



## *User's Guide*

*Version 4.0*



BERKSHIRE ASSOCIATES








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## Welcome to Reports & Dashboard



As information-distribution portals,  **Reports** and  **Dashboard** support  **balanceAAP** users in sharing and viewing information from completed Affirmative Action plans (AAPs). For those using one or both of these modules, you will have access to tools that are tailored to your role in the AAP process, whether you create plans or participate as a member of the viewing audience for plan results.

Typically, one or more users at your organization will be responsible for preparing AAP reporting, comprised of an array of workforce analyses, plus accompanying Narratives. These analysis results provide glimpses into the current status of equal employment opportunity at your organization.

When the AAPs are completed, another group of users – typically executives, hiring managers, and other stakeholders – will be given access to view these results to guide the upcoming year’s personnel recruitment, selection, and advancement activities.

### How this Guide is Organized

The following introductory chapter and first two numbered sections of this manual are written for the user who has been provided access to one or both of the following modules to view information, resulting from AAP analyses:

1. **BalanceAAP >  [Reports](#)**
2. **BalanceAAP >  [Dashboard](#)** (Multiple-location clients)

Please note that each installation may vary in what features are available within these modules. For each installation, the **balanceAAP** Administrator will turn on your access by plan, determine your access level to tabs and features, and set up display options for you.

If more advanced features have been made available to you beyond what is described in the above sections for standard users, you can refer to: Content for Plan Creators/System Administrators (below).

## **Content for Viewers of AAP Results**

All AAP audiences can take advantage **balanceAAP's** secure **Reports** portal to view and export plan narratives and reports.


In addition, the software offers those who are managing (or part of) multiple AAP locations, a **Dashboard** that displays an “executive” overview, helping highlight both successes and potential problem areas across the organization. This *Reports & Dashboard User's Guide* will provide information on how users can take advantage of **Dashboard** exhibits, graphical displays, data, and special reports.

## **Content for Plan Owners/System Administrators**

If you develop plans in **balanceAAP**, you will typically have Administrator-level access to **Reports** and **Dashboard** settings for those plans. Accordingly, instructions are provided in Chapters 3 to 5, describing how plan owner or system Administrator can:

- Manage **Reports**, such as organizing the plan's Select Report list, uploading additional documents, and notifying users that results from a completed plan are ready to view
- Globally customize the **Dashboard** display

### ***About Publishing the Plan and Managing User Access***


Before users can view results, the AAP must be “published” to **Reports** and **Dashboard**. For more information on publishing the plan and managing user audiences, see the companion *BalanceAAP User's Guide* – available within the  **Help > Library** or from Berkshire Product Support:

### **Contact 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](mailto:product.support@berkshireassociates.com)**

From within **balanceAAP**, click the  **Help icon**, which is located in the application's *header bar* (as shown on the next page). Then click the **Support** link, and send a message.

### ***In-line Help***

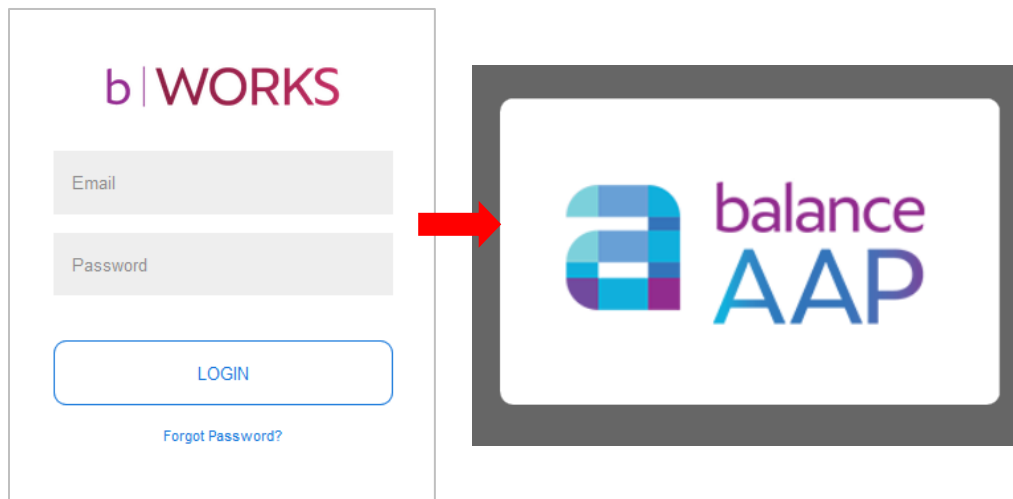
For anytime support, the  **Help > Documentation** pages can be accessed from the **balanceAAP header**. Helpful tools include a clickable Table of Contents, tags, a Search field, and a copy of this *User's Guide*.

## Entering BalanceAAP to View AAP Results

When your organization's annual or interim Affirmative Action plan is completed, the plan creator or owner will initiate your participation in the process by "publishing" the plan in **balanceAAP** software so you can view plan results, via the **Reports** and/or **Dashboard** portals.

Once access has been granted to you, the software is entered from the **balanceWORKS** Login page (<https://works.baiworks.com>). If other software has been purchased, additional software buttons will display.

After Login, click on the **AAP** button. The software will direct you to the **Plans** module, the software's landing page (as shown on the next page).

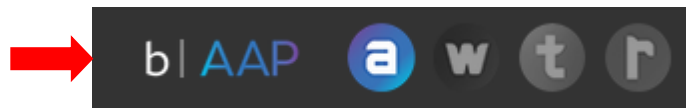


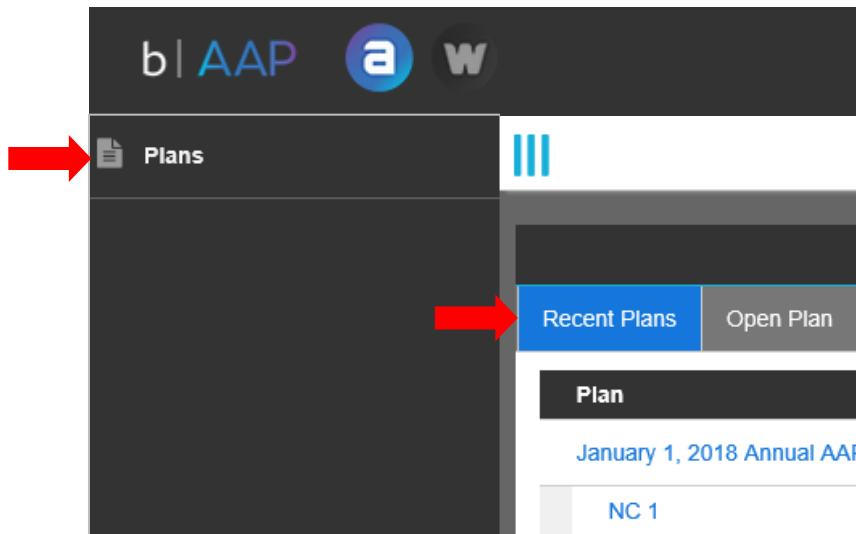
### Forgot Your Password Link

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

### (If applicable) Navigation in BalanceWORKS between Applications

If you have been granted permission to multiple **balanceWORKS** applications, (e.g., **balanceAAP** and **REACH**), simply click the icon in the *page header* on the upper left, representing the application.





## The First Step in BalanceAAP

For the viewer who has been notified that results are ready, the first step in **balanceAAP** is to open the plan from **Plans > Recent Plans**.

## How Plans are Organized

**Recent Plans**, the first tab shown in the **Plans** module, stores entries for up to 10 of the most current plans, for which you have been granted access, will be listed.

Recent Plans Open Plan					
Plan	Company	Establishment	Plan Date	Last Opened	
January 1, 2018 Annual AAP	Acme Technology Corp	Master Plan	1/1/2018	6/12/2018 12:38 PM	M
NC 1	ACME Location 3	Chapel Hill, NC	1/1/2018	6/10/2018 10:40 PM	S
CA 1	ACME Location 1	San Diego, CA	1/1/2018	6/10/2018 10:40 PM	S
DC 1	ACME Location 2	Washington, DC	1/1/2018	6/10/2018 10:40 PM	S
January 1, 2018 Annual Affirmative Action Plan	ACME Distributing	Cumberland, MD	1/1/2018	5/15/2018 1:57 PM	R

If there are multiple plans available to you, these plans will be labeled by type, as indicated by icons on the far right:

- R** = Annual Regular Plan (single)
- M** = Annual Master Plan (contains data for all sub-plans listed below it)
- S** = Annual sub-plan (tied to Master Plan shown above it)
- R (with Arrow)** = Update Regular plan (single)
- M (with Arrow)** = Update Master Plan
- S (with Arrow)** = Update Sub-plan




Recent Plans		Open Plan				
2018	2017	2016	All Plans	Show: <input checked="" type="checkbox"/> Annual Plans <input checked="" type="checkbox"/> Update Plans <input checked="" type="checkbox"/> Master Plans <input checked="" type="checkbox"/> Sub Plans <input checked="" type="checkbox"/> Regular Plans		
Plan ID	Plan Name	Company	Establishment	Plan Code	Plan Date	Last Opened
1 - 43591	January 1, 2018 Annual Affirmative Action Plan	ACME Distributing	Cumberland, MD		1/1/2018	5/15/2018
1 - 43597	April 2, 2018 Annual Affirmative Action Plan	ACME	Columbia, MD		4/2/2018	

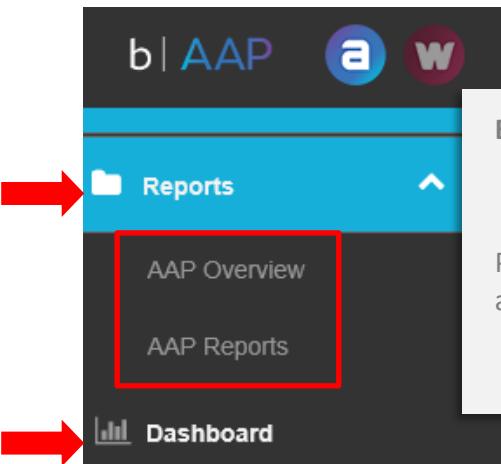
**Open Plans**, a companion tab, offers a more comprehensive list of plans by year, based on your organization's Archive settings. In addition to filtering by **[Year]**, the **Open Plans** list can be filtered by plan type:

- Annual Plans
- Update Plans
- Master Plans
- Sub Plans
- Regular Plans

All plan types are displayed by default.

The **Plans** list may also be sorted by any *column header* (shown above is a sort by Establishment). Click on a [Plan Name] to access a plan. Finally, a  **Search** field is available in the *software header*.

## Accessing the Plan's Reports & Dashboard





Based on your role in the AAP process, access:

**Reports** – View completed AAPs, including an Overview, Narratives, and associated Reports

PLUS, if your organization has multiple AAPs under a common hierarchy, access the:

**Dashboard** – View summary and graphical displays on organization-wide plan data.

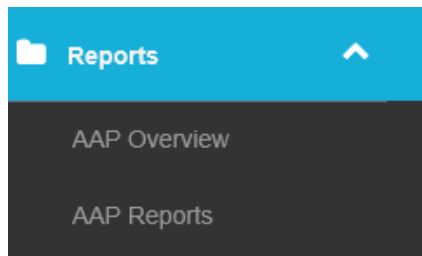
As shown above, the  **Reports** and  **Dashboard** modules are accessed from **balanceAAP's side navigation menu**, from within the selected plan. Based on your software permissions, you may see additional access points for other modules not covered in this guide, such as those for plan preparation or development of **EEO-1** or **VETS-4212** reporting.

Most viewing audiences will be navigating to the **Reports** module, which is comprised of:

- **AAP Overview**
- **AAP Reports**



## 1. Reports



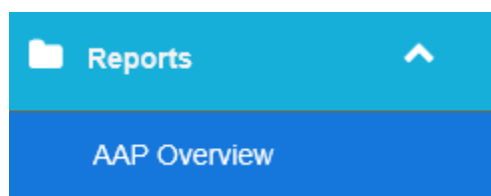
### Interact with AAP Reporting

Serving as the repository for AAP results, the **Reports** module is designed to help you interact with, design, and output information from the completed AAP. This portal is comprised of the following two sub-modules:

- **AAP Overview** — See the plan overview graphic and AAP Narratives
- **AAP Reports** — Select, view, and output AAP reports, by Report Group

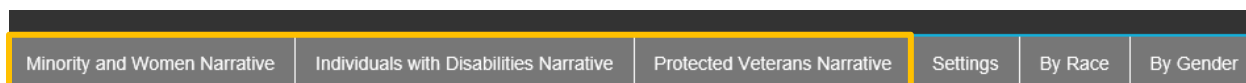
For users who are simply reviewing AAP results, **Reports > Overview** will be the default tab on entry into a plan, serving as the access point for viewing a plan's results.

### AAP Overview



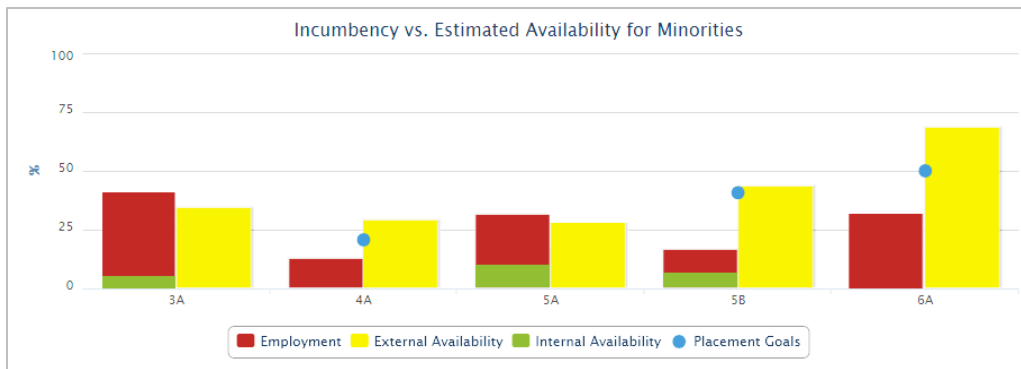
### *Read the Plan Narratives*

The **AAP Overview** is comprised of synopsis materials, beginning with *links* in the *tab header* to the **Minorities and Women Narrative**, the **Individuals with Disabilities [IWD] Narrative**, and the **Protected Veterans Narrative (shown below)**. The selected Narrative will open in the software's PDF Report Viewer, where a *toolbar* can be used to print and save the document.



### *View Plan Metrics*

Below the *tab header* are two graphical representation of plan results, including the Incumbency vs. Estimated Availability bar chart (shown below) and a Workforce Composition pie chart.



By clicking on links in the *tab header*, far right (as shown on the previous page), the charts may be displayed: **By Race** or **By Gender**.

The **Settings** link in the *tab header* (also shown above) provides access to the Plan Overview Settings menu:

PLAN OVERVIEW SETTINGS

Please note that changing the show placement goal and hide job group options will save only temporarily, and be will reset back to the defaults after leaving the page. To change the default values go to System Tools -> Overall Settings.

Job Groups

☒ All Job Groups
 ☐ Selected Job Groups

Incumbency vs. Estimated Availability Graph

☒ Hide Job Groups without a Placement Goal
 ☒ Show Placement Goal

Save

Choose how to display Job Groups:

- All Job Groups
- Selected Job Groups (and make selections from the provided list)

In addition, determine options for the Incumbency vs. Estimated Availability Graph:


- Hide Job Groups without a Placement Goal (default)\*
- Show Placement Goal (default)

\*If you selected to only show Job Groups *with* goals, and plan data reflect *no placement goals*, the graph will be empty.

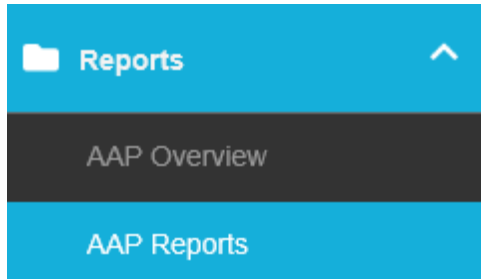
If changes are made to graph options, they are saved temporarily for the session. To apply changes as system-wide defaults, see the instruction below, which relies on **System Tools**.

Click the **Save button**.

## Determine Plan Overview Settings

Select  **System Tools** from the *page header*. Then navigate to **General / Overall Settings**, and work with the Plan Overview Settings menu there.

## AAP Reports



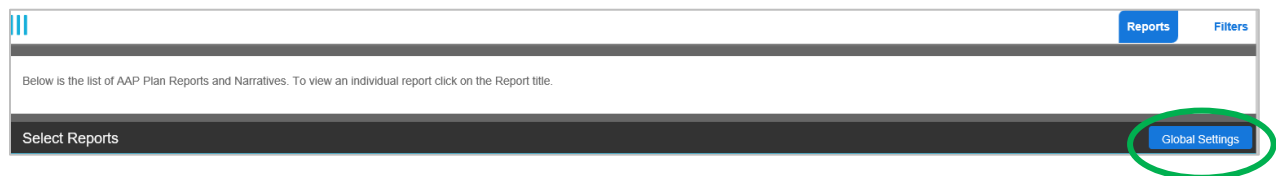
Before running **Reports**, it may be quite beneficial to review the various settings available for customizing the output, including:

- Global Settings
- Report Filters
- Report Group Settings
- Export File Settings

Read more about these “on-demand” reporting options below.

## Global Report Settings

Global Settings control options for showing or hiding certain annotations and including a footer on all output pages. To begin, click the **Global Settings** button, located in the *list header* at the upper right (as circled in green below).



The menu will display Global options and settings to:

- Suppress Statistical Significance Footnotes
  - Include Date Footer
- OR
- Enter text for a Custom Footer, in the provided field

If changes are made, click the **Save** button.

### About Report Filters

As an elective step, move on to customizing reporting content, by applying one of an array of **Filters**, based on those previously established in the AAP by the plan preparer. With a Filter, an AAP report can be reconfigured into a custom display that depicts results by one or more organization units (e.g., Department) or other groupings (e.g., Grade).

**Set-up Requirements** – For a Filter to be applied to **AAP Reports**:

1. AAP **Data** must be configured in **balanceAAP** to include (a) an underlying “legend” or Reference table, defining the unit type and permissible data entries, and (b) corresponding data entries in all relevant Data tables.
2. The organizational or other unit type must be identified in the system, via the appropriate software module.

See *Table 1* below for available Filters and corresponding software modules.

**Cross-reference for the Plan Preparer:** Please refer to the companion *BalanceAAP User’s Guide*, available in the [? Help > Library](#) or from Berkshire Product Support, for more information on preparing AAP data to accommodate output **Filters**.

<b>Table 1. Available Report Filters by Organizational Unit</b>	
<b>Filter</b>	<b>BalanceAAP Module</b>
<b>Plan (Subsets within the plan)</b>	
• Drilldowns	Reporting Levels > Drilldowns
• Sectors	Reporting Structure > Sectors
<b>Master Plan only</b>	
• Sub plans	Settings > Plan Codes
• Rollups ( <i>Levels above the sub plans</i> )	Reporting Levels > Rollups



### **Determine Report Filter Settings**

From **AAP Reports**, select the **Filters** tab from the *tab header*, and follow the steps below, based on whether you are viewing a single AAP or a Master Plan.

#### **On the Filters menu within a single AAP:**

1. Make selections in the provided drop-down for the relevant Filter type (e.g., Drilldown). The resulting menu options will be based on this initial drop-down selection.  
**Note:** The system's default starting point for outputting **AAP Reports** from a plan is to have no Filter(s) in place. This setting is shown on the Filter drop-down as: This Plan.
2. (If multiple unit types are in place) Choose the unit type from the displayed drop-down (e.g., Department, Functional Unit, Region)
3. From the provided menu, check off one or more of unit names (e.g., Executive Office, Marketing), or select: All.
4. Press the **Save Filters** button, initiating the system to perform the necessary calculations.
5. Continue at **AAP Reports** to further develop and output reporting. All viewed or exported reports will be run by the selected Filters.

#### **On the Filters menu for a Master Plan:**

1. Make selections in the provided drop-down for the relevant Filter type (e.g., Sub Plan, Rollup). The resulting menu options will be based on this drop-down selection.  
**Note:** The system's default starting point for outputting **AAP Reports** from a Master plan is to have no Filter(s) in place. This setting is shown on the Filter drop-down as: This Plan.
2. Choose the unit type from the displayed drop-down (e.g., Department, Functional Unit, Region)
3. From the provided menu, check off one or more sub plans (e.g., Headquarters, Distribution Center) OR Rollup values (e.g., VP - West Region, VP - East Region) and any displayed levels within the Rollup. You may also select: All.
4. Press the **Save Filters** button, initiating the system to perform the necessary calculations.
5. Continue at **AAP Reports** to further develop and output reporting. All viewed or exported reports will be run separately, based on the sub plan or Rollup unit.

A banner at the top of the **AAP Reports** page will indicate a filter has been set. Before running a standard AAP, in conformance with Federal requirements, return to the **Filters** menu and restore the default setting of: This Plan.

## Report Group Settings

### What are Report Groups?

Visually, Report Groups serve as “sub-headers” on the Select Reports table, but more critically, they align the AAP output or analysis by topic (e.g., Overview, Availability, Adverse Impact).

A Report Group also associates any underlying or supporting Reports with the primary Report.

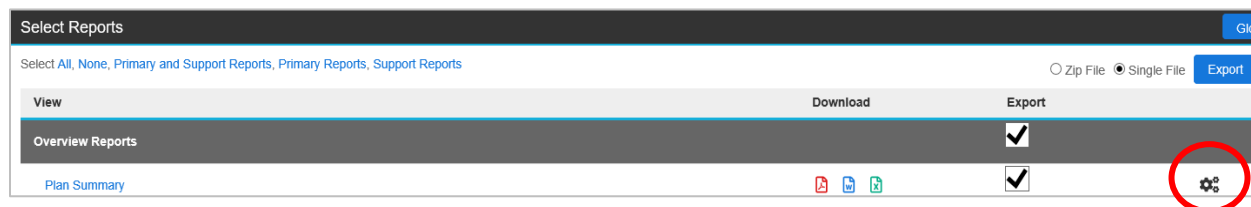
After reviewing Global Settings and **Filters**, return to **Reports > AAP Reports** and review/set Report Group parameters, which are specific to the topic at hand.

Based on the particular analysis, a Report Group’s settings may control what information or values to display; how to order content; or for longer analyses, how to include page breaks, for some examples. While defaults are already in place that will meet most requirements, these settings may be beneficial to organizing AAP information for the needs of your organization’s internal audiences.

**Master Plan:** If you have developed a Master plan set for multiple plan locations, or a set of sub plans, the Report Group setting can be cascaded to all sub plans (the default setting) OR retained for the Master plan alone.

**Cross-reference:** Please refer to the companion *Client’s Guide to AAP Reports*, available in the [? Help > Library](#) or from Berkshire Product Support, for tables, detailing options by Report Group settings.

To access this menu pane, click the  **Group Settings** icon, associated with the Report Group.

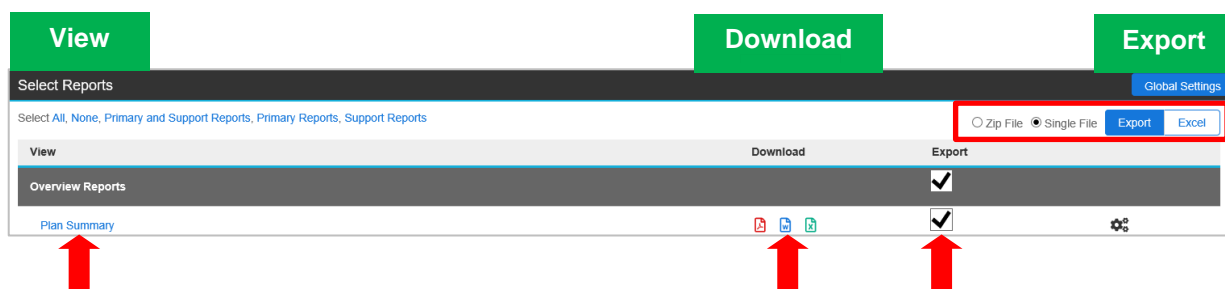


## Select, View and Output Reports

Within the open plan, choose **Reports > AAP Reports** to access the full list of Reports (and documents, if added) that are associated with the plan. **AAP Reports** are organized into the Select Reports table, which offers links and tools for accessing items individually or exporting them in bulk. A full list of standard Reports is included in the [Appendix](#).

**BalanceAAP** offers three methods for working with **AAP Reports**, as shown in the screenshot below:

- View (By link, a single item opens in the browser.)
- Download (By file type icon, transfers a document to open in corresponding software.)
- Export (By bulk selection, this is the option to choose when compiling the required AAP.)



### View a Plan Report

Simply click the report title to open the analysis results in a new browser, or Report Viewer, window.

### Export one or more Plan Reports

#### Select Files

As shown above, use the check boxes adjacent to each report to select one or more reports for export. For bulk exports, choose one of the links under the Select Reports *header*:

- **All** — Selects all reports, including Narratives
- **None** — Deselects any reports that are currently selected
- **Primary and Support Reports** — Checks off the reports required for an AAP, plus the Reports showing supporting documentation and calculations (e.g., Adverse Impact)
- **Primary Reports** — Selects the required reports for an AAP that will accompany the Minority/Female , IWD (Individuals with Disabilities), and Veteran Narratives\*
- **Support Reports** — Limits the selection to those Reports showing supporting documentation and calculations

*\* For a complete AAP, remember to select the Narratives.*



### Determine Settings for Export File(s)

Navigate to the buttons at the top of the page, in the upper right. (These buttons are outlined in the screenshot above.) Choose a radio button to Export as:

- Zip File (Collated, but separate files)

OR

- Single (consolidated) File

Then toggle the File Type button: either Excel, PDF, or Word.

**Note:** The Narratives can only be exported in PDF.

Click the **Export** button.

**Quick Tip:** The system may alert you it is processing data in order to create the Report display. If you would like to work in other areas of the software while the operation runs, click the displayed **Run in Background** button.

**Master Plan Export Settings:** The Export settings apply only to the Master Plan. However, by using a Filter (as described above), sub plan reports can be run from the Master Plan, based on Master Plan Export settings. For sub-plan specific reporting, you can access the sub plan and output reporting from there.



## 2. Dashboard (Multiple Location Plans)



### Dashboard > View




For organizations with multiple plans, the **Dashboard > View** tab provides access to graphical summaries of plan results. These summaries are typically of interest to executives and others who benefit from “snapshot” views of these results, organized by location and key reporting parameters.

As the first **Dashboard** tab (from the left), the **View** screen is comprised of these objects:

- **Pie Charts** (expanded by default)
- **Summary**
- **Map**
- **Scorecard**

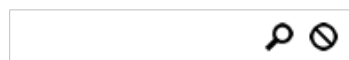
### *Basic View and Object Tools*

#### **Expanding and Minimizing Objects**

A reduced object (located in the right-hand *column*) may be expanded to fill the rest of the screen by clicking on the  **Move Exhibit** button in the object header. Only one object may be expanded at a time. Once an object is expanded, links allow for access to detail views. If the expanded object includes elements that extend beyond the visible pane, navigation bars will appear, providing access to that information.

After an introduction to some of the basic tools below, the [Dashboard objects](#) are described in more detail.

#### **Search (Summary)**



There is a Search field in the upper right corner of the **Summary** exhibit. This search feature can be used to find a specific plan. Type either the establishment name or plan ID, whichever is listed on the **Summary** chart in the **Establishment column**, and click the Search icon.

## Plan Groups Filter

Plan Groups : West Region ▼

If your organization's plan owner has developed [Plan Groups](#) (dividing plan results into sub-sets), the Plan Group drop-down will display on the right side of the *header toolbar*. Once a Plan Group is selected, Dashboard objects will display accordingly, with information limited to establishments included in that group. Objects can also show information for: All Plans.

## Object Display Drop-downs (Pie Charts and Map)

Calculate Using: Job Group ▼ Group By: Race and Gender Combined ▼

Drop-down menus in the object header determine basic parameters for the display, based on the object. (Above are the drop-downs—Calculate Using and Group By—for the Pie Charts.)

## Navigating to another Plan

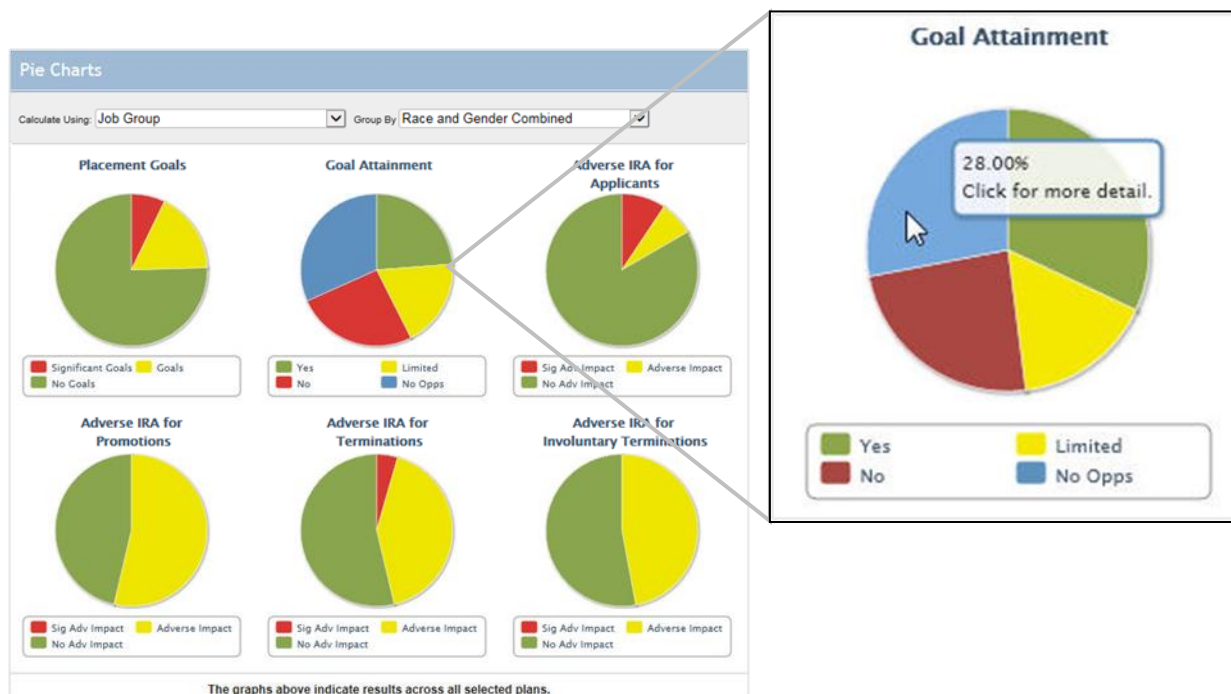
The **Dashboard** will display the most recently completed and published Master Plan. To view a Master Plan for a different year, click on the [Change Plan](#) link, found in the *lower status bar*, and select a different plan from the provided list.

The screenshot shows a dashboard interface. At the top right, there is a 'Plans' dropdown menu with a '[ x ] close' button. The menu is open, displaying three options: 'ACME - January 1, 2013 Annual Affirmative Action Plan', 'ACME - January 1, 2012 Annual Affirmative Action Plan', and 'ACME - January 1, 2011 Annual Affirmative Action Plan'. Below the menu, in the lower status bar, there is a 'Change Plan' button circled in red. An arrow points from the 'Change Plan' button to the dropdown menu. The status bar also displays 'January 1, 2014 Annual Affirmative Action Plan' and 'Plan ID: 1 - 6711'.

## Understanding Dashboard > View Objects

The **Dashboard** objects include: Pie Charts, Summary, Map/Metrics, and Scorecard, which provide an overview of plan results. Please note that your installation may not include all of the aspects described below.

### Pie Charts



The **Pie Charts** object is comprised of six graphics: The first indicates whether placement goals exist in the current plan and the second, whether goals from the prior year's plan have been met. The last four pies represent the existence (or not) of adverse impact for identified personnel actions. In the default layout, Job Group is the selected category, and the Group is Race and Gender Combined. The definitions for the color-coded segments, which represent percentages out of 100, are as follows:

Pie Chart	Legend			
	Red	Yellow	Green	Blue
Placement Goals	Significant Goals	Goals	No Goals	N/A
Goal Attainment	No	Limited	Yes	No Opportunities
Adverse Impact Ratio Analysis (IRA) for: Applicants, Promotions, Terminations, Involuntary Terminations	Significant Adverse Impact	Adverse Impact	No Adverse Impact	N/A

*Note:* Goals were determined in balanceAAP, based on the Utilization rule chosen in **Factor Weights** settings; and adverse impact thresholds were determined in balanceAAP's **Plan Settings**. Refer to **balanceAAP > ? Help** for more information.

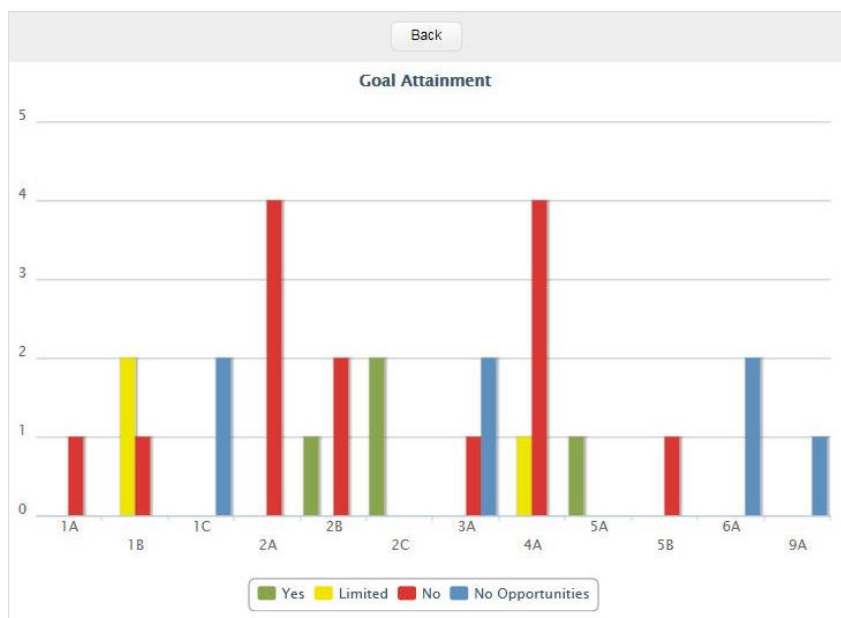
## Number Caption and Detail Graph

(Where installed) If you hover the mouse over a pie chart, a screen tip indicates the percentage for each segment; and you may: Click for more detail (as shown above right). A bar chart will show how many plans have issues by Job Group or EEO category and the selected protected class(es).

**Category** and **Group By** drop-down menus are available in the *page header* to change the detail view. To return to **Pie Charts**, click on the **Back** button.

































**Example:** The Goal Attainment pie chart above (by Job Group and Race and Gender Combined) displays a sizeable “No” slice, indicating there were goals set in the prior year’s plan that were not met this year. The percentage number of 27.00% appears when you hover the mouse over the slice.

By clicking on the pie chart, you can pinpoint where the issues are occurring. The tallest red bars draw your attention to the 2A and 4A job groups (below), which are exhibiting issues in four sub-plans.







## Summary

### Detail View

Summary				
Establishment	Race Sig AI For All	Gender Sig AI For All	Race Goal Attainment	Gender Goal Attainment
<a href="#">San Diego, CA</a>				
<a href="#">Chicago, IL</a>				
<a href="#">Minneapolis, MN</a>				
<a href="#">Abercrombie, ND</a>				
<a href="#">Sioux Falls, SD</a>				
<a href="#">Salt Lake, UT</a>				
<a href="#">Indianapolis, IN</a>				
<a href="#">Chicago, IL</a>				




  

Summary		
<a href="#">Back</a>		
Job Group	Race Significant Goals	Gender Significant Goals
1B - Mid Level Management		
2A - Senior Level Professional		
2B - Mid Level Professional		
4A - Sales Workers		
5A - Senior Level Clerical		

Based on a color-coding scheme, which may be customized for your installation, the **Summary** provides a list of plan locations and highlights the extent of Adverse Impact (AI) and Goal Attainment for each one. The table is organized by Establishment (or Plan ID), and the issues are categorized by Race and Gender.

The legend below the **Summary** display explains how to interpret the graphical display.

**Example:** The default legend colors, shown below, are defined as: Green = No Issues; Red = One or More Issues Exist; Gray = Not Applicable or No Data Available)

	No Issues		One or More Issues Exist		Not Applicable or No Data Available
---	-----------	---	--------------------------	---	-------------------------------------

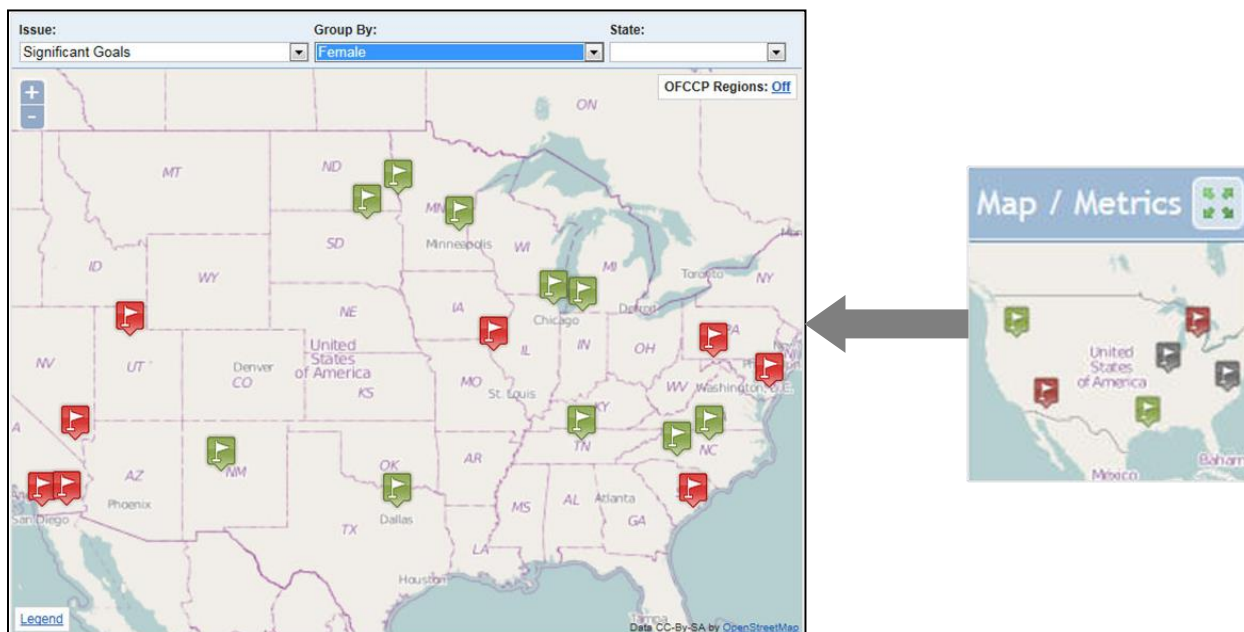
### Summary Detail View

To view more specific information by Job Group (as shown above left), click on the particular Establishment link to open a detail view. Click the **Back** button to return to the full **Summary**.

**Example (shown above):** The **Summary** display indicates Goal Attainment issues for Race and Gender at the San Diego location. Clicking on that location will open a detail table, with checkmarks indicating which Job Groups are exhibiting issues.

## Map (Location-based plans)

For users who have prepared location-based plans, the **Map** object provides a geographic view so that you can compare metrics across your organization's establishments. Flag color reflects the results for each location, based on an issue and the protected class group, as selected from the upper drop-downs.



## Map Tools

From the top to bottom of the page, here are the available **Map** tools:

**State drop-down**—A State drop-down in the *page header* allows you to zero in on a state.

**Zoom In/Out** by using buttons in the upper left-hand corner. Clicking the plus sign will zoom in, and clicking the minus sign will zoom out.

**OFCCP Regions:** On Clicking on the **OFCCP Regions** link, located in the upper right, will highlight OFCCP regions in color.

**Legend**—Click on the link in the lower left corner of the map to display a key that matches alert colors to the following definitions:

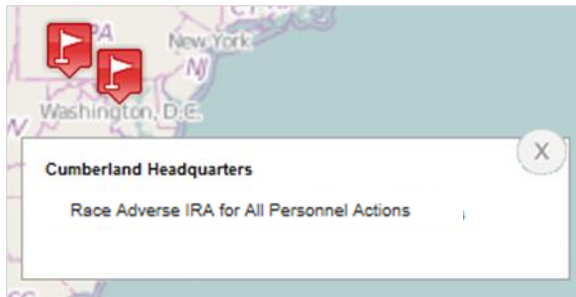
- Green = No Issues
- Red = One or More Issues Exist
- Gray = Not Applicable or No Data Available



**Note:** The flag alert colors may be different in your installation.

## Map Detail Caption

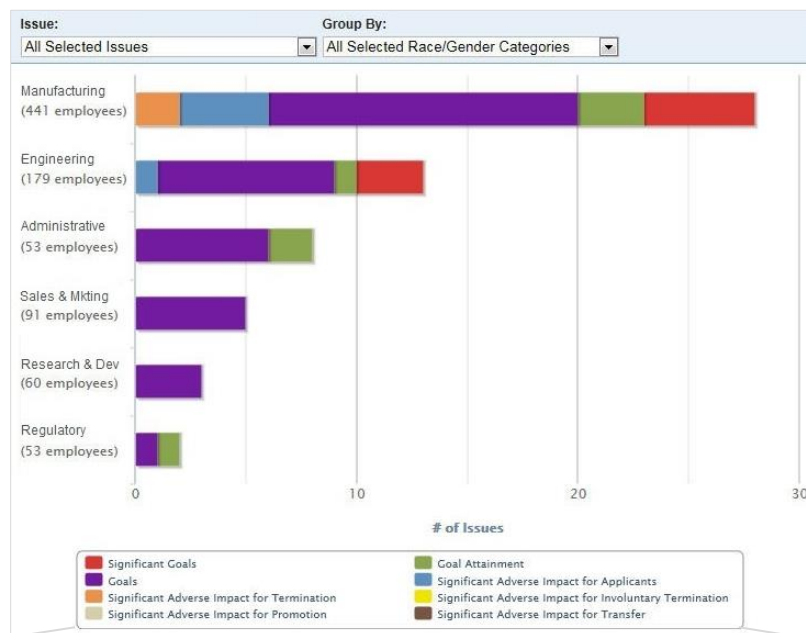
By clicking on a location flag, a detail caption displays the particular issue areas.



**Example:** By clicking on the Cumberland Headquarters flag (left), the issue is identified as Adverse Impact Ratio Analysis for race in all personnel actions. By returning to the **Summary** for this location, you can see what Job Groups are impacted.

## Metrics (Functional plans)

Because functional plans are not tied to locations, an alternative **Metrics** object will display for those plans (or if Zip code information was not provided in **balanceAAP**). If you have access to both location-based and functional plans, the **Map** and the **Metrics** will be available, and you can switch between the two. Relying on color-coded bar graphs, the **Metrics** object lists your organization's plans from greatest to least number of issues.



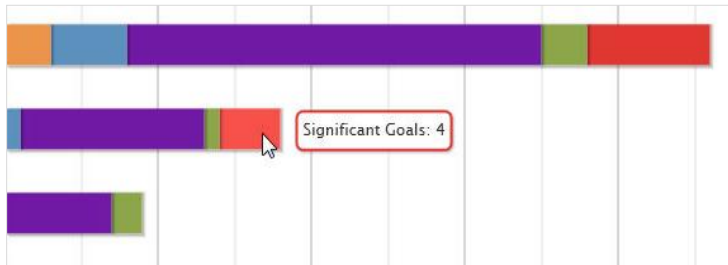
### Functional Plan Metrics—Legend

<span style="color: red;">■</span> Red = Significant Goals	<span style="color: green;">■</span> Green = Goal Attainment
<span style="color: purple;">■</span> Purple = Goals	<span style="color: blue;">■</span> Blue = Significant Adverse Impact for Applicants
<span style="color: orange;">■</span> Orange = Significant Adverse Impact for Termination	<span style="color: yellow;">■</span> Yellow = Significant Adverse Impact for Involuntary Termination
<span style="color: gray;">■</span> Gray = Significant Adverse Impact for Promotion	<span style="color: brown;">■</span> Brown = Significant Adverse Impact for Transfer



## Metrics Detail View

By hovering your mouse over a bar segment, you can view the statistic behind the graphical representation, or the number of job groups demonstrating the issue.



## Scorecard

The **Scorecard** object provides a summary of the significant issues across all plans, in table format. The first *column* lists each: Issue. Then for each issue, the percentage and number of Plans With and Plans Without are shown. The Scorecard also display statistics for IWD [Individual with Disabilities] Utilization Goals and Protected Veteran Benchmark Not Met.

Scorecard				
Issue	Plans With		Plans Without	
	%	No.	%	No.
Significant Goals for Minorities	30%	6	70%	14
Significant Adverse Impact for Minority Applicants	15%	3	85%	17
Significant Adverse Impact for Minority Promotions	0%	0	100%	20
Significant Adverse Impact for Minority Terminations	10%	2	90%	18
Significant Adverse Impact for Minority Involuntary Terminations	0%	0	100%	20
Significant Goals for Females	45%	9	55%	11
Significant Adverse Impact for Female Applicants	15%	3	85%	17
Significant Adverse Impact for Female Promotions	0%	0	100%	20
Significant Adverse Impact for Female Terminations	0%	0	100%	20
Significant Adverse Impact for Female Involuntary Terminations	0%	0	100%	20
IWD Utilization Goals	10%	2	0%	0
Protected Veteran Benchmark Not Met	10%	2	0%	0

## Dashboard > Reports



From the **Reports** sub-tab, you can view, print, and export **Dashboard** graphics, as well as the supporting data that underlies these displays.

**Note:** For information on accessing the Affirmative Action plan's reports, see: **SHARE > [Select Reports](#)**.

### *Run a Dash Report*

1. (If installed) Using the Plan Groups menu—  
Select an option for displaying plan groups:
  - **All Plans**
  - **Specific Plan Groups**—Select one of the displayed Plan Groups.
2. Navigate to the Sections menu, and select one or more of the **Dashboard** exhibits to include.
3. The third menu is Settings. Select how you want the content displayed:
  - **Graph and Data** (the most complete set)
  - **Graph Only** (graphical display(s))
  - **Data Only** (text and tabular matter)
4. Make selections on the Output menu, from the options shown below.

View Report as:

- **Preview** (HTML)
- **Export** (PDF)

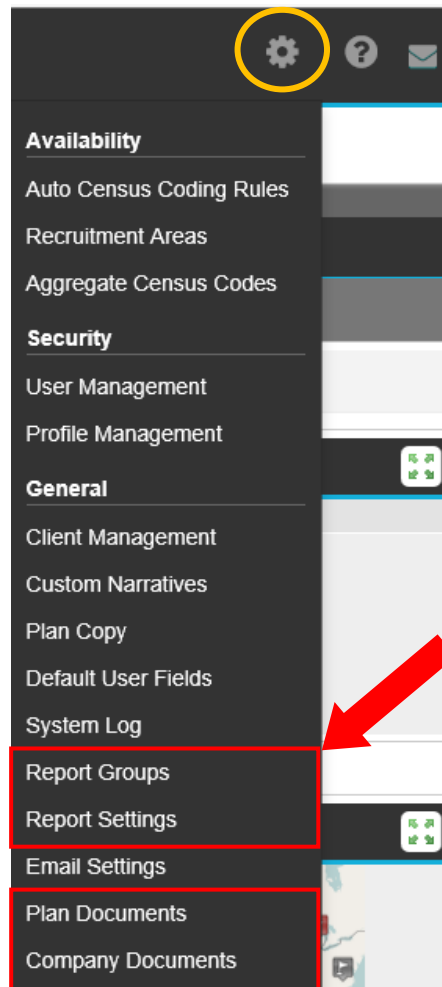
Export Report as:

- One (consolidated) File
- Separate Files—Files are Zip'd for download.

5. Finally, click the **Run Report** button.

If you selected Preview, the report will open in a browser window. If you selected, Export, you can open the PDF file or save it.

### 3. System Tools for Administering Reports



This chapter discusses:

- **Report Groups**
- **Report Settings**
- **Plan/Company Documents**

Refer to the companion *BalanceAAP User's Guide* for other  **System Tools**.

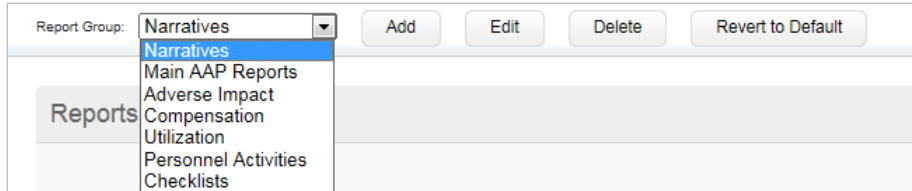
## Manage Report Groups (for the Select Reports menu)

Using  **System Tools > General / Report Groups**:

- Edit or configure **Report Groups** by category so that your organization's Reports-only audiences can readily recognize the topics that matter most.
- Place **Reports** and **Report Groups** on the **Select Reports** list in an order that makes sense to your audiences.
- Automatically include default and other reports that are specific by Annual Plan or Update Plan, using radio buttons just below the *tab header*.

### Define Custom Report Groups

On the **Report Groups** tab, the Administrator can change the components of a default group or create new groups. You may also use the **Revert to Default** button in the *tab header* to restore the original Report Group settings, or **Delete** an existing Report Group.



### Edit an Existing Report Group

Select a Report Group from the upper drop-down. Select or deselect reports on the provided list, by using the check boxes to the left of the Report Name. Use the **Select All** or **None** links at the top of the list, as necessary. Then click the **Save** button, which is located at the bottom of the page.

### Create a Report Group

Choose the **Add** button from the *tab header*. Enter a Name, and click **Save**. The Name will be added to, and display in, the Report Group drop-down. Check off any reports you would like to include. Then click **Save**.

### Order Report Groups



Once the **Report Groups** are defined, they may be placed in a particular order for display to users who access the **Select Reports** tab. Use the Move Up/Down arrows to place the groups in the desired order. Click **Save**.

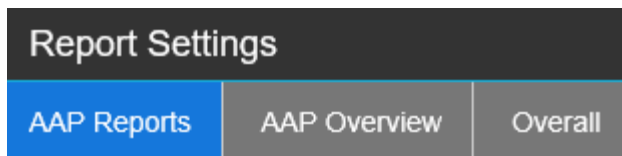
## Order Reports

Within the **Report Groups**, individual reports can also be placed in order. Access the **Order Reports** tab, and select a Report Group from the provided drop-down. Then use the Move Up/Down arrows to place the reports in the desired order.

## Determine Report Settings

⚙️ **System Tools** for **Report Settings** are divided into three tabs, as described below, with the first two aligning with **balanceAAP's AAP Reports** and **AAP Overview** modules.

### AAP Reports



### Default Report File Types

Review the File Types available for downloading plans from **balanceAAP > Reports**, and change, if necessary. The first three file types are checked by default:

- PDF (.pdf)\*
- Word (.doc)
- Excel (.xls)
- Rich Text (.rtf)

\* Because Reports are designed to look best in Acrobat and Narratives must be exported in PDF, this format should be retained.

**Quick Tip:** When reports are exported into Word, Excel, or Rich Text, they can be edited, while a PDF document is read-only. Consider these aspects when choosing the file types.

### Display Instructions for the Reports Screen

Enter text to appear on the **Reports** page, above the list of reports. The text will appear to all users logging into **balanceAAP** and viewing this page.

The text editor relies on common word processing tools, the same as are used when [editing the plan Narratives](#).

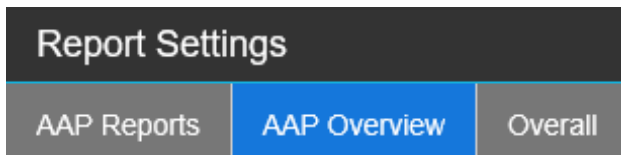
Instructions for Plans Screen


Below is the list of AAP Plan Reports and Narratives. To view an individual report click on the Report title.

Save

Click **Save** when your file type selections and editing are complete.

### AAP Overview



The graphs shown to users on the **Reports > AAP Overview** tab can be configured with two menus, shown under:  **Report Settings > AAP Overview**. Job Groups, the first menu, controls whether the graphs include:

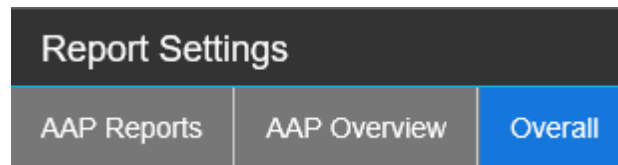
- All Job Groups (default)
- OR
- Selected Job Groups – If this option is selected, then check off one or more Job Groups.

Next, determine how Placement Goals will be configured into the Incumbency versus Availability graph, by checking (or deselecting) the following boxes:

- Hide Job Groups without Placement Goals
- Show Placement Goal

Both settings are checked by default.

## Overall

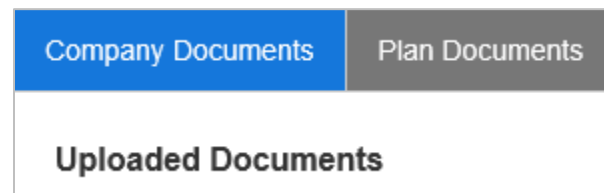


The **Reports Settings > Overall** tab displays two settings –


1. An optional setting for those multiple plan owners who have defined [Plan Groups](#) that will personalize the corresponding Filter *menu title* (e.g., Region). The default setting of “Plan Groups” can be retained.
2. A control for determining the default landing page for users entering Reports:
  - Plan Overview
  - Reports
 OR
  - Dashboard (default)

Press the **Save** button if changes are made.

## Add Documents to the Reports Module



## What Types of Documents can be Uploaded?

In support of your efforts to communicate with colleagues about **Affirmative Action**, Documents can be compiled in balanceAAP so that other users can access them at any time during the plan year. Corresponding links on the  **System Tools** menu bring you to two locations where documents can be organized by:

- **Company Documents** – This library is designed to hold information that relates to your program or organization as a whole. Documents stored here would be associated with all of your organization’s AAPs, within a single year or across several years. Examples may include company policies or instructions for AAP preparation to be shared across all of the account’s users.
- **Plan Documents** – In contrast, Plan Documents would pertain to a specific AAP. Any document stored here would contain content for users who have access to a specific plan, or in the case of a Master plan set, a specific sub plan.

Documents are accepted in PDF, Word, and Excel formats.

### Initial Step for Uploading Plan Documents

On the **Plan Documents** tab, begin by selecting a Company, Establishment, and Plan from the provided drop-downs:

**Select Plan**

What plan would you like to manage documents for?

Company: Acme Sample Corporation

Establishment: Abercrombie, ND


Plan: July 1, 2015 Annual Affirmative Action Plan

### Upload Company or Plan Documents

To add reference items to either the **Company Document** or **Plan Documents** library:

1. Locate the document on your computer or network, and click the **Browse** button, located under the Upload *header*.
2. The item will be added to the Uploaded Documents list. Continue adding documents, as needed,
3. Press the **Save** button.

Administrator tools for working with Uploaded Documents list include:

- **Remove This File** — Select the document; click the icon; and answer **Yes** to the confirmation message.
-  **Edit Display Name of This File** — Select the document; click the icon; edit the name, and click **Save**.
- Sort the **Uploaded Documents** list, using the **Move Up/Down arrows** on the right side of the list.
- **Preview a Document** (in another window) by select the document from the provided drop-down, and click the **Preview** button to open it in a PDF window.

The Uploaded Documents will display for viewing audiences on the **Reports > AAP Reports** tab, as part of a Report Group for **Company Documents** or **Plan Documents**, respectively.



## 4. Dashboard Tools for Plan Owners

### Dashboard > Options



The Administrator may customize the **Dashboard View**, using the **Options** tab, which is comprised of four menus, shown in a collapse/expand format:

- General
- Summary
- Pie Charts
- Scorecard

At any time, you may restore default settings by clicking the **Revert to Default** button, which is located at the bottom of the page.

### General Menu

General

▼ Select the issues to view (affects Summary and Map):

Select: [All](#), [None](#)

Goals and Goal Attainment:

☒ Goal Attainment
 ☒ IWD Utilization Goal (Summary Only)
 ☒ Protected Veteran Hiring Benchmark (Summary Only)

Adverse IRA:

☐ Adverse IRA for All Personnel Actions
 ☐ Adverse IRA for Applicants
 ☐ Adverse IRA for Promotion
 ☐ Adverse IRA for Termination
 ☐ Adverse IRA for Involuntary Termination
 ☐ Adverse IRA for Transfer

Significant Adverse Impact:

☒ Significant Adverse Impact for All Personnel Actions
 ☐ Significant Adverse Impact for Applicants
 ☐ Significant Adverse Impact for Promotion
 ☐ Significant Adverse Impact for Termination
 ☐ Significant Adverse Impact for Involuntary Termination
 ☐ Significant Adverse Impact for Transfer

Compensation:

☐ Compensation by Grade
 ☐ Compensation by Job Code
 ☐ Compensation by Job Group

Other:

☐ Plans Currently Under Audit


▶ Select a calculation option for adverse impact (affects Summary, Map, and Scorecard):

▶ Select a color coding option (affects Summary and Map ):

▶ Select the races and genders to display (affects Summary and Map):

1. In each category below—Select the issues to view (affects Summary and/or Map):

- Goals and Goal Attainment (including IWD Utilization and Protected Veteran Hiring Benchmark)
- Adverse IRA (Impact Ratio Analysis)
- Significant Adverse Impact
- Compensation
- Other (Plans Currently under Audit)\*




\*Plans must have been marked as being under audit on balanceAAP's **Plan Information** screen. (The **Dashboard Summary** will display a Plans Under Audit *column*, with a  **Red check mark** for each marked plan).

2. Select a calculation option for adverse impact:

- Favored Group Calculation  
*The calculation compares the highest selected group to the other group.*
- Traditional Calculation  
*The default calculation compares females to males and minorities to non-minorities.*

3. Select a color-coding option:

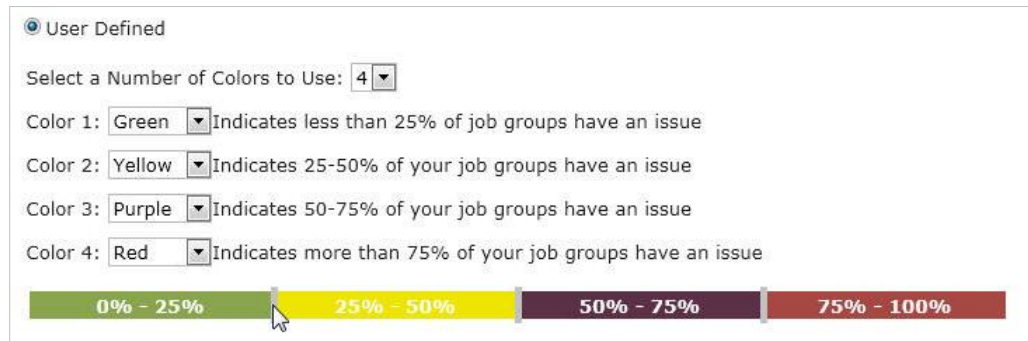
Default—

-  Green (no issues)
-  Red (one or more issues)
-  Gray (not applicable or no data available)

OR

User Defined—

Select the number of colors you want to use; select colors, and preview the display.



☒ User Defined

Select a Number of Colors to Use:

Color 1:  Indicates less than 25% of job groups have an issue

Color 2:  Indicates 25-50% of your job groups have an issue

Color 3:  Indicates 50-75% of your job groups have an issue

Color 4:  Indicates more than 75% of your job groups have an issue

0% - 25%    25% - 50%    50% - 75%    75% - 100%

Adjust the percentage represented by each color by dragging the sliding scale with the mouse, as shown above.

4. Select the races and genders to display:

Races—

- Total Minorities (default)
- Asian
- Black or African American
- Hispanic or Latino
- American Indian or Alaska Native
- Native Hawaiian or Other Pacific Islander
- Two or More Races
- White

Genders—

- Female (default)
- Male

Combine categories—

- Show Issues by each individually selected race and selected gender categories (default).
- Show Issues by grouping all selected races together and all selected genders together.
- Show Issues by grouping all selected races and genders together.

### Summary menu

Options on this menu control the Summary exhibit's appearance.

1. The first Summary menu options are dependent on the number and names of colors selected above.

Select a filter option:

- Show All
  - Show only [Color 1] issues
  - Show only [Color 2] issues
  - Show only [Color 3] issues
  - Show only [Color 4] issues
2. Using the second Summary menu, select a plan description (to be used in the Establishment Name *column*):
    - Establishment Name
    - Plan Code (This optional is helpful for functional plans.)

### Pie Charts menu

Choose to: Suppress Drilldown Bar Graph. If checked off, the user will not have access to the detailed view for any pie chart.

## Note about Plan Groups

The plan owner or creator can arrange the organization's plans – while developing the set of Master and sub plans – so that **Dashboard** users can [Filter](#) AAP results by **Plan Groups**. This is an effective display tool, especially when your organization has a large volume of plans. (**Plan Groups** also organize the plans' **Availability** results.) For more information, refer to the *BalanceAAP User's Guide*, available in the [Help > Library](#) or from Berkshire's Product Support.

## Dashboard > Summaries



The **Summaries** tab is available for the balanceAAP Administrator to export summary data from the **Dashboard**.

Summary Reports Report Settings

Select an export file type:

☒ Excel 2007

☐ Excel 97-2003

Select reports to run:

☐ Utilization

☐ Adverse Impact

☐ Goal Attainment

Export

## Report Settings

Although the system provides default settings for the Summary Reports, you can visit **Report Settings** (as outlined in the screenshot above) to determine different report parameters:

REPORT SETTINGS

Utilization

☐ All Groups

☒ Underutilized Groups

☐ Statistically Significant Underutilized Groups

Adverse Impact

Run Adverse Impact Report By:

☐ All Groups

☐ Groups with Adverse IRA

☒ Groups with Statistically Significant Adverse Impact

Filter Adverse Impact Report Action Types:

☒ Applicant

☒ Involuntary Termination

☒ Voluntary Termination

☒ Termination

☒ Promotion

☐ Transfer

Save

## Output a Dashboard Data Summary

First, select a file type:

- Excel 2007 (default)
- Excel 97-2003

Then, select the summary data to export:

- **Utilization—**  
*Columns:* Job Group, Total EE [Eligible Employees], Protected Class (PC), PC #, PC %, PC Avail [Availability], PC Stat [Statistical Significance, value], \* PC Shortfall, PC UU [Under Utilization], PC Stat Sig [Statistical Significance; e.g., Yes, No]
- **Adverse Impact—**  
*Columns:* Action Type, Job Group, Favored Group, Protected Class, PC Selection Ratio, PC AI [Adverse Impact?], PC Stat Sig?, \* PC Stat Val [Statistical Value], PC Shortfall
- **Goal Attainment—**  
*Columns:* Job Group, Protected Class, Result [e.g., Yes, No], Prior Year Goal %, Placement Rate %

All results will include Plan ID, Company, Plan Code, and Establishment *columns*.

*\* Depending on analysis type, "E" designates Exact Binomial test, for small groups of <30 persons; and "F" designates Fisher's Exact test, for small groups of <30 persons.*

Finally, click the **Export** button, and download the file.

**Note:** If multiple reporting categories are exported, the Excel file will have a corresponding sheet for each one.



## Appendix

The table (on the next few pages) lists reports that can be generated from **balanceAAP**, including the Narratives and supporting reports. Reports with an asterisk (\*) in the table below are Primary reports for an Affirmative Action plan, while other supporting reports assist you with plan preparation or offer underlying analyses.

For descriptions and sample output for the most commonly used Reports, please see the *Client's Guide to AAP Reports* available via [? Help](#) or from Berkshire Product Support).

<b>Table 2. BalanceAAP Standard Reports</b>	
<b>Communication</b>	
• Plan Summary (Annual plan)	• Progress Summary (Update plan)
<b>Narratives</b>	
• Individuals with Disabilities Narrative*	• Minorities and Women Narrative*
• Protected Veterans Narrative*	
<b>Employment</b>	
• Job Group Analysis*	• Roster Checklist
• Job Group Analysis by EEO Code	• Roster Compensation Checklist^
• Job Group Analysis Summary*	• History Source Summary by Job Code
• Annotated Employee List*	• History Source Summary by Job Group
<b>Workforce</b>	
• Workforce Analysis* (or)	• Annotated Employee List by Department*
Organizational Display* (plus)	• Department Analysis
Supervisor By Department*	• Department Checklist
<b>Availability</b>	
• Availability Factor Computation Form*	• Feeder Job Calculations
• Incumbency vs. Estimated Availability*	• Shortfall
• Placement Goals*	• Availability Worksheet
• Recruitment Area Worksheet	• Census Code Assignments
• Requisite Skills Calculations	• Current Year Promotion Calculations
• Department Analysis	• Recruitment Area Composition
• Department Checklist	

<b>Table 2. BalanceAAP Standard Reports</b>	
<b>IWD / Veteran</b>	
<ul style="list-style-type: none"> <li>• Data Collection for Individuals With Disabilities*</li> <li>• Data Collection for Protected Veterans*</li> </ul>	<ul style="list-style-type: none"> <li>• Individuals with Disabilities Utilization Goals*</li> <li>• Veteran Benchmarks for Hiring Analysis*</li> </ul>
<b>Personnel Actions</b>	
<ul style="list-style-type: none"> <li>• Applicant Summary*</li> <li>• New Hire Summary*</li> <li>• Promotion Summary by Old Job*</li> <li>• Promotion Summary by New Job</li> <li>• Promotion Summary for Goal Attainment</li> <li>• Transfer Summary by Old Job</li> <li>• Transfer Summary for Goal Attainment</li> <li>• Termination Summary by Termination Code</li> <li>• Termination Summary*</li> <li>• Involuntary/Voluntary Termination Summaries</li> <li>• Promotion Pool Summary by Old Job</li> <li>• Promotion Pool Summary by New Job</li> </ul>	<ul style="list-style-type: none"> <li>• Termination Pool Summary</li> <li>• Involuntary/Voluntary Termination Pool Summaries</li> <li>• Applicant Checklist</li> <li>• New Hire Checklist</li> <li>• Promotion Checklist</li> <li>• Transfer Checklist</li> <li>• Termination Checklist</li> <li>• Involuntary/Voluntary Termination Checklists</li> <li>• Promotion Pool Checklist</li> <li>• Termination Pool Checklist</li> <li>• Involuntary/Voluntary Termination Pool Checklists</li> </ul>
<b>Monitoring</b>	
<ul style="list-style-type: none"> <li>• Applicant Pool Analysis</li> <li>• Labor Force Calculations</li> </ul>	<ul style="list-style-type: none"> <li>• Goal Attainment*</li> <li>• Promotion/Hiring Comparison</li> </ul>
<b>Adverse Impact for [Personnel Action] Summary and Detail reports</b>	
<b>By Favored Group</b> (Legacy personnel action reports by the traditional calculation are hidden by default.)	
<ul style="list-style-type: none"> <li>• Applicants</li> <li>• Promotions</li> <li>• Transfers</li> <li>• Terminations</li> <li>• Involuntary Terminations</li> </ul>	<ul style="list-style-type: none"> <li>• Promotion Pool</li> <li>• Termination Pool</li> </ul> <p><b>Other</b></p> <ul style="list-style-type: none"> <li>• IWDs</li> <li>• Protected Veterans</li> </ul>
<b>Compensation</b>	
^Roster compensation data may be <a href="#">exported</a> from balanceAAP. Legacy reports for desk audit and compliance review are hidden by default.	
<ul style="list-style-type: none"> <li>• Roster Compensation Checklist</li> <li>• Compensation Summary by Job Group</li> </ul>	<ul style="list-style-type: none"> <li>• Compensation Summary by Title</li> <li>• Compensation Summary by Grade</li> </ul>