



balance
REACH

User's Guide

Version 4.0

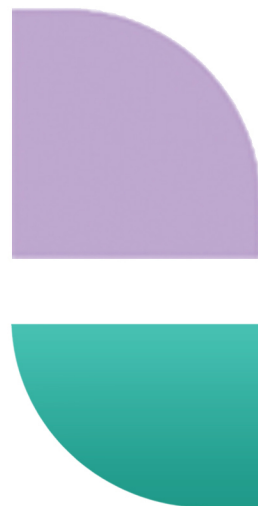




TABLE OF CONTENTS

An Affirmative Action Tool <i>for Recruiters and HR Professionals</i>	1
<i>Interactivity and Support for AAPs created in BalanceAAP</i>	1
Entering REACH	2
<i>Forgot Your Password Link</i>	2
<i>Navigation between BalanceWORKS Applications</i>	2
Contacting Berkshire for Software Support	3
<i>Request Support from within REACH</i>	3
<i>In-line Help</i>	3
About REACH Modules and Data Tools	4
<i>Organizing REACH Data Lists</i>	4
<i>Quick-Click Icons for working with REACH Data</i>	5
Activities	6
Add an Activity (and Source)	6
Overview of the Activities List	7
Edit an Activity	8
<i>Import Activities</i>	8
Sources	10
Add a Source	10
Overview of the Sources List	11
<i>Filter the Sources List</i>	11
Edit a Source	12
<i>Import Sources</i>	12
Evaluations	13
Add (Perform) an Evaluation	13
<i>Overview of the Evaluations List</i>	14
Edit an Evaluation	14
REACH: Reports	15
Determine Report Settings by Topic	15
(Optional) Filter Report to View or Export by Date	16
View a Report	16
Export Reports	17

Sample Reports.....	18
User Management for Administrators	20
Work with Existing Profiles.....	20
<i>Profile Options.....</i>	<i>20</i>
<i>Profile Functions.....</i>	<i>21</i>
Add a New Profile	21
Manage New and Existing Users.....	21
<i>Add a New User and Apply Profile</i>	<i>22</i>
System Set-up Tools for Administrators.....	23
Settings	23
Evaluation Criteria	24
<i>Add Criteria</i>	<i>24</i>
<i>Edit Criteria</i>	<i>24</i>
Activity Types	25
<i>Add an Activity Type.....</i>	<i>25</i>
<i>Display Active/Inactive Activity Types.....</i>	<i>25</i>
Job Families	25
<i>Add a Job Family</i>	<i>26</i>
<i>Import Job Families</i>	<i>26</i>
<i>Display Active/Inactive Job Families</i>	<i>26</i>
<i>Delete a Job Family</i>	<i>26</i>
Location Codes.....	26
<i>Add a Location Code</i>	<i>27</i>
<i>Import Location Codes</i>	<i>27</i>
<i>Display Inactive/Active Location Codes</i>	<i>27</i>
<i>Delete a Location Code</i>	<i>27</i>
Plan Dates	27
<i>Add a Plan Date.....</i>	<i>28</i>
<i>Activate/Deactivate a Plan Date.....</i>	<i>28</i>
<i>Plan Date is In Use.....</i>	<i>28</i>



An Affirmative Action Tool for Recruiters and HR Professionals

Providing tools for tracking and evaluating Good Faith Efforts (GFEs) as part of an Affirmative Action program, **REACH** serves as a companion to **balanceAAP**, a software application used to prepare Affirmative Action plans (AAPs). Both applications are part of the **balanceWORKS** software family.

Ideally, **REACH** tracking is a collaboration between members of your Human Resource department, such as between talent acquisition personnel and one or more Affirmative Action or Federal compliance specialists.

Accordingly, this guide will explain how you (and your colleagues) can employ **REACH** to store recruiting sources, document outreach efforts for underrepresented groups, and evaluate the effectiveness of these efforts.


Interactivity and Support for AAPs created in BalanceAAP

Software subscribers who have access to both **REACH** and **BALANCEaap** can take advantage of settings that will automatically merge GFE data into your organization's AAP Narratives.

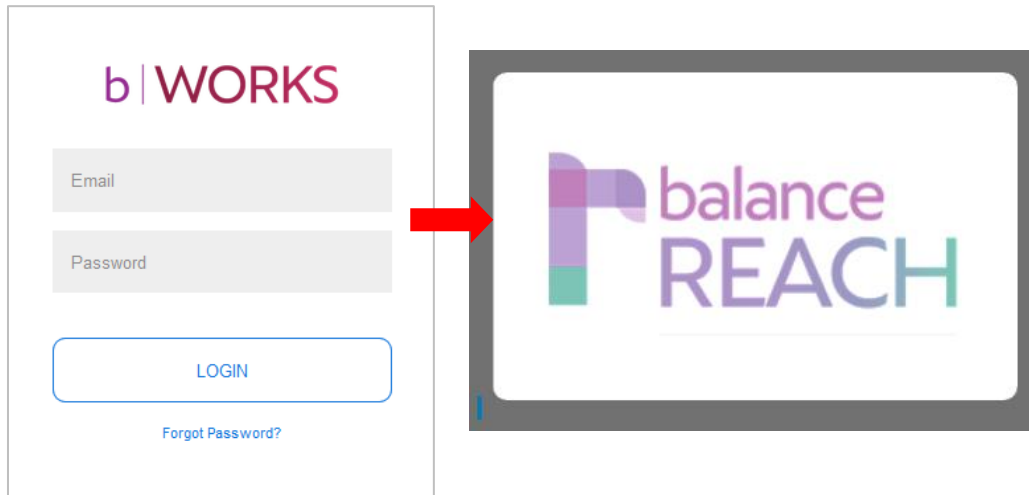
For the **REACH** Administrator (typically, the AAP owner/creator), instructions are provided on how to set up and manage the user environment, including settings that link the two applications.

The *BalanceAAP User's Guide*, which is available within the software's **Help > Library** or from Berkshire Product Support, provides information on plan preparation software settings.

Entering REACH

The process will begin with an activation email, initiated and sent by your organization's System Administrator. Once you activate your account, **REACH** is accessed from the  **BALANCEworks** Login page (<https://works.baiworks.com>).




After Login, open the software by clicking on the **Reach** button.



Forgot Your Password Link

If you have forgotten your password, a link is available below the **Login** button to guide you through the process of resetting your password.

Navigation between BalanceWORKS Applications

For easy navigation between any  **BALANCEworks** applications (e.g.,  **balanceAAP** and  **REACH**) you have permission to use, simply click the icon in the *page header* on the upper left, representing the application.



Contacting Berkshire for Software Support

Telephone: (800)-882-8904, option 4

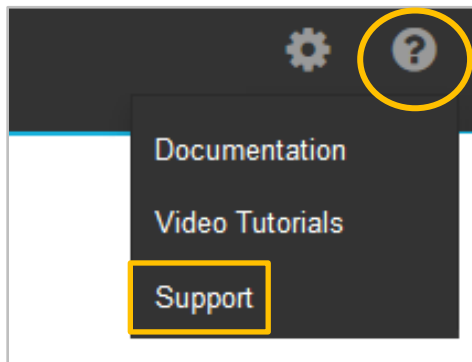
(8:30am – 8pm ET, Monday–Thursday; 8:30am–5pm ET, Friday)

Email: product.support@berkshireassociates.com

Berkshire Associates Inc.
8924 McGaw Court
Columbia, MD

Request Support from within REACH

While working in **REACH**, click the **? Help** icon, which is located in the application's *header bar* (as shown below). Select **Support** from the provided drop-down to display the Support Request form. Then, develop the message, and hit the **Submit** button.



In-line Help

As circled above, the **? Help** menu can also be accessed from the **REACH header**. In-line **? Help** is comprised of the following resources:

- **Documentation** (including a Wiki-style Help system, a library of software *User's Guides*, and links to Federal resources)
- **Video Tutorials** (for topics, as available)
- **Support** (from a Berkshire representative, as described above)

About REACH Modules and Data Tools

Plan creator(s), recruiters, and other HR personnel comprise the key audiences for **REACH** tools, which are used to track Good Faith efforts (GFEs) in support of Affirmative Action planning.

Once the **REACH** database is successfully developed, information can be pulled into **balanceAAP** for use in plan narratives and reports.

REACH is comprised of three task areas, or tabs, for collecting data:

- **Activities**—Log information on outreach efforts, such as type, target group, location, and job family.
- **Sources**—Store recruiting contacts and associated information, with access to the OFCCP database of recruiting sources.
- **Evaluations**—Perform and record evaluations of **Sources**.

The fourth tab provides access to:

- **Reports**—View, print, and export reports related to GFE data collection and statistics.

Important Note: Before entering **Evaluations** and **Reports**, please visit **Sources** or **Activities** to enter basic information.

Organizing REACH Data Lists

Once information is collected on a **REACH** data collection tab, a table of records related to the task area will display. The tools described below will help you organize and view these lists.

The screenshot shows a table titled "Sources" with columns: Source Name, Source Type, Date, Evaluation, and Status. Two rows are visible: "ARC of Central MD" and "Fort Meade", both of type "Outreach Center". Annotations include: a red box labeled "Sort" pointing to the Source Name header; a red box labeled "Filter by column" pointing to the Source Type header; a green box labeled "View options" pointing to the "Show sources: Active" dropdown; and a green box labeled "Expand" pointing to the expand arrow icon in the Status column.

Source Name	Source Type	Date	Evaluation	Status
ARC of Central MD	Outreach Center	5/10/2014	Perform Evaluation	✓
Fort Meade	Outreach Center	12/3/2013	7/1/2013	✓


Relevant view options are available (as shown above) for use in narrowing each list to specific information, using *column* sorts, expand arrows, and a drop-down filter ("Show ..."). These options are described in more detail in the chapters about the particular task areas.

View Options


A tab-specific drop-down is available in the *list header* at the top right to "Show" by broad categories. An "All" selection is available in the "Show ..." drop-down to restore the full list view.



Filter by Column

Data entries in key *columns* on the data lists can be used for more detailed filtering. Click the  **Filter by** icon (adjacent to the *column header*) to open a menu, containing the *column's* available fields. Select one or more fields, and click **Save**. The list will be limited to records containing that column entry. When applicable, a **Clear Filter** button is available in the *upper toolbar* to restore the full list.

Sort









Use the  **Sort arrows** adjacent to a *column header* (circled above left) to sort the list by the particular *column* in ascending or descending order.

Display Additional Information

Click the  **Expand** (shown below right) to display hidden information, related to a record.

Quick-Click Icons for working with REACH Data

The following icons provide easy access to common tasks, related to **REACH** data entries:

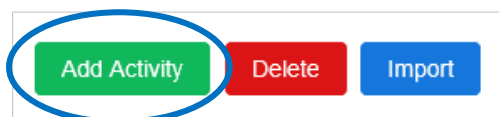
Icon	Command	Action
	Edit	Open a record to view fields and make changes.
	Add a File	Attach an external file (PDF, Word, Excel, PowerPoint) to the record.
	Download a File	Access a file that was added to a record for documentation.
	Add a Comment	Enter documentation notes for an Activities or Sources record.
	Cancel	Exit out of editing a record without making changes.
	Save	Retain changes after editing a record.
	View History	View a log of user activity related to a record.
	Delete	Remove an entry from the data list (or delete documentation within a record).

Activities

Activities	Sources	Evaluations	Reports
------------	---------	-------------	---------

As the first tab on the left, **Activities** will be a key screen for users who are entering information about specific GFEs under their purview. A Source (as described in the [next chapter](#)) must be entered into **REACH** to log **Activities** related to the Source. However, an Activity and a Source can be created at the same time from the **Activities** tab.

Add an Activity (and Source)



Click the **Add Activity** button to add a blank record to the **Activities** list.

1. From the first drop-down, select Activity Type. Then, associate the Activity with a Source:

If the Activity relates to an existing Source, select one from the second drop-down.

OR

If the Activity is for a new Source, click the **Add** link, which is below the drop-down. Enter a Source Name, or select one from the provided OFCCP database. Click **Save**.

2. Enter an Activity Date in two-digit month, two-digit day, and four-digit year format.

Note: The date must fall within the Plan Date's annual evaluation period.

3. Score the Activity, by clicking the appropriate number of stars.
4. (Required for link to AAP narrative) Check the boxes for one or more of the following Target Groups:
 - Minority (M)
 - Female (F)
 - Veteran (V)
 - Disabled (D)

5. (Required for accurate AAP reporting) From the provided list of Locations; check off the appropriate one(s), or Select All.

Note: The Administrator may have applied a different label for the Locations *column*, (e.g., Facilities).

Quick Reminder: If the Location is blank, the activity will not display when the **Activities** list is filtered by the Location *column*.





6. Next, fill in Additional Information.
 - a. (Optional) Enter Recruiter Name and Activity Contact Information (Name, Email Address, Phone Number).
 - b. (If menu is displayed) Select Job Families from those provided, or Select All.

Quick Reminder (for those using REACH Job Families): If no Job Families are selected, **Activities** reporting will not reflect complete statistics.




Example: Select All was applied to Job Families:

Job Families

- ☒ Select All
- ☒ Clerical Workers (Clerical)
- ☒ Craft Workers (Craft)
- ☒ Management (Managers)
- ☒ Operatives (Operative)
- ☒ Professionals (Professionals)
- ☒ Sales Workers (Sales)

7. Click the  **Save** icon. The record is added to the **Activities** list.
8. To include Documentation with the Activity,  **Edit** the record, as described on the next page.

Overview of the Activities List

Activities						
Show activities for: All Sources						
Activity Type	Source	Activity Date	Score	Target Categories	Location	
<input type="checkbox"/>  Sent Outreach Letter (ORL Email)	Recruit Military	05/07/2018	★★★★★	D / V	All Locations	>
<input type="checkbox"/>  Sent Job Listings (JP Email)	Recruit Military	01/01/2018	★★★★★	D / V	Piedmont Coastal Bayside	>
					Show More	
<input type="checkbox"/>  Job Fair Participant (JFP)	University of Iowa	02/03/2015	★★★★★	M / F	Northwest Plains	>

Once developed, the **Activities** list will organize data by the following *columns*: Activity Type (dropdown), Source (link), Activity Date, Score (in stars), Target Categories, and Location.


View options for the **Activities** list are as follows:



- All
- Active Sources
- Discontinued Sources
- [Source Name]



Additional information is available by clicking ➤ **Expand**.

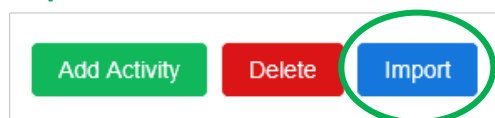
Edit an Activity

Click the  **Edit** icon for the particular record. The table below outlines the field types contained in an Activity record.



Field	Type
Activity Type*	Drop-down
Source (Name)*	Drop-down
Activity Date*	Numerical Date
Score	Click stars
Target Categories (Minority, Female, Veteran, IWD)	True/False (Check boxes)
Location	Drop-down
Additional Information	
Recruiter (Name)	Text
Job Families	Check boxes
Activity Contact Information (Contact Name, Email Address, Phone)	Text
Notes	Text
Documentation	 Upload file  Comment/File Name (text)

*Required field

Import Activities



Multiple **Activities** are best imported from an Excel spreadsheet, and required fields (shown in the table above) must be included. To obtain the most complete results, the spreadsheet's *column headers* should match the field names used in **REACH** (as listed in the table above). The data entries for Activity Type, Location, and Job Families should also match those used in corresponding menus on the **Activities** list.

Quick Tip: Click the  **Edit** button for an **Activities** record, or click the **Add Activity** button, to review menu options for Activity Type, Location, and Job Families. (Then click  **Cancel** after becoming familiar with the information.)



Click the **Import** button, which is located in the *upper toolbar*, and follow the prompts to identify the file, upload it, and match its fields to those used in **REACH**.

If a record's data entry for Activity Type, Location, or Job Families do not match an option available in the system's menus, an alert will display. Choose one of the provided Options, which may include discarding the record, performing a match, or returning to the previous screen.

Example: Below are the Options for an invalid Activity Type:

The screenshot shows a web interface with a yellow alert banner at the top that reads: "The file you are importing has invalid Activity Types. Please choose one of the following options." Below the banner is a section titled "Options" containing three radio button choices: "Don't import any records that don't have a valid Activity Type.", "Match any invalid Activity Type values.", and "Return to match page." The third option is selected. At the bottom of the dialog are "Previous" and "Next" buttons.

- Don't import any records that don't have a valid Activity type.
- Match any invalid Activity Type values.
- Return to match page.

Once all matches are made, click **Next** to display the Import menu. Select the **Import Activities** button. The current **Activities** list will be appended.

Sources

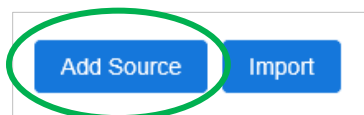
Activities

Sources

Evaluations

Reports

Add a Source



If this is your first visit to **REACH** or you want to enter a new Source, navigate to the (Recruiting) **Sources** tab to enter the basic information, which will be recorded on the **Sources** list.

Quick Tip: An associated recruiting Activity may be entered after the Source is added. See instructions below under: [Overview of the Sources List / Last Activity](#)).

Begin by clicking the **Add Source** button, located in the *upper toolbar*, to display a blank record in the next available position.

1. (Required) Enter a Source Name.

Quick Tip: Select one from the provided OFCCP database to ensure a consistent and recognizable Source Name. Navigate the list by using the drop-down's arrow or entering the Source Name's first few letters.

2. From the Source Type drop-down, select one of the following:



- College or University
- Association
- Outreach Center
- State Job Center
- Other

3. Then, from the Geographic Reach drop-down, choose: Local, Regional, or National.

4. Provide entries for the following additional fields:



- City
- State
- Source Contact Information (First Name, Last Name, Email Address, Phone Number)
- Source Origin
- Website
- Notes
















5. Click the  **Save** icon. The record is added to the **Sources** list.
6. To include Documentation with the Source,  **Edit** the record, as described on the next page.

Overview of the Sources List

The **Sources** list will display by Source Name and Source Type. *Columns* will be available for:



- **Last Activity**—If an Activity has not been associated with the Source, you can click **Add Activity**, which will redirect you to the [Activities](#) tab. If an Activity has been entered for the Source, click the **[Activity Date]** to view it.
- **Last Evaluation**—If the Source has not been evaluated, click the **Perform Evaluation** link for a Source Name to score its effectiveness (as described in the next section of this guide). If an evaluation has been completed, click the **[Plan Date]** to view it.
- **In Use**—If an **Activities** entry has been made for the Source Name, a  **Green check mark** indicates that it is in use.
- **Discontinued**—Click the  **Edit** button adjacent to a Source Name to check off the entry as discontinued (where option is available).

Sources						Show sources: Active	
	Source Name	Source Type	Last Activity	Last Evaluation	In Use	Discontinued	
  	Jobs HQ Career Fair	Outreach Center	Add Activity	Perform Evaluation			>
 	DeMarVa Empowerment	Outreach Center	06/29/2017	Perform Evaluation			>
  	Northern MN Veterans' Job Board	Association	Add Activity	Perform Evaluation			>
 	Hire Americas Heroes	Association	11/17/2017	01/01/2018			>



By clicking  **Expand**, additional information may be viewed for: Location, Source Contact Information, Notes, and Documentation.

Filter the Sources List


Once a **Sources** list has been created, you can take advantage of the following tools:



- **Search**—Enter part of a Source (name) in the Search field, located at the upper right in the *page header*. Click  **Search**, or hit the ESCAPE (ESC) key. To restore the **Sources** list, click  **Clear**.
- **View Options** (outlined in green above)—Choose one of the following options from the Show sources drop-down:
 - All
 - Active
 - Discontinued
 - With/Without Activities For [Annual Date Range prior to Plan Date]
 - With/Without Evaluations For [Plan Date] AAP



- **Filter by Source Name / Source Type**—Click the  **Filter by** icon; select one or more options; and click **Save**. When a filter is applied, the  **Filter** icon changes to blue. To restore the full **Sources** list, choose the **Clear Filter** button from the *upper toolbar*.

Edit a Source

The table below outlines the field types that may be edited in a Source record by clicking the  **Edit** icon.

Field	Type
Source Name*	Text or drop-down entry
Source Type	Drop-down
Discontinued	Check box (if editable)
Location	Geographic Reach (drop-down) City (text) State (drop-down) Source Origin (text)
Additional Information	
Source Contact Information (First Name, Last Name, Email Address, Phone Number)	Text
Documentation	 Upload file  Comment/File Name (text)

*Required field

Import Sources

If you have an Excel spreadsheet, containing **Sources** information, click the **Import** button (located in the *upper toolbar*), and follow the prompts. Best results are achieved if the spreadsheet is formatted according to **REACH** fields. The Source Name is required.

Data entries for Source Type and Geographic Reach should also be limited to the drop-down menu options available on the **Sources** list. (For more information on the fields and menu options available for **Sources**, see: Add a Source, above.)



Evaluations



Once a Source has been entered (and **Activities** are associated with it), the Source may be assessed for effectiveness, using the **Evaluations** tab. While an activity may be evaluated with a [simple Score](#) from **Activities** list, the Source may be evaluated here as a whole, based on regulatory and optional criteria (for inclusion in an Affirmative Action plan).

Quick Tips: A Source may also be evaluated by clicking the [Perform Evaluation](#) link on the **Sources** list.

In addition, a simple Score (from one-half star to five stars) may be provided for an activity when it is added to the **Activities** list or it is edited there.

Add (Perform) an Evaluation

Select the **Add Evaluation** button from the *upper toolbar*. On the Evaluation Information menu, select a Source and Plan Date from the provided drop-downs. This will cause the associated Activities to display for review.

Evaluation Information

Source

Disabled American Veterans

Evaluation for Plan Date

04/01/2014

Activities

The following activities occurred during the date range for this evaluation:

Activity Type	Activity Date	Overall Score	Job Families	Locations
Other (OTH)	01/10/2014	★★★★☆	Information Technology (IT)	US MD Baltimore -VAMC (Barnett & Ramel) (MD-B) US MO Columbia (Barnett & Ramel) (MO-C)
Notes				
Posted the position online				

Quick Tip: Use each activity's Overall Score rating to aid in scoring the Source as a whole.

Navigate down to the Criteria menu, and:

1. (Required) Click the number of stars that indicates your rating for each of the displayed Criteria.
2. (Required) Enter a Rationale for each Score.



3. As scores are entered, the Average Criteria Score at the top of the menu will be updated to reflect the entries.

Criteria

Average Criteria Score

★★★★☆

Criteria	Score	Rationale
Did the activities for this source during the evaluation period attract qualified applicants?	★★★★☆	The online posting generated a 10-percent increase in applications.
Did the activities for this source during the evaluation period result in hiring of qualified individuals?	★★★☆☆	We are still looking for the right candidate.

4. Click the **Save** button, located at the bottom of the page.
5. The entry will be added to the **Evaluations** list, at the top. Once an evaluation is added, it can be edited, as described below, or deleted.

The evaluation can also be accessed by locating the Source Name on the **Sources** list, and clicking the associated [Plan Date], which is provided in the Last Evaluation *column*.

Overview of the Evaluations List

The **Evaluations** list displays by Source Name, Average Score, Evaluation Date, and Last Updated.

Evaluations				
Show evaluations for: Active Sources				
	Source Name	Average Score	Evaluation Date	Last Updated
	University of Maryland	★★★★★	01/01/2018	05/21/2018
	Society of Black Engineers	★★★★☆	01/01/2018	05/23/2018
	Hire Americas Heroes	★★★★☆	01/01/2018	05/23/2018
	Iowa State University	★★★★☆	01/01/2018	05/23/2018

The **Filter** drop-down for **Evaluations** (located in the *list header*) includes the following options:

- All Sources
- Active Sources
- Discontinued Sources
- [Source Name]

By clicking the **Expand** icon for an **Evaluations** entry, you can access the last evaluation for the Source.

Edit an Evaluation

Click **Edit** for an existing evaluation on the **Evaluations** list, or use the [Sources list quick link](#).

REACH: Reports




The **REACH > Reports** tab provides access to information and statistics that are compiled from GFE data. The **Reports** list is organized by topic, reflecting the **REACH** tab names: **Sources**, **Activities**, and **Evaluations**.

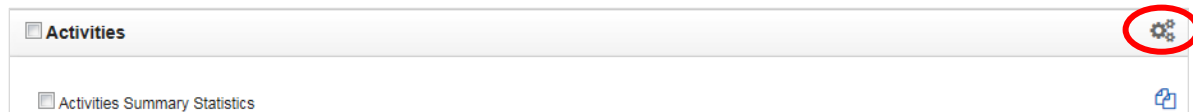
Example: For a compiled view of all recruiting contacts, export the Sources Contact List, which is accessed under **Reports / Sources** (shown below).

You may customize the report display for each topic by selecting from provided options. Sample **Reports** are provided at the end of this chapter.

Determine Report Settings by Topic

Click the  **Settings** icon in the *topic header* (circled below on the right) to choose options for the report display. Make selections from the following sub-menus:

- Filter By/Sort By
- For Selected Categories
- Group By





The table below lists the options for each sub-menu.


Reports by tab:	Sources	Activities	Evaluations
Filter By	No Filter AAP Plan Created By Location Recruiter Geographic Reach Source	No Filter AAP Plan Created By Location Recruiter Source	No Filter Plan Date Source Target Category
Sort By			Source Created Date, then by Source Created by, then by Source
Group By	No Group Source Type Category Geographic Reach Source	No Group Activity Type Category Geographic Reach Source	
For Selected Categories	All Categories, or Selected Categories: Minorities, Females, Disabled, Veteran		

Click **Save**.

(Optional) Filter Report to View or Export by Date

Using the **Reports** / Report Settings menu, select a date range to view reports by: In the Start Date field, enter two-digit month, two-digit day, and four-digit year. Then enter a later day for the End Date.

View a Report

Under Report Settings, choose to View Reports in: PDF or HTML. Then click the  **View Report** icon to the right of the report to open it in another window. If the report contains multiple pages, navigation tools will display at the top of the window. Please refer to the sample **Reports** at the end of this chapter.



Export Reports

1. Navigate to the **Reports** list, and check off one or more reports to include, or Select All Reports.

<input type="checkbox"/> Select All Reports	
<input checked="" type="checkbox"/> Sources	
<input checked="" type="checkbox"/> Sources Summary Statistics	
<input checked="" type="checkbox"/> Sources Detail List	
<input checked="" type="checkbox"/> Sources Contact List	
<input type="checkbox"/> Activities	
<input type="checkbox"/> Activities Summary Statistics	
<input type="checkbox"/> Activities Detail List	
<input type="checkbox"/> Evaluations	
<input type="checkbox"/> Evaluations Summary Statistics	
<input type="checkbox"/> Evaluation Detail List	
<input type="checkbox"/> Evaluation Scoring Summary	

Quick Tip: To select all reports for a topic, check the box in the *topic header* (as circled above).

2. Move to the bottom of the page, and select options to Export Reports:
 - A Single File
 - Separate Files (Zip'd for download)
3. Select a File Type for Reports:
 - PDF
 - Word
 - Excel
 - Rich Text
4. Click **Export Reports**. Then follow the prompts to open or save the file.

Note: The export process may take some time. You can click **Run in Background**, using the provided button, and continue working in other areas. The system will provide an alert when the process is complete.



Sample Reports

Activities Summary Statistics

This summary report displays the number of Activities per Category, Job Family, Location, and Source.

Go To: 1 of 3 Find:	
Activities Summary Statistics	
All Activities	
Activities per Category	
All Categories	5
Disabled	7
Female	7
Minority	6
Veteran	4
Activities per Job Family	
Accounting (Accountants)	3
Human Resources (HR)	1
Information Technology (Engineers)	6
Information Technology (IT)	10
Information Technology (Programmers)	6
Management (Executives)	3
Office and Clerical (Admin)	4
Sales (Sales Managers)	3
Activities per Location	
Buffalo (NY01)	1
Charlotte, NC (Office 718)	1
Columbia, MD (Office 712)	6
Cumberland (MD 1)	2
Cumberland, MD (Office 543)	4
Houston (TX 2)	1



Evaluation Detail List

This detail report compiles the completed **Evaluations**, including Criteria used, Score, Activities, and Evaluation Results.

Go To: 1 of 15 Find:

Evaluation Detail List

All Evaluations

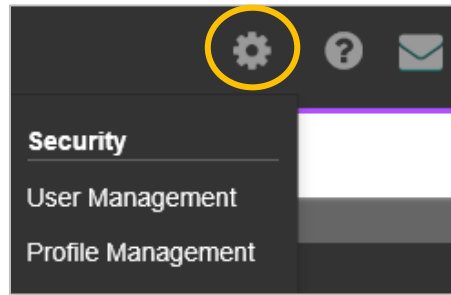
Source Name:	Evaluation Date:	Created By:
CLEAR CONNECT	03/01/2015	erink@berkshireassociates.com

Criteria Used	Score	Comments
Did the activities for this source during the evaluation period attract qualified applicants?	4.00	Yes, many already cleared candidates
Did the activities for this source during the evaluation period result in hiring of qualified individuals?	3.50	Yes, one
Did the activities for this source during the evaluation period expand the organization's outreach to individuals?	5.00	Yes
Did the activities for this source during the evaluation period increase the organization's capacity/capability to include individuals?	1.50	No specific outreach to M/F/D/V
Does the source provide appropriate access to qualified applicants?	4.00	Yes



List of Activities:	Activity Date
ORE - Onsite Recruitment Event	06/12/2014

Evaluation Results:	
Overall Ranking	3.60
Overall Evaluation	Great
Continue/Discontinue	Continue

User Management for Administrators



Granting access to new users is comprised of two main steps:

1. Add the user to the system through  **User Management**.
2. Apply a profile to the user via  **Profile Management**.

Work with Existing Profiles

From the  **REACH** page header, select  **System Tools > Security / Profile Management**.

Before adding a new profile, review the default or existing profiles, which are listed in the upper Profile drop-down menu, to familiarize yourself with them. By selecting an existing profile from the drop-down, you can review (and edit) settings on two tabs:

Profile Options

On the Profile Options menu, Choose the **Edit** button from the *upper toolbar* to update the following identifying information:

- **Profile Name:** Customize the Profile Name in the text field to align with your organization's nomenclature.
- **Default Profile:** Check off whether the Profile will be the default when new users are added.
- **(Optional) Default Access Level:** If all or a large number of Profile Functions will have the same Access Level (e.g., Read/Write), select one that serves best as the global selection.



Profile Functions

Options

Profile Name

☐ Default Profile

Default Access Level

Profile Functions

Function	Access Level
Manage User Profiles	<input type="text" value="None"/>
Reach Add/Edit Activities	<input type="text" value="Read/Write"/>
Reach Add/Edit Activity Codes	<input type="text" value="None"/>
Reach Add/Edit Criteria	<input type="text" value="None"/>

In the Profile Functions table, a *column* of possible permissions is matched with a *column*, displaying drop-downs, holding the possible Access Levels. Simply navigate through the table and make an Access Level selection for each Function.

If changes are made to a Profile, click the **Save** button to update the system.

Add a New Profile

From the *upper toolbar*, click the **Add** button. A blank Profile menu will display. Complete entries for the Profile Name and other Options; then, complete entries for Function/Access Level. Press the **Save** button, at the bottom of the page, to add the Profile to the system so that it can be assigned to users.

Manage New and Existing Users

From the **REACH** header, select  **System Tools > Security / User Management**, which will open a list of existing users in the left Users *column* by Email Address, plus and a “detail” view,” representing each user account. Remember, **User Management** is a cross-software administrative function, so the module will operate in the  **BALANCEworks** environment.

By entering from **REACH**, the detail’s **REACH** tab will be already activated in the detail for the currently highlighted user. Another user detail can be accessed, by navigating through the Users list and selecting another Email Address.



[First Name, Last Name (User Email Address)]

User Info Security API AAP **REACH**

REACH Profile AAP Administrator Save

As shown above, tools will be available to work with the following detail tabs for each existing user as a whole:

- **User Info** – Basic identifying information, and a quick toggle switch to Activate/Deactivate the user.

Note: The user’s Email Address serves as the key security credential and cannot be edited or used for multiple user accounts. However, a new user can be created if an existing user’s Email Address changes, and the prior record deactivated.

- **Security** – Require the user to: Change password on next login OR change the password for the user.
- **[Software product] (e.g., balanceAAP, REACH)** – Quickly apply a software Profile to a new user, or assign a different one to an existing user.

If changes are made to the user record, click the **Save** button to update the system.

Add a New User and Apply Profile

Quick Tip: If a new user will require a Profile that is not currently available in the system, create the Profile first, as outlined above.

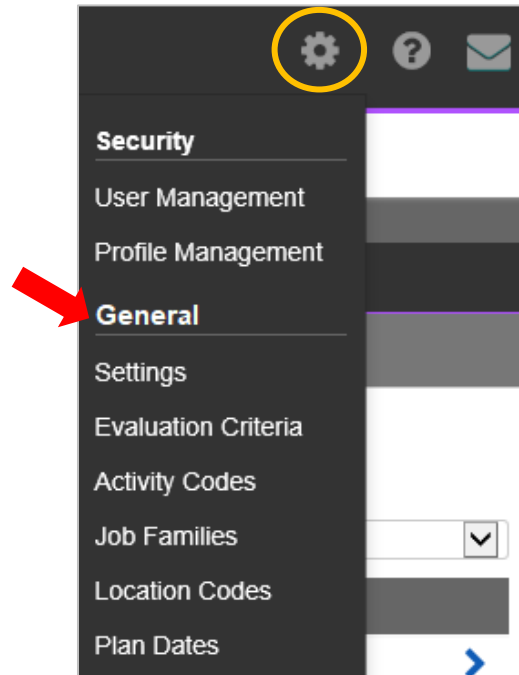
Adding a new user to the system is handled at the top of the Users *column*. From the *upper toolbar*, click the **Add New** icon to open a blank **User Info** tab:

1. Enter the Email (address) to serve as the user’s login ID.
2. Enter the user’s First Name, Last Name, and (optional) Phone Number/Extension.
3. Toggle the Active button (at this time or later).
4. Toggle the Activation Email (at this time or later).

Click the **Add** button to append the Users list with the new entry.

With the user highlighted and the **REACH** tab activated, selected a Profile from the provided drop-down that applies to the new user. Choose the **Save** button from the *upper toolbar*.

System Set-up Tools for Administrators



Using **System Tools > General** menus, the Administrator may customize the REACH interface to align with an organization’s terminology, supporting data collection and evaluation activities.

Settings


The Administrator can rename the **REACH > Activities / Locations** *column header* to reflect specific types of organizational units (e.g., “Store,” as shown below). Enter a custom Location Name, and click the **Save** button.

A screenshot of the 'Location Name' settings form. The 'Location Name' field contains the text 'Store'. A 'Save' button is at the bottom right.


Below, the Locations *column* in **Activities** now displays as “Store”:

Activity Type	Source	Activity Date	Score	Target Categories
Onsite Recruitment Event (ORE)	University of MD	02/15/2014	★★★★★	Store




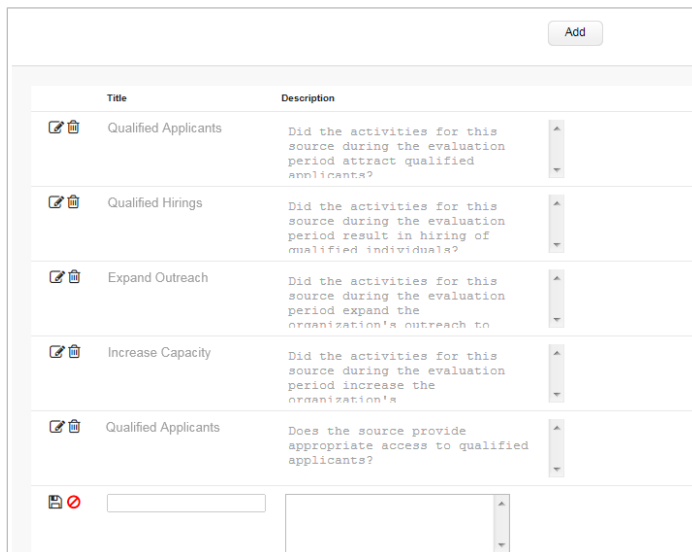
This custom name will also replace the Location Code *column header* on the Locations list in  **balanceAAP > REACH Assignment**. The button used to **Assign Locations** will also include the custom name, which for above example would be: **Assign Store Codes**.







Evaluation Criteria

The criteria used in performing **Evaluations** of **REACH Activities** are stored under  **System Tools > General / Evaluation Criteria**. While this list will already contain the suggested regulatory language for use in evaluating Good Faith Efforts, the Administrator may add, edit, or delete an entry.

Add Criteria

Click the **Add** button to display a blank record at the bottom of the **Evaluation Criteria** list. Enter a Title. Then enter a question in the Description field. Click the  **Save** icon.

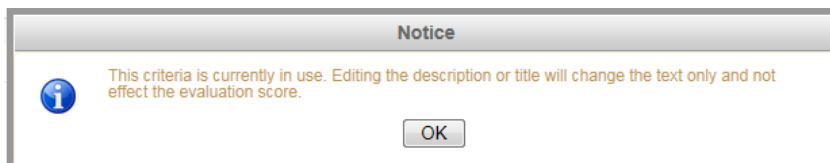


Title	Description
 Qualified Applicants	Did the activities for this source during the evaluation period attract qualified applicants?
 Qualified Hirings	Did the activities for this source during the evaluation period result in hiring of qualified individuals?
 Expand Outreach	Did the activities for this source during the evaluation period expand the organization's outreach to
 Increase Capacity	Did the activities for this source during the evaluation period increase the organization's
 Qualified Applicants	Does the source provide appropriate access to qualified applicants?
 <input type="text"/>	<input type="text"/>


Edit Criteria

Click the **Edit icon** to activate a current listing. Edit the Title or Description. Click the  **Save** icon.

If the criteria is in use, a Notice will display:



Notice

 This criteria is currently in use. Editing the description or title will change the text only and not effect the evaluation score.

OK

Click **OK**. Editing a Title or a Description will not affect the Evaluation score where an [Evaluation](#) as been performed.



Activity Types

Activity Type, which is used to categorize **REACH Activities**, is selected by the user when an activity is added to the **Activities** list. The administrator can manage the **Activity Types** that are available for selection, based on terminology or categories used in the Human Resources Information System (HRIS) or within the employer's organization (e.g., Internal Outreach Effort, Job Fair Participant). Tools for developing and working with this list follow.

Note: A document outlining **REACH** field attributes for Activities, Sources, and Evaluation Criteria can be downloaded from **? Help > About the REACH Database > File Structure Details**.

Add an Activity Type

Click the **Add** button, which is located in the *upper toolbar*. Provide entries for Activity Type and Description.

Note: Both Activity Type and Description will display for the user.

Display Active/Inactive Activity Types

<input checked="" type="checkbox"/> Include Inactive Activity Types		
Activity Type	Description	Active
IOE	Internal Outreach Event	

If Activity Type has been associated with any record on the [Activities](#) list, that type will be displayed as Active. To display the Active *column*, check the box next to the tagline: Show Inactive Activity Types. A **Red check mark** will indicate the Activity Type is Active.

Job Families


The administrator may develop a list of **Job Families**, using the employer's terminology, so they are available to the user; tools for working with this list are described below.

REACH Job Families		
Back to REACH home		
<input checked="" type="checkbox"/> Include Inactive Job Families		
<div><div>Add</div><div>Import</div></div>		
Job Family	Description	Active
Admin	Clerical Support	
IT	Information Technology	
Mgmt	Management	

The user will assign **Job Families** to **REACH Activities**, when they are created.




Add a Job Family



Click on the **Add** button to display a blank record line at the bottom of the **Job Families** list. Provide entries for Job Family and Description. Then, click  **Save**. Because both entries will display for users, entries should be as brief as possible.

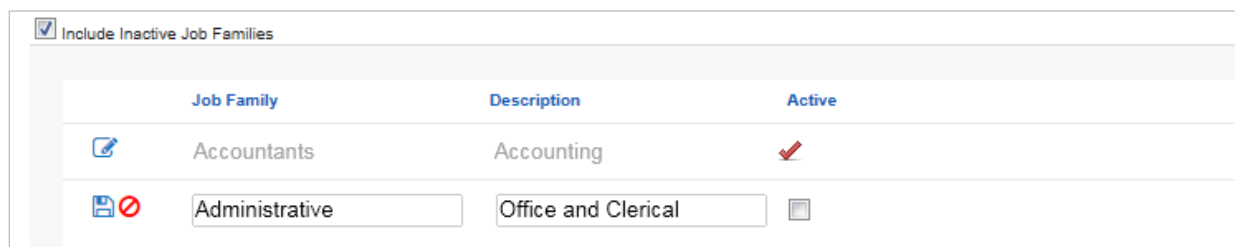
Import Job Families

If job categories are available from the HRIS or other external source, they may be imported, most typically by using an Excel spreadsheet. *Columns* of data should represent: Job Family and Description.

Display Active/Inactive Job Families

When added, a Job Family is checked as Active. To display the Active *column* for the **Job Families** list, check the box next to the tagline: Show Inactive Activity Types. A  **Red check mark** will indicate the Job Family is Active.


To deactivate a Job Family so that it cannot be selected in the future, check the  **Edit** icon, and uncheck the box under: Active.  **Save** the update. If the Job Family has been selected for an Activity, the selection will remain in place.

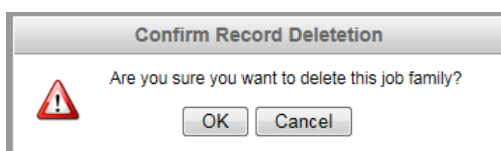


Job Family	Description	Active
Accountants	Accounting	
Administrative	Office and Clerical	<input type="checkbox"/>

To make the Job Family Active again, enter the record, and check the box under: Active.

Delete a Job Family

If a Job Family is not in use for an Activity, it may be deleted. Click the  **Delete** button for the Job Family; then click the **OK** button to confirm the deletion.



Confirm Record Deletion

Are you sure you want to delete this job family?

Location Codes

Because **REACH Activities** are tracked by particular establishments or company locations, the administrator can manage a list of Location Codes (e.g., Store 53, TX 1). Location Codes will be used to tie GFE locations to the Affirmative Action plan structure in **balanceAAP**.



If your organization uses a Master Plan, in which sub-plans directly represent all locations, Plan Codes will suffice for Location Codes.

Include Inactive Facility Codes	
Facility Code	Description
<input type="checkbox"/> DC	Nation's Capital
<input type="checkbox"/> CA	California
<input type="checkbox"/> MD	Headquarters

Quick Reminder: Any changes made here to REACH > **System Tools / General / Location Codes** will be reflected in the **BalanceAAP > REACH Assignment / Location Code** list.

Add a Location Code

Click the **Add** button to add an empty line item to the bottom of the **Location Codes** list. Enter Location Code and Description. Click the **Save** button.

Import Location Codes

- **From External File**

If Location Codes are available from the HRIS or other external source, they may be imported, most typically from an Excel spreadsheet. *Columns* of data should represent: Location Code and Description.

Initiate the process by clicking the **Import** button. Then choose File Type; Upload the file; and click **Next**. Follow the displayed prompts to select the data location, Preview the data, and proceed to choosing Import Options. Finally, click the **Import Locations** button.

Display Inactive/Active Location Codes

To display the Active *column* for the **Location Codes** list, check the box next to the tagline: Show Inactive Activity Types. A **Red check mark** will indicate the Job Family is Active.

Delete a Location Code

Check the box to the left of a Location Code, then choose the **Delete** button from the *upper toolbar*.

Plan Dates

The evaluation periods for **REACH Activities** are also based on the **Plan Dates** stored in **System Tools / General**. By managing **Plan Dates**, the administrator can ensure the **Evaluations / Evaluation Information** menu is populated with the proper dates, so that users may select the one that applies.



Plan Dates		
<div>Add Plan Date</div>		
	Plan Date	In Use Active
	01/01/2011	<input checked="" type="checkbox"/>
	01/01/2012	<input checked="" type="checkbox"/>
	01/01/2013	<input checked="" type="checkbox"/>
	01/01/2014	<input checked="" type="checkbox"/>
	03/01/2014	<input checked="" type="checkbox"/>
	08/22/2014	<input checked="" type="checkbox"/>
	01/01/2015	<input checked="" type="checkbox"/>
	03/01/2015	<input checked="" type="checkbox"/>

Add a Plan Date

Select the **Add Plan Date** button from the *upper toolbar*. An empty record line will be added at the bottom of the **Plan Dates** list. Enter a two-digit month, a two-digit day, and a four-digit year. Then click **Save**. An added date is checked as Active by default.

Activate/Deactivate a Plan Date

Navigate to the Active *column*: Any Active **Plan Dates** will be checked. If the check box is empty, check the box to activate the Plan Date. To deactivate a Plan Date so that it cannot be selected for new **Activities**, uncheck the box. The deactivated entry will remain on the **Plan Dates** list.

Plan Date is In Use

Once a **REACH** user selects a Plan Date, while performing an evaluation of any **REACH** [Activities](#), the Plan Date will be checked here as: In Use.