Reports** 

from the **CRC Home** page.



Report Sets

Report Sets

Name	Description	Last Update User	Last Update Date
2011 Req AA Reports		Admin.User	2011-05-18 04:28:29 PM
2011 Compliant Support Rpts		Admin.User	2011-05-18 04:28:38 PM
2011 Compliant Q-2		Admin.User	2011-05-20 07:21:22 PM
2011 Compliant Q-4		Admin.User	2011-05-20 07:21:28 PM
2011 Diversity		Admin.User	2011-05-18 04:28:52 PM

2. The report sets currently loaded in CRC will be displayed.

3. Click a report set name to view its associated plans and documents.

<u>Report sets documents tab</u>

Report Sets 〉 2011 Req AA Reports

Report Set - 2011 Req AA Reports

Plan Definitions | Documents

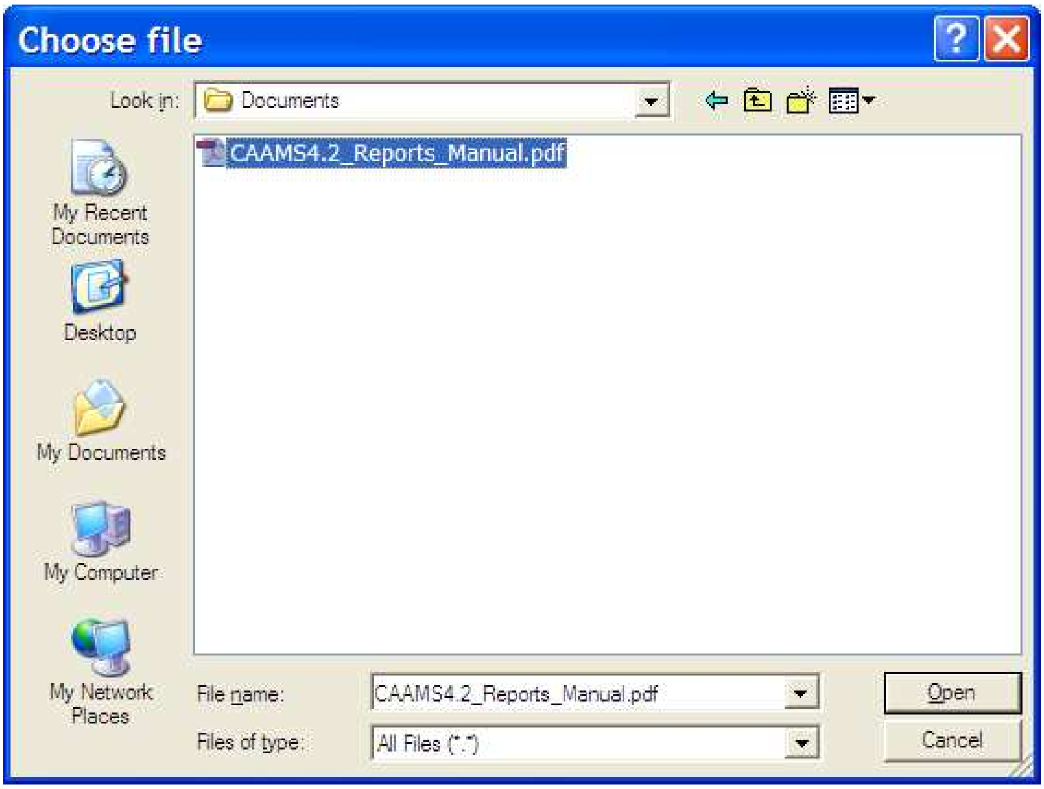
Add Document

Name ▲	Description	Last Update User	Last Update Date	
Peopleclick CAAMS 4.2 Reports Manual.pdf		Train.User	2011-05-18 06:56:16 PM	

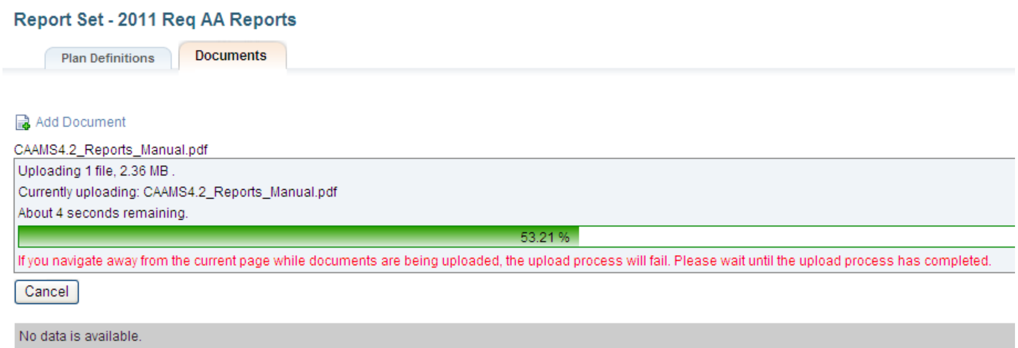
1. Click on the **Documents** tab to view and load documents related to a report set.

2. Examples of the type of documents that might be loaded here are the ***Peopleclick CAAMS® Reports Manual***, general AA plan preparation instructions or overall roles and responsibilities for AA planning within your organization.

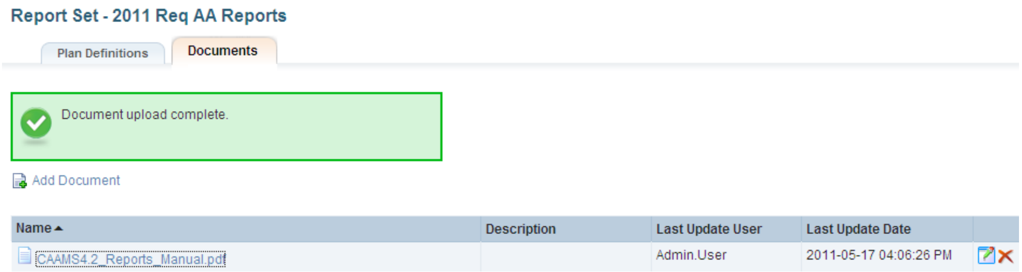
3. To add documents, click on the **Add Document** Add Document hyperlink.



4. Browse to the location of the document you wish to load and click **Open** .



5. A progress bar will be displayed. Note that if you navigate away from the current page before the load is complete, the load will fail.



6. After the document has loaded, it can be viewed or printed by double clicking on the document name. However, immediately following the load, there may be a short wait before it is accessible while it is scanned for viruses.

7. Click on the **Edit or Delete** icons at the far right to edit the document name or delete the document.

Plan definitions

1. From within a report set, click the **Plan Definitions** tab if not already selected.

2. Click on a plan definition listed in the **Name** column to view a list of the specific plans in the structure.

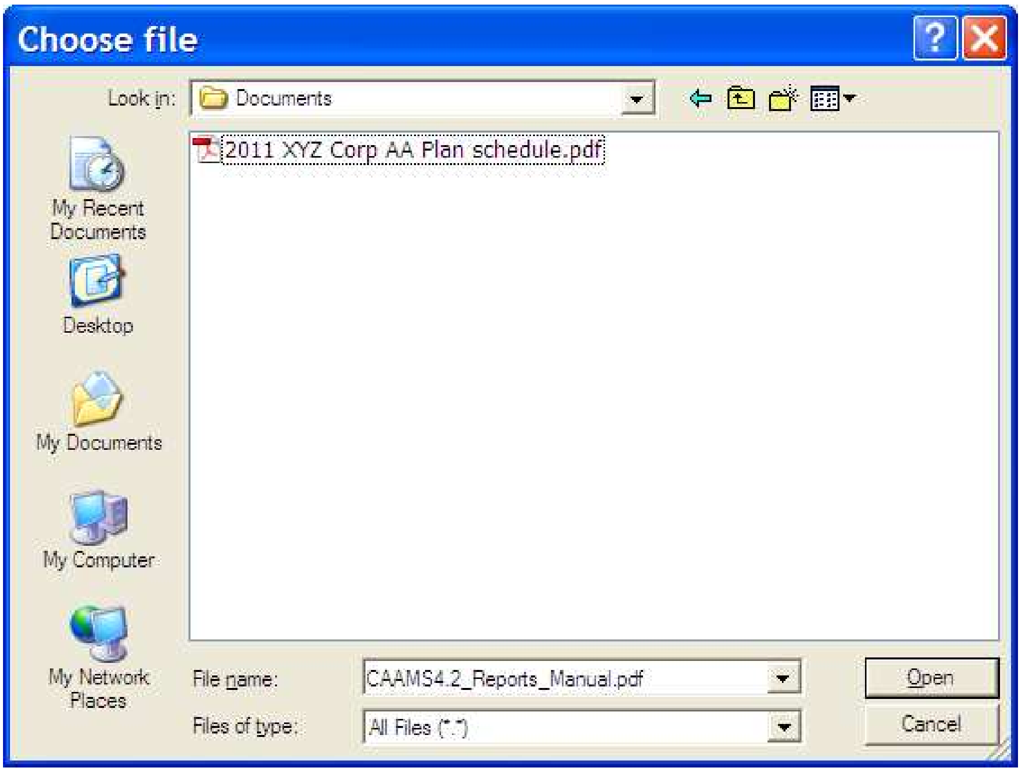
Plan definitions documents tab

1. Click on the **Documents** tab to view and load documents related to a plan definition.

2. Examples of the type of documents that might be loaded here are the internal company deadlines for plan preparation, your corporate EEO policy or employee handbook.

3. To add documents, click on the **Add Document** 

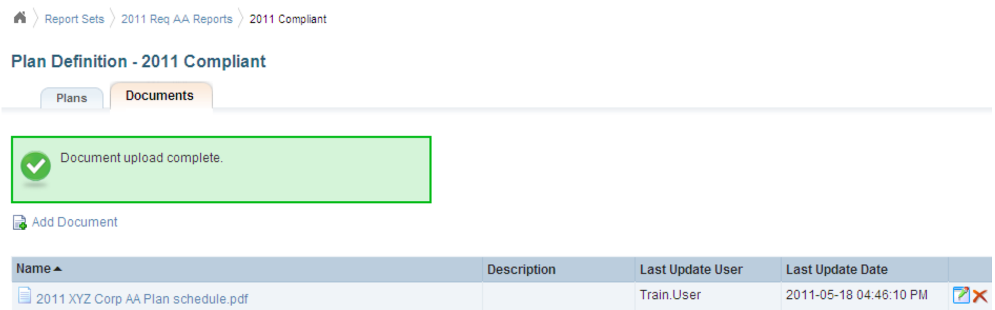
hyperlink.



4. Browse to the location of the document you wish to load and click **Open** 

.

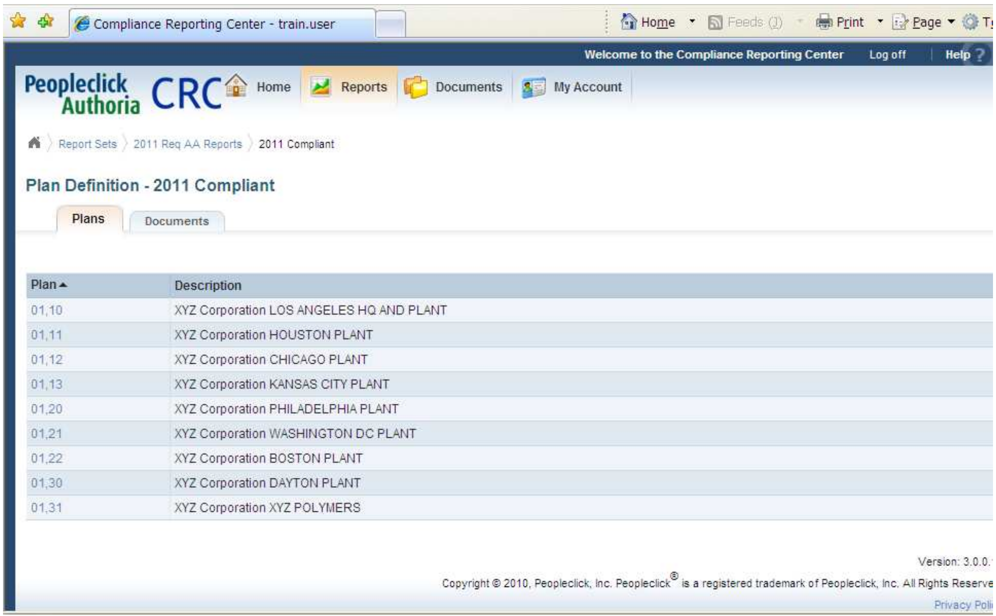
5. A progress bar will be displayed. Note that if you navigate away from the current page before the load is complete, the load will fail.



6. After the document has loaded, it can be viewed or printed by double clicking on the document name. However, immediately following the load, there may be a short wait before it is accessible while it is scanned for viruses.

7. Click on the **Edit or Delete**  icons at the far right to edit the document name or delete the document.

<u>Plan specific level</u>

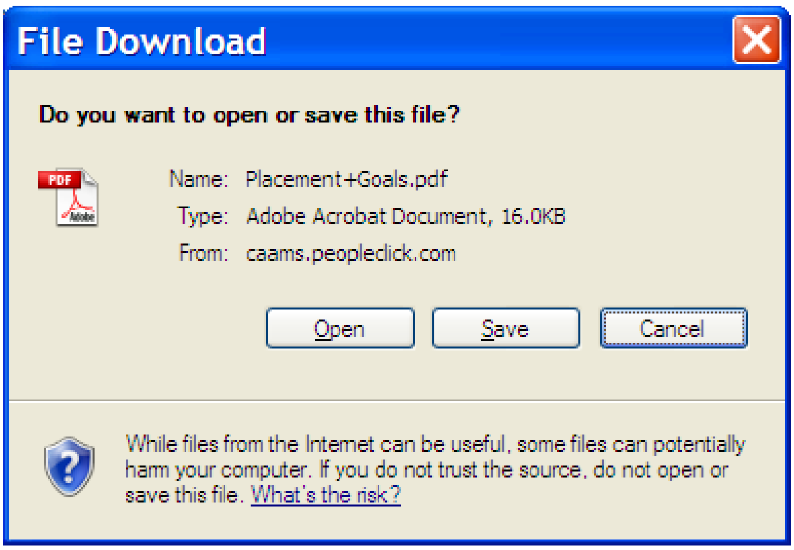


From the **Plan Definition** window, click on a specific plan name to view plan-specific reports or documents.

Plan level reports tab

1. To view a report or reports, click on the check box next to each report you wish to view or click on **Select All** Select All.

2. Click on **View Selected Reports** View Selected Reports.



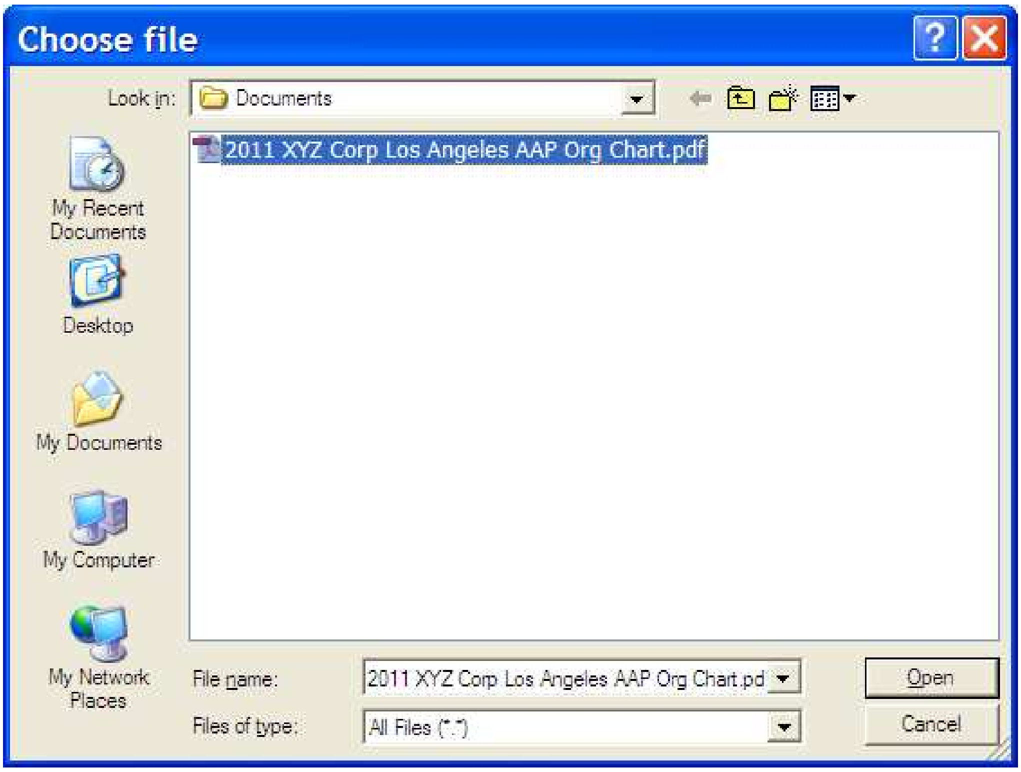
3. Click on **Open** to view the document or **Save** to save a copy of the document to your computer. Click on **Cancel** to exit.

Plan level documents tab

1. Click on the **Documents** tab to view and load documents related to a specific AA plan establishment.

2. Examples of the type of documents that might be loaded here are an organization chart for the plan or copies of the establishment's EEO-1 and VETS-100A.

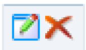
3. To add documents, click on the **Add Document** hyperlink.



4. Browse to the location of the document you wish to load and click **Open** .

5. A progress bar will be displayed. Note that if you navigate away from the current page before the load is complete, the load will fail.

6. After the document has loaded, it can be viewed or printed by double clicking on the document name. However, immediately following the load, there may be a short wait before it is accessible while it is scanned for viruses.

7. Click on the **Edit or Delete**  icons at the far right to edit the document name or delete the document.

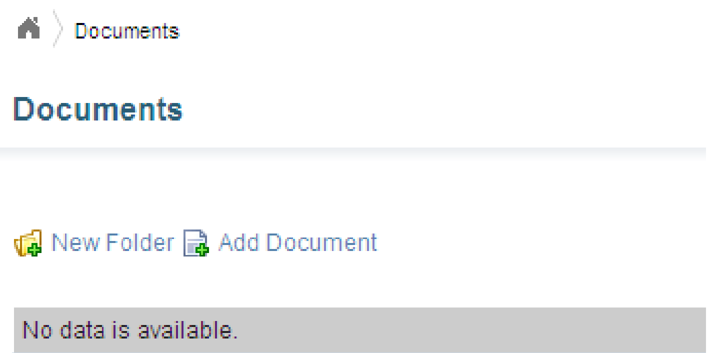
Documents module

The **Documents** 

module allows you to load and work with documents and other artifacts in addition to CAAMS reports. To access **Documents**, from the **CRC Home** page, click on **Documents** 

. The list of documents, if any, currently loaded into CRC will display.

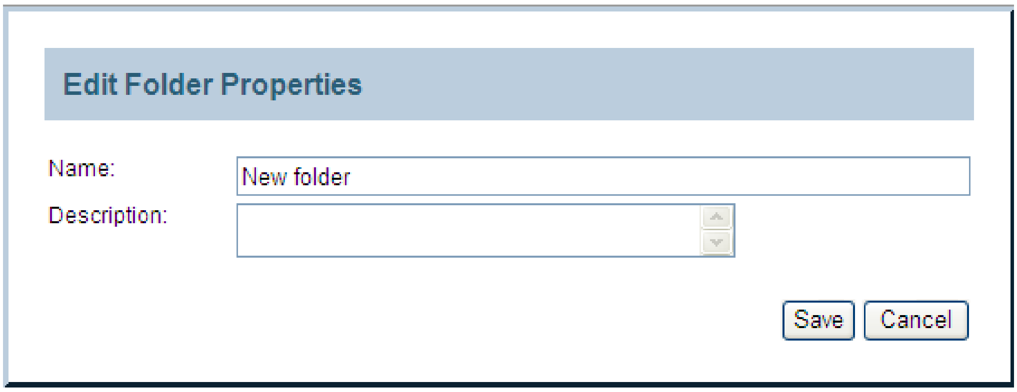
Folders and adding documents



1. You can create folders to facilitate organization of your documents and artifacts.

2. To create a folder, click on **New Folder** 

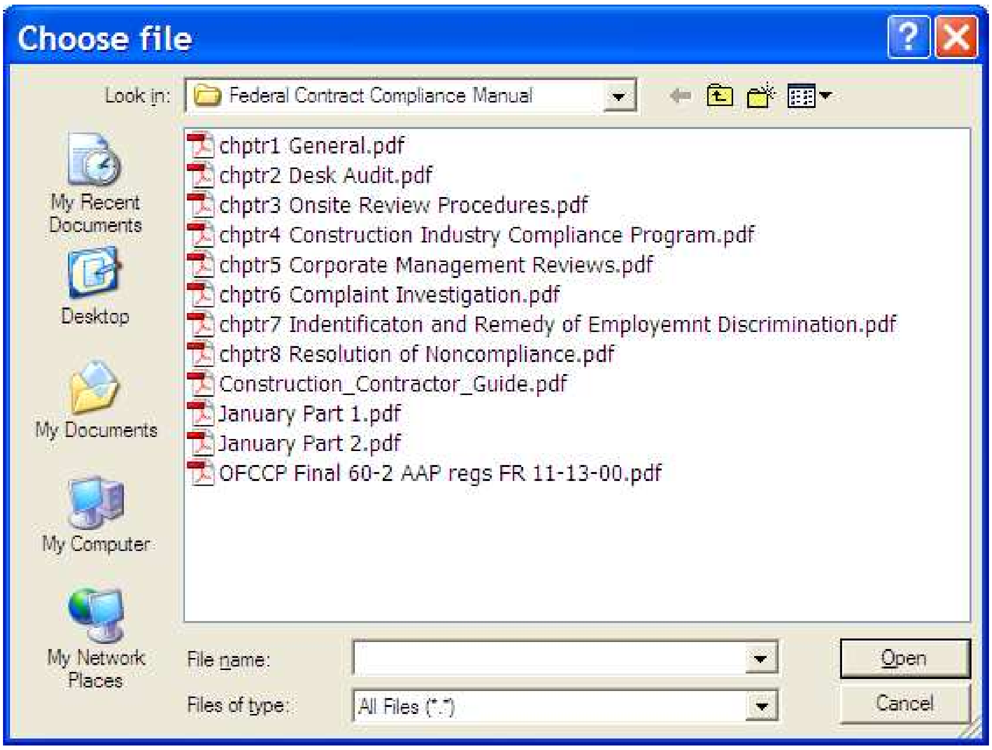
.



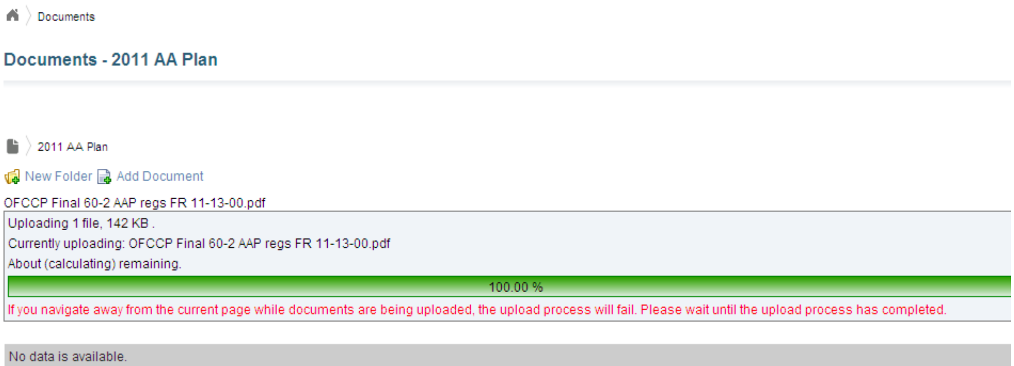
3. On the **Edit Folder Properties** window, enter a **Name:** and an optional **Description:** for your new folder.

4. Click **Save** Save to save your changes or **Cancel** Cancel to exit without saving.

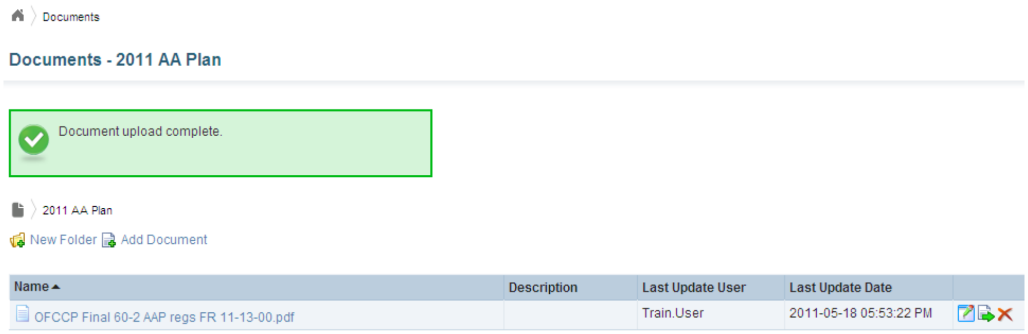
5. To add a document, click on the name of the folder to which you want to add the document and click **Add Document** Add Document .



6. Browse to the location of the document you wish to add and click **Open** .



7. A progress bar will be displayed. Note that if you navigate away from the current page before the load is complete, the load will fail.

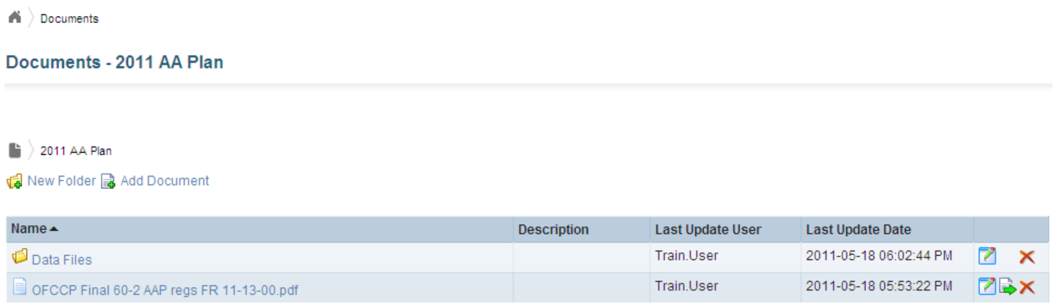


8. After the document has loaded, it can be viewed or printed by double clicking on the document name. However, immediately following the load, there may be a short wait before it is accessible while it is scanned for viruses.

9. Click on the **Edit** icon at the far right to edit the document name.

10. Click the **Move** icon to move the document to a different folder.

11. Click on the **Delete** icon to delete the document.

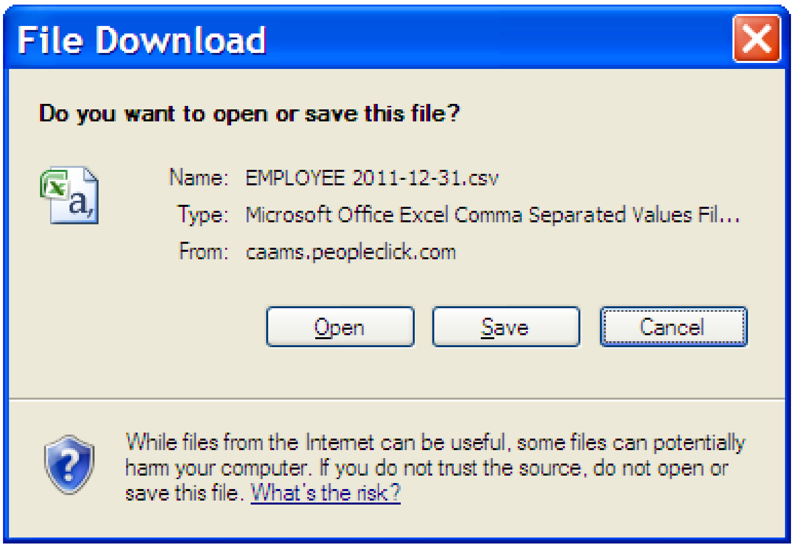


12. You can add subfolders by clicking on the **New Folder** New Folder hyperlink within an existing folder.

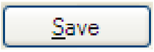
View or save documents

1. To view a document or other artifact loaded into CRC, browse to the location of the document in CRC.

2. Click on the name of the document.



3. Click on **Open**  to view the document.

4. Click on **Save**  to save a copy of the document or artifact to your local computer.

5. Click on **Cancel**  to exit.

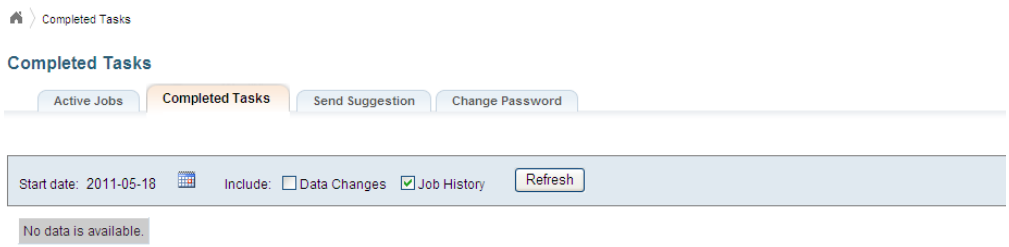
My Account

The **My Account** module allows you to view your own active jobs (processes that are currently executing or pending) and completed tasks (such as loading documents). You can also change your password and send suggestions for improving the CRC application to Peoplefluent. To access **My Account**, from the **CRC Home** page, click on **My Account**  .

Active jobs

The **Active Jobs** list displays all jobs in the database that are actively executing, pending, or failed. You can update the list with the most current status by clicking **Refresh**. You can cancel any job by clicking on **Cancel**.

Completed tasks



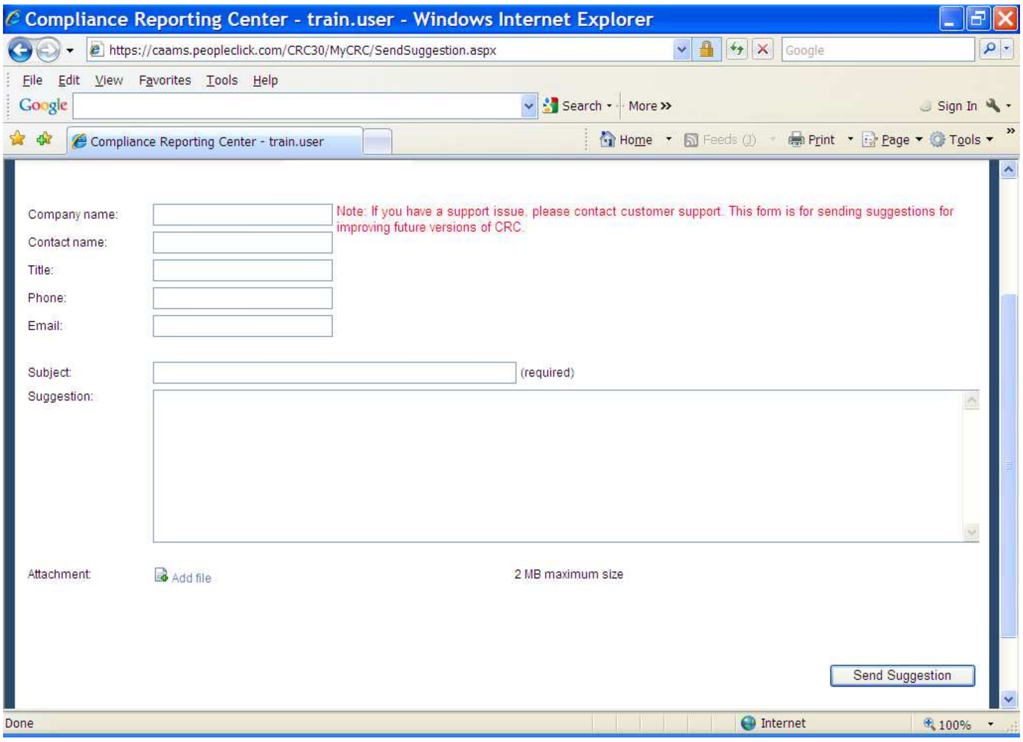
The **Completed Tasks** log lists activities that have completed execution. Two types of activities are listed: **Data Changes** and **Job History**. An example of a **Data Change** entry is edits to a Good Faith Efforts activity. An example of a **Job History** entry is merging two Report Sets.

1. Select a **Start date:** to display activities beginning on that date through the current date. A maximum of 1000 records will be displayed.

2. To filter the activities displayed, click on the **Data Changes** or **Job History** check box.

3. To sort the display, click a column heading to sort by that column. Clicking the column heading a second time reverses the sort order.

Send suggestion



Peoplefluent is very interested in hearing suggestions from you on how to improve our products and services. You can use the **Send Suggestion** module to provide feedback to the CRC Product Manager.

1. To send a suggestion from the **My Account Send Suggestion** tab, enter your contact information in the fields provided. (This information is optional.)

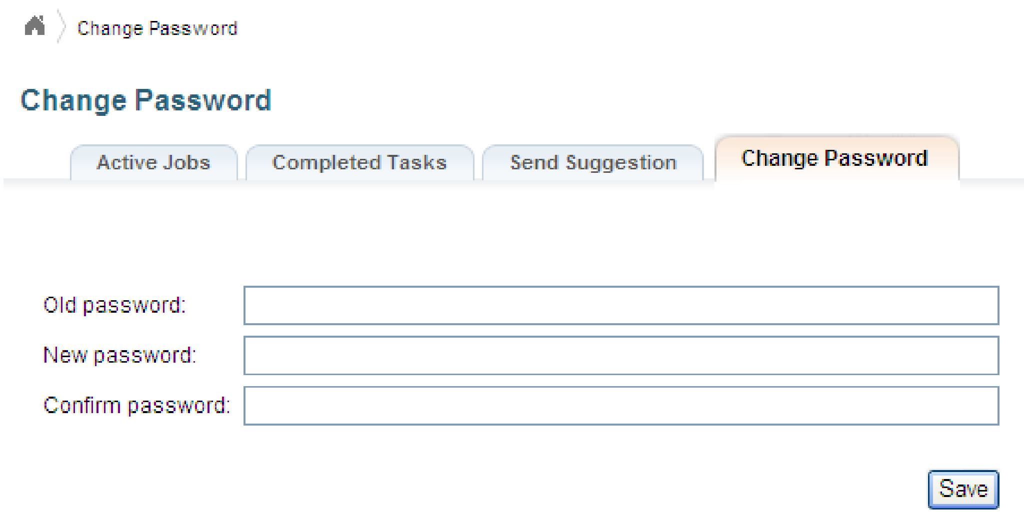
2. Enter a short description of the suggestion in the **Subject:** field.

3. You may also enter a more detailed description in the **Suggestion:** text box.

4. If you want to attach a file to further clarify your suggestion, click the **Add file** Add file hyperlink at the bottom left of the page to navigate to the file. Note that attachments cannot be larger than 2MB.

5. Click **Send Suggestion** Send Suggestion. Your suggestion will be sent to the CRC Product Manager.

Change password

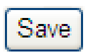


1. To change your password, from the **My Account** module, click the **Change Password** tab.

2. Enter your current password in the **Old password:** field.

3. Enter your new password in the **New password:** field. Your new password can be a maximum of 256 characters, and must be different from the old password. Your new password must also adhere to the password rules defined by your administrator in CRC **Options.**

4. Enter the new password again in the **Confirm password:** field.

5. To save your new password, click **Save** 

.

CRC Premium

The CRC Premium license enhances all of the features of the basic license by adding the ability to easily enter, track, and document your organization's Good Faith Efforts across all of your Affirmative Action Plans.

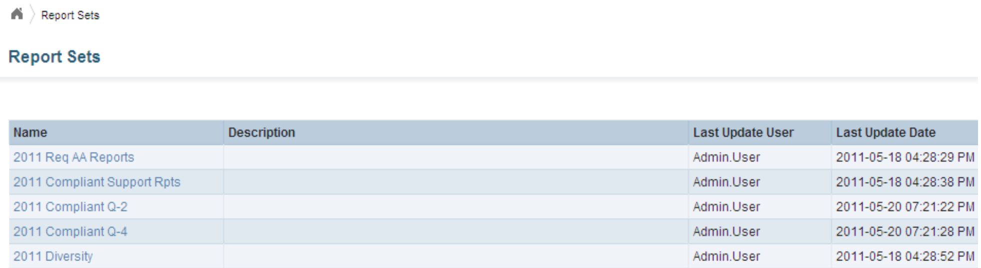
Gap Analysis

The **Gap Analysis Dashboard** provides external census demographics, applicant pool representation, and current representation metrics by establishment and job group. This helps you determine whether your external good faith efforts, sourcing, and outreach programs are having a positive effect on your applicant pool representation and your current representation.

Note: In order to view the **Gap Analysis Dashboard**, monitoring reports must have been loaded into CRC.

1. To access the **Gap Analysis Dashboard**, from the **CRC Home** page, click **Reports** 

.



Report Sets

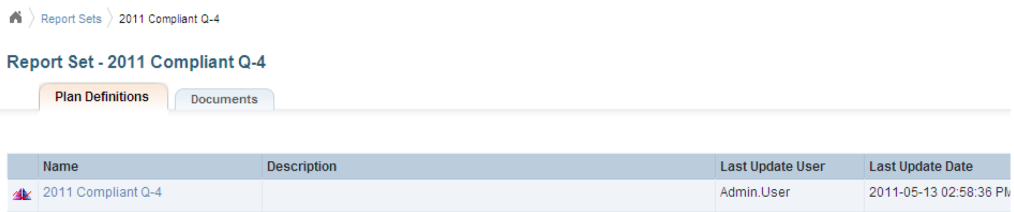
Report Sets

Name	Description	Last Update User	Last Update Date
2011 Req AA Reports		Admin.User	2011-05-18 04:28:29 PM
2011 Compliant Support Rpts		Admin.User	2011-05-18 04:28:38 PM
2011 Compliant Q-2		Admin.User	2011-05-20 07:21:22 PM
2011 Compliant Q-4		Admin.User	2011-05-20 07:21:28 PM
2011 Diversity		Admin.User	2011-05-18 04:28:52 PM

2. The list of report sets loaded into CRC displays.

3. Select a report set.

Note: The report set must contain monitoring reports.



Report Sets 2011 Compliant Q-4

Report Set - 2011 Compliant Q-4

Plan Definitions Documents

Name	Description	Last Update User	Last Update Date
2011 Compliant Q-4		Admin.User	2011-05-13 02:58:36 PM

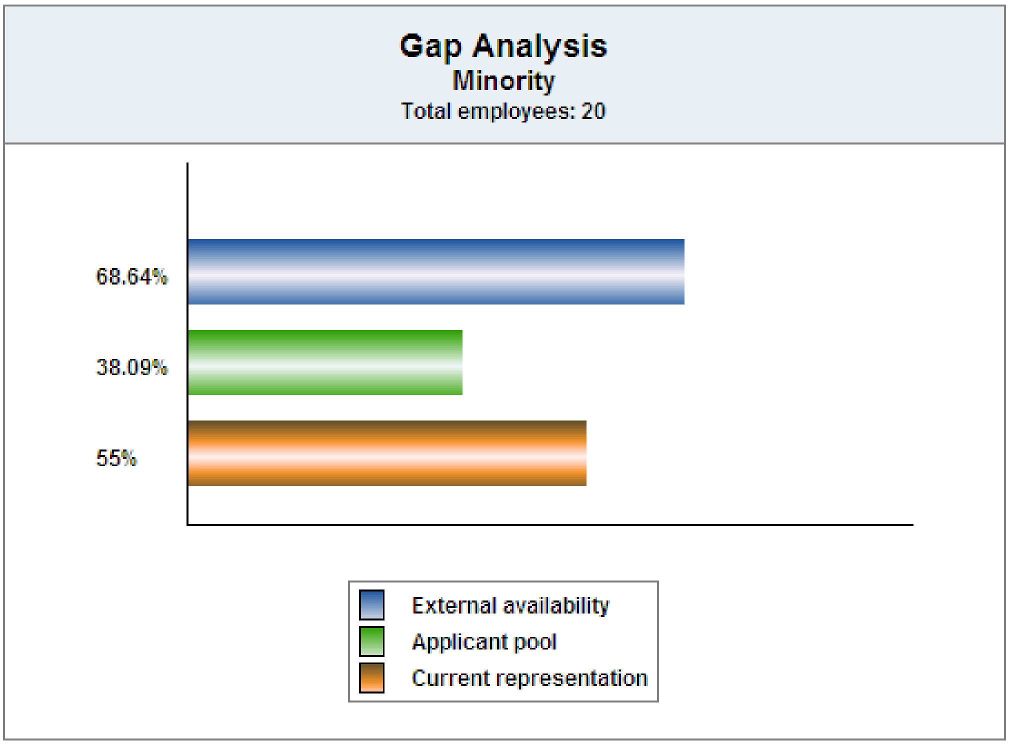
4. A list of associated plan definitions will be displayed.

5. Select a plan definition by clicking on the **Name** of the plan definition.

Plan	Description
01,10	XYZ Corporation LOS ANGELES HQ AND PLANT
01,11	XYZ Corporation HOUSTON PLANT
01,12	XYZ Corporation CHICAGO PLANT
01,13	XYZ Corporation KANSAS CITY PLANT
01,20	XYZ Corporation PHILADELPHIA PLANT
01,21	XYZ Corporation WASHINGTON DC PLANT
01,22	XYZ Corporation BOSTON PLANT
01,30	XYZ Corporation DAYTON PLANT
01,31	XYZ Corporation XYZ POLYMERS

6. On the **Plan Definitions** window, click the **Gap Analysis Dashboard** tab.

7. Select the **Plan:**, **Job Group:**, and **Class:** you want to view. Highlighted plans, job groups, and classes indicate that a gap in representation exists.



8. The **Gap Analysis** chart displays the external availability, applicant pool, and current representation for the selected plan/job group/ class combination indicating where you need to revise and concentrate your good faith effort activities.

Good faith efforts

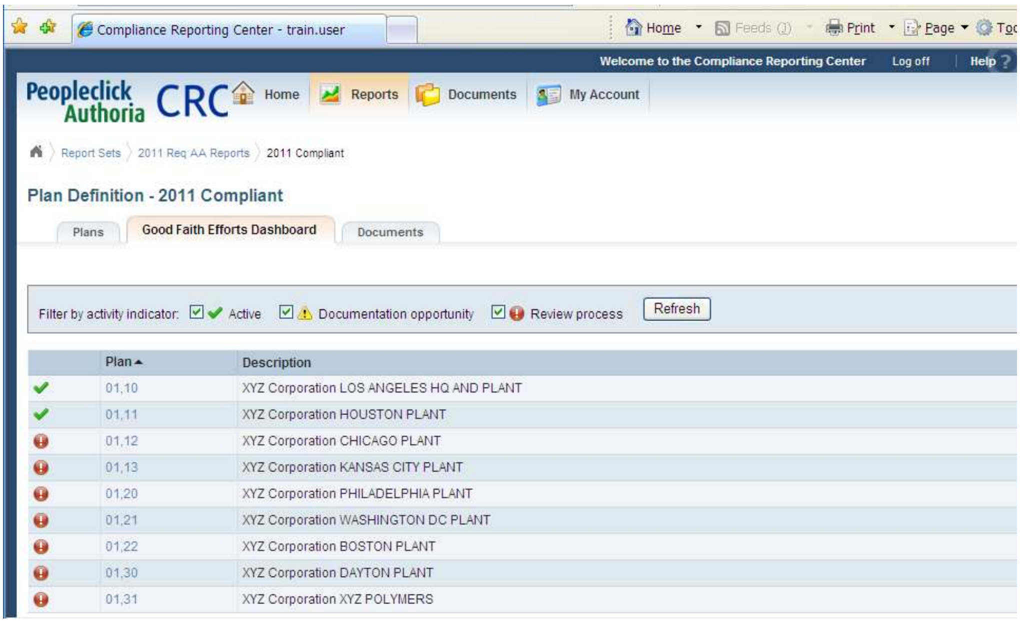
Federal contractors are required to define and implement specific programs to address the goals and objectives outlined in the Affirmative Action Plan for each establishment. These programs are commonly referred to as Good Faith Efforts, and are captured in the Development and Execution of Action section in narrative documents. If these programs and activities are not recorded, an organization is at risk of non-compliance. There are two types of good faith efforts:

- Internal – Examples of internal efforts are internal training opportunities or internal communication of opportunities encouraging minorities and women to apply for positions.
- External -- Examples of external efforts are participation at job fairs, use of specific recruitment sources targeting women or minorities, or college recruitment.

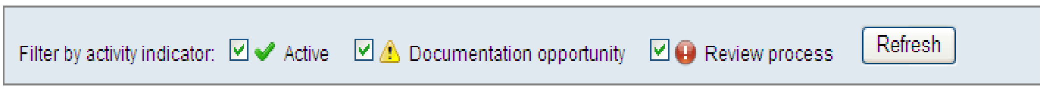
Good faith efforts dashboard

The **Good Faith Efforts Dashboard** is designed to provide a high level quick look at the good faith effort activity levels for all of your Affirmative Action plans.

1. To view the **Good Faith Efforts Dashboard**, from the **Reports** module main window, select a **Report set** and a **Plan definition** to display.



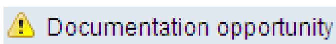
2. Click the **Good Faith Efforts Dashboard** tab. A list of your Affirmative Action plans will be displayed.



3. To filter the display, click on the check box next to the type of activity you wish to view.

4. The **Active** indicator 

shows plans where recent **Good faith efforts** activity has been entered.

5. Those plans with the **Documentation Opportunity** 

indicator are plans where there has been recent activity but no documentation has been provided in support of the activity. The owners of these plans should be contacted to determine why good faith effort activities are not being updated.

6. The **Review Process** Review process indicator shows those plans where no recent activity has occurred.

7. To view the good faith efforts for a specific plan, click on the plan code hyperlink next to the plan name.

The good faith effort activities can be recorded and managed for each plan in CRC

Plan specific good faith efforts


Report Sets 〉 2011 Req AA Reports 〉 2011 Compliant

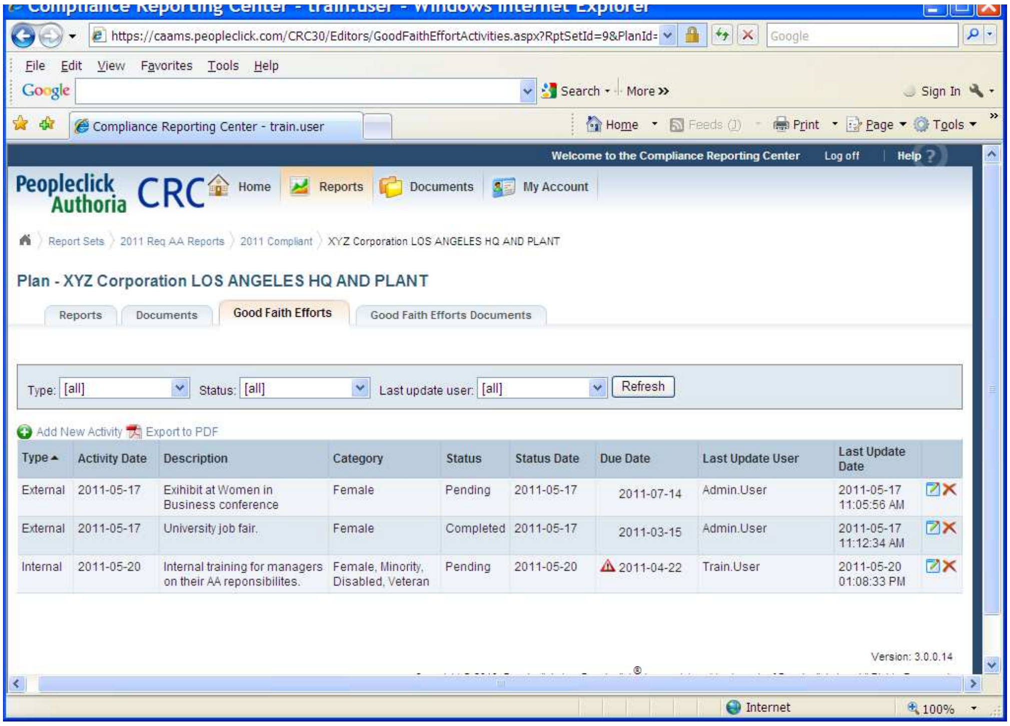
Plan Definition - 2011 Compliant

Plans | Good Faith Efforts Dashboard | Documents

Plan ▲	Description
01,10	XYZ Corporation LOS ANGELES HQ AND PLANT
01,11	XYZ Corporation HOUSTON PLANT
01,12	XYZ Corporation CHICAGO PLANT
01,13	XYZ Corporation KANSAS CITY PLANT
01,20	XYZ Corporation PHILADELPHIA PLANT
01,21	XYZ Corporation WASHINGTON DC PLANT
01,22	XYZ Corporation BOSTON PLANT
01,30	XYZ Corporation DAYTON PLANT
01,31	XYZ Corporation XYZ POLYMERS

To enter, track, and document Good Faith Efforts for a particular Affirmative Action Plan, from the either **Reports → Report Sets → Plan Definition** or the **Good Faith Efforts Dashboard**, select the plan you wish to edit by clicking on the plan code in the **Plan** column.

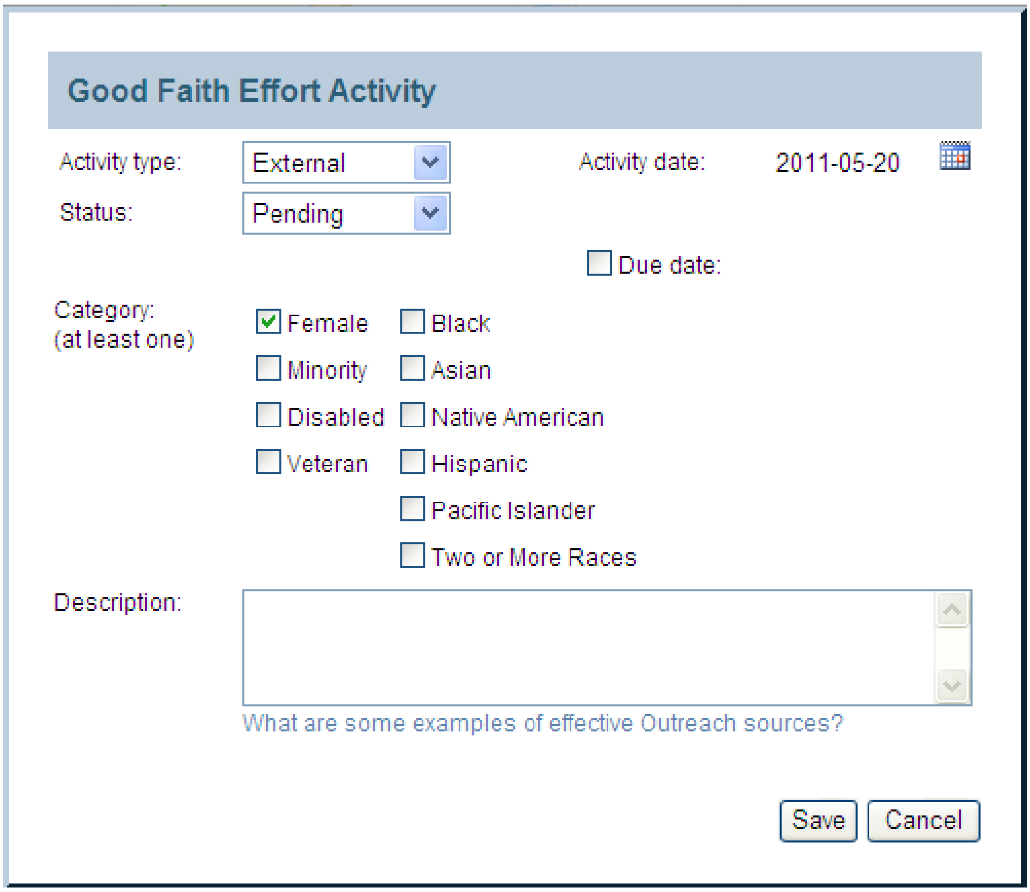
Add a new good faith effort activity



1. To add a new Good Faith Effort activity, click the **Good Faith Efforts** tab.

2. Click **Add New Activity** 

.



3. The **Good Faith Effort Activity** box will be displayed.

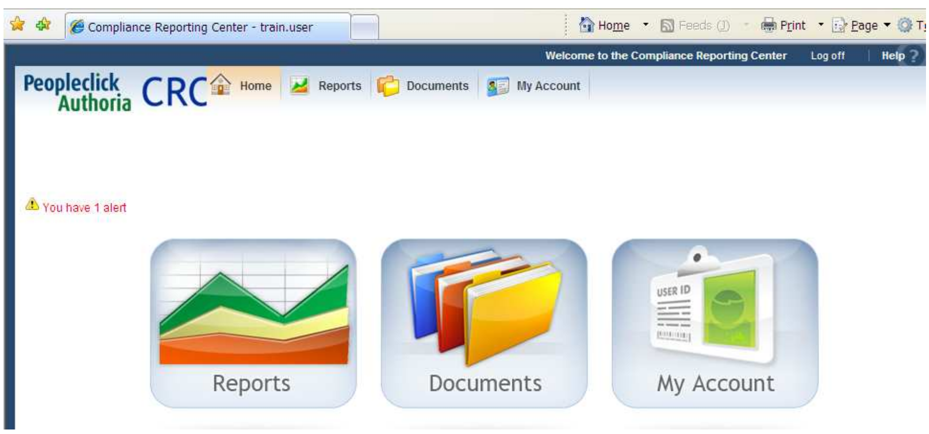
4. Fill in the fields as follows:

- **Activity type:** Indicate whether the activity is internal to your organization or external.
    - **Internal** – Examples are internal training opportunities or internal communication of opportunities encouraging minorities and women to apply for those positions.
    - **External** – Examples are participation at job fairs, use of specific recruitment sources targeting women/minorities, or college recruitment.
- **Status:** Enter the status of the activity.
    - **Pending** -- Activity has not begun yet due to pending information.

- o **Active --** Activity is currently underway.
- o **Completed --** Activity has been completed. Once the status of an activity has been updated to **Completed**, a **Completed date:** field will be enabled.

- **Category:** At least one category must be selected.
- **Activity date:** Select the date the activity started.
- **Status date:** Automatically updates when the activity's status field is updated.
- **Due date:** The date the activity is due to be completed. This is an optional field, but it is recommended that a due date be set in order for CRC to send alert notifications to remind you to update your Good Faith Effort activities.

A red icon next to the due date indicates that the item is past due.



If an item is past due, an alert will also be displayed on the **CRC Home** page.

A yellow icon indicates that the item is due within 15 days.

Clicking on the alert will display the **Alerts** page, where you can select any of the **Report Sets/Plan Definitions** associated with a **Good Faith Effort** activity that is past due or is up coming and drill down directly to the activity.

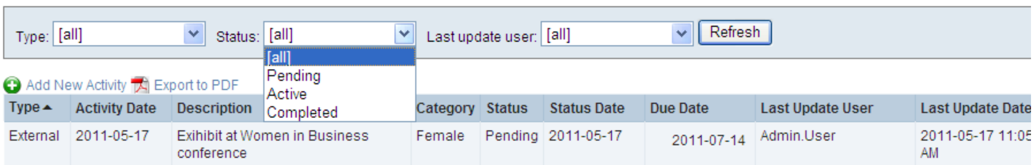
- **Description:** Enter a description of the activity. This is a required field.

5. For recommended outreach sources and recommendations that can be used to build or define your external good faith effort, click the **What are some examples of effective Outreach sources?** hyperlink at the bottom of the window to connect to Peoplefluent's EEOSource website.

6. Click **Save** Save to save your changes or **Cancel** Cancel to exit without saving.

7. You will be returned to the main **Good Faith Efforts** window where a list of good faith effort activities that have been recorded is displayed.

8. Click on the **Edit** or **Delete** icons at the far right to edit or delete the activity.



9. To filter the display, click on the drop down arrow next to **Type:**, **Status:**, or **Last update user:** list boxes and select the item by which you wish to filter.

10. Click **Refresh** Refresh. The activities that meet the filter selected will be displayed.

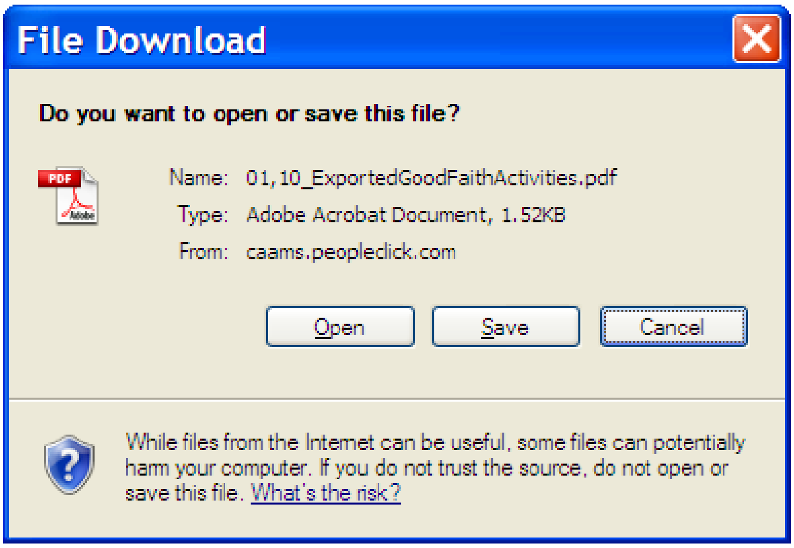
11. To sort activities, click on the column heading of the field you want to use to sort the data. An arrow is displayed indicating the direction of the sort.

12. Click on the column heading again to reverse the sort order.

13. To sort by a different field, click on the column heading of that field.

Export good faith efforts to a PDF

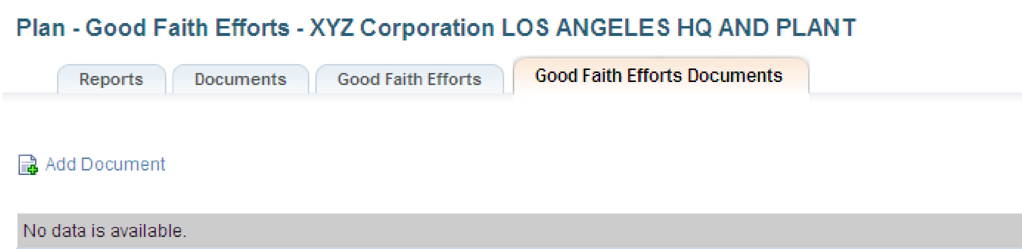
1. To export a list of the good faith efforts activities shown to a PDF file, from the **Good Faith Efforts** tab click the **Export to PDF** Export to PDF hyperlink.



2. Click on **Open** Open or **Save** Save to save the PDF file or **Cancel** Cancel to exit without saving.

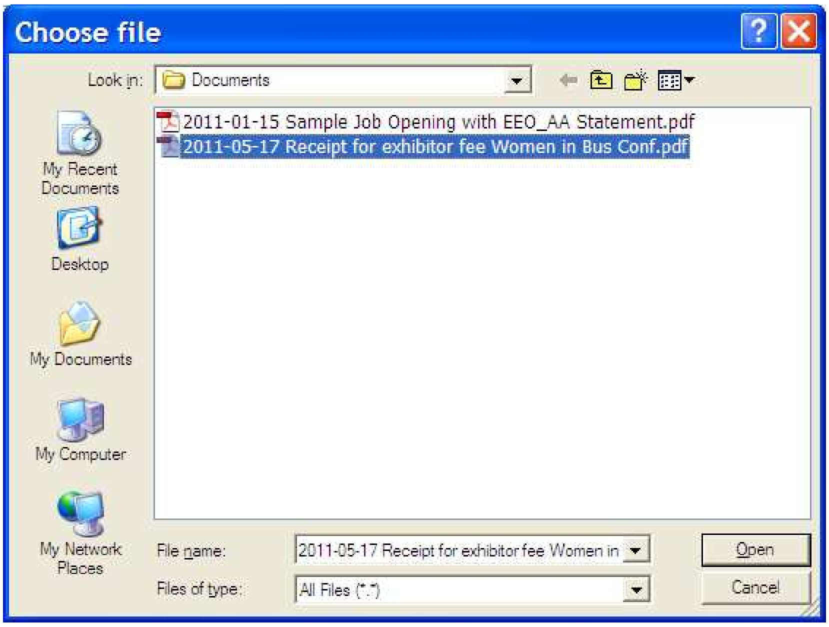
Good faith efforts documents tab

1. Click on the **Good Faith Efforts Documents** tab to view and load documents related to the good faith efforts for a specific AA plan establishment.



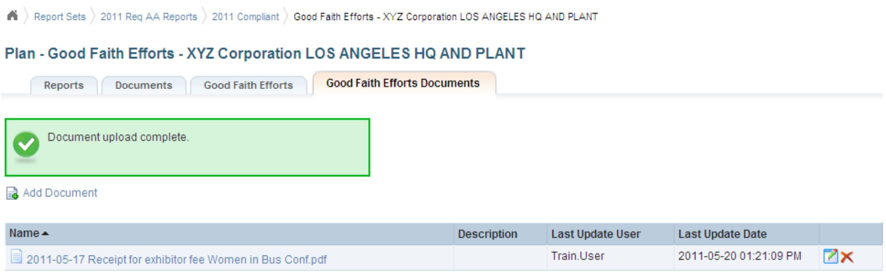
Examples of the type of documents that might be loaded here are documentation of participation at job fairs or other conferences.

2. To add documents, click on the **Add Document** Add Document hyperlink.

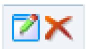


3. Browse to the location of the document you wish to load and click **Open** Open.

4. A progress bar will be displayed. Note that if you navigate away from the current page before the load is complete, the load will fail.



5. After the document has loaded, it can be viewed or printed by double clicking on the document name. However, immediately following the load, there may be a short wait before it is accessible while it is scanned for viruses.

6. Click on the **Edit or Delete**  icons at the far right to edit the document name or delete the document.