## Disseminate and View Completed AAP Results

BalanceAAP's **Reports** portal offers secure access for viewing Affirmative Action plan (AAP) results, based on each viewer's role in the AAP process; permission to see sensitive data; and if applicable, the viewer's establishment. Plus, for those companies with multiple location plans, the BalanceAAP **Dashboard** reveals a bird's eye view of organization-wide metrics, with detail views, to highlight successes and problem areas.

### Reports

- View the completed narratives
- Select AAP-required reports, supporting reports, or individual reports for output.
- Determine settings by report group (e.g., Monitoring report options)
- Based on report content, filter results by key data variables
- Quickly identify issue and success areas through highlighting
- View reports in HTML and PDF
- Export reports in read-only or editable formats
- View trends over multiple years' AAPs

### Dashboard (For Multiple Location Plans)

- View executive displays that highlight placement goals, goal attainment, and adverse impact
- Graphical objects provide one-click access to detail views
- View organization-wide results, or filter the display by plan groups
- Export graphics, data, and reports for use in other presentations and documents

### Results Dissemination – Managed by the AAP Owner

- Publish complete plans – to Reports, for single plans, and Dashboard for multiple plans – so others can access the results
- Customize graphical displays and summaries for meaningful reviews of AAP data across the organization's AAPs
- Administer user profiles to facilitate communication of results to management, while controlling access to sensitive information

### On-line Access

- Provided free-of-charge to Berkshire service clients and software customers
- Compatible with Chrome, Firefox, Edge, and Internet Explorer
- Collaborate with an unlimited number of users from any location, at any time

### Product Support

- In-line Help documentation, including a *Client's Guide to AAP Reports*
- Technical support by telephone and email is included as long as a client account is maintained.
  Clients for Berkshire services may also contact their service representatives for assistance with AAP-related matters. Please refer to contact information on reverse.

### Security

- 256-bit https on-line platform via Transport Layer Security (requires a current browser)
- Data are encrypted at rest and in transit.
- Password requirements include minimum length, complexity, version control, and expiration.
- Publish reports and information, based on system roles and permissions
- 24/7-monitored data center with physical and network security is SSAE-16-certified and meets the PCI Data Security Standard
- System and plan-level logging of user activity available to administrators

| Module | Tools |
|---|---|
| **REPORTS**<br><br>*Special Feature:*<br>Access Overview graphics: *Incumbency vs. Estimated Availability, Adverse Impact, Workforce* | • Access Minorities & Women, Individuals with Disabilities, and Veterans Narratives<br>• Access a comprehensive set of primary and supporting AAP reports<br>• Select reports alphabetically, by Report Group, or by primary/supporting designation<br>• Filter results by key data variables, as appropriate for the report (e.g., job group, EEO code, race/ethnicity, statistical significance)<br>• View a report in HTML, PDF, or where applicable, a graph<br>• Export plan reports in Excel, PDF, or Word. Export narratives in PDF<br>• Export separate files in a Zip file, or export a single file |
| **DASHBOARD**<br>**(For Multiple Location Plans)**<br><br>*Special Features:*<br>Minimize and expand objects<br>Filter by plan group, protected group, job group, audit status | View an interactive display, which graphically highlights successes and problem areas for placement goals, goal attainment, and adverse impact:<br>• **Pie charts**—Identify successes/problem areas for placement goals, goal attainment, and adverse impact in personnel actions, overall and by plan group; with detail view<br>• **Map object**—View plans and metrics by location and OFCCP region<br>• **Metrics object**—For organizations with functional plans, view a bar chart (and detail) by unit (e.g., Engineering), showing goals, goal attainment, and adverse impact<br>• **Summary table**—Identify adverse impact by location and review details by job group<br>• **Scorecard**—Review current scores on placement goals and adverse impact<br>View, print, and export graphics and underlying data, in PDF, Excel, or Text, as appropriate |
| **Trend Reports** | For up to four AAPs, identify positive/negative movement in key AAP metrics; display graphs and tables on workforce composition, goals, and personnel actions |
| **Results Dissemination –**<br>***System Controls for the AAP Owner*** | • Determine plan groups in the AAPs (e.g., by region) to organize the Dashboard display<br>• Publish completed plans to Reports portal and Dashboard<br>• Set up user profiles to control access (e.g., Narratives only, AAPs by location, pay data)<br>• Determine email settings for notifying audiences that plans are ready to view, and create the notification message; develop an on-screen banner for viewers<br>• Customize the Reports screen, including naming and ordering report groups<br>• Apply report group settings, as applicable (e.g., hide/show, include, order by, run by)<br>• Apply highlighting to problem areas (e.g., potential/significant underutilization)<br>• Determine global Dashboard display options<br>• Set default file types for downloading plan results<br>• Upload corporate, HR, or compliance documents in PDF, Word, and Excel<br>• Store completed AAPs for the mandated regulatory period<br>• Export the OFCCP compensation data submission for an audit<br>• Archive completed plans for use outside of balanceAAP |
| **BalanceAAP Intraconnectivity** | • Navigate between plans<br>• Role-based controls allow access to the Reports portal and Dashboard separately OR in conjunction with the software's plan preparation/analysis functions<br>• Direct publishing connectivity for the AAP owner |

# balance AAP
## REPORTS | DASHBOARD | TRENDS

*AAP-required reports are shown below in blue.*

**Narratives**
Minorities & Women
Individuals with Disabilities
Protected Veterans

**Overview Reports**
Plan Summary (Annual plan)
Progress Summary (Interim update plan)

**Main AAP Reports**

**Workforce**
Workforce Analysis *or*
  Organizational Display *plus*
  Supervisor By Department
Annotated Employee List by Department

**Employment**
Job Group Analysis
Job Group Analysis by EEO Code
Job Group Analysis Summary
Annotated Employee List

**Availability/Utilization**
Availability Factor Computation Form
Incumbency vs. Estimated Availability
Placement Goals

**Monitoring**
Goal Attainment
History Source Summary by Job Group

**Personnel Activities**
Applicant Summary
New Hire Summary
Promotion Summary by Old Job
Termination Summary

**IWD / Veterans**
Data Collection for Individuals with
  Disabilities
Data Collection for Protected Veterans
Individuals with Disabilities
  Utilization Goals
Veteran Benchmarks for Hiring Analysis
Five Factor Benchmark

**Utilization**
Availability Worksheet
Census Code Assignments
Feeder Job Calculations
Feeder Worksheet
Job Groups with Default RRA
  (Reasonable Recruitment Area)
Recruitment Area Composition
Requisite Skills Calculations
Shortfall

**Personnel Activities**
Current Year Promotion Calculations
Applicant Summary by Disposition Code
Promotion Summary by New Job
Promotion Summary for Goal
  Attainment
Transfer Summary by Old Job
Termination Summary by Termination
  Code
Involuntary Termination Summary
Voluntary Termination Summary
Promotion Pool Summary by
  Old Job
Promotion Pool Summary by
  New Job
Termination Pool Summary
Involuntary Termination Pool Summary
Voluntary Termination Pool Summary

**Monitoring**
Applicant Pool Analysis
History Source Summary by Job Code
Labor Force Calculations
Promotion/Hiring Comparison

**Checklists**
Applicant Checklist
History Source Roster Checklist
Roster Checklist
New Hire Checklist
Promotion Checklist
Transfer Checklist
Termination Checklist
Involuntary Termination Checklist
Voluntary Termination Checklist
Promotion Pool Checklist
Termination Pool Checklist
Involuntary Termination Pool Checklist
Voluntary Termination Pool Checklist

**Adverse Impact Summary and Detail
  (by Favored Group)**
Applicants*
Applicants by Requisition Number
Promotions*
Transfers*
Terminations*
Involuntary Terminations*
Promotion Pool*
Termination Pool*
*Traditional available*

**Compensation**
Roster Compensation (Export File)
Compensation Summary by Job Group
Compensation Summary by Title
Compensation Summary by Grade