

# **The Complete AAP™ Training Manual**

*Affirmative Action Planning Software*

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## Special Features - Pro Version

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The following features are unique to the Pro version of The Complete AAP. All other features are available in both versions.

- **One button multiple AAP import** is available for workforce and adverse impact data of affirmative action programs (AAPs) in the same company.
- The **Roll up Plans** utility allows users to import and create AAPs for all company locations, and then roll the employees from smaller AAPs into their supervisors' AAPs without manipulating the plan codes. Per regulations, the default threshold is 50, but user may change the threshold. Annotations are created by the program as necessary.
- The **Work with All Plans** function available in the Open Plan icon window allows users to view and edit data for all AAPs in a company at one time.
- The **Copy All...to Another Plan** utility allows the user to copy departments, job groups and jobs from one AAP to another AAP.
- The **Add in Job Groups from Other Plans** tool available in the Job Groups window adds job groups of employees who report or roll into an AAP if the job group does not exist in the supervisor's AAP.
- The **Import Jobs from Other Plans** tool available in the Jobs window brings in the jobs for employees who report or roll into an AAP.
- The ability to **select feeders from other AAPs** is an option available to Pro users. Job groups and jobs from other AAPs in the same company can be selected as feeders groups for factor 2a in the Job Groups window.

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# Chapter 1

## Gather Your Data

## Special Notes



- The terms “plan” and “AAP” are used throughout this manual and in The Complete AAP software to mean Executive Order Affirmative Action Program.
- This training manual uses screen shots of only the Pro version.
- The symbol shown at left is used throughout the manual to indicate instructions relevant to only the Pro version. The instructions otherwise apply to either version of The Complete AAP.
- The term “company” in the Pro version refers to a shell that holds related AAPs that have the same AAP dates.
- If you need to move AAP files between versions of The Complete AAP, please call Yocom & McKee for instructions.

## AAP Checklist

It is recommended that you use the software's checklist while you work on your AAP. The checklist is available by clicking the **Checklist** icon. It helps you return to where you left off if the process is interrupted. Below is an expanded version of the software's checklist.



AAP Checklist	Reference	Action Completed
<b>Gather Your Data</b>	Chapter 1	
1. Pull workforce data. 2. Collect adverse impact data (personnel activity). 3. Gather previous year's goals.	Your files	
<b>Create A New Plan</b>	Chapter 2	
1. Open company. 2. Create new AAP utilizing the option appropriate to your situation. 3. Review and update company. 4. Review and update plan information.	Company icon  Company Information Plan Information	
<b>Format Your Data</b>	Chapter 3	
1. Organize your workforce data as required by the current <b>Workforce File</b> template. 2. Organize your adverse impact data as required by the Adverse Impact Detail File template.	Import icon	
<b>Import Your Data</b>	Chapter 4	
1. Import workforce data. 2. Import adverse impact data.	Import icon	



<b>AAP Checklist</b>	<b>Reference</b>	<b>Action Completed</b>
<b>Fix Data Errors</b>	Chapter 5	
<ol style="list-style-type: none"> <li>1. Check for data errors.</li> <li>2. Correct errors displayed on report.</li> <li>3. Edit locations.</li> <li>4. Edit departments</li> <li>5. Edit job groups.</li> <li>6. Edit jobs.</li> <li>7. Edit employee records.</li> <li>8. Edit adverse impact data.</li> </ol>	Utilities menu  Locations icon Department icon Job Groups icon Jobs icon Employees icon Adv Impact icon	
<b>Goals Progress Data</b>	Chapter 6	
<ol style="list-style-type: none"> <li>1. Ensure previous goals, if any, appear for each job group.</li> <li>2. Ensure base group, hire and promotion (to) data appears for each job group as appropriate.</li> </ol>	Progress icon	
<b>Publish Narratives and Reports</b>	Chapter 9	
<ol style="list-style-type: none"> <li>1. Click <b>Reports</b> icon.</li> <li>2. Restore defaults.</li> <li>3. Select document to publish or Select individual reports to publish.</li> <li>4. Review published documents.</li> </ol>	Reports icon Report Options Documents Report Options Pen & Notebook icon	
<b>Back up Your Completed Plan</b>	Chapter 10	

## Before You Begin

---

Have the following in place before you begin to gather your data:

- Establish your AAP dates: the AAP year represents the period of time that your company has to meet the goals it sets as of the start date of its AAP. Your company's first AAP should be completed within 120 days of its initial federal contract date. The start date of your AAP should fall within those 120 days, and the end date should be one year after the start date (e.g. January 1, 2015 to December 31, 2015). If the initial federal contract date is unknown, pick any date.
- Determine the number of AAPs that you must complete; each establishment that has 50 or more employees must have its own AAP.
- Determine which employees should be in your AAP; all active employees should be included in an AAP. This includes field employees and employees at sites of 49 or fewer employees.

The videos that are available in The Complete AAP's **Help Menu** may help you to further understand these concepts.

## Gather Your Data

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The three sets of data that you must gather for each AAP that you complete are listed below:

- Workforce data;
- Data for adverse impact reports; and
- Last year's goals.

A description of each data set is provided below. After you gather all necessary data, proceed to Chapter 2.

### *Workforce Data Requirements*

---

Most of the statistical reports in your AAP are based on a one-moment snapshot of your workforce as of the beginning date of your AAP year. The snapshot should include all employees covered by affirmative action regulations. The workforce snapshot should be in the form of a spreadsheet file pulled from your payroll or Human Resources Information System (HRIS) or other database. In addition to employee names, your file must contain information associated with each employee. In order to run compliant reports for your AAP gather as many of the importable fields as you can for each employee who was in your workforce on the beginning date of your AAP.

## Workforce Data Import Template

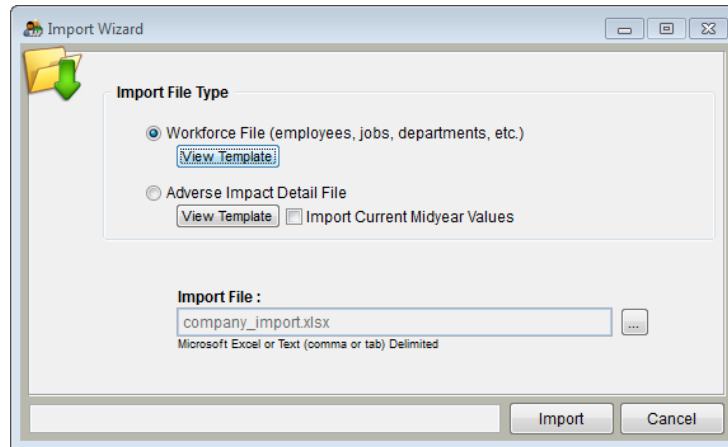
---

To view the **Workforce Import** template that shows the importable field order mandated by the software, follow these steps:

- 1) Click the **Import** icon.



- 2) Click **View Template** under **Workforce File Import**.



- 3) The template opens in a spreadsheet program. Your fields must be ordered in the order shown in the template.

Microsoft Excel - company_import.xlsx									
	A	B	C	D	E	F	G	H	I
1	Plan Code	Employee ID	Employee Name	Race	Gender	Location Code	Location Name	Dept. Code	Dept. Name
2									
3									
4									
5									
6									
7									
8									
9									

## Importable Workforce Fields

Below is a vertical rendering and descriptions of the importable fields that appear in the import template.

Column	Header	Description
A	Plan Code	<p>Pro users must provide an alpha or numeric code (10 character limit) that informs the software into which AAP each employee should be placed, keeping in mind the regulations, herein paraphrased, that govern placement of employees into AAPs:</p> <ol style="list-style-type: none"><li>1) All companywide employees must be in an AAP.</li><li>2) Prepare a separate AAP for each establishment that has 50+ employees.</li><li>3) Employees at establishments of fewer than 50 employees must be:<ol style="list-style-type: none"><li>a) included in their establishment's own AAP;</li><li>b) rolled into the AAP that supports their establishment's personnel function; or</li><li>c) rolled into the AAP that covers their managers work locations.</li></ol></li></ol> <p>Other users must import a separate workforce file into the software for each AAP, but are not required to include plan codes. Though blank, the <b>Plan Code</b> column must remain.</p>
B	Employee ID	<p>Provide a unique alpha or numeric employee identification code (10 character limit) for each employee. Review the codes to ensure that there are no duplicates.</p>
C	Employee Name	<p>Provide a name for each employee as of the snapshot date in the following format: <i>Smith, John A.</i></p>
D	Race/ Ethnicity	<p>Provide one of the following race/ethnicity titles for each employee: White, Black or African American, Hispanic or Latino, Asian, American Indian or Alaska Native, Native Hawaiian or Other Pacific Islander, Two or More Races. Title variations of the seven races/ethnicities are acceptable. If an employee has not disclosed his or her race, determine his or her race visually.</p>
E	Gender	<p>Provide one of the following designations for each employee: male, female.</p>
F	Location Code	<p>Location codes and names are used to annotate employee work locations. Provide a location code (10 character limit) for each employee and ensure that each code identifies only one location name. If your import file does not contain location codes, but does contain location names, the software creates location codes.</p>
G	Location Name	<p>Location codes and names are used to annotate employee work locations. Provide a location name in the format of city and state (or identifying FAAP name) for each employee as you wish it to appear in your annotations. Provide the city and state of isolated employees who work at remote offices or at home. Provide only one location name per code and provide the location names in a consistent format throughout (e.g. if you have <i>DENVER CO</i> and <i>Denver, Colorado</i> location designations representing the same location, choose one format and assign it consistently to all employees at that location.) If you wish to distinguish sites within the same city (e.g. <i>Denver, CO Building A</i> and <i>Denver, CO Building B</i>), add identifying text of your liking and code the sites differently.</p>

Column	Header	Description
H	Department Code	Provide a department code (10 character limit) for each department name. Each department code should have only one department name. If you do not provide department codes, but do provide department names, the software creates the department codes.
I	Department Name	Provide the name of each employee's department or unit of supervision. Provide only one department name per department code and provide the names in a consistent format throughout (e.g. if you have <i>Accounting</i> and <i>Acctg</i> departments representing the same department, choose one or the other format and assign it consistently to all employees.)
J	Job Code	Provide a job code (10 character limit) for each job name. Each job code should have only one job name. If you do not provide job codes, but include job titles, the software creates them.
K	Job Name	Provide a job name (i.e. title) for each employee. Provide only one job name per job code and provide the job names in a consistent format throughout (e.g. if you have <i>Accountant</i> and <i>Acct</i> job titles representing the same position, choose one format and assign it consistently to all employees.) If you have more than one set of job titles to choose from in your HRIS, provide the more descriptive set of titles to develop more tailored placement goals.
L	EEO Code	Provide an EEO-1 (Private), an EEO-4 (Public) or an EEO-6 (Educational-IPEDS) code for each job. Each unique job code/title should be assigned only one EEO code. In other words, all instances of <i>Accountant</i> should be assigned the same EEO code.
M	Census Code 1	If you wish to select and import your census codes, provide from one to three census codes for each job using this field for the first and using columns N and O for the second and third census codes. Again, each job should be assigned the same census code(s), for example every instance of the job Accountant should have the same census code (usually 80 Accountants & Auditors in this specific example).
N	Census Code 2	Although only one census code per job is sufficient, you may provide up to three per job, using this field for the second.
O	Census Code 3	Although only one census code per job is sufficient, you may provide up to three per job, using this field for the third.
P	Job Group Code	Provide a job group code (10 character limit) for each job group name. Each job group code should have only one job group name. If you do not provide job group codes, but do provide job group names, the software creates job group codes.

Column	Header	Description
Q	Job Group Name	Job groups represent groups of jobs that have similar wages, responsibilities and opportunities for advancement. Provide a job group name for each job (rather than for each employee). Each job must be assigned only one job group (e.g. all instances of the title <i>Accountant</i> should be assigned the same job group). Provide only one job group name per job group code and provide the job group names in a consistent format throughout (e.g. if you have <i>Clerical</i> and <i>Clerical/Admin</i> job group titles representing the same job group, choose one of the two and assign it consistently to all jobs.) EEO categories can be used as Job Groups if your company has fewer than 150 companywide employees (i.e. all sites). If your company has 150 or more companywide employees, you should review the jobs by EEO category and determine if you should split them into groups that share similar wages, responsibilities and opportunities for advancement. For example, a <i>2-Professional</i> group can be split into <i>2A-Engineers</i> and <i>2B-Administrative Professionals</i> . If splitting the group is not feasible or if splitting the groups would result in statistically invalid groups of fewer than ten employees, at the very least provide job group names that do not exactly match EEO code titles.
R	Hire Date	Provide each employee's original hire date. (Rehire dates may be provided in the Date 1 field.)
S	Salary Code	If your company uses salary/wage <i>codes</i> , salary/wage <i>bands</i> , salary/wage <i>grades</i> or salary/wage <i>ranges</i> , provide one of up to ten characters for each employee. If your company does not have established salary grades, ranges or codes, provide nothing in this column.
T	Base Salary	Provide the annual pay of each employee, not including bonuses, overtime or other additional income. If you cannot provide annual base pay, provide the base hourly, weekly, bi-weekly, semi-monthly, or monthly monetary compensation, none of which should include bonuses, overtime or other additional income.
U	Salary Basis	If the amount shown in the Base Salary column is an annual rate, indicate an "A" in this column. If it is hourly, indicate "H." If it is weekly, indicate "W." If it is bi-weekly, indicate "B." If it is semi-monthly, indicate "S." If it is monthly, indicate "M."
V	Hours Worked per Week	Please include in this field the standard number of hours each employee is required to work per week.
W	Part-Time?	Indicate whether each employee works full time or part time. Do not provide the number of weekly work hours in this column. Provide a status of "PT" or "FT" for each employee based on your company's definitions.
X	Total Salary	Provide each employee's prior year earnings. Total pay should include base pay <u>plus</u> bonuses, overtime and any other additional income earned in the 12 months prior to your current AAP year.
Y	Supervisor's ID	Provide the employee ID of each employee's supervisor, ensuring that the supervisor ID matches an employee ID in the workforce data that you provide. If you do not provide all Supervisor ID's, the software will not accurately assign managers to departments, which means that your Organizational Display and annotated reports may not be in compliance.

Column	Header	Description
<b>Z</b>	<b>Annotation - Optional if Supervisors' IDs are provided</b>	If you want to create your own annotations, you may do so in the annotation field of your import file. Otherwise, the software assigns annotations by comparing each employee's location or plan code against his or her manager's location or plan code. All annotations you provide in this field take priority over any created by the software. For more information about annotations, please see the glossary and the <i>Edit Employees</i> section of Chapter 5.
<b>AA</b>	<b>SSEG Code</b>	Similarly Situated Employee Groupings represent groups of employees whose jobs are similarly situated. SSEGs are optional and provide an alternate method of analyzing the compensation of employees performing the same or substantially similar work.
<b>AB</b>	<b>Date 1</b>	Provide a date that your company deems a significant factor that affects pay. Examples include: date of last increase, rehire date, date in current job, etc.
<b>AC</b>	<b>Date 2</b>	Provide another date that your company deems a significant factor that affects pay. Examples include: date of last increase, rehire date, date in current job, etc.
<b>AD</b>	<b>Number 1</b>	Provide a numeric factor that your company deems significant in determining pay. Examples include: years of experience, tenure, years of education, education level, etc.
<b>AE</b>	<b>Number 2</b>	Provide a second, different numeric factor that your company deems significant in determining pay. Examples include: years of experience, tenure, years of education, education level, etc.
<b>AF</b>	<b>Number 3</b>	Provide a third, different numeric factor that your company deems significant in determining pay. Examples include: years of experience, tenure, years of education, education level, etc.

### Adverse Impact Data Requirements

The adverse impact data that you gather should include personnel activities from the year prior to your current AAP year. For example:

If your AAP dates are January 1, 2015 to December 31, 2015, your adverse impact reporting period is January 1, 2014 to December 31, 2014.

Gather the following activities to prepare compliant adverse impact analyses:

- Applicants
- Hires
- Promotions From (and Within)
- Promotions To
- Terminations
- Base Group\*

*\*The Base Group includes the employees who were in your workforce on the first day of the previous AAP year.*

Furthermore, each activity must be identified by:

- Plan code
- Activity code
- Job group code
- Job group name
- Gender
- Race

Transfers, layoffs and training are other activities for which you can run Adverse Impact reports, but OFCCP auditors rarely request them. If you wish to analyze other activities use the user-defined activity fields in the software's adverse impact import or **Adv. Impact** editing window. Instructions for formatting user-defined personnel activity are the same as those for other adverse impact activity.

Follow the instructions below to format your adverse impact data.

## Adverse Impact Import Template

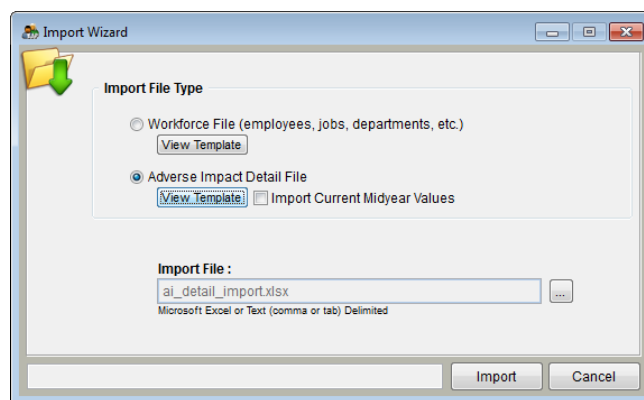
---

Follow the directions below to view the import template that shows the field order mandated by the software.

- 1) Click the **Import** icon.



- 2) Click **View Template** under **Adverse Impact Detail File**.





3) The following worksheet opens.

	A	B	C	D	E	F	G	H	I	J
1	Plan Code	Activity	Job Group Code	Job Group Name	Gender	Race	Job Code	Job Name	Requisition Code	Requisition Name
2										
3										
4										
5										
6										

*Adverse Impact Detail File Template*

## Importable Adverse Impact Fields

Below is a vertical rendering and description of the fields that appear in the adverse impact template.

**Detail File** -In a Detail Template, each row represents one activity for one individual.

Column	Header	Explanation
A	<b>Plan Code</b>	Pro users must include the alpha or numeric code (10 character limit) that allows the software to identify into which AAP activities should be imported. Other users must import a separate adverse impact file into the software for each AAP, but are not required to include plan codes. Though blank, the <b>Plan Code</b> column must remain.
B	<b>Activity Code</b>	Include a code or name of an activity, such as: applicant, hire, termination, promotion from, and promotion to. The software may ask you to define activities when you import.
C	<b>Job Group Code</b>	Include the job group codes into which employee or applicant titles were classified when the activity occurred.
D	<b>Job Group Name</b>	Include the job group names into which employee or applicant titles were classified when the activity occurred.
E	<b>Gender</b>	Provide one of the following designations for each employee: male, female. OFCCP allows unknown gender only for applicants. If an applicant or employee chooses not to identify his or her gender it is allowable to make a visual determination.
F	<b>Race</b>	Include the race or ethnicity of each applicant or employee. OFCCP allows unknown race only for applicants. If an applicant or employee chooses not to identify his or her race it is allowable to make a visual determination.
G	<b>Job Code</b>	Provide the job code of the individual. If your company does not have established job codes, leave this area blank.
H	<b>Job Name</b>	Provide the job title of the individual.
I	<b>Requisition Code</b>	If the record of an applicant or hire is associated with a requisition, please provide the requisition code.
J	<b>Requisition Name</b>	If the record of an applicant or hire is associated with a requisition, please provide the requisition name.

## *Gather Last Year's Goals*

---

The manner by which you gather last year's goals depends on how, if at all, your company's AAP was prepared last year. You should consider that:

- If your company did not have an AAP in place last year, you cannot determine progress made toward goals. You need not gather prior goals.
- If your company's prior AAP was not prepared using The Complete AAP software, have ready a printout of any report that displays total availability of females and minorities for all underutilized job groups. Common titles of such reports include: "Annual Goals," "Utilization Summary" and "Availability Analysis report".
- If your company's prior AAP was prepared using version 9, 10, or the current version of The Complete AAP, you can transfer the goals automatically. (Note: you must upgrade AAPs created in version 9 or 10 in order to use the current version's automatic goal transfer feature.)

Please proceed to Chapter 2.

# Chapter 2

Create an AAP Shell

## Create or Copy an AAP Shell

---

There are three ways to approach the creation of a new AAP in The Complete AAP. Determine which of the following best suits your circumstances and use only the corresponding instructions in this chapter to create your AAP:

- If your company does not have an AAP in place, or if your company has not previously used The Complete AAP to prepare an AAP, follow the instructions to *Create a New Company with No Data*.
- If your company prepared its last AAP in version 11 of The Complete AAP, follow the instructions in the *Copy the Company and Prepare Adverse Impact and Goals Progress for New Year* section of this chapter. This option transfers prior year base group totals into the adverse impact table and Goals Progress table and transfers the prior year goals into the Goals Progress table. This option also retains other helpful information that cuts down on the work involved in preparing your AAP.
- The option to *Create an Exact Copy of A Company* is useful if you wish to create different reporting scenarios.

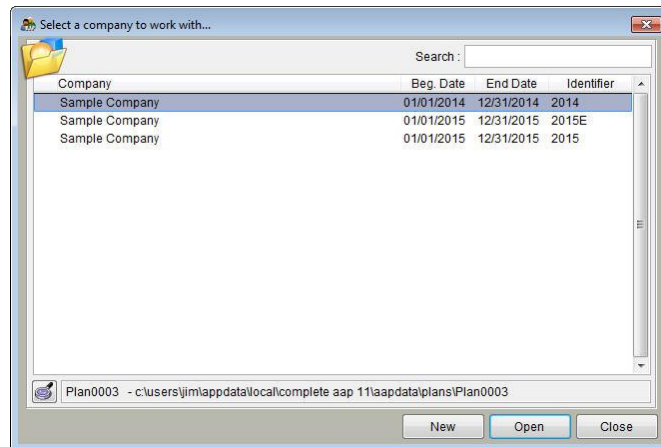
After you determine which method is suitable for your circumstances, follow the appropriate instructions in this chapter, and then advance to Chapter 3.

## Create a New Company with No Data

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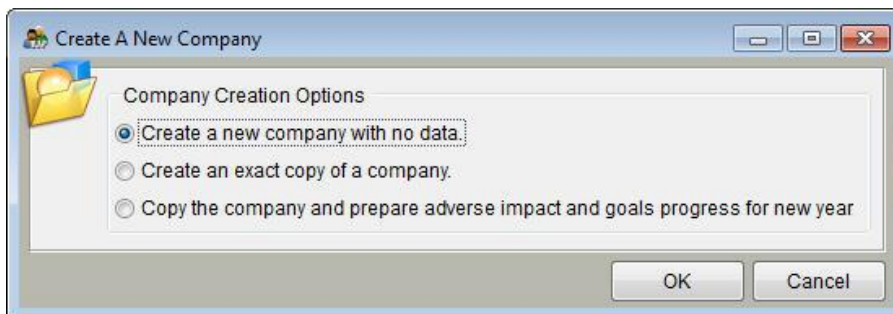
The *Create a New Company with No Data* instructions are best for companies that have never had their AAPs completed in The Complete AAP software.

- 1) Launch The Complete AAP.
- 2) In the **Select a company to work with** window, click **New**.



*If a Select a company to work with window similar to the one shown above does not appear upon login, access it by clicking the Company icon. Your software list may be different, and have more or fewer AAPs.*

- 3) Select **Create a new company with no data**.



- 4) Click **OK**.

- 5) In the **Company Information** window that appears, provide the following:
  - a) Your company name.
  - b) A unique identifier (An identifier helps differentiate your AAPs one from another.)
  - c) Effective and end dates.
  - d) An EEO type. Unless your company is a government or education agency, choose **Private**.
  - e) Indicate whether automatic annotations should be based on plan codes or location codes. (See Chapter 5 for an explanation of annotations).

- 6) Click **OK**. If you are not using the Pro version, skip to step 8.



- 7) There are two ways to add multiple AAPs to your company shell in The Complete AAP's Pro version. You may let the software create the AAPs by plan code when workforce data is imported, or you may create the AAP shells prior to importing data. Follow steps a through c below for each AAP if you wish to create AAP shells prior to importing.

- a) Click the **Open Plan** icon.
  - b) Click the **Create a New Plan** button.
  - c) Proceed to step 8a.

- 8) Select **File** from the main menu and then select **Plan Information**.

- a) **General Info Tab** – The Complete AAP assigns sequential numbers as plan codes; only Pro users may change these. All users may assign plan names. Plan identifiers do not appear on reports and are not required, but all users may assign them for the purpose of differentiating your AAPs. All users should type the address, city, state and zip code, which appear in the header of each published AAP report.

Plan Information

General Info Narrative Info AAP Cover Page

Plan Code : DEN

Plan Name : Sample Company Denver, CO

Plan Identifier : SCDEN

Address Line 1 : 15401 West 9th Avenue

Address Line 2 :

City : Golden

State : CO

Zip : 80401

Previous Plan : [Select a Plan](#) [Clear](#)

☐ Force this plan to be a "base" plan when using the rollop feature.

Delete OK Cancel

- b) **Narrative Info Tab** - Type in all available narrative information, which will appear throughout the published AAP narrative. Regulations require that an executive officer be named for each AAP. Exclusion of data in the **Executive Officer, Executive Officer's Title, EEO Coordinator, EEO City** and **EEO State** fields will cause awkward verbiage and punctuation in the published narrative.

Plan Information

General Info Narrative Info AAP Cover Page

Executive Officer : Ms. Jacqueline Kennedy

Executive Officer's Title : President

Dun & Brad # : 123456

EIN : 1234-5

EEO-1 # : 987654

EEO Coordinator : Ms. Sandra Day O'Conner

EEO Email :

EEO Company : Sample Company

EEO Address : 15401 West 9th Avenue

EEO City : Golden

EEO State : CO

EEO Zipcode : 80401

Parent Company :

Parent Dun & Brad # :

Parent EIN :

Parent EEO-1# :

Delete OK Cancel

- c) **AAP Cover Page** - Using the browse button to the right of the **Logo** box, select your logo file. A preview of the logo will appear in the large box in the bottom half of the window.

Plan Information

General Info Narrative Info AAP Cover Page

Plan Name :

Plan Name Line 2 :

Logo : C:\USERS\JIM\APPDATA\LOCAL\COMPLETE AAP 11\AAPDATA\PLANS\PLAN0001\SL [Browse](#)

Max logo dimensions : 728w x 188h ( .jpg .gif .bmp .wmf .tif )

Sample Company

Delete OK Cancel

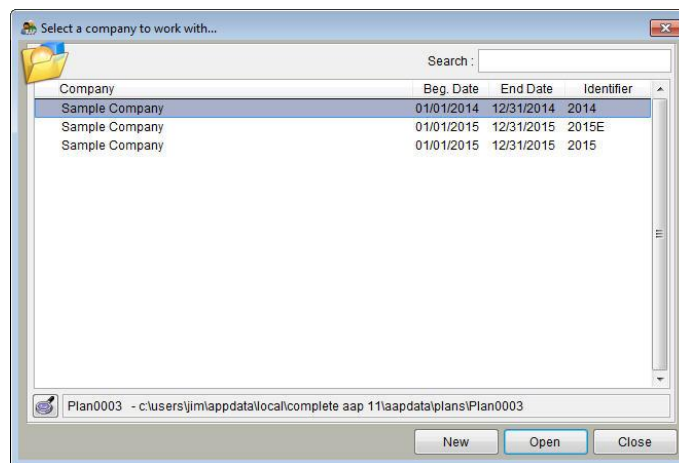
d) Click **OK**.

Your next step is to format the data that you gathered per the instructions in Chapter 1. Advance to Chapter 3.

### *Copy a Company and Prepare Adverse Impact and Goals Progress for New Year*

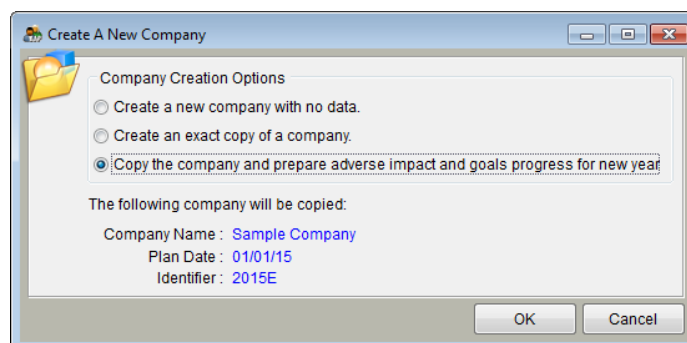
---

- 1) Launch The Complete AAP.
- 2) In the **Select a company to work with** window, click once on the AAP that you wish to copy and then click **New**.



*If a Select a company to work with window similar to the one shown above does not appear upon login, access it by clicking the Company icon. Your software list may be different, and have more or fewer AAPs.*

- 3) In the **Create a New Company** window, click **Copy the company and prepare adverse impact and goals progress for new year**.



- 4) Click **OK**.



- 5) Verify that the information is correct in the **Copy a Company** window that appears.

The screenshot shows a window titled "Copy A Company". Inside, there is a "Company Name" field with "Sample Company" entered. Below it is an "Identifier" field with "2015W" entered, with a note "(optional - up to 10 characters)". Then there are "Effective Date" and "End Date" fields with calendar icons, showing "01/01/2015" and "12/31/2015" respectively. Under "EEO Type", there are three radio buttons: "EEO-1 (Private)" (selected), "EEO-4 (Public)", and "Educational - IPEDS". To the right, under "Annotate Employees Based On", there are two radio buttons: "Plan Codes" (selected) and "Location Codes". At the bottom, there is a section "Optional Fields For Salary Analysis Report" with several checkboxes and corresponding text boxes for "Date Field #1 Name", "Date Field #2 Name", "Number Field #1 Name", "Number Field #2 Name", and "Number Field #3 Name". At the very bottom are "OK" and "Cancel" buttons.

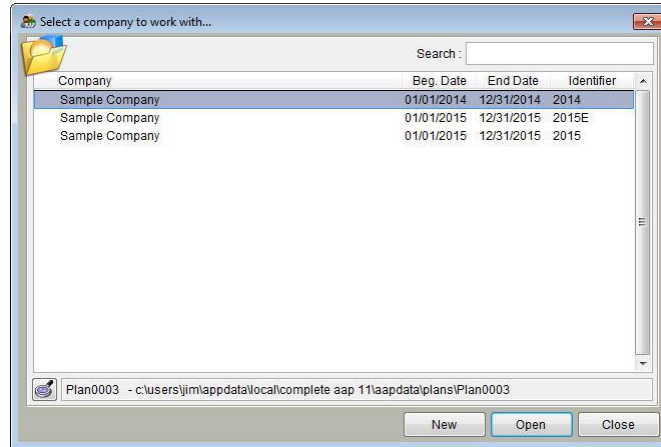
- 6) Review and overwrite applicable information:
- a) Update the company name.
  - b) Update the identifier (An identifier helps differentiate your AAPs one from another.)
  - c) Review effective and end dates.
  - d) Review the selected EEO type. Unless your company is a government or education agency, choose **Private**.
  - e) Indicate whether automatic annotations should be based on plan codes or location codes.
- 7) Click **OK**.

Your next step is to format the data that you gathered per the instructions in Chapter 1. Advance to Chapter 3.

## Create an Exact Copy of a Company

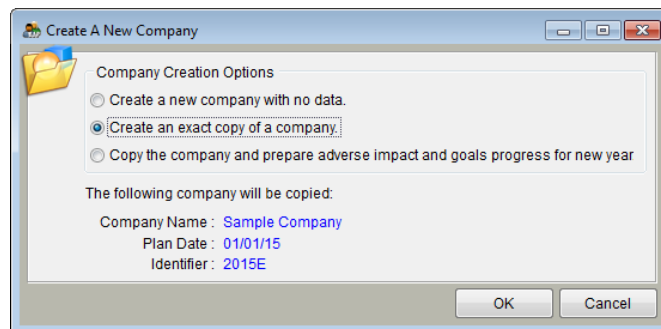
---

- 1) Launch The Complete AAP.
- 2) In the **Select a company to work with** window, click once on the company that you wish to copy.



*If a Select a company to work with window similar to the one shown above does not appear upon login, access it by clicking the Company icon. Your software list may be different, and have more or fewer AAPs.*

- 3) Click **New**.
- 4) Click **Create an exact copy of a company**.



- 5) Click **OK**.

- 6) Review and overwrite applicable information:
- Update the company name.
  - Update the identifier (An identifier helps differentiate your AAPs one from another.)
  - Review effective and end dates.
  - Review the selected EEO type. Unless your company is a government or education agency, choose **Private**.
  - Indicate whether automatic annotations should be based on plan codes or location codes.

Company Information

Company Name  
Sample Company

Identifier (optional - up to 10 characters)  
2015

Effective Date  
01/01/2015

End Date  
12/31/2015

EEO Type  
☒ EEO-1 (Private)  
☐ EEO-4 (Public)  
☐ Educational - IPEDS

Annotate Employees Based On  
☒ Plan Codes  
☐ Location Codes

Optional Fields For Salary Analysis Report

<input type="checkbox"/> Enable user-defined date field #1	Date Field #1 Name	
<input type="checkbox"/> Enable user-defined date field #2	Date Field #2 Name	
<input type="checkbox"/> Enable user-defined number field #1	Number Field #1 Name	
<input type="checkbox"/> Enable user-defined number field #2	Number Field #2 Name	
<input type="checkbox"/> Enable user-defined number field #3	Number Field #3 Name	

OK Cancel

- 7) Click **OK**.

Your next step is to format the data that you gathered per the instructions in Chapter 1. Advance to Chapter 3.

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# Chapter 3


## Format Your Data

## Format Your Workforce Data for Import

---

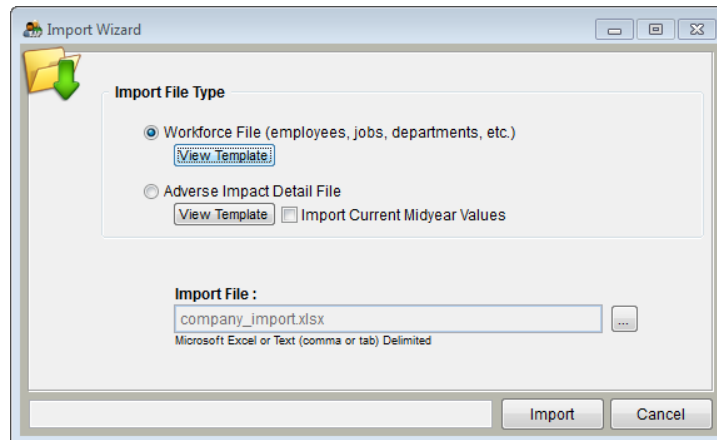
### *Detailed Formatting Steps:*

---

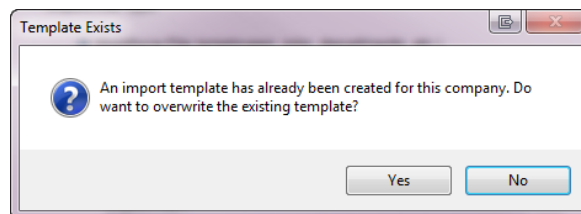
- 1) Open your workforce file in a spreadsheet application.
- 2) Launch The Complete AAP and open the company into which you wish to import.
-  3) Pro users must then open an AAP.
- 4) Click on the **Import** icon.



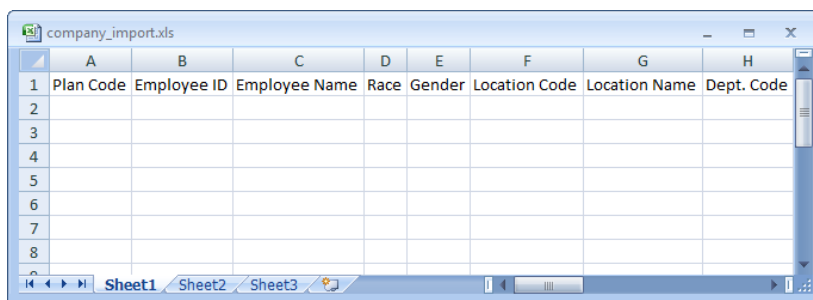
- 5) Click the **View Template** button under **Workforce File**.



- 6) The following window may appear.



- a) Click **Yes** if you wish to work with a blank template.
  - b) Click **No** if you wish to edit the data you previously entered on the template and saved in the default location described in the next step.
- 7) A spreadsheet will open.



*Example of Blank Workforce Template.*

8. The file is automatically saved in a folder (default is **drive:\Complete AAP 11\AapData\plans\PlanXXXX\import**) within the open company as “company\_import.xlsx” in Excel Workbook format (Excel 2007). You may change the name of the file, and though not recommended, you may relocate the file. We recommend that you retain the Excel Workbook format (Excel 2007).

9. Copy and paste data values\* from your workforce file into the appropriate columns in the company\_import.xlsx file. The software requires the data to be imported in the order shown in the template. You may retain row one (1) as the header row.

\* Formulas not allowed.

10. Review your import file to ensure that all data that you wish to import is present on a single tab and that there are no blank rows between data.

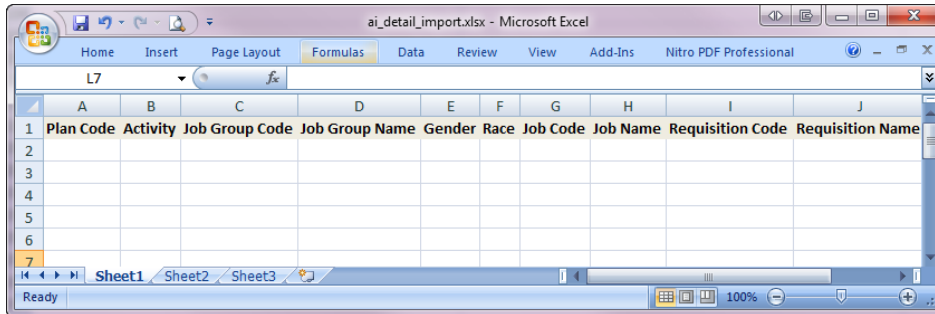
11. If you are not using the Pro version, separate data for multiple AAPs into individual files. Pro version users may import workforce data for multiple AAPs at one time if the plan codes and names are identified in the workforce file.

12. Save your changes.


Proceed to the adverse impact formatting steps in this chapter. If you have no adverse impact data to import, proceed to Chapter 4.

## Format Your Adverse Impact Data for Import

The Detail File, an example of which is shown below, lists one person's record per row in a spreadsheet. The file must contain data in only columns A through J in the following order: Plan Code, Activity Code, Job Group Code, Job Group Name, Gender, Race, Job Code, Job Name, Requisition Code and Requisition Name.

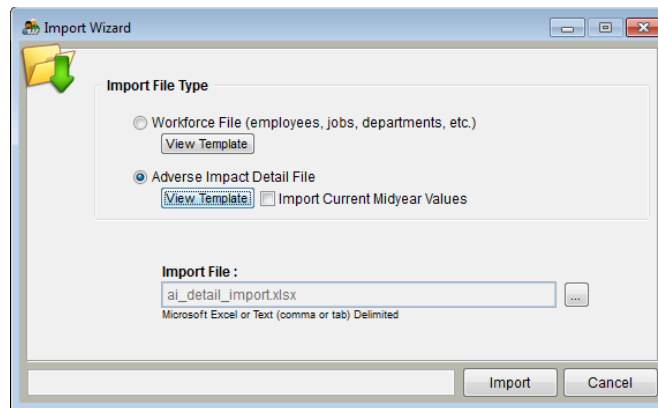


### Detailed Formatting Steps:

- 1) Open the file or files that contain the prior year's activities: applicant, hire, promotion from / within, promotion to and termination data.
- 2) Open the file that contains prior year base group if you wish to import them.
- 3) Launch the Complete AAP and open the company into which you wish to import.
-  4) Pro users must then open an AAP.
- 5) Click on the **Import** icon.

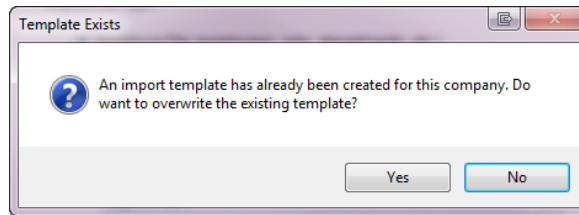


- 6) Click the **View Template** button under **Adverse Impact Detail File**.



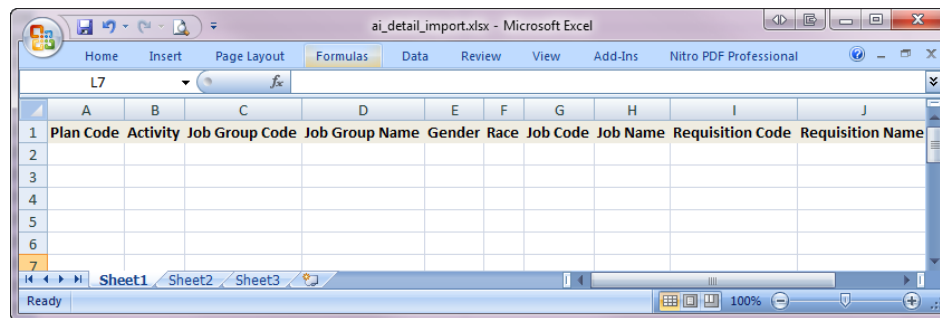


7) The following window may appear.



- c) Click **Yes** if you wish to work with a blank template.
- d) Click **No** if you wish to edit the data you previously entered on the template and saved in the default location described in the next step.

8) A spreadsheet will open.



*Example of Blank Adverse Impact Template.*

9) The file is automatically saved in a folder (default is **drive:\Complete AAP 11\AapData\plans\PlanXXXX\import**) within the open company as **ai\_detail\_import.xlsx** in Excel Workbook format (Excel 2007). You may change the name of the file, and though not recommended, you may relocate the file. We recommend that you retain the Excel Workbook format (Excel 2007).

10) Copy data from your activity files and paste the values\* into the template.

\*Formulas not allowed.

11) Review your import file to ensure that all data (see Chapter 1) that you wish to import is present on a single tab and that there are no blank rows between data.

12) If you are not using the Pro version of The Complete AAP, separate data for multiple AAPs into individual workbooks.



13) Pro version users may include adverse impact data for multiple AAPs in one spreadsheet as long as the plan codes are identified in the adverse impact file.

14) The adverse impact data does not roll up with the employee data when you use the **Roll up Plans** utility. If you wish to use the **Roll up Plans** utility, be certain to include the personnel activities in the appropriate AAPs' adverse impact import file.

After you format your files, proceed to Chapter 4 to begin importing workforce and adverse impact data.

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# Chapter 4

## Import Workforce and Adverse Impact Data

## Import Workforce

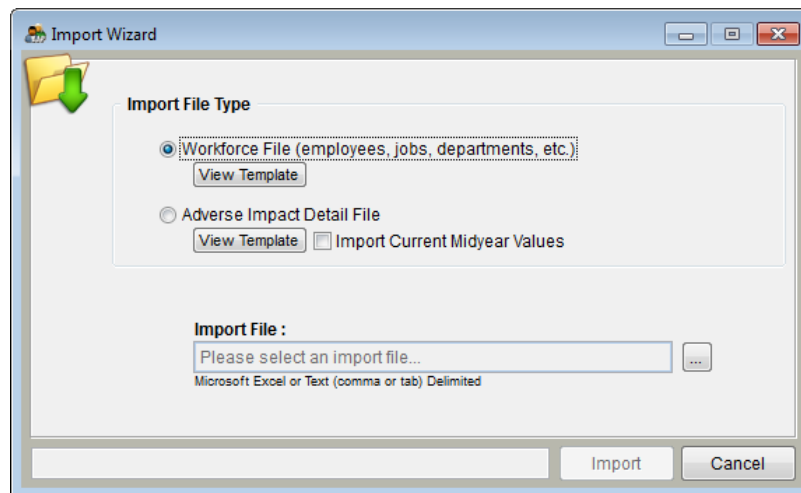
---

Follow the Import instructions on this page to import your workforce. Pro users may include workforce data for all AAPs in one company in the same import file.

- 1) Launch The Complete AAP.
- 2) Open the company into which you wish to import
-  3) Pro users must also open an AAP or must click on **Work with All Plans**, which requires fewer steps.
- 4) Click the **Import** icon.



- 5) Click the **Workforce File** button if it is not selected.
- 6) The **Import File** box displays the location of your **company\_import.xlsx** file. If your import file is not mapped correctly, click the browse (...) button to locate and select it.

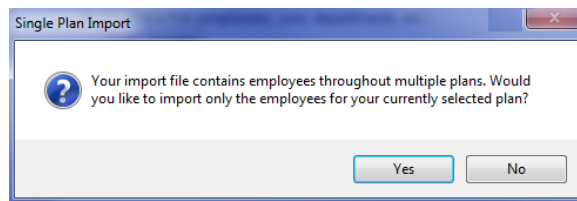


- 7) After you select the file, its path will appear in the **Import File** box.
- 8) Click **Import**.

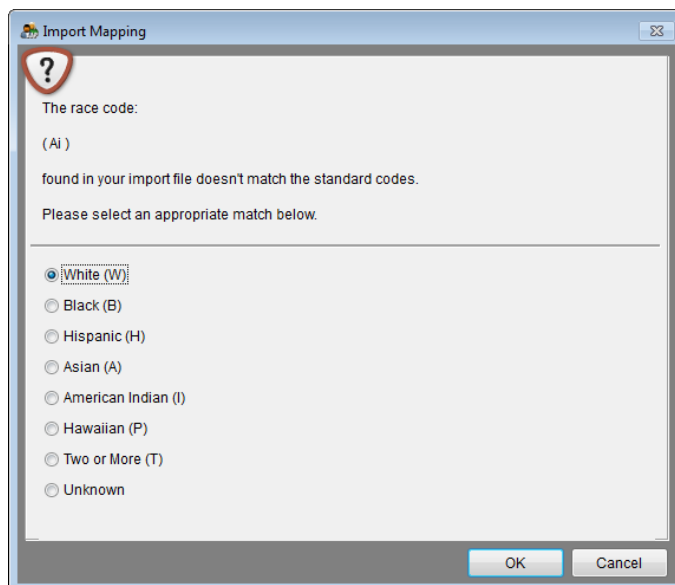
PRO

9) Pro users may get the message shown below.

- Click **No** to import all AAPs and/or locations.
- Click **Yes** if you wish to import data for only the AAP you have open.

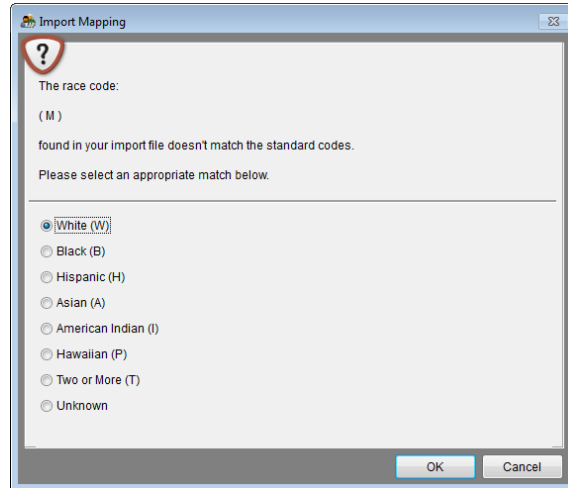


10) The software may ask you to clarify some information such as race, EEO and gender codes. Read and respond to each **Import Mapping** window as it appears. An example is shown below.



- a) Read the statement.
- b) Select the appropriate entry in the category.
- c) Click **OK**.

- 11) If the software asks you to clarify information that does not seem to correlate to the information below it, you will need to cancel your import and correct your import file. For example, if “M” for “Male” is shown at top, but race information is shown at bottom, the import file has race data in the gender column. After correcting your import file, start the import process again.



- 12) When the import is complete, the **Select A Plan** window will appear. If you are not using the Pro version, please proceed to the *Import Adverse Impact Data* section of this chapter or to Chapter 5 if you have no adverse impact data to import. Pro users, please continue to step 14.

PRO

- 13) If you have small AAPs that need to be rolled into a larger AAP we recommend performing the roll up at this time.
- a) Open an AAP or select **Work with All Plans**.
  - b) Click **Utilities** and then **Roll up Plans**.
  - c) Set the minimum AAP size if you want a different threshold than 50.
  - d) Click **OK**.
  - e) Click **Open Plan** to confirm that all small AAPs were rolled up.
  - f) If employees remain in a small AAP, check the employee data for missing or incorrect supervisor information. Correct the supervisor information and follow these *Roll up Plans* steps again.

Proceed to the *Import Adverse Impact Data* section of this chapter, or proceed to Chapter 5 if you have no adverse impact data to import.

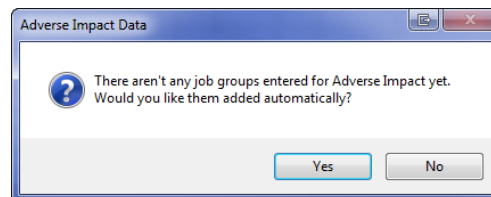
## Import Adverse Impact Data

Before you begin the process of importing your adverse impact data, visit the adverse impact window to ensure that base group and reporting dates are present. To do so, click the **Adv. Impact** icon.

If the message in the image shown below does not appear on your screen, review the totals in the **Base Group** tab of the adverse impact window and review the dates for accuracy. Correct the totals by manually overwriting them using your keyboard. When all are correct, proceed to *Import Adverse Impact* in this chapter.

If the message shown below does appear on your screen, you currently do not have Base Group or AAP dates entered.

- If your prior AAP was not completed in The Complete AAP, follow the *Enter Base Group and Plan Dates* instructions below to enter the necessary data.
- If your previous AAP was completed in The Complete AAP, click **No** and follow the *Import Workforce Data from Previous AAP* instructions in this chapter to automatically transfer the necessary data.

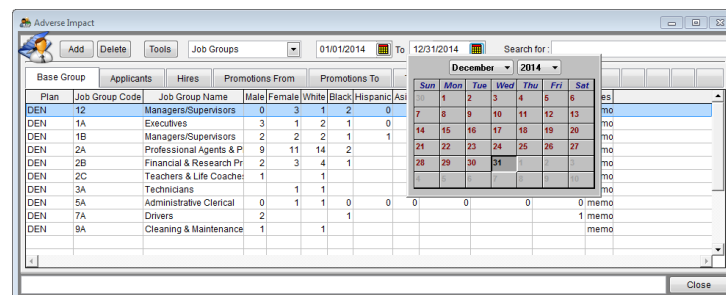


### Enter Base Group and Plan Dates

- 1) Click **Yes**.
- 2) Type or update the dates. The dates should be exactly one year prior to your current AAP year.

Example:

If current AAP year is January 1, 2015 to December 31, 2015 your adverse impact dates will be January 1, 2014 to December 31, 2014.



*Double-click on date to close calendar.*

- 3) Click the **Base Group** tab and type the male, female, White, Black, Hispanic, Asian, Am. Indian, Pac/Hawaiian, and Two or More totals of all employees who were working as of the start date of the reporting period.

If you will be importing adverse impact data but have no previous plan from which to draw base group data you may utilize the job group totals from the current workforce. Click on **Tools** and then select **Transfer Workforce Data From This Plan**.

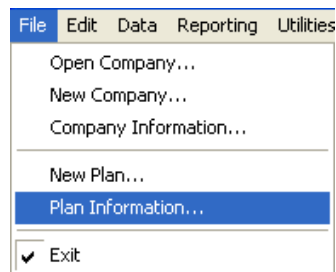
- 4) Close your adverse impact window and proceed to the *Import Adverse Impact* section of this chapter.

### *Import Workforce Data from Previous AAP*

---

Transfer the base group from the previous AAP by following the steps below. Have the current AAP open before performing the following steps. Pro users must perform the following steps within each individual AAP.

- 1) Click **File** and then **Plan Information**.

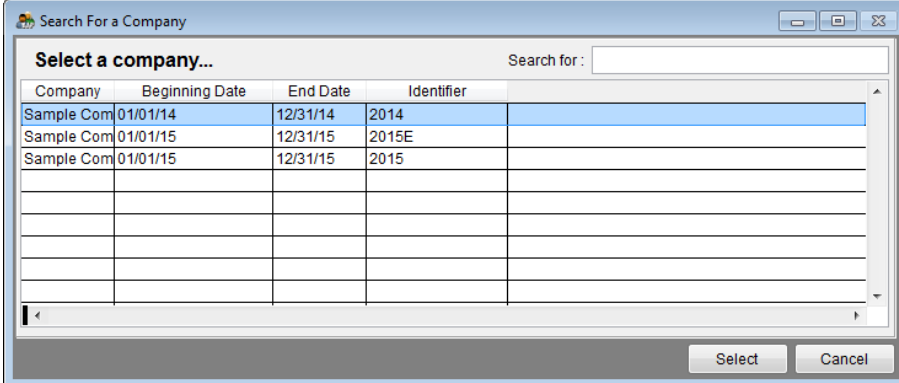


- 2) Click the **Select a Plan** button beside **Previous Plan**.

A screenshot of the 'Plan Information' dialog box. It has three tabs: 'General Info' (selected), 'Narrative Info', and 'AAP Cover Page'. The 'General Info' tab contains several text input fields: 'Plan Code' (DEN), 'Plan Name' (Sample Company Denver, CO), 'Plan Identifier' (SCDEN), 'Address Line 1' (15401 West 9th Avenue), 'Address Line 2' (empty), 'City' (Golden), 'State' (CO), and 'Zip' (80401). Below these is a 'Previous Plan' section with a 'Select a Plan...' button and a 'Clear' button. At the bottom, there is a checkbox labeled 'Force this plan to be a "base" plan when using the rollup feature.' and three buttons: 'Delete', 'OK', and 'Cancel'.



- 3) In the **Search for a Company** window that appears, highlight the company from which you wish to transfer data and then click **Select**.

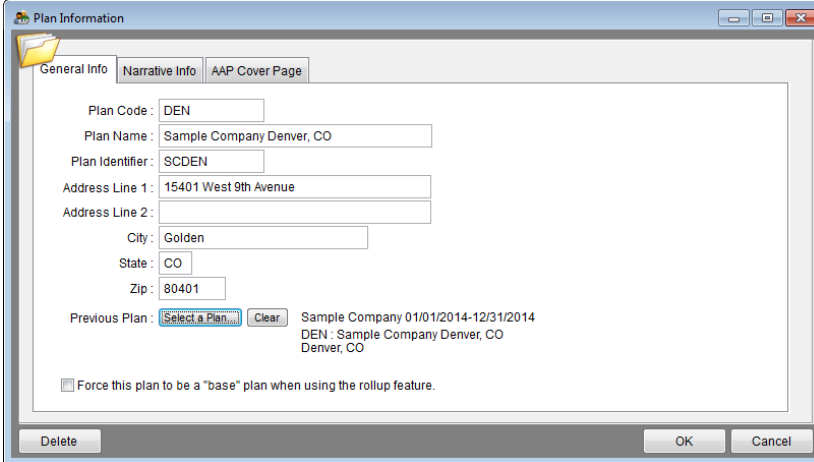


The "Search for a Company" window displays a table with the following data:

Company	Beginning Date	End Date	Identifier
Sample Com	01/01/14	12/31/14	2014
Sample Com	01/01/15	12/31/15	2015E
Sample Com	01/01/15	12/31/15	2015

Buttons at the bottom: Select, Cancel

- 4) In the **Search for a Plan** window that appears next, highlight the AAP from which you wish to transfer data and then click **Select**.



The "Plan Information" window shows the following details:

- Plan Code: DEN
- Plan Name: Sample Company Denver, CO
- Plan Identifier: SCDEN
- Address Line 1: 15401 West 9th Avenue
- Address Line 2:
- City: Golden
- State: CO
- Zip: 80401

Buttons: Select a Plan..., Clear

Previous Plan: Sample Company 01/01/2014-12/31/2014  
DEN : Sample Company Denver, CO  
Denver, CO

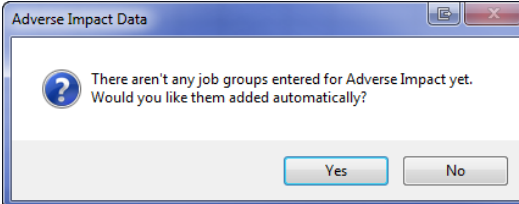
☐ Force this plan to be a "base" plan when using the rollout feature.

Buttons at the bottom: Delete, OK, Cancel

- 5) Click **OK** to exit the **Plan Information** window.
- 6) Click the **Adv. Impact** icon.



- 7) Click **No** when the following message appears.

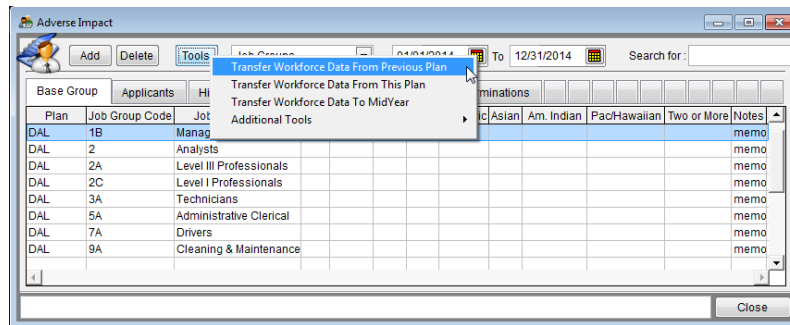


The "Adverse Impact Data" dialog box contains the following text:

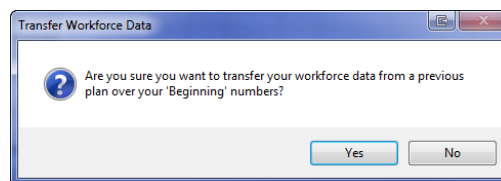
There aren't any job groups entered for Adverse Impact yet.  
Would you like them added automatically?

Buttons: Yes, No

- 8) Click **Tools** and then **Transfer Workforce Data from Previous Plan**.



- 9) Click **Yes** when the following message appears.



- 10) Click **Close**.

Precede to the *Import Adverse Impact* steps in this chapter.

### *Import Adverse Impact*

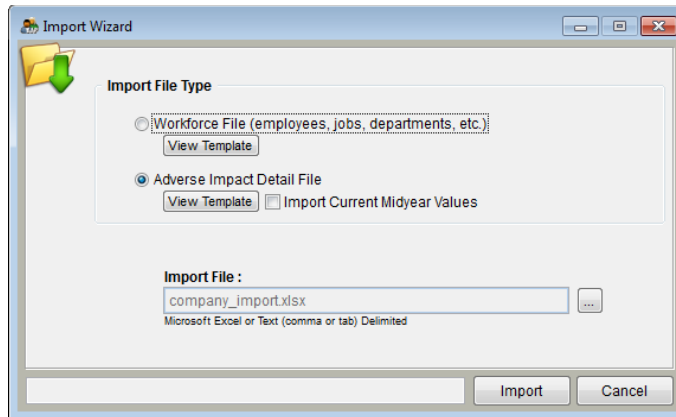
If you have not already formatted your **Adverse Impact Detail File**, please refer to *Chapter 3*. You must format your file before importing. Have the appropriate AAP open before performing the following steps. Pro users may import using the **Work with All Plans** option, or you may import into one AAP at a time. To import, have no windows open in The Complete AAP, and follow the steps below.

Follow these steps to import:

- 1) Click the **Import** icon.

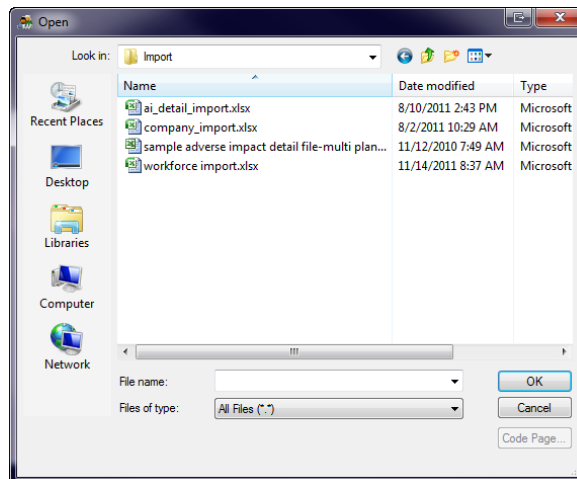


- 2) Click the **Adverse Impact Detail File** button if it is not selected.



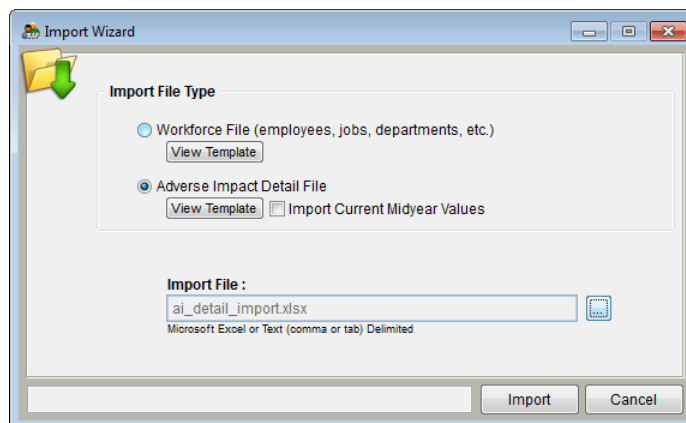
3) The **Import File** box displays the location of your **ai\_detail\_import.xlsx** file. If your import file is not mapped correctly, click the browse (...) button to locate it.

a. Use the **Look in** pull-down menu to indicate the drive where your file is stored.

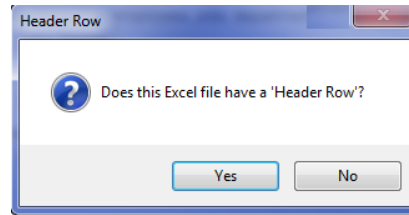


b. Select your **Adverse Impact Detail File** and then click **OK**.

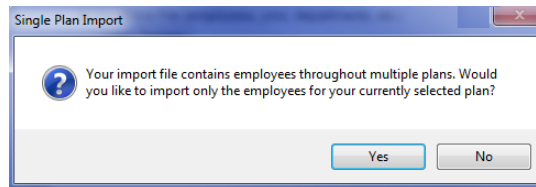
c. You'll see your path appear in the **Import File** box.



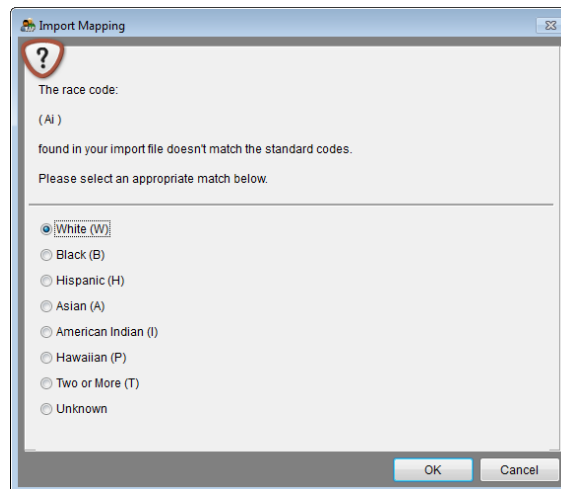
- 4) Click **Import**.
- 5) If it applies, click **Yes** when you see the following message. Skip to step 7 if you are not using the Pro version.



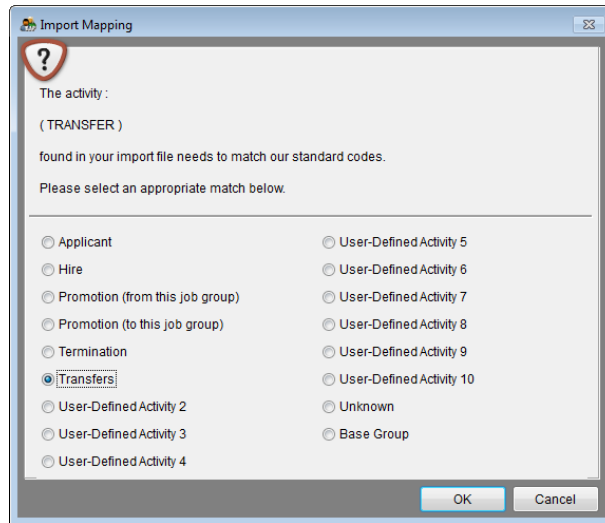
- 6) Pro users may see the following message.
  - Click **No** to import all AAPs and/or locations.
  - Click **Yes** if you wish to import data for only the AAP you have open.



- 7) The Complete AAP might ask you to clarify information what it does not recognize. These are not errors. Do not cancel the import.
  - a) Identify the item that is in question.
  - b) Select the correct corresponding selection from the provided list.



- 8) Click **OK**.
  - a) If the software asks you to clarify unknown or blank race or gender information, select the **Unknown** option.
  - b) If importing transfers (as shown in the illustration below) or any other user-defined activity, select one user-defined button for each activity.



- 9) When the import is complete click the **Adv. Impact** icon.
- 10) If dates are not populated, type dates in the date boxes or use the calendar to select them.
- 11) If the **Base Group** of each job group is not populated, type totals for males, females, Whites, Blacks, Hispanics, Asians, American Indians, Pacific Islanders/Hawaiians and Two or More.
- 12) Review the **Applicant, Hires, Promotions From, Promotions To** and **Terminations** tabs to verify that the data imported correctly.
- 13) If you wish to change some of the data, it is recommended that you make the changes manually or remove data and re-import the corrected data. The Complete AAP adds to existing totals.
- 14) Proceed to Chapter 5.

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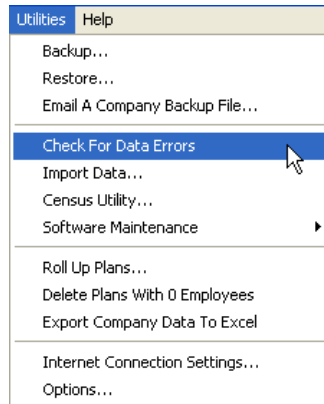
# Chapter 5

Add, Edit and Delete Data to  
Eliminate Errors

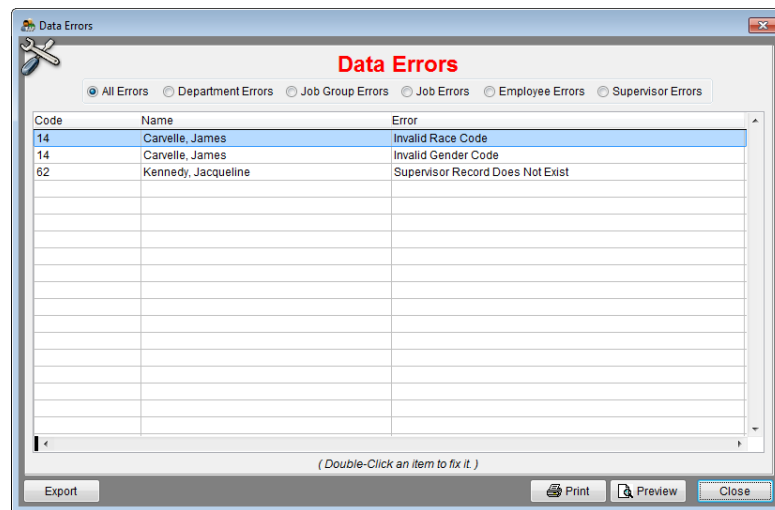
## Check for Data Errors

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- 1) Check for data errors after importing your data by selecting **Utilities** and then **Check for Data Errors**.



- 2) If your AAP has data errors, a window with the list of errors will appear. You may print the list and check off the items as you address them while reading through this chapter, or you may double-click items on screen to fix them as you read through the chapter.



Even if you have no data errors, you are encouraged to read through this chapter before proceeding to Chapter 7, which contains information about compliance issues.

Close your **Data Error List** before proceeding with the instructions in this chapter.



## Edit Locations

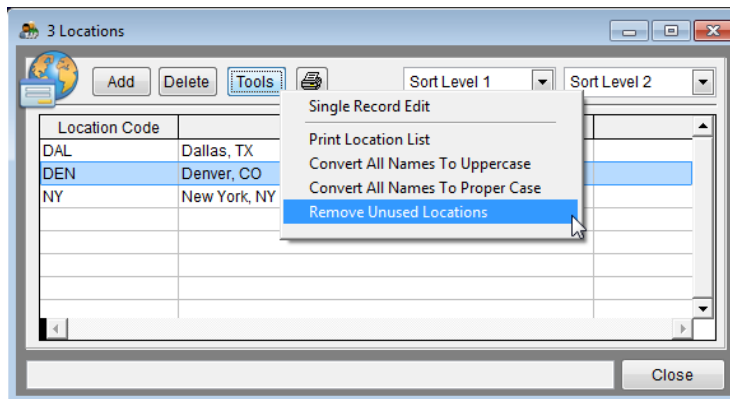
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The **Locations** table will not generate errors, however, it is recommended that you review it for typos, missing location titles, and unused locations.

- 1) Click the **Locations** icon.



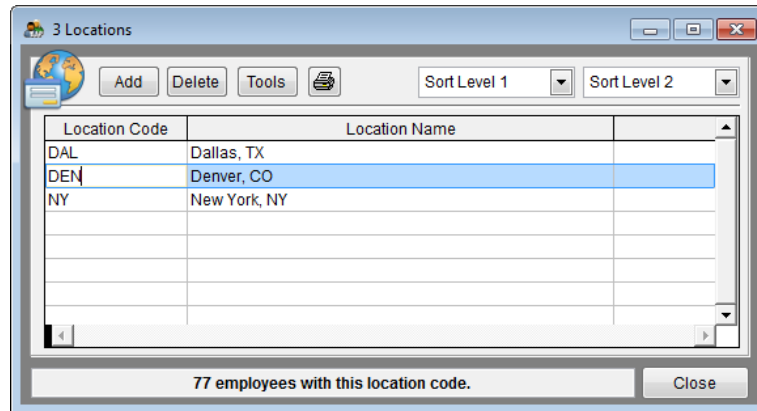
- 2) Type missing location codes.
- 3) Type missing location names.
- 4) Fix typos or mistakes:
  - a) Select the text that you want to change.
  - b) Type the correct text.
- 5) Delete blank records.
  - a) Select **Tools** and then **Remove Unused Locations** to delete unassigned locations.



6) To add a single location, click **Add**, and then type a location code and its name.

PRO

- a) If a Company in the Pro version contains multiple AAPs, the locations for all AAPs are shown in the location table.



- 7) To delete a single location, select the location and then click **Delete**.
- Confirm the deletion.
  - Reassign employees if necessary.
- 8) Click **Close**.

Continue reading to edit your data or to eliminate remaining errors.

## Edit Departments

The following items in the Departments table cause data errors that may affect reporting results:

- Missing department codes
- Missing department names

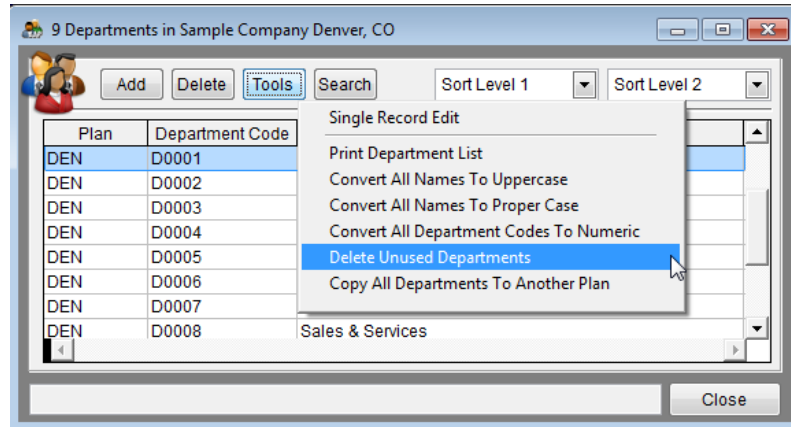
## Eliminate Department Errors

- 1) Click the **Departments** icon.



- Type missing department codes.
- Type missing department names.
- Fix typos or mistakes:

- a) Select the text that you want to change.
  - b) Type the correct text.
- 5) Delete blank records.
- a) Select **Tools** and then **Delete Unused Departments** to delete unassigned departments.



- 6) To add a single department, click **Add** and then type a department code and its title.
- a) Pro users should also type the plan code of the Department if working with all AAPs.
- 7) To delete a single department, select the department and then click **Delete**.
- a) Confirm the deletion.
  - b) Reassign employees if necessary.
- 8) Close the **Departments** window.

Continue reading to edit your data or to eliminate remaining errors.

## Edit Job Groups

The following items in the **Job Groups** table cause data errors that may affect reporting results:

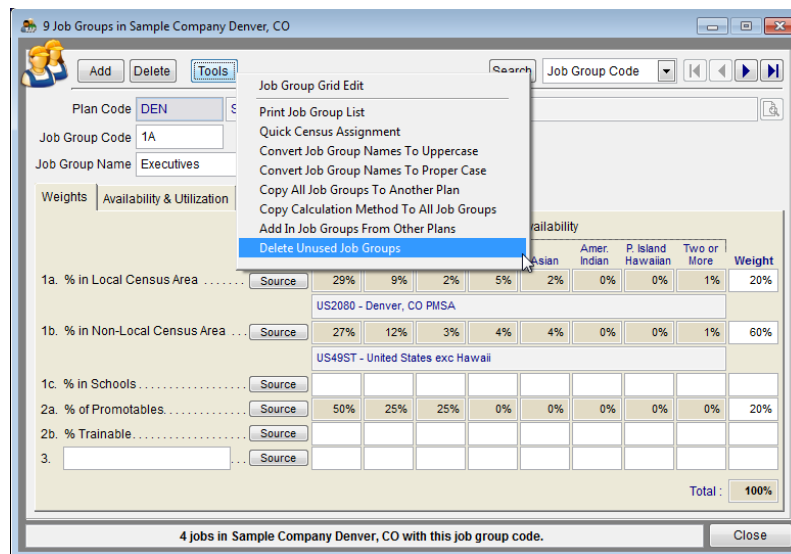
- Missing job group codes
- Missing job group names
- Missing local census area
- Missing non-local census area
- Missing weight
- Weights not totaling 100%

## Eliminate Job Group Errors

- 1) Click the **Job Groups** icon.



- 2) Type missing job group codes.
- 3) Type missing job group names.
- 4) Fix typos or mistakes:
  - a) Select the text that you want to change.
  - b) Type the correct text.
- 5) Delete blank records:
  - a) Select **Tools** and then **Remove Unused Job Groups**.
  - b) If job groups remain that you believe are unused, click the **Jobs** icon, remove unused jobs, return to job groups, and repeat step 5a.



	Asian	Amer. Indian	P. Island	Two or More	Weight
1a. % in Local Census Area	29%	9%	2%	5%	20%
1b. % in Non-Local Census Area	27%	12%	3%	4%	60%
1c. % in Schools					
2a. % of Promotables	50%	25%	25%	0%	20%
2b. % Trainable					
3.					
<b>Total</b>					<b>100%</b>

- 6) To add a single job group, click **Add** and then type a job group code and its title.

**PRO**

If working with all AAPs, Pro users should also type the plan code of the job group.

- 7) To delete a single job group, select the job group and then click **Delete**.
  - a) Confirm deletion.
  - b) Reassign jobs if necessary.
- 8) Assign weights and statistical sources to your recruiting factors by following the steps in the *Assign Weight to Your Recruiting Factors* and *Determine Availability* sections in this chapter.

## Assign Weight to Your Recruiting Factors

Your company's annual goals are determined by comparing the utilization of females and minorities against the availability that is calculated in the **Job Groups** table. The availability of each job group is based on the methods used to recruit employees. Set the recruiting methods in the **Job Groups** table by assigning weight to the various recruiting factors. You may weight as many factors as are appropriate for each job group.

- 1) Click the **Job Groups** icon and use the left blue arrow to find the first job group in the table.
- 2) Using your keyboard, assign weight to the first factor that is relevant to the given job group.

9 Job Groups in Sample Company Denver, CO

Plan Code: DEN Sample Company Denver, CO

Job Group Code: 1A

Job Group Name: Executives

Weights | Availability & Utilization | Notes

Unweighted Availability

	Female	Minority	Black	Hispanic	Asian	Amer. Indian	P. Island Hawaiian	Two or More	Weight
1a. % in Local Census Area	29%	9%	2%	5%	2%	0%	0%	1%	25%
US2080 - Denver, CO PMSA									
1b. % in Non-Local Census Area	27%	12%	3%	4%	4%	0%	0%	1%	40%
US49ST - United States exc Hawaii									
1c. % in Schools									
2a. % of Promotables	50%	25%	25%	0%	0%	0%	0%	0%	35%
2b. % Trainable									
3.									
Total:									100%

4 jobs in Sample Company Denver, CO with this job group code.

Close

- 3) Use your tab key to move to and assign weight to each relevant factor until a total weight of 100% is reached. If only one factor is used, assign 100% to it.
- 4) Repeat steps 2 and 3 until weight has been assigned to all applicable factors for all job groups.

After all factors have been assigned weight, proceed to the *Determine Availability* section of this chapter.

## Determine Availability

### Factors 1a and 1b

The availability of females and minorities in factors 1a and 1b is determined by the census areas and job census codes selected. Follow the steps below for all job groups that have weight on factor 1a and/or 1b. The steps below illustrate how to assign a local census area. The steps are the same for assigning local or non-local census areas.

- 1) Click the **Source** button of factor **1a: % in Local Census Area**.

The screenshot shows a software window titled "9 Job Groups in Sample Company Denver, CO". It has tabs for "Weights", "Availability & Utilization", and "Notes". The "Weights" tab is active, showing a table of "Unweighted Availability". The table has columns for various demographic groups and a "Weight" column. The first row is for factor 1a: % in Local Census Area, with a "Source" button highlighted. The second row is for factor 1b: % in Non-Local Census Area, also with a "Source" button. Below the table, it says "4 jobs in Sample Company Denver, CO with this job group code." and a "Close" button.

	Female	Minority	Black	Hispanic	Asian	Amer. Indian	P. Island Hawaiian	Two or More	Weight
1a. % in Local Census Area	29%	9%	2%	5%	2%	0%	0%	1%	20%
US2080 - Denver, CO PMSA									
1b. % in Non-Local Census Area	27%	12%	3%	4%	4%	0%	0%	1%	60%
US49ST - United States exc Hawaii									
1c. % in Schools									
2a. % of Promotables	50%	25%	25%	0%	0%	0%	0%	0%	20%
2b. % Trainable									
3.									
Total :									100%

*A Census Area added in Single Record Edit.*

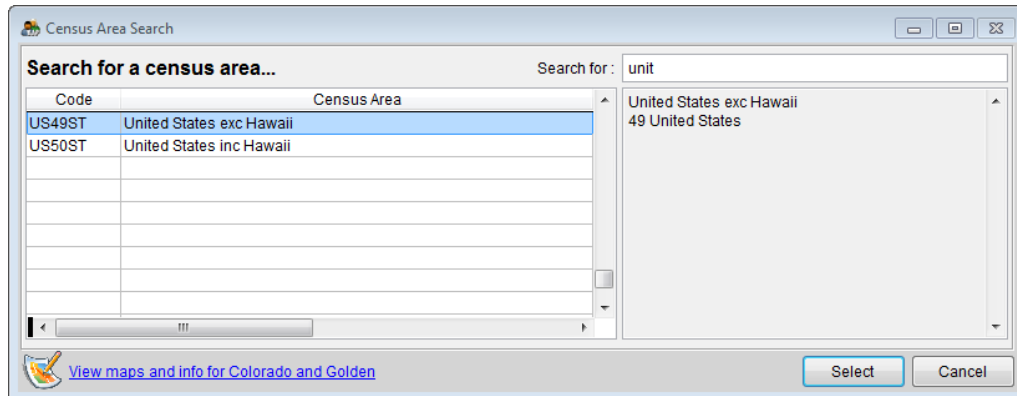
The screenshot shows the same software window, but in the "Grid Edit" view. It displays a table with columns for "Plan", "Job Group Code", "Job Group Name", "Local Census", and "Non-Local Census". The "Local Census" column is highlighted, showing "US2080" for job group 1A. The "Non-Local Census" column shows "US49ST" for job group 1A. The table lists various job groups and their corresponding census codes.

Plan	Job Group Code	Job Group Name	Local Census	Non-Local Census
DEN	1A	Executives	US2080	US49ST
DEN	1B	Managers/Supervisors	US2080	US49ST
DEN	2A	Level III Professionals	US2080	US49ST
DEN	2B	Level II Professionals	US2080	
DEN	2C	Level I Professionals	US2080	
DEN	3A	Technicians	US2080	CO08
DEN	5A	Administrative Clerical	US2080	
DEN	7A	Drivers	US2080	
DEN	9A	Cleaning & Maintenance	US2080	

*A Census Area added in Grid Edit.*

- 2) A **Census Area Search** window will appear.
- 3) Type the name of your local census area in the **Search for a census area** box. You may search for cities, counties or states, or you may search for the United States as a whole.
  - a) Click the **View maps and info** link to access a U.S. Census Bureau page where you may view a state map.

- b) If you do not find the geographic census area that covers your company's recruiting area, chances are that it is incorporated in its county's statistics, or in the statistics of a nearby county.
  - c) If you wish to create your own combined census areas using available census statistics, read the Combine Census Areas instructions toward the end of this Edit Job Groups section.
- 4) Double-click the census area to select it.



- 5) The area you select will appear in the box just below and to the right of the **Source** button.

Unweighted Availability									
	Female	Minority	Black	Hispanic	Asian	Amer. Indian	P. Island Hawaiian	Two or More	Weight
1a. % in Local Census Area	29%	9%	2%	5%	2%	0%	0%	1%	25%
US2080 - Denver, CO PMSA									
1b. % in Non-Local Census Area	27%	12%	3%	4%	4%	0%	0%	1%	40%
US49ST - United States exc Hawaii									
1c. % in Schools									
2a. % of Promotables	50%	25%	25%	0%	0%	0%	0%	0%	35%
2b. % Trainable									
3.									
Total :									100%

4 jobs in Sample Company Denver, CO with this job group code.

Continue reading to learn about the other available factors and statistical sources.

### Factor 1c

Factor 1c availability is determined by the percentage of available females and minorities at schools from which you recruit. Follow the same steps for all job groups that use factor 1c.

- 1) Click the **Source** button beside **1c: % in Schools**.

	Female	Minority	Black	Hispanic	Asian	Amer. Indian	P. Island Hawaiian	Two or More	Weight
1a. % in Local Census Area	29%	17%	3%	6%	6%	0%	0%	1%	40%
US2080 - Denver, CO PMSA									
1b. % in Non-Local Census Area	29%	26%	7%	4%	12%	0%	0%	2%	10%
US49ST - United States exc Hawaii									
1c. % in Schools	54%	29%	10%	9%	9%	1%	0%	0%	10%
2a. % of Promotables	75%	25%	25%	0%	0%	0%	0%	0%	40%
2b. % Trainable									
3.									
Total:									100%

8 jobs in Sample Company Denver, CO with this job group code.

- 2) In the **Disciplines and Award Levels** tab, double click on the types of awards and disciplines from which you recruit for jobs in the given job group. If you wish to use all awards and all disciplines, do not double-click on any.

Mal	Fem	Whi	Min	Blk	His	Asi	Ind	Pac	Two
65996	64502	85020	45478	20051	13926	9882	937	117	565
51%	49%	65%	35%	15%	11%	8%	1%	0%	0%

- 3) Click the **Institutions** tab to select the institutions from which you would recruit for positions in the current job group. Using the top left pull-down menu, you may select a particular state in which to search, or you may select **ALL**. Type a name in the **Search** box or scroll down on the **Institution** list to find and select institutions. If you wish to use all institutions, do not double-click on any institutions.



Factor 1c - 2A: Level III Professionals

Disciplines and Award Levels Institutions Notes 2010 Ipeda Data

State: CO Search: Institution

- All Institutions Within [CO]

- Academy of Medical & Health Science | Pueblo
- Academy of Natural Therapy | Greeley
- Adams State College | Alamosa
- Aims Community College | Greeley
- Anthem College-Denver | Aurora
- Arapahoe Community College | Littleton
- Argosy University-Denver | Denver
- Aspen University | Denver

Selected Institution(s)

All Institutions

Mal	Fem	Whi	Min	Blk	His	Asi	Ind	Pac	Two
1594073	2382919	2649224	1327768	521170	500384	245383	36938	5166	18727
40%	60%	67%	33%	13%	13%	6%	1%	0%	0%

Save Cancel

*Note: If you wish to modify or add to the notes that will appear in the Statistical Sources area of your Availability Analysis report, click the **Notes** tab. Type your text.*

Factor 1c - 2A: Level III Professionals

Disciplines and Award Levels Institutions Notes 2010 Ipeda Data

2010 IPEDS Completions Survey : Graduating students with an Associate's, Bachelor's, Master's, Doctorate's or Certificate degree in all disciplines from Colorado State University, Regis University and University of Denver.

Mal	Fem	Whi	Min	Blk	His	Asi	Ind	Pac	Two
4973	7083	10143	1913	401	839	488	146	1	38
41%	59%	84%	16%	3%	7%	4%	1%	0%	0%

Save Cancel

- 4) Click **Save**.
  - 5) Percentages will appear in the **Unweighted Availability** section of the **Weights** tab.
- Information about the other available factors and statistical sources follows.

## Factor 2a

Factor 2a availability is derived from the selection of specific job groups and/or jobs that promote into the job group in question. Follow the same steps for all job groups that use factor 2a.

- 1) Click the **Source** button for factor 2a.

9 Job Groups in Sample Company Denver, CO

Plan Code: DEN Sample Company Denver, CO

Job Group Code: 1A

Job Group Name: Executives

Weights | Availability & Utilization | Notes

Unweighted Availability

	Female	Minority	Black	Hispanic	Asian	Amer. Indian	P. Island Hawaiian	Two or More	Weight
1a. % in Local Census Area	29%	9%	2%	5%	2%	0%	0%	1%	25%
US2080 - Denver, CO PMSA									
1b. % in Non-Local Census Area	27%	12%	3%	4%	4%	0%	0%	1%	40%
US49ST - United States exc Hawaii									
1c. % in Schools									0%
2a. % of Promotables	29%	14%	14%	0%	0%	0%	0%	0%	35%
2b. % Trainable									
3.									
Total :									100%

4 jobs in Sample Company Denver, CO with this job group code.

Close

- 2) To select one or more job groups as feeders:
  - a) Click **Job Groups** in the top left **View** box.
  - b) Consider which of the job groups in the **Available Feeders** section can promote directly into the job group in question.
  - c) Double-click or use the single right-arrow to move each promotable job group to the **Selected Feeders** box.

Feeders for Job Group : 1B

View: ☒ Job Groups ☐ Jobs

In: ☒ This Plan Only ☐ All Plans

☒ Use employees included in the plan(s) for feeders instead of all employees physically located in the plan(s).

Available Feeders

Plan	Job Group	Job Group Name	Job Code
DEN	1A	Executives	
DEN	1B	Managers/Supervisors	
DEN	2B	Level II Professionals	
DEN	2C	Level I Professionals	
DEN	3A	Technicians	
DEN	5A	Administrative Clerical	
DEN	7A	Drivers	
DEN	9A	Cleaning & Maintenance	

Selected Feeders

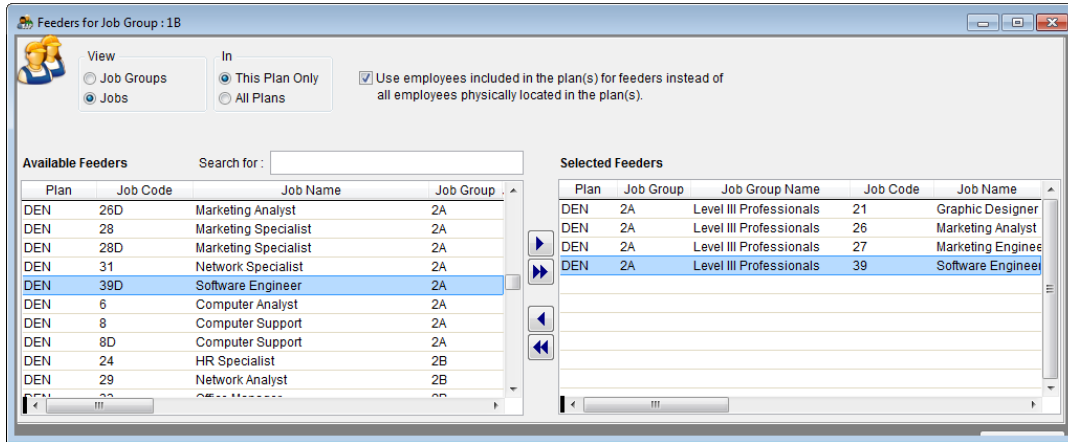
Plan	Job Group	Job Group Name	Job Code
DEN	2A	Level III Professionals	

Close

*Selecting a job group as a feeder.*

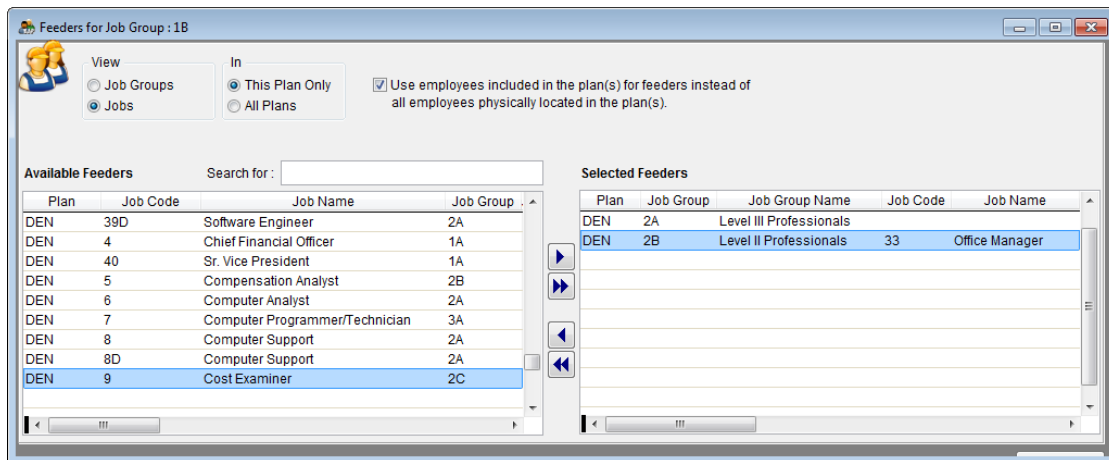
- 3) To select one or more jobs as feeders:

- Click **Jobs** in the top left **View** box.
- Consider which of the jobs in the **Available Feeders** section can promote directly into the job group in question.
- Double-click or use the single right arrow to move each promotable job to the **Selected Feeders** box.



*Selecting a Job as a feeder.*

*Note: You may select both job groups and jobs as feeders for the same job group by selecting **Job Groups** and then selecting **Jobs** in the **View** box.*



*Job groups and job selected as feeders.*

**PRO**

- Pro users, if you wish to select job groups or jobs from another AAP in your company, select **All Plans** in the **In** box.

4) Click **Close**.

5) Percentages will appear in the **Unweighted Availability** section of the **Weights** tab.

Information about the other available factors and statistical sources follows.

### Factor 2b

Factor 2b availability is determined by the percent of females and minorities who are trainable to be eligible for promotion into a given group. Follow the same steps for all job groups that use factor 2b.

- 1) Determine which employees are or will be enrolled in formal training programs to be eligible for promotion into the job group in question within the AAP year.
- 2) Determine what percentage of that group is female.
- 3) Determine what percentage of that group is minority.
- 4) Type the percentage of available females into the appropriate **Unweighted Availability** box to the right of factor 2b.

9 Job Groups in Sample Company Denver, CO

Plan Code: DEN Sample Company Denver, CO

Job Group Code: 7A

Job Group Name: Drivers

Weights Availability & Utilization Notes

Unweighted Availability

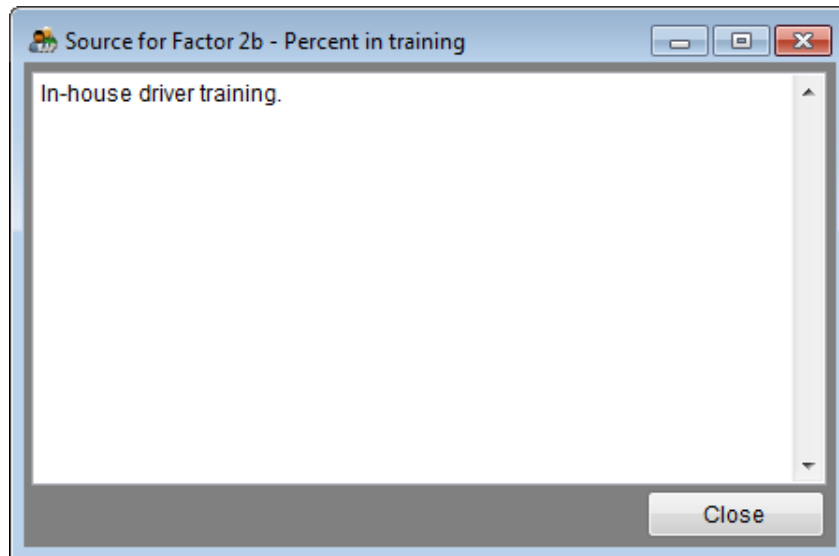
	Female	Minority	Black	Hispanic	Asian	Amer. Indian	P. Island Hawaiian	Two or More	Weight
1a. % in Local Census Area	8%	29%	7%	19%	1%	1%	0%	2%	90%
US2080 - Denver, CO PMSA									
1b. % in Non-Local Census Area	0%	0%	0%	0%	0%	0%	0%	0%	
1c. % in Schools									
2a. % of Promotables	0%	0%	0%	0%	0%	0%	0%	0%	
2b. % Trainable	15%	10%							10%
3.									
Total :									100%

1 job in Sample Company Denver, CO with this job group code.

Close

- 5) Type the percentage of available minorities into the appropriate **Unweighted Availability** cell to the right of factor 2b. It is not necessary to type the availability statistics of each individual race group, but you may do so if you wish.

- 6) Use the **Source** button to type details about training programs using 240 or fewer characters.



- 7) Click **Close**.

Information about the last available factor and statistical sources follows.

### Factor 3

The availability for factor 3 is determined by the percent of females and minorities who are available in the factor of your choice. The example used here shows the factor “Bargaining Agreement” to denote that the company recruits strictly by following union regulations. Follow the same steps for all job groups that use factor 3.

- 1) Determine the percentages of females and minorities that are available in your custom factor.
- 2) Type a title for your custom factor in the white cell to the right of the 3.
- 3) Type the percentages of available females and minorities into the **Unweighted Availability** boxes to the right of factor 3.

9 Job Groups in Sample Company Denver, CO

Plan Code: DEN Sample Company Denver, CO

Job Group Code: 9A

Job Group Name: Cleaning & Maintenance

Weights | Availability & Utilization | Notes

Unweighted Availability

	Female	Minority	Black	Hispanic	Asian	Amer. Indian	P. Island Hawaiian	Two or More	Weight
1a. % in Local Census Area	0%	0%	0%	0%	0%	0%	0%	0%	10%
US2080 - Denver, CO PMSA									
1b. % in Non-Local Census Area	0%	0%	0%	0%	0%	0%	0%	0%	
1c. % in Schools									
2a. % of Promotables	0%	0%	0%	0%	0%	0%	0%	0%	
2b. % Trainable									
3. Bargaining Agreement	10%	15%							90%
Total :									100%

1 job in Sample Company Denver, CO with this job group code.

Close

- 4) Click the **Source** button for factor 3 and type in details of the custom factor using 240 or fewer characters.

Source for Factor 3 - 3.

XYZ Bargaining Agreement

Close

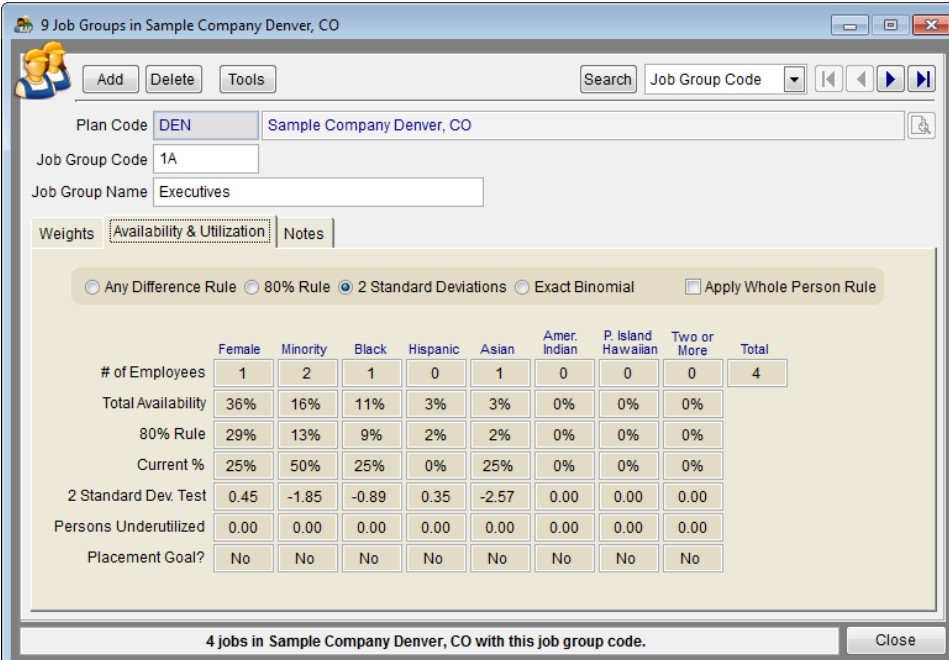
If you wish to change the recommended default calculation methods, or if you wish to create a custom census area, continue to the *Other Options* section below; otherwise proceed to the *Edit Jobs* section of this chapter.

## Other Options

### [View Availability/Utilization](#)

Click the Availability/Utilization tab to view results of your chosen factors and weights and to select the calculation method that will be used in your Availability Analysis, Utilization Summary and Annual Goals reports. By default, the Two Standard Deviations test is selected, but you can view results using the Any Difference, 80% Rule or Exact Binomial tests.

Please remember to select Two Standard Deviations after viewing the results of different tests if you wish to publish the Availability Reports using the recommended Two Standard Deviations test. The test ultimately selected on this tab is the one the software will use when the Availability Reports are published; the **Restore Defaults** button located in the Reports icon will not change the test used to create the availability reports.



9 Job Groups in Sample Company Denver, CO

Plan Code: **DEN** Sample Company Denver, CO

Job Group Code: **1A**

Job Group Name: **Executives**

Weights: **Availability & Utilization** | Notes

☐ Any Difference Rule
 ☐ 80% Rule
 ☒ 2 Standard Deviations
 ☐ Exact Binomial
 ☐ Apply Whole Person Rule

	Female	Minority	Black	Hispanic	Asian	Amer. Indian	P. Island Hawaiian	Two or More	Total
# of Employees	1	2	1	0	1	0	0	0	4
Total Availability	36%	16%	11%	3%	3%	0%	0%	0%	
80% Rule	29%	13%	9%	2%	2%	0%	0%	0%	
Current %	25%	50%	25%	0%	25%	0%	0%	0%	
2 Standard Dev. Test	0.45	-1.85	-0.89	0.35	-2.57	0.00	0.00	0.00	
Persons Underutilized	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Placement Goal?	No	No	No	No	No	No	No	No	

4 jobs in Sample Company Denver, CO with this job group code. Close

## Notes

Click the **Notes** tab if you wish to enter comments about a selected job group. Please remember that whatever is typed in the **Notes** box will be printed as a footnote on the Availability Analysis report.

9 Job Groups in Sample Company Denver, CO

Plan Code: DEN Sample Company Denver, CO

Job Group Code: 1A

Job Group Name: Executives

Weights | Availability & Utilization | **Notes**

These notes apply only to the selected Job Group (shown above). Anything you enter here will be shown on the Availability Analysis report.

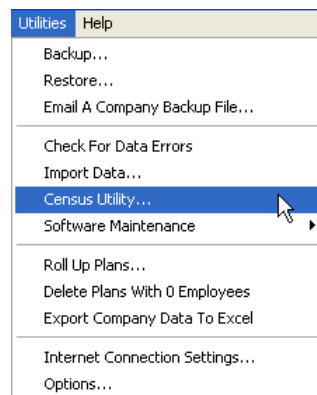
35% of the placements into this group have been promotions.

4 jobs in Sample Company Denver, CO with this job group code. Close

## Census Utility

If you wish to view, print or export a census area's female and minority availability statistics or if you wish to combine two or more geographic census areas' female and minority availability statistics, you may do so within The Complete AAP software's **Census Utility** window.

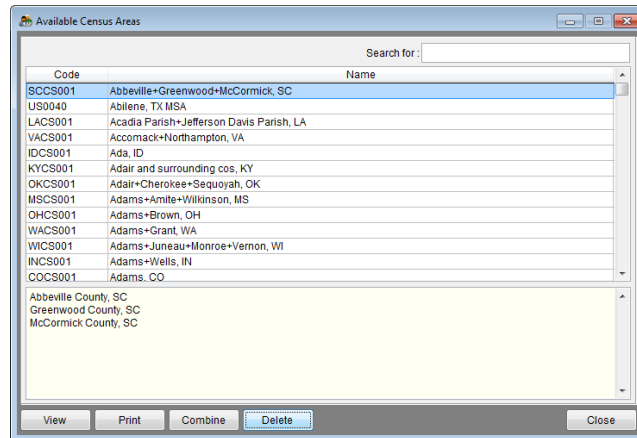
- 1) Open an AAP.
- 2) Click **Utilities** and then **Census Utility**.





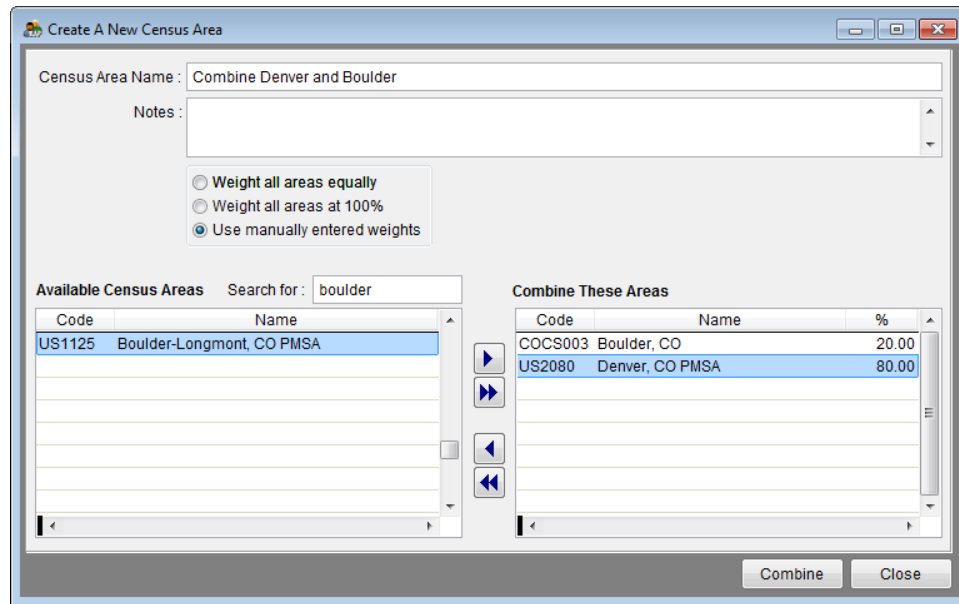
3) Below is a description of each button and area of the window. These are merely descriptions of each option and are not necessarily steps that you must follow to complete your AAP:

- a) **Search for:** Type the first few characters of the county/census area you want to view. A list of all census areas that include names with those characters will appear.
- b) **View:** Click on an area and then on the **View** button to preview the female and minority availability raw numbers or percentages by job census code or title.
- c) **Print:** Click on an area and then on the **Print** button to print the female and minority availability raw numbers or percentages by job census code or title.
- d) **Combine:** Use the *Combine Census Areas* instructions in this chapter to create your own custom recruitment areas.
- e) **Delete:** Click on any census area and then the **Delete** button to remove it.



### Combine Census Areas

- 1) Select **Utilities**, click **Census Utility** and then click **Combine**.
- 2) In the window that appears, give your new census area a name, and type any additional, optional notes into the **Notes** box. The census area notes will appear only in the **Census Utilities** window.



- 3) Scroll through the available census areas to find and add each area that you want to combine, double-clicking on each to add it to the queue.
- 4) Select one of the following weight combinations:
  - a) **Weight all areas equally:** The Complete AAP will automatically assign equal weight to each selected area.
  - b) **Weight all areas at 100%:** The Complete AAP will use 100% rather than an average of each census area's female and minority availability.
  - c) **Use manually entered weights:** Weight each area as you wish. The weight must add up to 100%.
- 5) If you select the option to use manually entered weights, you will need to click on the first area in your queue and then enter the desired weight in the % cell to the right of the area name; do the same for each census area, making sure that the weights you type add up to 100%.
- 6) Click **Combine**.
- 7) Click **OK**.
- 8) Click **Close** and return to **Job Groups** window of the AAP to which you wish to apply the newly combined area.

## Edit Jobs

---

The following items in the **Jobs** table cause data errors that may affect reporting results:

- Missing job names
- Missing EEO codes
- Missing job group codes
- Missing census codes

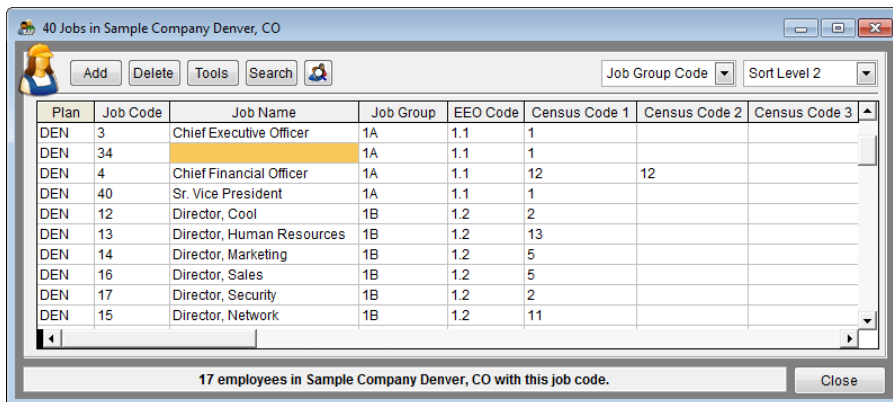
## Eliminate Job Errors

---

- 1) Click the **Jobs** icon.



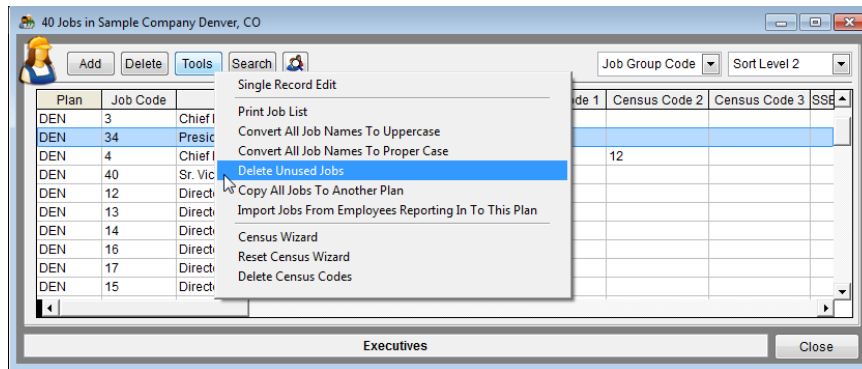
- 2) Type in missing job names.



Plan	Job Code	Job Name	Job Group	EEO Code	Census Code 1	Census Code 2	Census Code 3
DEN	3	Chief Executive Officer	1A	1.1	1		
DEN	34		1A	1.1	1		
DEN	4	Chief Financial Officer	1A	1.1	12	12	
DEN	40	Sr. Vice President	1A	1.1	1		
DEN	12	Director, Cool	1B	1.2	2		
DEN	13	Director, Human Resources	1B	1.2	13		
DEN	14	Director, Marketing	1B	1.2	5		
DEN	16	Director, Sales	1B	1.2	5		
DEN	17	Director, Security	1B	1.2	2		
DEN	15	Director, Network	1B	1.2	11		

- 3) Fix typos or mistakes.
  - a) Select the text that you want to change.
  - b) Type the correct text.
- 4) Assign missing job group codes. Click on the search icon at the right side of the empty job group's cell to bring up a list of codes.
- 5) Assign missing EEO codes. Click on the search icon at the right side of the empty EEO cell to bring up a list of codes.
- 6) Verify that EEO codes correspond with job groups. For example, if a management EEO code is assigned, a corresponding management job group should be assigned.

- 7) Select **Tools** and then **Delete Unused Jobs**.



- 8) To add a job, click **Add** and then type a job code, job name, job group and EEO code.
- 9) If working with All Plans, Pro users should also type the plan code of the job.
- 10) To delete a job, select the job and then click the **Delete** button in the **Job** window. Confirm deletion. Reassign employees if necessary.
- 11) Assign at least one census code for every job. See the *Assigning Census Codes* section.

## Assigning Census Codes

There are three methods you may use to enter census codes in The Complete AAP's **Jobs** table. Any of the methods may be used in either **Grid Edit** or **Single Record Edit** options that are available from the **Tools** button in the **Jobs** table.

- 1) You may import or type job census codes into the **Census Code 1** field.
- 2) You may use the **Census Code Wizard** icon to interactively or silently select census codes for jobs. This method works well when you need census codes for a list of jobs rather than a single job.
- 3) You may use the **Search** icon at the right side of each census code field. The Census Code Wizard will make a suggestion for the job in question.

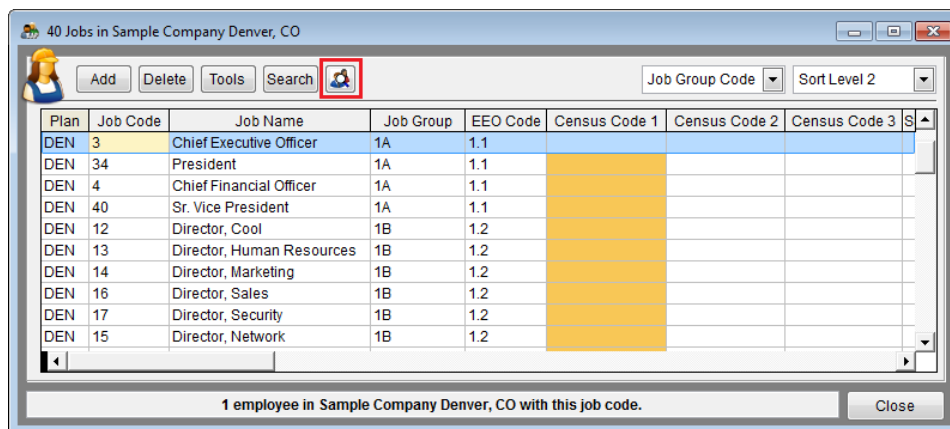
Method 1 is self-explanatory, but methods 2 and 3 require some instruction. Follow one or the other method's instructions below to assign census codes to your jobs.

### Use the Census Code Wizard

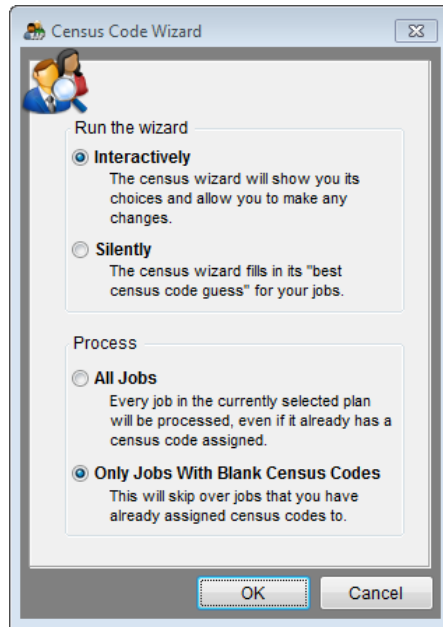
The Census Code Wizard searches its database of Standard Occupational Classification (SOC) descriptions to provide a list of or assign census codes based on job titles and EEO categories. After you prepare one or more AAPs for the same company, the wizard builds a list of the company's job titles that it will search when new jobs are imported. If at some point you wish to reset all of the census codes, you can select **Tools** and then **Reset Census Wizard**. Resetting the Census Code Wizard and erasing the census codes removes the previously used codes from its memory and builds a new database based on new selections.

Follow the directions below to use The Complete AAP's Census Code Wizard to assign census codes.

- 1) In the AAP to which you wish to assign census codes, click the **Jobs** icon.
- 2) Click the **Census Code Wizard** icon that is positioned to the right of the **Search** button.



- 3) Select either **Interactively** or **Silently** under **Run the wizard**.
  - a) Running the wizard interactively allows you to approve or change the choice.
  - b) Running the wizard silently allows it to make selections without your input.



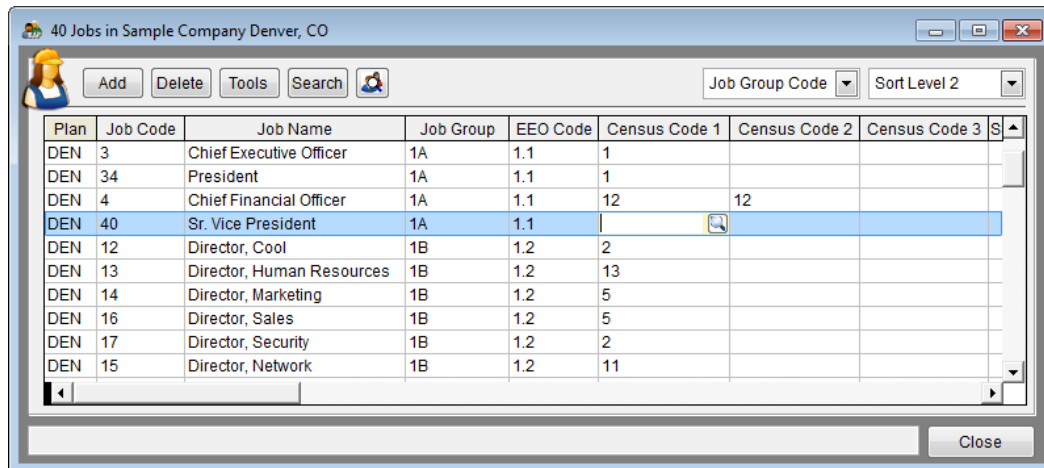
- 4) Select **All Jobs** or **Only Jobs with Blank Census Codes** under **Process**.
  - a) **All Jobs** - The wizard will attempt to assign census codes to all jobs on your job list.
  - b) **Only Jobs with Blank Census Codes** - The wizard will attempt to assign census codes only to jobs with no census codes.
- 5) Click **OK**.
- 6) Review the wizard's selections as it runs interactively or after it runs silently.
- 7) If you run the wizard interactively, you may find that **Census Code 1** for one or more jobs is blank. This means that the wizard is unable to find a census code match. You will need to assign **Census Code 1** by running the Census Wizard Interactively, or by using the search option within the **Census Code 1** field (see the *Use the Search Icon* instructions that follow in this chapter).
- 8) You must assign at least one **Census Code 1** for each job, but you may use up to three. Assign **Census Code 2** and **Census Code 3** manually if you wish.
- 9) Click **Close**.

Move forward to the *Edit Employee Records* section of this chapter.

## Use the Search Icon

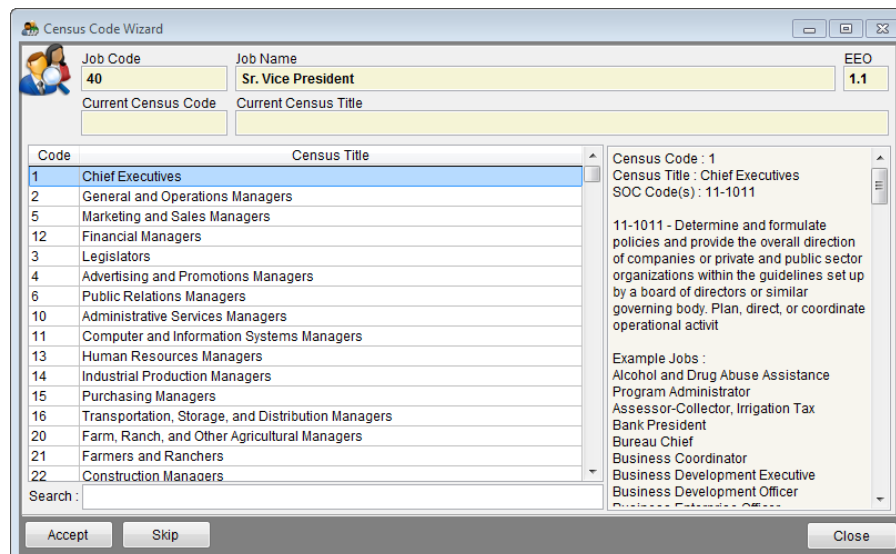
The **Search** icon is available at the right edge of each **Census Code** field in both **Grid Edit** and **Single Record Edit**.

- 1) Click the **Search** icon on the line of the job for which you wish to select a code.



*Search button in Grid Edit.*

- 2) Select a census code for your job. The wizard prioritizes its recommendations in descending order. Type a keyword in the **Search** box at the bottom of the window to see other census code recommendations.



- 3) Click the desired choice and then click **Accept** or double-click the census code.
- 4) Repeat steps 1-3 until census codes are assigned for each job.
- 5) Click **Close**.

Move forward to the *Edit Employee Records* section of this chapter.

## Edit Employee Records

The first five items below will cause errors to appear on the Data Errors list. The last item may cause the compensation reports to not run correctly.

- Missing gender
- Missing race
- Missing department codes
- Missing job codes
- Missing supervisor IDs
- Missing salary information – You must have either base or total salary to produce any compensation analyses. If base salaries are used, salary basis must be indicated. Salary codes are not necessary, but they may be used in compensation analyses.

Read the *Review Employee Records* and *Other Employee Record Options* sections that follow.

## Review Employee Record Errors

- 1) Click the **Employees** icon.



- 2) Page down and verify that each record contains the following information:
  - a) Last name and first name.
  - b) Race and gender.
  - c) Supervisor ID.
  - d) Base salary and salary basis, total salary, or salary code.
  - e) Job code.
  - f) Department code.
  - g) Annotation (if necessary).

Plan	Emp ID	Name	Race	Gender	Supervisor	Dept. Code	Job Code	Job Group Code	Hire Date	Salary Code	Salary Basis	Base Salid
DEN	5	Bacon, Kevin	W	M	1	D0002	6	2A	01/19/98		A	30000.00
DEN	6	Baldwin, Brian	W	M	1	D0003	23	9A	01/02/01		A	18000.00
DEN	7	Baldwin, William	W	M	1	D0003	23	9A	01/01/01		A	18000.00
DEN	54	Bear, Smokey	W	M	1	D0002	6	2A	01/01/01		A	30000.00
DEN	68	Bear, Yogi	T	M	50	D0007	6	2A	01/01/01		A	30000.00
DEN	8	Bolton, Michael	W	M	50	D0009	39	2A	01/01/96		A	30000.00
DEN	9	Boone, Deborah	W	F	17	D0008	35	5A	07/18/00		A	20000.00
DEN	55	Buffalo, Ralph	I	M	50	D0009	39	2A	01/01/01		A	30000.00
DEN	17	Bumstead, Dagwood	W	M	62	D0008	16	1B	01/01/01		A	50000.00
DEN	11	Bunny, Bugs	T	M	66	D0001	19	7A	01/06/96		A	26000.00
DEN	51	Cartwright, Benjamin	W	M	17	D0006	26	2A	01/20/95		A	52898.00

- 3) Spot-check race and gender to ensure that they are correct.



- 4) Ensure that a supervisor ID is assigned to each employee, using the search icon on the right edge of each **Supervisor** field to select managers.
- 5) Spot-check base salaries and their correlating salary bases, total salaries, hours worked per week (at least for those with an hourly base) and, if you have them, salary codes to ensure that they are all correct.

Continue reading to learn about deleting and adding employee records. If you wish to, you may skip forward to the *Edit Adverse Impact* section of this chapter, however, it is recommended that you read through at least the *Other Employee Record Options* section to ensure that your AAP is compliant and to ensure that your compensation reports are thorough.

### Delete or Add Employee Records

If you need to delete an employee, select the employee and then click **Delete**. Re-visit the **Department**, **Job Groups** and **Jobs** icons to remove resulting unused records.

Follow the directions below if you need to add an employee record:

- 1) Click **Add**.
- 2) Type an employee's ID and name.
- 3) Type or select the employee's:
  - a) race,
  - b) gender,
  - c) supervisor,
  - d) department code,
  - e) job code,
  - f) hire date,
  - g) salary code (if any),
  - h) base salary and/or total salary,
  - i) salary basis (of base salary),
  - j) hours worked per week (at least for those with an hourly base),
  - k) part time status, and
  - l) location.

Plan	Emp ID	Name	Race	Gender	Supervisor	Dept Code	Job Code	Job Group Code	Hire Date	Salary Code	Salary Basis	Base Salary
DEN 5		Bacon, Kevin	W	M	1	D0002	6	2A	01/19/98		A	30000.00
DEN 6		Baldwin, Brian	W	M	1	D0003	23	9A	01/02/01		A	18000.00
DEN 7		Baldwin, William	W	M	1	D0003	23	9A	01/01/01		A	18000.00
DEN 54		Bear, Smokey	W	M	1	D0002	6	2A	01/01/01		A	30000.00
DEN 68		Bear, Yogi	T	M	50	D0007	6	2A	01/01/01		A	30000.00
DEN 8		Bolton, Michael	W	M	50	D0009	39	2A	01/01/96		A	30000.00
DEN 9		Boone, Deborah	W	F	17	D0008	35	5A	07/18/00		A	20000.00
DEN 55		Buffalo, Ralph	I	M	50	D0009	39	2A	01/01/01		A	30000.00
DEN 17		Bumstead, Dagwood	W	M	62	D0008	16	1B	01/01/01		A	50000.00
DEN 11		Bunny, Bugs	T	M	66	D0001	19	7A	01/06/96		A	26000.00
DEN 51		Cartwright, Benjamin	W	M	17	D0006	26	2A	01/20/95		A	52898.00

**PRO**

- 4) Pro users must also select a plan code for the employee if working in all plans.

You may skip forward to Edit Adverse Impact section of this chapter, however, it is recommended that you read through the *Other Employee Record Options* to ensure that your AAP is compliant and to ensure that your compensation reports are thorough.

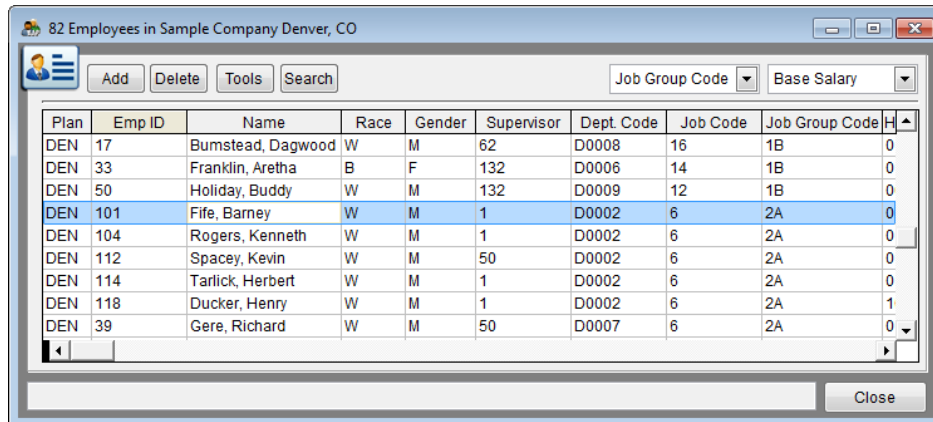
## *Other Employee Record Options*

### Annotations

Regulations require that employees who work at one facility but report to a manager at a facility that is covered under a different affirmative action plan (AAP) be annotated in both AAPs, and be included only in the statistics of the AAP that covers their managers' work location. An "annotation" is a notation that indicates an employee's reporting and work location. Both versions of The Complete AAP can automatically create an annotation for each employee who has a different location code than their supervisor. The Complete AAP Pro can alternatively create an automatic annotation for each employee who has a different plan code than their supervisor, depending on the selection made on the **Company Information** window (found in the **File** menu). In addition to automatically annotating a record, The Complete AAP Pro will also exclude an employee's record from his or her work location's AAP statistics and include the record in his or her reporting location's AAP statistics.

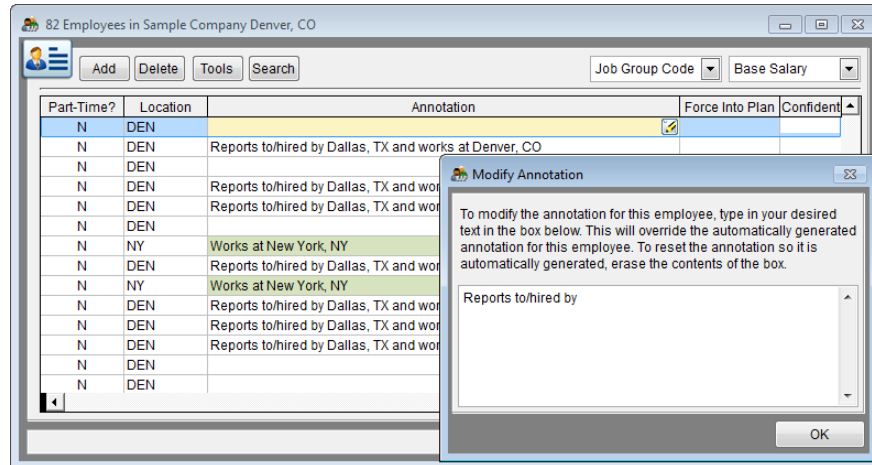
To manually add or edit an annotation:

- 1) Search for and select the record of the employee that you wish to annotate.



Plan	Emp ID	Name	Race	Gender	Supervisor	Dept. Code	Job Code	Job Group Code	
DEN	17	Bumstead, Dagwood	W	M	62	D0008	16	1B	0
DEN	33	Franklin, Aretha	B	F	132	D0006	14	1B	0
DEN	50	Holiday, Buddy	W	M	132	D0009	12	1B	0
DEN	101	Fife, Barney	W	M	1	D0002	6	2A	0
DEN	104	Rogers, Kenneth	W	M	1	D0002	6	2A	0
DEN	112	Spacey, Kevin	W	M	50	D0002	6	2A	0
DEN	114	Tarlick, Herbert	W	M	1	D0002	6	2A	0
DEN	118	Ducker, Henry	W	M	1	D0002	6	2A	1
DEN	39	Gere, Richard	W	M	50	D0007	6	2A	0

- 2) Add or edit an annotation by clicking on the button at the right side of the annotation box and typing text. Click **OK**.

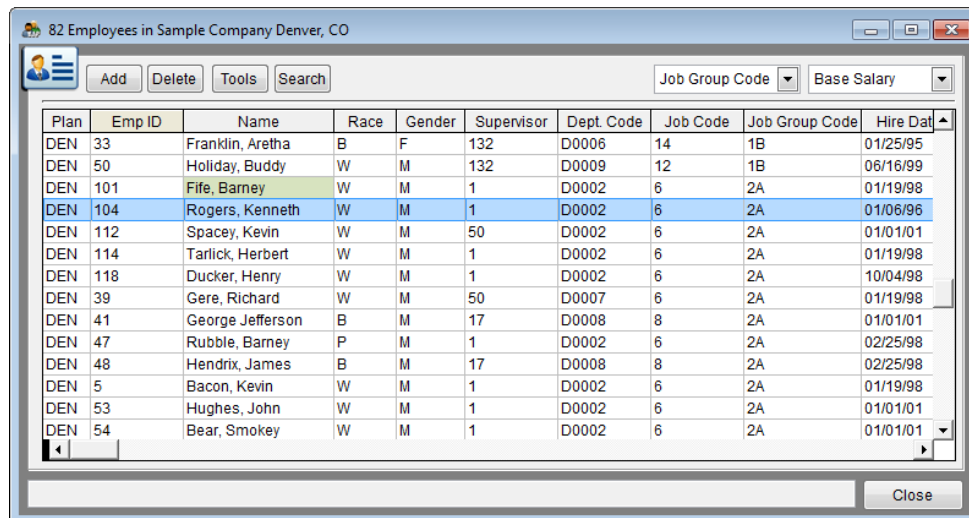


3) You may manually exclude an employee from the current AAP by following the steps below.



Note: The Pro version automatically excludes or includes employees based on their managers' information.

- a) Search for and select the record of the employee you wish to exclude.
- b) Select **Tools** and then **Manually Exclude This Employee From This Plan**. The **Name** box will become shaded.



Continue reading to learn about editing adverse impact data.

## User-Defined Fields

User-defined fields are used exclusively in the Salary Regression Analysis to help account for salary disparity. These fields can be imported or keyed in.

There are various factors that can explain salary disparity. The software allows two date fields and three numeric fields. User-defined date fields that are often used include:

- Date of most current job
- Date of last increase

Hire date is also commonly used in the compensation reports and should be input or imported into the **Hire Date** field.

User-defined numeric fields that are used most often include:

- Performance scores
- Education level
- Years of experience

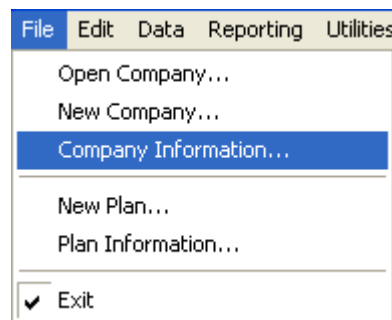
Performance scores and education levels must be assigned numeric values before they are input or imported. The following is an example of numeric conversion:

1 = No high school diploma  
2 = High school diploma  
3 = Associate's degree  
4 = Bachelor's degree  
5 = Master's degree  
6 = Ph.D.

NOTE: Do not use zero as a numeric value because the program will treat zeros as blanks, which are not used in the calculations.

When you access the **Employees** window, you might find that user-defined fields are not visible. Close open windows within The Complete AAP and follow these steps to activate the user-defined fields:

- 1) Click **File** and then **Company Information**.



- 2) Enable fields by clicking the **Optional Fields for Salary Analysis Report** boxes.

Company Information

Company Name  
Sample Company

Identifier (optional - up to 10 characters)  
2015E

Effective Date  
01/01/2015

End Date  
12/31/2015

EEO Type  
☒ EEO-1 (Private)  
☐ EEO-4 (Public)  
☐ Educational - IPEDS

Annotate Employees Based On  
☒ Plan Codes  
☐ Location Codes

Optional Fields For Salary Analysis Report

☒ Enable user-defined date field #1 Date Field #1 Name Date in Job

☐ Enable user-defined date field #2 Date Field #2 Name

☒ Enable user-defined number field #1 Number Field #1 Name Yrs of Education

☐ Enable user-defined number field #2 Number Field #2 Name

☐ Enable user-defined number field #3 Number Field #3 Name

OK Cancel

- 3) Type names for your fields.
- 4) Click **OK** and return to the **Employees** window to view and edit or to add the user-defined data.

Continue reading to learn about editing adverse impact data.

## Edit Adverse Impact

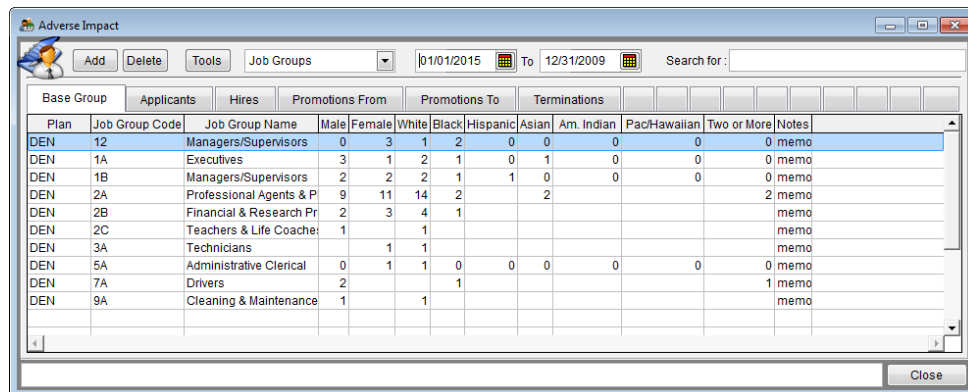
One can either import or manually key adverse impact data into The Complete AAP. It is also possible to manually edit imported data. Chapter 4 provides instructions on importing, and the steps below instruct you how to key in adverse impact data.

Have your adverse impact base group, termination, applicant, hire, and promotion totals ready before you follow the directions below.

- 1) Click the **Adv. Impact** icon.

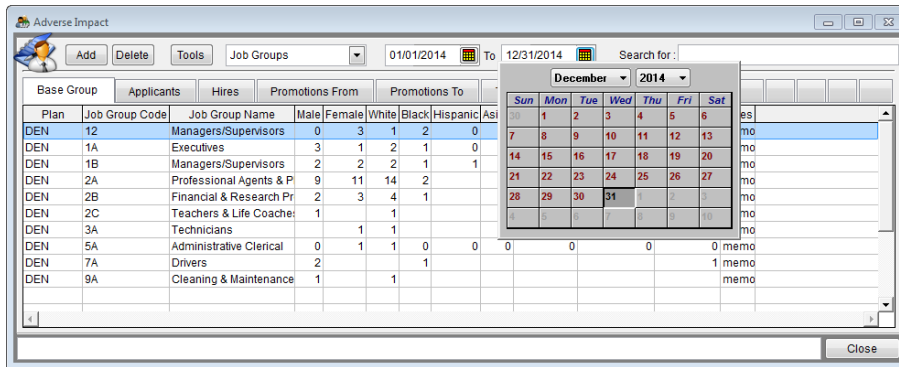


- 2) To add a job group, click **Add** and then type the job group code and its title.
- 3) If working in the **Work with All Plans** function, Pro users must also type the plan code.
- 4) To delete a job group, select the job group and then click **Delete**. Confirm deletion.
- 5) Edit all activities.
  - a) Click the **Base Group** tab and, using your keyboard, edit or add male, female, White, Black, Hispanic, Asian, Am. Indian, Pac/Hawaiian, and Two or More totals.

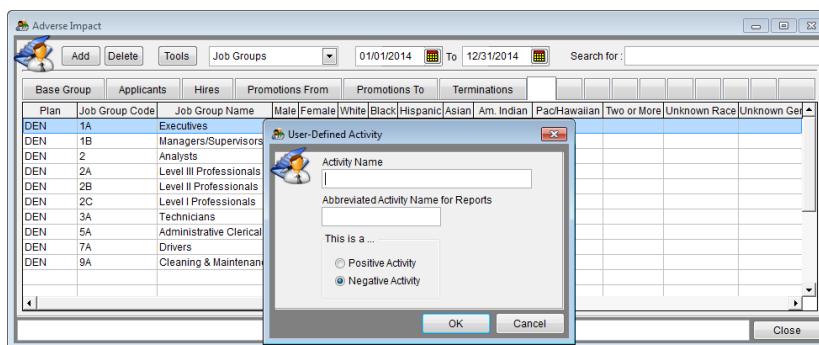


Plan	Job Group Code	Job Group Name	Male	Female	White	Black	Hispanic	Asian	Am. Indian	Pac/Hawaiian	Two or More	Notes
DEN	12	Managers/Supervisors	0	3	1	2	0	0	0	0	0	memo
DEN	1A	Executives	3	1	2	1	0	1	0	0	0	memo
DEN	1B	Managers/Supervisors	2	2	2	1	1	0	0	0	0	memo
DEN	2A	Professional Agents & P	9	11	14	2		2				memo
DEN	2B	Financial & Research Pr	2	3	4	1						memo
DEN	2C	Teachers & Life Coaches	1		1							memo
DEN	3A	Technicians			1	1						memo
DEN	5A	Administrative Clerical	0	1	1	0	0	0	0	0	0	memo
DEN	7A	Drivers	2			1						memo
DEN	9A	Cleaning & Maintenance	1			1						memo

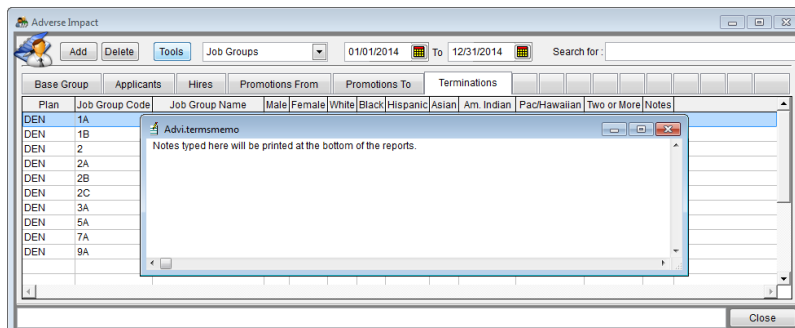
- b) Click the **Applicants** tab and edit or add totals.
  - c) Click the **Hires** tab and edit or add totals.
  - d) Click the **Promotions (From)** tab and edit or add totals.
  - e) Click the **Promotions (To)** tab and edit or add totals.
  - f) Click the **Terminations** tab and edit or add totals.
- 6) If dates are not populated, type dates in the date boxes or double-click on a date in the calendar to select them.



- 7) Click any of the blank tabs to add user-defined activities such as transfers, layoffs or training.



- 8) Double-click on the word “memo” in the **Notes** column to add notes that will be printed on the bottom of the reports.



After you review each of your editing windows and fix all obvious errors we suggest that you run the **Check For Data Errors** report again. Follow the procedures listed at the beginning of this chapter to run the report.

After you finish editing all activities for all job groups and after eliminating all or most data errors, proceed to Chapter 6.

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# Chapter 6

Determine Progress toward Goals

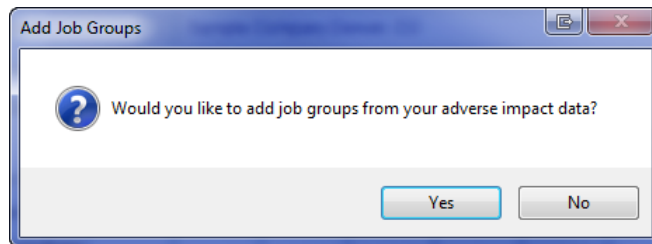
## Determine Progress toward Goals

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After you finish entering your adverse impact data, follow the steps below to determine how your company has progressed toward meeting last year's goals.

Click the **Progress** icon to view, edit or enter your company's prior placement goals. When the **Goals Progress** table pops up, review your prior goals to ensure that they match the prior year's placement goals. If you find that changes need to be made, follow the *Edit Goals Progress* instructions toward the end of this Chapter; otherwise move forward to Chapter 7.

If when you click on the **Progress** icon you see the message below appear, this means that the prior goals are not found.



If your company has no previous AAP in place, you do not have to enter goals and you may proceed to Chapter 7.

If your prior AAP was not prepared in The Complete AAP, follow the *Input Goals* instructions below.

If your prior AAP was prepared in The Complete AAP, follow the *Import Goals* instructions that follow the *Input Goals* instructions.

## Input Goals

- 1) Click **Yes** in the **Add Job Groups** window that appears when you click the **Progress** icon.
- 2) Confirm that the **Dates of Data** shown are exactly one year prior to your current AAP year. Type the correct dates if necessary.

Example:

If current AAP year is January 1, 2015 to December 31, 2015, prior goal dates are January 1, 2014 to December 31, 2014.

	Female	Minority		Sun	Mon	Tue	Wed	Thu	Fri	Sat	Hawaiian / Pacific Is	Two or More
Previous Goals %	0%	0%		1	2	3	4	5	6		0%	0%
Number of Hires	0	0		7	8	9	10	11	12	13	0	0
Number of Promotions	0	0		14	15	16	17	18	19	20	0	0
Actual Placement Rate %	0%	0%		21	22	23	24	25	26	27	0%	0%
Base Group	0	0		28	29	30	31				0	0
Total in Base Group	0	0	Total	4	5	6	7	8	9	10		

*Double-click on date to close the calendar.*

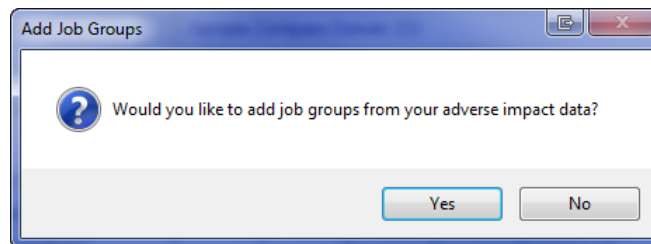
- 3) To type data into the table, remove the check mark from **Automatically populate goals progress numbers**.

	Female	Minority	Black	Hispanic	Asian	Am Indian / Ak Native	Hawaiian / Pacific Is	Two or More
Previous Goals %	0%	0%	0%	0%	0%	0%	0%	0%
Number of Hires	0	0	0	0	0	0	0	0
Number of Promotions	0	0	0	0	0	0	0	0
Actual Placement Rate %	0%	0%	0%	0%	0%	0%	0%	0%
Base Group	1	2	1	0	1	0	0	0
Total in Base Group	4	Total Hires	2	Total Promotions	1			

- 4) Type your prior AAP's annual placement goals using whole numbers in the **Previous Goals %** row. The total availability percent of underutilized minorities and females represent the annual goals.
- 5) Arrow to next job group and repeat step 4. Repeat for all job groups.
- 6) Click on **Automatically populate goals progress numbers** to allow the software to automatically populate base group, hires and promotion (to) from the **Adv. Impact** table.
- 7) The **Actual Placement Rate %** will be calculated for you.
- 8) Click **Close**. Proceed to Chapter 7.

### Import Goals

- 1) Click **Yes** in the **Add Job Groups** window that appears when you click the **Progress** icon.



- 2) Click **Tools** and then **Import goals %, percentages, hires and promotions**.

	Female	Minority	Black	Hispanic	Asian	Am Indian/ Ak Native	Hawaiian / Pacific Is	Two or More		
Previous Goals %	0%	0%	0%	0%	0%	0%	0%	0%		
Number of Hires	0	0	0	0	0	0	0	0		
Number of Promotions	0	0	0	0	0	0	0	0		
Actual Placement Rate %	0%	0%	0%	0%	0%	0%	0%	0%		
Base Group	1	2	1	0	1	0	0	0		
Total in Base Group	4		Total Hires		2		Total Promotions		1	

- 3) Scroll through all job groups to confirm that goals, hires, promotions and base group are correctly populated.
- 4) The **Actual Placement Rate %** will be calculated for you.

- 5) If you need to make a change to the **Previous Goal %** numbers, follow the *Edit Goals Progress Data* instructions that follow this section.
- 6) If all looks well, click **Close** and proceed to Chapter 7.

### *Edit Goals Progress Data*

Follow the steps below to edit the information that appears in the **Progress** table:

- 1) Click the **Progress** icon.



- 2) To make changes to the **Previous Goal %** numbers, click the box to the left of **Automatically Populate Goals Progress Numbers**.
- 3) Type the changes.
- 4) Click on **Automatically Populate Goals Progress Numbers**.

Sample Company - Previous Goals

Job Group Code

☐ Automatically populate goals progress numbers

Plan Code

Job Group Code  Name

Dates of Data  To

	Female	Minority	Black	Hispanic	Asian	Am Indian/ Ak Native	Hawaiian / Pacific Is	Two or More
Previous Goals %	0%	0%	0%	0%	0%	0%	0%	0%
Number of Hires	0	0	0	0	0	0	0	0
Number of Promotions	0	0	0	0	0	0	0	0
Actual Placement Rate %	0%	0%	0%	0%	0%	0%	0%	0%
Base Group	1	2	1	0	1	0	0	0
Total in Base Group	4	Total Hires	2	Total Promotions	1			

Previous Plan : 01/01/14-12/31/14 : Sample Company Denver, CO

- 5) Click **Close**.
- 6) If you wish to prepare Midyear Adverse Impact continue to the next section of this chapter. Proceed to Chapter 7 if you do not need to prepare Midyear Adverse Impact reports.

## Current Midyear Adverse Impact Data

---

There are several reasons you may wish to prepare Midyear Adverse Impact reports. Your company wish to see what progress has been made towards meeting any annual goals that have been set in the AAP. You may need to prepare Midyear Adverse Impact reports to meet an OFCCP requirement if your plan is audited at least six months through your plan year. You may import or manually key in this data. Instructions for both follow. If you manually key in your data, have your summarized totals in front of you and begin on step 5.

**Note:** When reading through your OFCCP scheduling letter, you will find that if you are six months or more into your AAP year on the date you receive an OFCCP scheduling letter, you must submit the first six months' employment activity (applicants, hires, promotions and terminations) for the current AAP year.

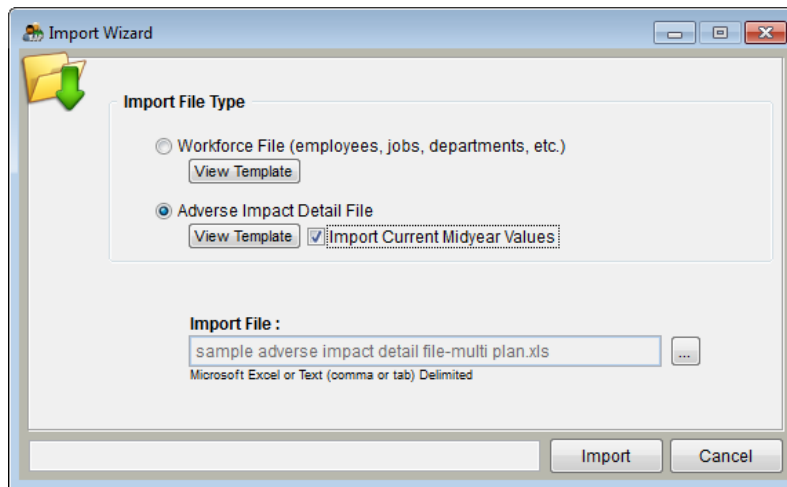
You must format your file before importing. If you have not already formatted your "Detail" file, please refer to the instructions in Chapter 3 to do so. Have the appropriate AAP open before performing the following steps. Have no windows open in the program when you start.

Follow these steps to import:

- 1) Click the **Adv. Impact** icon.



- 2) Select the **Adverse Impact Detail File**.
- 3) Click the **Import Current Midyear Values** box.



- 4) The remaining import steps are the same as those shown in Chapter 4, except that the software may not have the correct import file mapped.
- 5) When your import is complete click the **Adv. Impact** icon.

- 6) Select **Job Groups – Midyear** from the dropdown menu.

The screenshot shows the 'Adverse Impact' software window. At the top, there are buttons for 'Add', 'Delete', and 'Tools'. Below these is a 'Job Groups' dropdown menu, which is currently open, showing a list of options including 'Job Groups - Midyear'. To the right of the dropdown, there are date fields: '01/01/2009' and '12/31/2009'. Below the date fields are tabs for 'Applicants', 'Hires', 'Promotions To', and 'Terminations'. The 'Hires' tab is currently selected. The main area of the window contains a table with the following columns: 'Plan', 'Job Group Code', 'Job Group', 'White', 'Black', 'Hispanic', 'Asian', 'Am. Indian', 'PacHawaiian', 'Two or More', and 'Notes'. The table contains data for various job groups, including 'Managers/Executives', 'Managers/Supervisors', 'Professional Agents & P', 'Financial & Research Pr', 'Teachers & Life Coaches', 'Technicians', 'Administrative Clerical', 'Drivers', and 'Cleaning & Maintenance'.

Plan	Job Group Code	Job Group	White	Black	Hispanic	Asian	Am. Indian	PacHawaiian	Two or More	Notes
DEN	12	Managers/Executives	1	2	0	0	0	0	0	0 memo
DEN	1A	Managers/Supervisors	2	1	0	1	0	0	0	0 memo
DEN	1B	Managers/Supervisors	2	1	1	0	0	0	0	0 memo
DEN	2A	Professional Agents & P	9	11	14	2	2			2 memo
DEN	2B	Financial & Research Pr	2	3	4	1				memo
DEN	2C	Teachers & Life Coaches	1	1						memo
DEN	3A	Technicians		1	1					memo
DEN	5A	Administrative Clerical	0	1	1	0	0	0	0	0 memo
DEN	7A	Drivers	2		1					1 memo
DEN	9A	Cleaning & Maintenance	1	1						memo

- 7) Confirm that the dates are correct. If they are not, type the correct dates. The first date should be the start of your current AAP and the end date should be the date that marks the midpoint of your AAP year or the date you pulled your data..
- 8) Click through the activity tabs to ensure that the data imported correctly. Type or overwrite totals that appear in the **Applicants, Hires, Promotions From, Promotions To and Terminations** tabs.
- 9) Click **Close**.
- 10) Proceed to Chapter 9 for directions on printing **Current Midyear Adverse Impact** and **Goals Progress** reports.

If you are under audit or wish to preemptively address audit issues click on the **Audit Prep** icon. The OFCCP Audit portion of Chapter 7 includes a list of topics that may be accessed from the Audit Prep icon. Proceed to Chapter 8 if you wish to skip the OFCCP Audit portion of this chapter.

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# Chapter 7

## Audit Your AAP

## Internal Audit

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You should have by this point addressed and fixed data errors that affect the results of your statistical reports; however, the fact that you have eliminated errors does not necessarily mean that your reports comply with regulations. There are other issues that might need to be addressed before you run your reports; these other issues are outlined in this chapter.

### *Audit Issues & Solutions*

---

The following is a list of the most common audit issues and their solutions. Many of these issues are not evident until you preview the associated reports, so it is recommended that you preview each from the Report Options tab of the Reports icon as you read through the list.

- **Every job in a job group does not have the same EEO code.**

Solution: Sort the **Jobs** table by job group in **Grid Edit** to determine if any job has a conflicting EEO vs. job group code. Fix the incorrect code (the incorrect code may be either the EEO Code or the job group).

- **Job groups have 0% total availability for either Females or Minorities in the Availability Analysis report.**

Solution: It is rare that absolutely no females or Minorities are available in a statistical source. Click the **Job Groups** icon to confirm that recruitment weights and their statistical sources have been assigned for all job groups. A census area should be selected for factor 1a and/or factor 1b if you have placed weight on either or both factors. If the changes still yield no availability, review your jobs' census codes to ensure that the most descriptive codes have been selected.

Check to see that at least one job or job group has been selected as a feeder for factor 2A by clicking the **Source** button if you have weight on that factor. If a feeder has been selected this means that there are no females or minorities in the job or job group.

If weighted, factor 1c requires you to type availability percentages or select the appropriate disciplines, degrees, and institutions utilizing the **Source** button.

If factors 2b and 3 are weighted, you must type availability percentages. Ensure that manually entered availability is correct.

If none of the above yields female and minority availability, choosing alternate factors, weighting factors differently, or choosing alternate statistical sources can yield some female and minority availability, which in turn helps demonstrate good faith efforts in recruiting females and minorities.

- **The adverse impact data's start date is not one year prior to the AAP's start date.**

Solution: Click the **Adv. Impact** icon and change the AAP dates to reflect the period one year prior to your current AAP year.

- **The Goals Progress data's start date is not one year prior to the AAP's start date.**

Solution: Click the **Progress** icon and change the AAP dates to reflect the period one year prior to your current AAP year.

- **The dates of the adverse impact and goals progress data do not match.**

Solution: Click the **Progress** icon or the **Adv Impact** icon and change the AAP dates that are incorrect, keeping in mind that the dates in both windows should be one year prior to your current AAP year.

### *Other Issues & Solutions*

---



The following issues are more complex audit issues that can arise in The Complete AAP Pro and that should be addressed before you publish your final reports.

When employees who report in from other AAPs within the same company are pulled into an AAP, the jobs and job group codes from their work locations follow. If a trailing job group does not exist in the supervisor's AAP, the program will create a virtual job group when it publishes reports that display them. Virtual job groups are identified with brackets around the job group name in these reports. It is wise to eliminate virtual job groups from a host AAP before finalizing your AAP so that a separate goal is not set for the virtual job group.

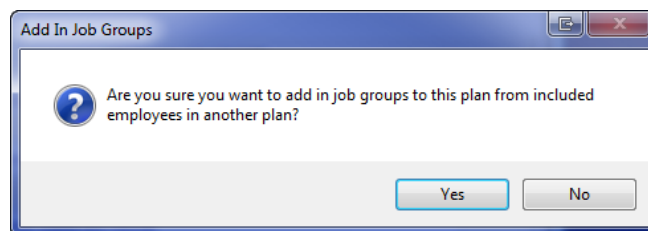
If you would like to eliminate virtual job groups from the reports, you will need to either bring in the job group or bring in the job and assign it to one of the host AAP's job groups. Follow the procedure under *Import Job Groups for Employees Reporting into This Plan* below if you wish to add job groups from other AAPs. Follow the *Import Jobs from AAPs of Employees Reporting into This Plan* procedure to assign jobs to existing job groups.

### *Virtual Job Groups*

---

#### *Import Job Groups from Employees Reporting into This Plan*

- 1) Click the **Job Groups** icon.
- 2) Click **Tools** and then **Add In Job Groups From Other Plans**.
- 3) Click **Yes** on the message that appears.



- 4) Assign recruitment weights and statistical sources to any newly-added job groups.

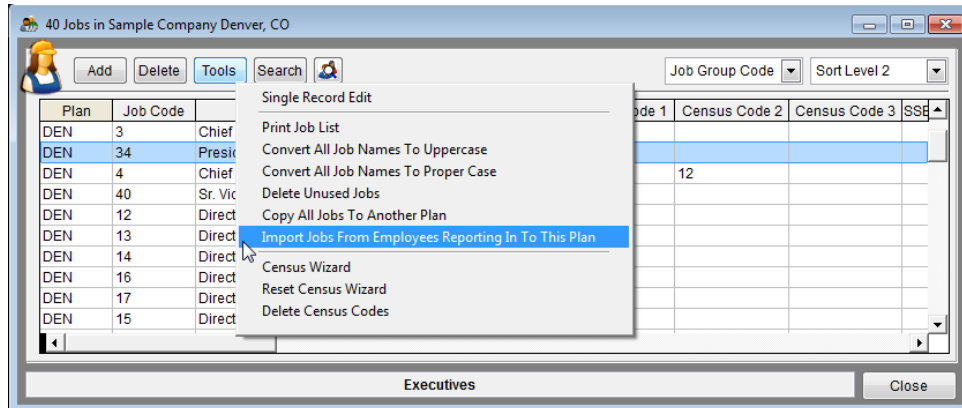
If you are under audit or wish to preemptively address audit issues click on the **Audit Prep** icon. The OFCCP Audit portion of this chapter includes a list of topics that may be accessed from the **Audit Prep** icon. Proceed to Chapter 8 if you wish to skip the OFCCP Audit portion of this chapter.

### Import Jobs from AAPs of Employees Reporting into This Plan

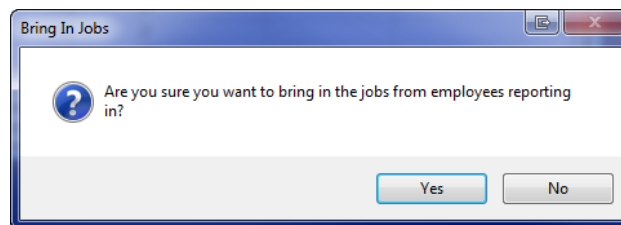
- 1) In the AAP into which you wish to bring jobs, click **Jobs** icon.



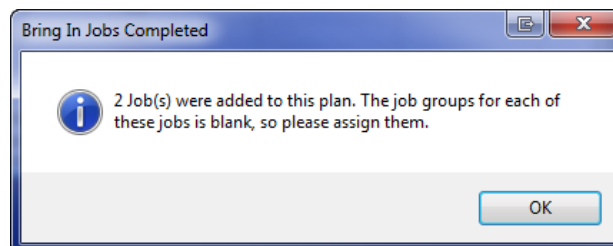
- 2) Click **Tools** and then select **Import Jobs From Employees Reporting In To This Plan**.



- 3) Click **Yes** when the following message appears.



- 4) Click **OK** when the following message appears.



- 5) Sort the job list by job group to move to the top the jobs that are missing job groups. To assign the associated job group either type in the job group code or use the search icon on the right side of the empty job group cell to select it.

32 Jobs in Sample Company Denver, CO

Add Delete Tools Search Job Group Code Sort Level 2

Plan	Job Code	Job Name	Job Group	EEO Code	Census Code 1	Census Code 2	Census Code 3	S
DEN	12	Director, Cool		1.2	2			
DEN	3	Chief Executive Officer	1A	1.1	1			
DEN	34	President/CEO	1A	1.1	1			
DEN	4	Chief Financial Officer	1A	1.1	12			
DEN	40	Sr. Vice President	1A	1.1	1			
DEN	13	Director, Human Resources	1B	1.2	13			
DEN	14	Director, Marketing	1B	1.2	5			
DEN	21	Graphic Designer	2A	2	100			
DEN	26	Marketing Analyst	2A	2	180			
DEN	27	Marketing Engineer	2A	2	493			

Close

If you are under audit or wish to preemptively address audit issues click on the **Audit Prep** icon. The OFCCP Audit portion of this chapter includes a list of topics that may be accessed from the **Audit Prep** icon. Proceed to Chapter 8 if you wish to skip the OFCCP Audit portion of this chapter.

## OFCCP Audit

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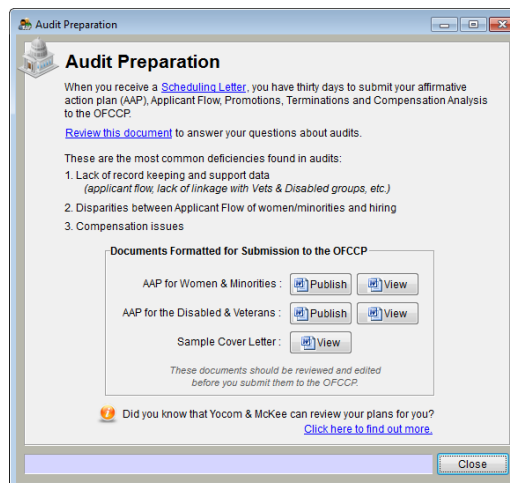
### *Preparing For an OFCCP Audit*

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If you are under audit or wish to preemptively address audit issues please click on the **Audit Prep** icon to learn about the OFCCP audit process.



- Clicking on the *Scheduling Letter* link will launch a Word document that contains an example of the OFCCP scheduling letter with references to the AAP sections that fulfill the requirements of the scheduling letter.
- Clicking on the *Review this document* link will launch a Word document with the following topics:
  - Preparing for an OFCCP Audit
  - OFCCP Compliance Review (Audit)
  - I received notice of a Compliance Review, what should I do?
  - What if I do not submit my AAP within 30 days?
  - Sample Scheduling Letter Requesting AAP and Support Data
  - Sample Response to OFCCPs Scheduling Letter
  - Sample Compensation Follow Up Letter
  - Sample Non-Compensation Related Follow-Up Letter
  - Preparing for an On-Site Review
  - OFCCP Compliance Evaluation Quality Assurance Form
  - Identification of Problem Areas
  - Action Oriented Programs



# Chapter 8

## Prepare Your Narrative

## Prepare Text for Your Narrative

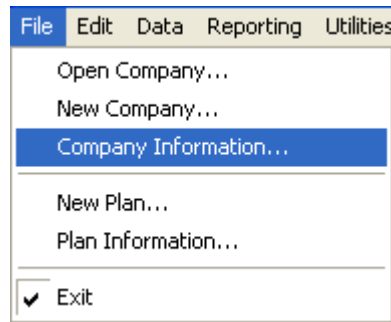
---

The Complete AAP will automatically incorporate the following items when you publish your AAP:

- AAP Name
- AAP Address
- AAP Dates
- Executive Officer Name and title
- EEO Coordinator Name
- EEO Coordinator address
- AAP and Parent Company Dun & Bradstreet
- AAP and Parent Company Tax ID (EIN)
- AAP and Parent Company EEO-1 Number
- AAP logo

The above items are included in the **Company Information** and **Plan Information** windows. Follow these directions to populate the fields:

- 1) Click **File** and then **Company Information**.

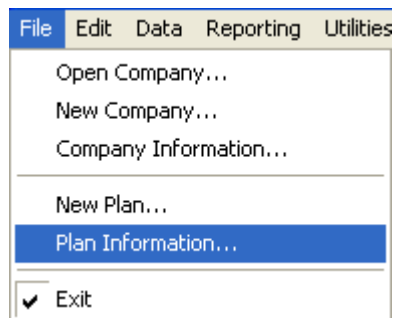


- 2) Confirm that the company name is correct. Highlight the current text and type the correct text if necessary.
- 3) Confirm that the effective and end dates are correct. Highlight the current text and type the correct text if necessary.



*Double-click on date to close calendar.*

- 4) Click **OK** to save the information.
- 5) Click **File** and then **Plan Information**.



- 6) Confirm that text in the following fields on the **General Info** tab are correct. Highlight the current text and type the correct text if necessary.
  - a) Pro users only - **Plan Code**.
  - b) **Plan Name**. (This will appear in the text of the Narrative and in the report headings).
  - c) **Address, City, State** and **Zip**. (This will appear in the text of the Narrative and in the report headings).

Plan Code: DEN

Plan Name: Sample Company Denver, CO

Plan Identifier: SCDEN

Address Line 1: 15401 West 9th Avenue

Address Line 2:

City: Golden

State: CO

Zip: 80401

Previous Plan: [Select a Plan](#) Clear

☐ Force this plan to be a "base" plan when using the rollout feature.

Buttons: Delete, OK, Cancel

7) Click the **Narrative Info** tab.

Executive Officer: Ms. Jacqueline Kennedy

Executive Officer's Title: President

Dun & Brad #: 123456

EIN: 1234-5

EEO-1 #: 987654

EEO Coordinator: Ms. Sandra Day O'Conner

EEO Email:

EEO Company: Sample Company

EEO Address: 15401 West 9th Avenue

EEO City: Golden

EEO State: CO

EEO Zipcode: 80401

Parent Company:

Parent Dun & Brad #:

Parent EIN:

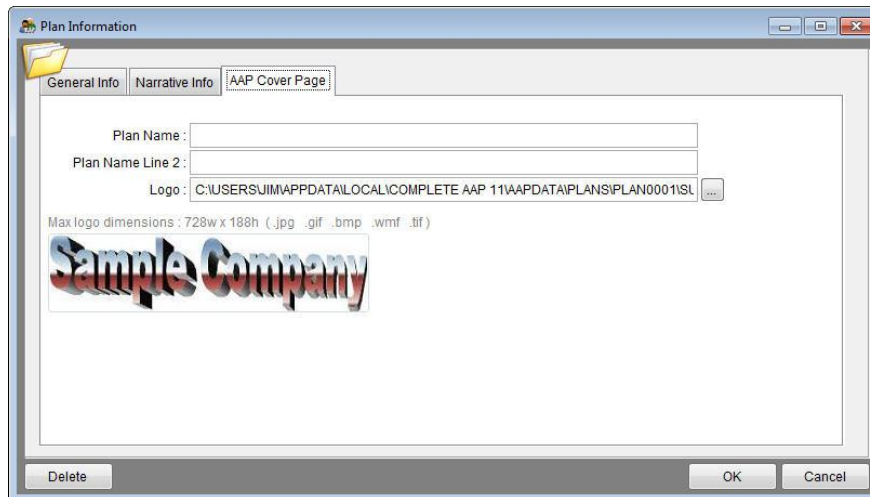
Parent EEO-1#:

Buttons: Delete, OK, Cancel

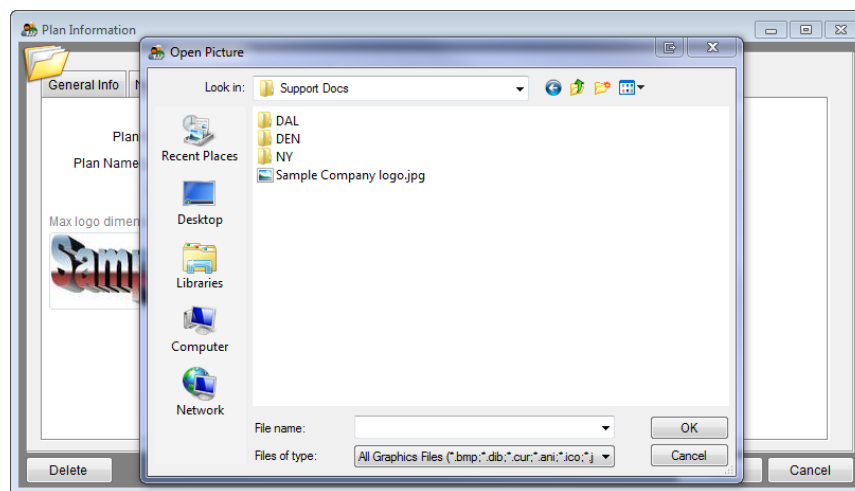
8) Confirm that all of the information is correct. Highlight the current text and type the correct text if necessary.

9) Click the **AAP Cover Page** tab.

- a) Use the **Plan Name 1** and **Plan Name 2** fields for long or alternative plan names. The text in these fields will appear only on the cover pages of both narratives. The Plan name provided in the **General Info** tab will appear in the body of both narratives.



- b) Use the browse (...) button to map the location of the corporate logo that you wish to display on the cover pages of both narratives. Click on the logo file and then click **OK**. The logo displayed in the large box will appear on the cover pages of your Women & Minorities and Disabled & Veterans narratives. The logo will also appear on the cover of the Compensation Analysis.



10) Click **OK** to save the information.

Continue reading this chapter to learn more about customizing your narratives, or proceed to Chapter 9 for instructions on publishing your AAP.

## Customizing Your AAP Layout & Design

If you wish to make changes to a publishable document's order and text, follow the steps outlined below in the sections *Create a New Document*, *Section Designer*, and *Layout Designer*. Only the affirmative action plan is used in the example below, but the instructions can be used to make changes to any publishable document.

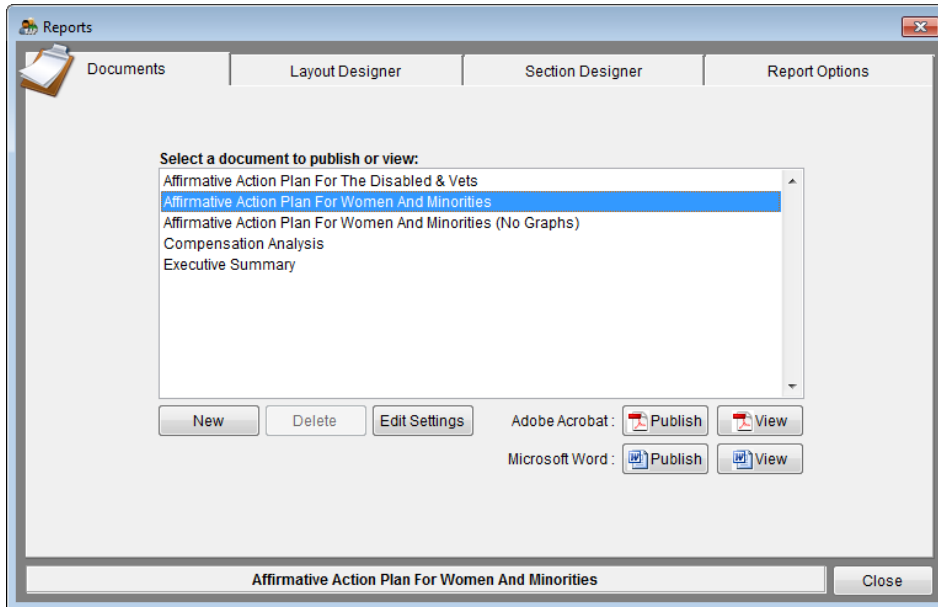
## Create a New Document

---

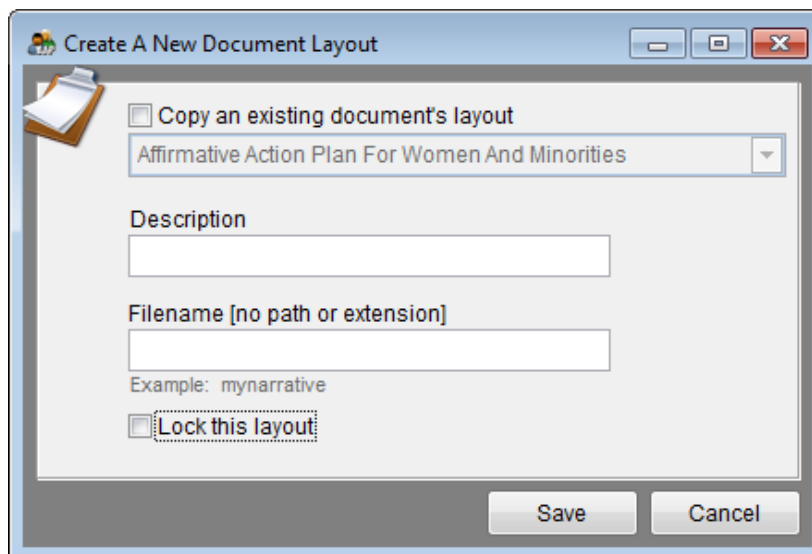
- 1) Click the Reports icon.



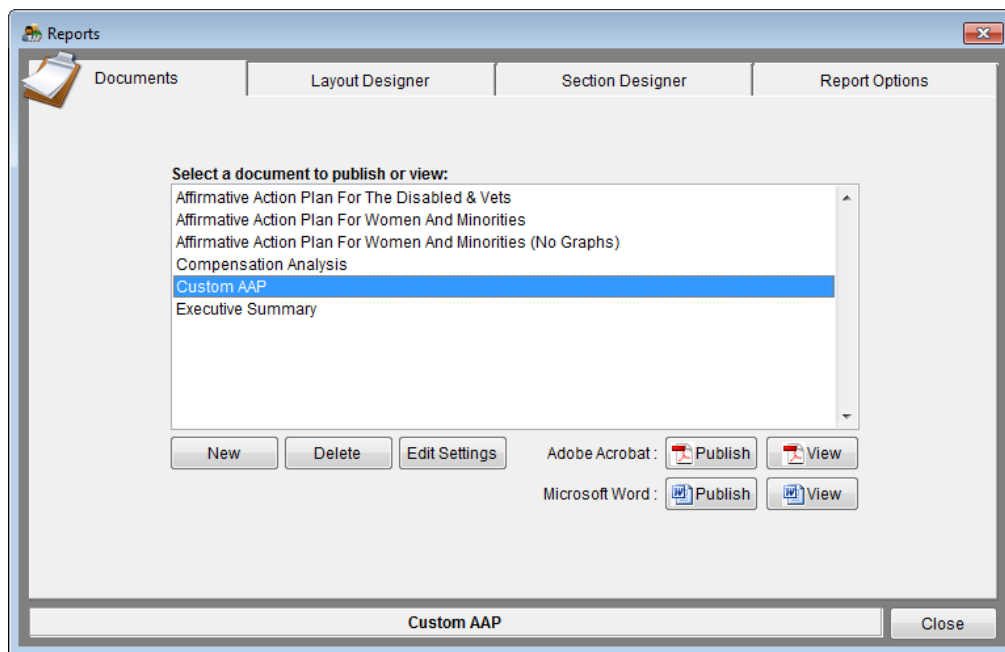
- 2) On the **Documents** tab, click on the **New** button.



- 3) Select **Copy an existing document's layout** and choose the existing layout on which you want to base your custom layout from the pull-down menu. If you want to build a document layout from scratch, leave this box un-checked.



- 4) In the **Description** box, type in a unique name that you will recognize in the list of printable PDFs.
- 5) In the **Filename** box, enter what your file should be named when you publish this particular PDF; do not enter a path or extension.
- 6) Do not select **Lock this layout** at this point. If it is checked at this point, the layout will be locked and cannot be customized.
- 7) Click **Save**. The document you created appears in the Select a document to publish or view list.



- 8) Use the **Section Designer** tab to edit text in the sections of your new document. Use the **Layout Designer** tab to reorder the sections of your new document. Instructions for each follow.

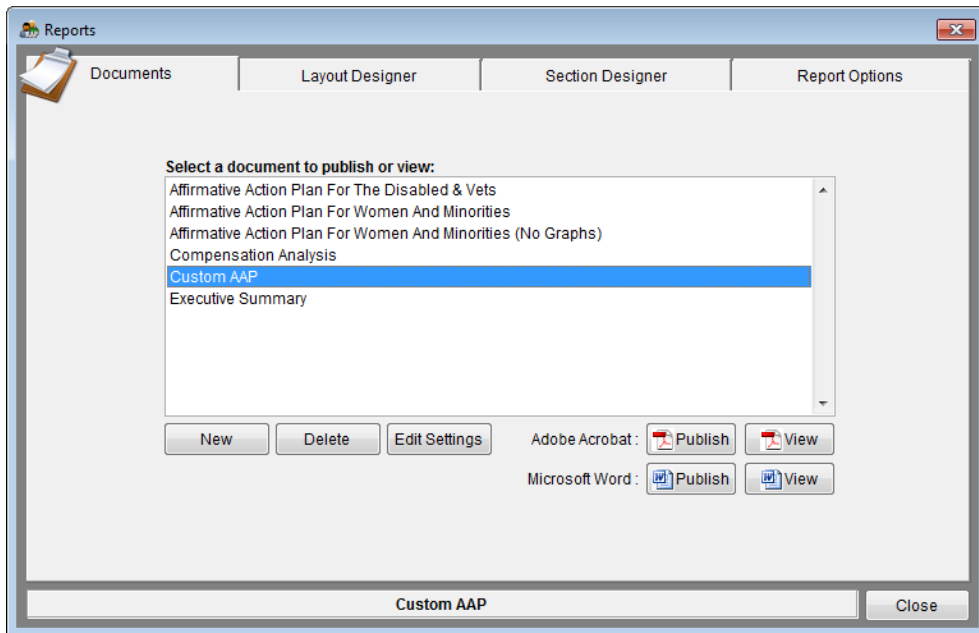
## Section Designer

If you have not already created an editable document, follow the steps in *Create a New Document* above before proceeding.

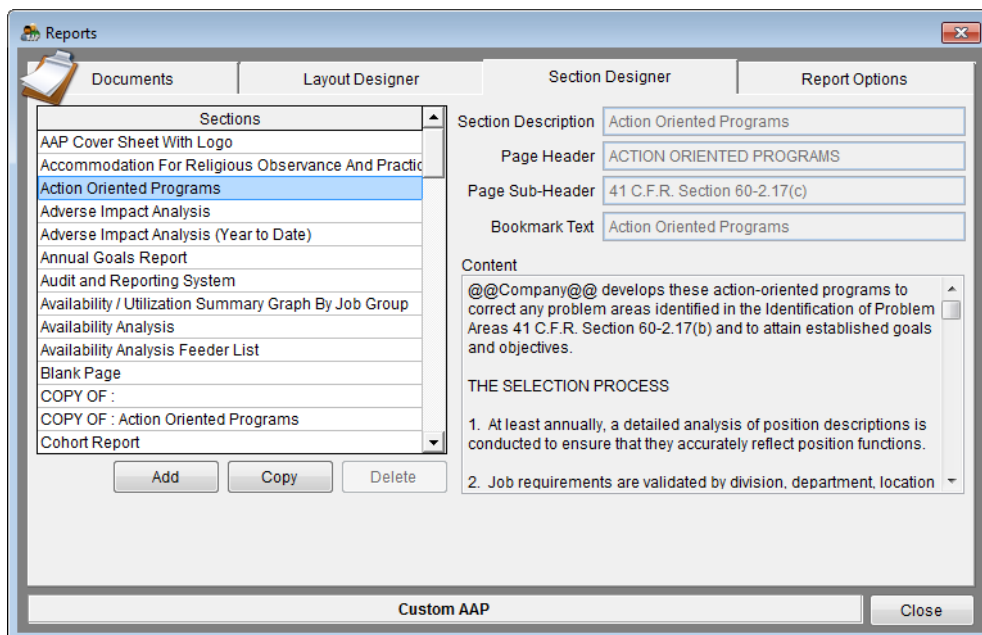
- 1) Click the **Reports** icon.



- 2) Click on the document that you created.



- 3) Click the **Section Designer** tab. The list of available sections is shown on the left side.
- If you want to make changes to one of the existing sections, click on it in the list, and then click the **Copy** button. This copies the section you highlighted, and automatically names it **COPY OF:\_\_\_\_\_**.
  - If you want to create a new section, click the **Add** button.
- 4) Edit the section text using the *Text Entry Field* descriptions below as a guide.



## Text Entry Fields

---

The sections below can be changed in the **Section Designer** tab by typing new or overwriting the text in the boxes beside them. While you are editing the fields, keep in mind the following:

- Some of the PDF sections listed on the left side of the **Section Designer** tab cannot be copied or edited.
- There are no editing functions available in the **Section Designer** tool, such as bold, indent, etc. If you plan extensive editing and wish to use word processing functions, we suggest that you publish your final AAP to Word rather than PDF format.
- Text entered into the fields is saved automatically when the **Close** button is pressed.

**Section Description:** The text in the **Section Description** field serves to distinguish the section from others in the **Sections** list. This title does not appear on published reports.

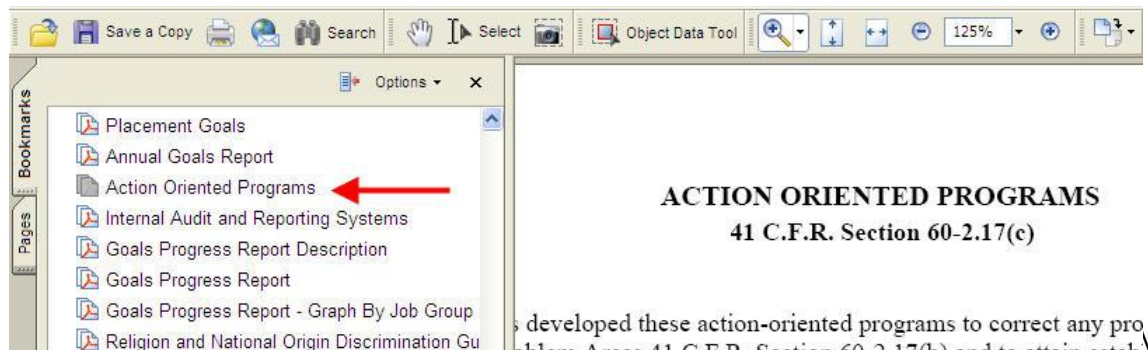
**Page Header:** The text entered into the **Page Header** field appears in bold text at the top of the section's page in the narrative of the AAP. This header is represented by the words "Action Oriented Programs" in the example below.

**Page Sub-Header:** The text entered into the **Page Sub-Header** field appears in bold directly under the page header. This header is represented by the words "41 C.F.R. Section 60-2.17(c)" in the example below.

### **ACTION ORIENTED PROGRAMS** **41 C.F.R. Section 60-2.17(c)**

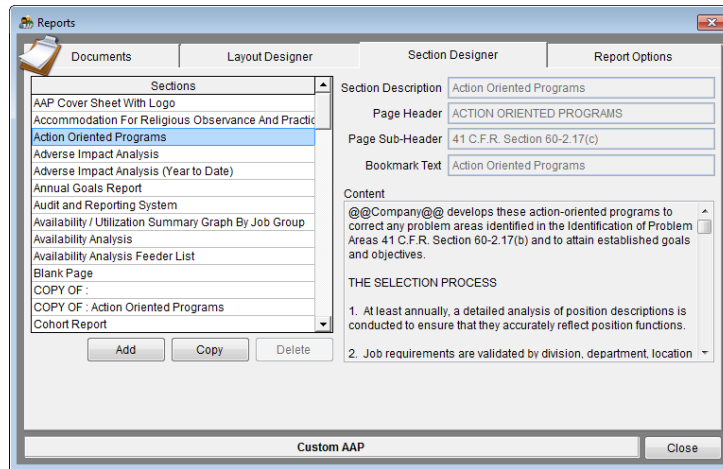
ed these action-oriented programs to correct any pro  
reas 41 C.F.R. Section 60-2.17(b) and to attain estab

**Bookmark Text:** Text entered into the **Bookmark Text** field is the name that is given to the section's bookmark in the published PDF document. An example is shown below.



**Content:** This text appears in the main body of the published section. The text is standard and cannot be formatted to be bold, italic, etc. Items that appear in the **General Info &**

**Narrative Info** tabs of the **Plan Information** window can be inserted automatically into the narrative by using “@@” symbols as shown in the **Content** box of the image below.



To insert fields into the **Content** text, type them exactly as they appear in the list below. The @@Company@@ entry pulls text directly from the **Plan Name** field of the **Plan Information** window's **General Info** tab. The @@User\_Name@@ entry pulls from the **User** tab of the **Utilities** menu's **Options** window. The @@Date@@ entry inserts the current date when the document is published. All others listed below are pulled directly from the **General Info** tab of the **Plan Information** window.

@@Company@@  
 @@User\_Name@@  
 @@Date@@  
 @@Company\_Dunn\_\_Bradstreet\_@@  
 @@Employer\_ID\_@@  
 @@Company\_EEO1@@  
 @@EEO\_Contact@@  
 @@EEO\_Company@@  
 @@Address\_1@@  
 @@City@@  
 @@State@@  
 @@Zip@@  
 @@EEO\_Contact\_Phone\_@@  
 @@Parent\_Company@@  
 @@Parent\_Dunn\_\_Bradstreet\_@@  
 @@Parent\_EIN@@  
 @@Parent\_EEO1@@  
 @@Executive\_Officer@@  
 @@Executive\_Officer\_Title@@  
 @@PlanStartDate@@  
 @@PlanEndDate@@

After you create custom sections, insert them into the layout of your document by using the **Layout Designer** tool. Instructions for the **Layout Designer** follow.

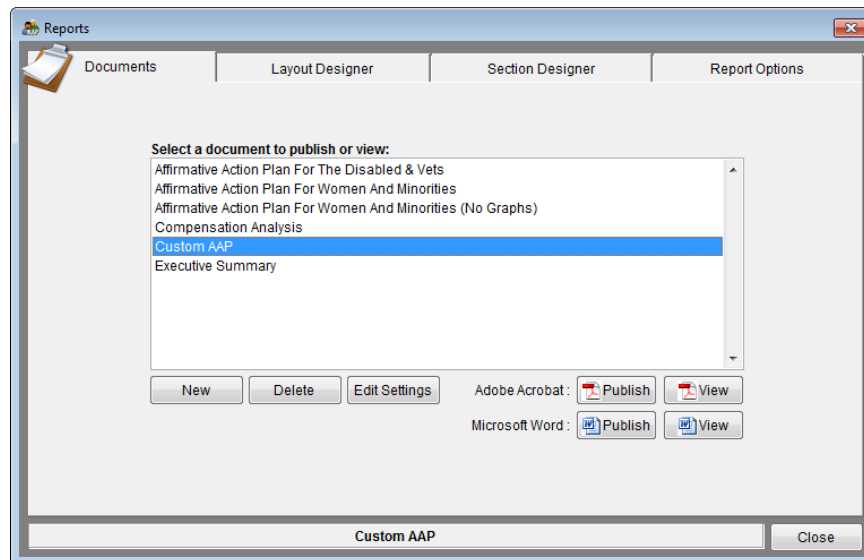


If you wish to insert a new section into a custom layout, it is recommended that you follow the directions in the *Section Designer* section before proceeding with the steps outlined below.

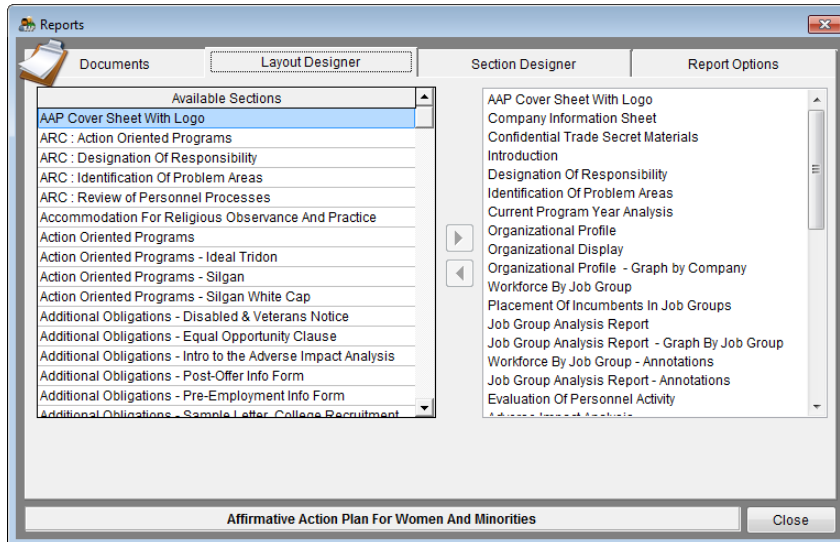
- 1) Click the **Reports** icon.




- 2) On the **Documents** tab, click on a custom layout in the list.



- 3) Click on the **Layout Designer** tab.
  - a. The left side of the window shows all available sections that can be added to your custom document layout.
  - b. The right side of the window shows all the sections currently included in your custom document layout in the order in which they will appear in the published document.



- 4) To add an available section to your custom document layout, highlight it on the left side and then push the right-pointing arrow button to incorporate it into your custom document layout. It will automatically appear on the bottom of the list on the right side of the window.
- 5) To re-order the selected sections:
  - a. Hover your mouse over the gray box to the left of the section you want to move:
 
  - b. When your cursor turns into a double arrow, click and drag the section to the desired position. Release the mouse when the section is in the desired location.
- 6) To remove a section, highlight it in the list on the right side, and then click the left-pointing arrow button to remove it from your custom layout.
- 7) Changes are saved automatically; there is no “Save” button.
- 8) When the layout of your custom document is completed, click on the **Documents** tab to publish your custom document. Highlight your custom document in the list under the document list and click either the Adobe Acrobat or Microsoft Word **Publish** Button.

Please continue to Chapter 9 to publish your reports.

# Chapter 9

Publish and Review Your Reports

## Publish Your Reports

---

The Complete AAP allows you to publish your reports individually without using a template or all together in a complete document by using the recommended document template. You may publish reports individually by selecting the **Reporting** menu at the top of your screen or by clicking the **Publish** button in each report's **Options** tool found in the **Report Options** tab of the **Reports** icon. You may publish a complete AAP, Compensation Analysis and Executive Summary from the **Reports** icon by following the steps below. Publishing documents by using the AAP template or the Compensation Analysis template will create either Microsoft Word or PDF documents that contain narratives with the reports and graphs inserted in the appropriate locations. PDF documents also contain bookmarks.

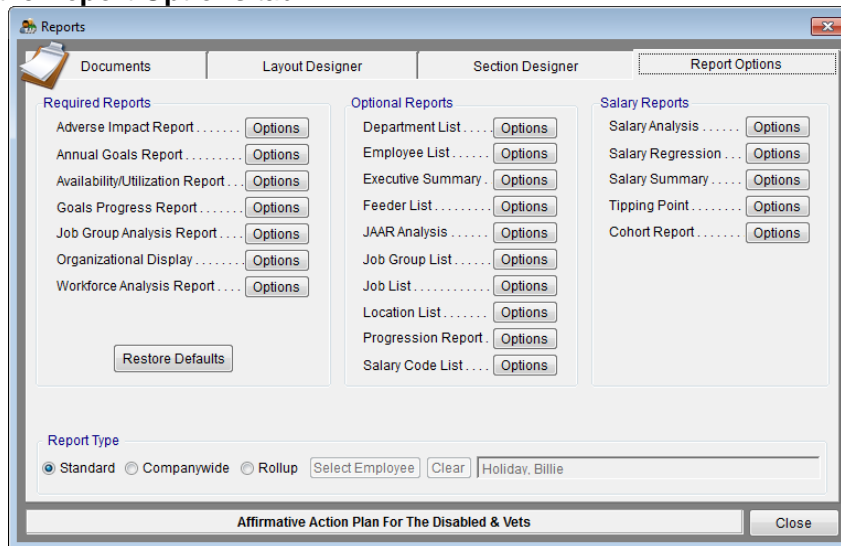
### *Publish Your AAP*

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- 1) Click the **Reports** Icon.



- 2) Click the **Report Options** tab.



- 3) Click the **Restore Defaults** button.

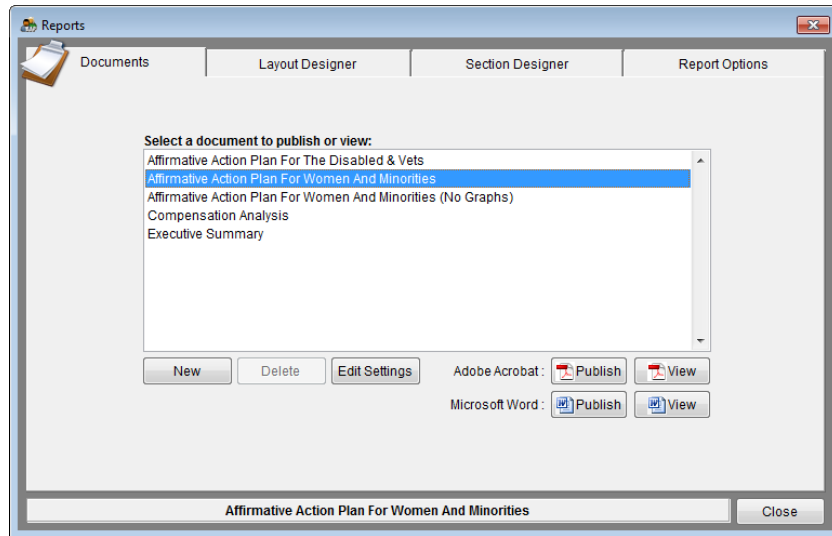
Note: You may set reporting options by clicking the **Options** button of each report, or by visiting the **Job Groups** window's **Availability & Utilization** tab, however, it is recommended that you use the software's default settings.

- 4) Click the **Documents** tab.
- 5) Select the document that you wish to publish.
- 6) Click **Publish** for either Adobe Acrobat or Microsoft Word.

- a. If you wish to print a hard copy, first publish the document and then open your document. Print using the directions in your software.



- b. Pro users may publish all AAPs in one company by clicking on the **Work with All Plans** button in the **Open Plan** window.



- 7) When the document has been created it will open on your screen.

### *Publish Your Midyear Update Reports*

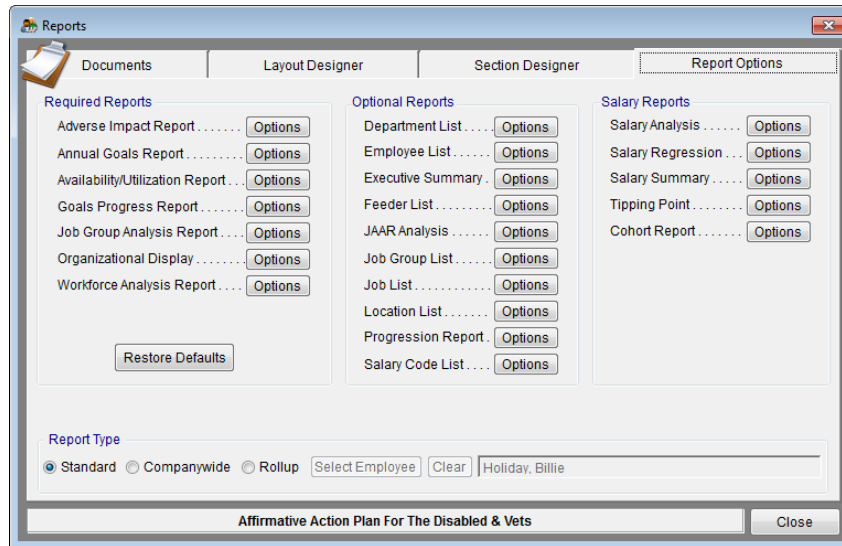
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If you have manually entered or imported Current Midyear data following the instructions in Chapter 7 you may publish the Current Midyear Adverse Impact and Goals Progress Reports utilizing the steps listed below.

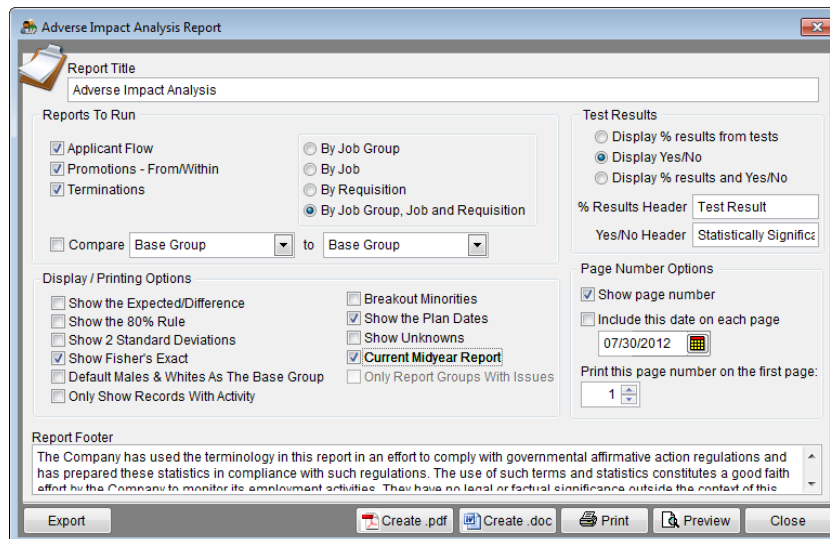
- 1) Click the **Reports** Icon.



- 2) Click the **Report Options** tab.



- 3) Click the **Restore Defaults** button.
- 4) Click the **Options** button for Adverse Impact Report or Goals Progress Report.
- 5) Click the **Current Midyear Report** box.



- 6) Click **Create .pdf**, **Create .doc** or **Print** to publish your midyear reports. The PDF or Microsoft Word reports will automatically open on your screen.
- 7) Click **Close**.
- 8) Click the **Options** button for Goals Progress Report and follow steps 5 through 7.

## Understanding Your Reports

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### *Organizational Display*

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The Organizational Display is a detailed presentation of your company's organizational structure. It identifies each organizational unit and shows the relationship to other organizational units. An organizational unit is any component part of a government contractor's corporate structure. It might be a department, division, section, branch, group, project team, job family, or similar component. This includes an umbrella unit (such as a department) that contains a number of subordinate units, and it separately includes each of the subordinate units (such as sections or branches).

For each organizational unit, the organizational display includes the following:

1. The name of the unit;
2. The job title, gender, race, and ethnicity of the unit supervisor(s) (if the unit has a supervisor);
3. The total number of males and females in the base group; and
4. The total number of males and females in each of the separate minority groups within the base group.

<b>Sample Company Denver, CO</b> 15401 West 9th Avenue Golden, CO 80401	
<b>Organizational Display</b> 41 CFR Section 60-2.11 (b)	
D0001 : Administration - Total Employees: 11; 4WM / 3WF / 1BF / 2AM / 1TM	
34 : President - Total: 1; 1WF	
D0004 : Finance - Total Employees: 4; 2WM / 1BM / 1BF	
4 : Chief Financial Officer - Total: 1; 1BM	
D0003 : Facilities - Total Employees: 1; 1WM	
D0006 : PR & Marketing - Total Employees: 9; 3WM / 4WF / 1BM / 1BF	
14 : Director, Marketing - Total: 1; 1BF	
D0002 : Development - Total Employees: 6; 2WM / 2WF / 1BM / 1PF	
7 : Computer Programmer/Technician - Total: 1; 1WF	
D0009 : Software - Total Employees: 16; 10WM / 1WF / 2BF / 1HM / 1IM / 1TM	
12 : Director, Cool - Total: 1; 1WM	
D0005 : Human Resources - Total Employees: 5; 4WF / 1TF	
13 : Director, Human Resources - Total: 1; 1WF	
D0007 : Product Maintenance - Total Employees: 8; 5WM / 1HM / 1IM / 1TM	
D0008 : Sales & Services - Total Employees: 22; 10WM / 5WF / 2BM / 1BF / 1HM / 1PM / 1TM / 1TF	
16 : Director, Sales - Total: 1; 1WM	

### **What should you look for?**

This report determines the top-level supervisor in each department by searching for the highest EEO-1 category and the highest pay. If jobs listed for the supervisor in each department do not appear to be correct, verify the base salary, supervisor ID and EEO-1 category of each employee for each department in question.

## Job Group Analysis Report

The Job Group Analysis report lists all jobs in each job group and shows the total number of males, females and minorities for each job and job group.

Sample Company Denver, CO 15401 West 9th Avenue Golden, CO 80401																	
Job Group Analysis Report																	
41 CFR Section 60-2.12-13																	
Job Code : Job Title		Males								Females							
		Total	WHI	BLK	HIS	ASI	AMI	PH	TWO	Total	WHI	BLK	HIS	ASI	AMI	PH	TWO
<b>1A : Executives</b>																	
3 : Chief Executive Officer		1	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
34 : President		0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0
4 : Chief Financial Officer		1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0
40 : Sr. Vice President		1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Job Group Totals :		3	1	1	0	1	0	0	0	1	1	0	0	0	0	0	0
Job Group Percentages :		75%	25%	25%	0%	25%	0%	0%	0%	25%	25%	0%	0%	0%	0%	0%	0%

### What should you look for?

Compare the percent representation of women and minorities between job groups to detect where women and/or minorities may be relegated to only certain job groups. Use this as a tool to pinpoint promotion opportunities.

## Job Group Analysis Report Annotations

The Annotations report that follows the Job Group Analysis lists the total number of males, females, whites and minorities in each job and job group who work at your facility and report to or are hired through another facility. Employees who work at other facilities and report to or are hired through yours are also shown in this report. This report displays only annotated records.

Sample Company Denver, CO 15401 West 9th Avenue Golden, CO 80401																	
Job Group Analysis Report (Annotations)																	
41 CFR Section 60-2.12-13																	
Job Code : Job Title		Males								Females							
		Total	WHI	BLK	HIS	ASI	AMI	PH	TWO	Total	WHI	BLK	HIS	ASI	AMI	PH	TWO
<b>1B : Managers/Supervisors</b>																	
15 : Director, Network		1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reports to/hired by Denver, CO and works at Dallas, TX																	
17 : Director, Security		1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reports to/hired by Denver, CO and works at Dallas, TX																	
18 : Director, Software		1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reports to/hired by Denver, CO and works at Dallas, TX																	
Job Group Totals :		3	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Job Group Percentages :		100%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%



## Availability Analysis Report

The Availability Analysis report analyzes your workforce by matching the current percentage of minorities and females you have in the jobs that make up each job group to the percentage of minorities and females that are available in the labor market you use to fill those jobs. The top of the report shows the name of the job group, and the total number of total employees, females, and minorities that constitute the job group. To determine minority and female availability, the OFCCP has developed two main factors that you see listed in the middle of the report.

To determine female and minority availability, these factors are:

1. The percentage of minorities or women with requisite skills in the reasonable recruitment area.
2. The percentage of minorities or women among those promotable, transferable, and trainable within the contractor's organization.

We have broken these down into factors 1a (local census area), 1b (non-local census area), 1c (training institutions), 2a (promotable/transferable) and 2a (persons trainable). Factors 1a & 1b represent those individuals in relevant labor market areas who currently have the skills and experience for the jobs in the job group. Factor 1c is the percent of minorities and females at training institutions where your company recruits who have the educational training in areas needed by your company. Factor 2a gives the percentages of females and minorities in job groups that "feed" into the job group being analyzed. Factor 2b gives the percentage of minorities and females in your workforce who are trainable for promotion or transfer during the current AAP year.

There are two columns of figures under the **Minorities** and **Females** headings. The first column, **Raw Percent**, gives the total percent of availability for each factor. The second column representing the **Net Percent** is the result of the multiplication of the percentage under the **Weight Factor** column times the raw percentage. The **Weight Factor** column is the degree of consideration you give to each factor when filling the jobs in each job group. A zero percentage is shown where no consideration is given to that factor. Adding the percentages in the **Net Percent** column yields the total percentage of availability for minorities and females. Listed just below this availability figure is the current percentage of minorities and females found in the job group. The total availability and the utilization are compared in a 2 Standard Deviations test to determine whether your organization is underutilized in minorities and/or females in the job group. If the current utilization percentage of females and minorities is beyond 2 standard deviations of their availability percentage, a placement goal is set; the goal is the total percent availability.

Sample Company Denver, CO 15401 West 9th Avenue Golden, CO 80401					
Availability Analysis 41 CFR Section 60-2.14					
1A : Executives (Total Employees : 4)					
	Weight	Females		Minorities	
		Total: 1	Total: 2	Total: 1	Total: 2
		Raw %	Net %	Raw %	Net %
1a. Recruitment (local)	20%	29%	6%	9%	2%
1b. Recruitment (non-local)	60%	27%	16%	12%	7%
1c. Training Institutions	0%	0%	0%	0%	0%
2a. Promotable/Transferable	20%	50%	10%	20%	0%
2b. Persons Trainable	0%	0%	0%	0%	0%
3. Custom Factor	0%	0%	0%	0%	0%
	100%				
Total Availability		32%		14%	
Current %		25%		50%	
Placement Goal?, 2 Standard...		No		No	
Statistical Sources:					
Factor 1a: 2000 U.S. Census Bureau Statistics for Denver, CO PMSA					
Factor 1b: 2000 U.S. Census Bureau Statistics for United States exc. Hawaii					
Factor 2a: Internal promotions are from all jobs within job group 1B.					

### What should I look for?

Review each job group's total availability to see if it appears to be reasonable. If you feel the availability figures are unreasonable, review job groups' weight factors and statistical sources, including job census codes if weight is placed on factor 1a or 1b.

## Utilization Summary Report

The Utilization Summary report displays the total number of employees and the total number of females and minorities. The report shows the total availability, current % of utilization for females and minorities, and a "Yes" or "No" placement goal result.

Sample Company Denver, CO 15401 West 9th Avenue Golden, CO 80401			
Utilization Summary 41 CFR Section 60-2.15			
1A : Executives (Total Employees : 4)			
Test Used: Two Standard Deviations			
	Female	Minority	
Current #	1	2	
Total Availability	28%	12%	
Current %	25%	50%	
Placement Goal?, 2 Standard Deviations Test	No	No	

## Annual Goals Report

The Annual Goals report displays the placement goals of each job group that is underutilized in females and/or minorities. The placement goal is equal to the total availability percentage calculated on the Availability Analysis Report.

Sample Company Denver, CO  
15401 West 9th Avenue  
Golden, CO 80401

Annual Goals Report  
41 CFR Section 60-2.16

1A : Executives

Test Used : Two Standard Deviations

Female

Minority

Current Placement Goals

0%

0%

1B : Managers/Supervisors

Test Used : Two Standard Deviations

Female

Minority

Current Placement Goals

0%

0%

## Goals Progress Report

---

The Goals Progress report shows each job group's hire and promotion (to) percentage rates for females and minorities during the previous AAP year, and the placement rate goal set at the beginning of the previous AAP year.

Sample Company Denver, CO 15401 West 9th Avenue Golden, CO 80401			
<b>Goals Progress Report</b>			
41 CFR Section 60-2.16 01/01/2014 - 12/31/2014			
<b>1A : Executives (4 total incumbents)</b>			
Total Hires: 2	Total Promotions: 2	<b>Female</b>	<b>Minority</b>
Incumbents		1	2
Previous Placement Goals %		0%	0%
Actual Placement Rate %		50%	25%
Actual Placement (Hires)		0	0
Actual Placement (Promotions)		2	1
Met Goal?		Yes	Yes
<b>1B : Managers/Supervisors (7 total incumbents)</b>			
Total Hires: 2	Total Promotions: 2	<b>Female</b>	<b>Minority</b>
Incumbents		5	4
Previous Placement Goals %		0%	0%
Actual Placement Rate %		50%	25%
Actual Placement (Hires)		0	0
Actual Placement (Promotions)		2	1
Met Goal?		Yes	Yes

### What should you look for on the Previous Progress report?

Make sure that the previous goals match the annual goals from the previous AAP.

## Understanding Your Adverse Impact Analysis Reports

---

Adverse Impact Analysis reports display the applicant, hire, base group, promotions from/within and termination data that are in the Adverse Impact table of the software. The report uses a statistical test to determine if adverse impact exists in the hiring rates of women as compared to men, and minorities as compared to whites. The Complete AAP defaults the use of The Fisher's Exact Test, which was developed to more accurately compare the selection ratios of minorities to whites, and females to males in groups. The default settings\* in The Complete AAP deem a reported number of greater than .05 as passing the Fisher's Exact test. Though The Fisher's Exact test can be calculated in a variety of different ways, a number of .05 or less is considered by the OFCCP to be a statistically significant indication that the difference in selection rates occurred by something other than chance.

*\*To change the calculation method of The Fisher's Exact test, select **Options** in the **Utilities** menu of the main screen.*

### What should you look for?

- Review each report to identify areas of statistical adverse impact. Statistical adverse impact is indicated by a "Yes" in the **Statistically Significant** column.
- If "N/A" appears in the **Statistically Significant** column, the software cannot conduct a valid analysis due to one or more factors.

## Applicant Flow

The Adverse Impact Analysis (Applicant Flow) report compares the number of hires to the number of applicants in each job group. The percentage of hires is calculated by dividing the number of hires by the number of applicants. The difference in the percentage of hires between males versus females, and whites versus minorities is run through a statistical test\* to determine if it is statistically significant.

*\*Fisher's Exact being the default, recommended test*

Sample Company Denver, CO 15401 West 9th Avenue Golden, CO 80401				
<b>Adverse Impact Analysis (Applicant Flow)</b>				
1A : Executives				
01/01/2014 - 12/31/2014				
	Applicants	Hires	% Hires	Fisher's Exact Statistically Significant?
Male	4	2	50%	No
Female	8	0	0%	
White	2	2	100%	Yes
Minorities	10	0	0%	

### What should you look for?

- Review all of your totals to ensure that accurate data were used in the analysis.
- Review the applicants in the groups with adverse impact to determine the nondiscriminatory reasons why non-favored groups were not hired at a statistically similar rate to that of favored groups.

## Promotions (From/Within)

The Adverse Impact Analysis (Promotions – From/Within) report calculates the percentage of promotions by dividing the number of promotions by the base group.

Sample Company Denver, CO 15401 West 9th Avenue Golden, CO 80401				
<b>Adverse Impact Analysis (Promotions - From/Within)</b>				
1A : Executives				
01/01/2014 - 12/31/2014				
	Base Group	Promotions	% Prom.	Fisher's Exact Statistically Significant?
Male	3	1	33%	No
Female	1	0	0%	
White	2	0	0%	No
Minorities	2	1	50%	

### What should you look for?

- Review all of your totals to ensure that accurate data were used in the analysis.
- Analyze the groups with adverse impact to determine the nondiscriminatory reasons why non-favored groups were not promoted at a rate similar to that of favored groups.

## Terminations

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The Adverse Impact Analysis (Terminations) report calculates the percentage of terminations by dividing the number of terminations by the base group.

Sample Company Denver, CO  
15401 West 9th Avenue  
Golden, CO 80401

### Adverse Impact Analysis (Terminations)

1A : Executives

01/01/2014 - 12/31/2014

	Base Group	Terms.	% Term.	Fisher's Exact Statistically Significant?
Male	3	2	67%	
Female	1	1	100%	No
White	2	2	100%	
Minorities	2	1	50%	No

#### What should I look for?

- Review all of your totals to ensure that accurate data were used in the analysis.
- Analyze the groups with adverse impact to determine nondiscriminatory reasons why non-favored groups were terminated at a greater rate than favored groups.

## Compensation Reports

The compensation analysis reports are preliminary analyses designed to expose possible compensation issues, but are not necessarily indicative of illegal wage discrimination. The Salary Summary report lists the total compensation by race and gender for each job title. This report may be submitted to OFCCP to satisfy their initial request for compensation data in the audit letter. The Salary Analysis reports consist of a comparison of average and median pay of females to males and whites to minorities within each job title. The Salary Regression Analysis by job title is the best indicator of whether a difference in pay between males and females or between whites and minorities is statistically significant. This report can include factors, such as seniority, work performance, related experience, etc., that may explain pay differences. See the *Employees* section of Chapter 5 for information on how to include these factors.

### Salary Summary

The Salary Summary report lists the total compensation by race and gender for each job title. **Only this** compensation report should be submitted to the OFCCP to satisfy item 11 of the audit scheduling letter. The scheduling letter requests that the data be submitted by salary range, rate, grade, or level, however, we recommend that you run this report by job.

Sample Company Denver, CO 1234 Broadway Denver, CO 80222					
<b>Salary Summary Report</b> All Employees, Base Salaries 41 CFR Section 60-1.4(a)(1)					
CONFIDENTIAL					
Job: 1 : Administrative Assistant					
	White		Minority		Total
	#	Salary	#	Salary	# Salary
Male	1	\$25,000	0	\$0	1 \$25,000
Female	1	\$25,489	3	\$79,041	4 \$104,530
Total	2	\$50,489	3	\$79,041	5 \$129,530
Job: 11 : Database Data Entry					
	White		Minority		Total
	#	Salary	#	Salary	# Salary
Male	0	\$0	0	\$0	0 \$0
Female	1	\$19,000	0	\$0	1 \$19,000
Total	1	\$19,000	0	\$0	1 \$19,000

## Salary Analysis

The Salary Analysis consists of a comparison of average and median pay of females to males and whites to minorities within each job title. The **Median** results of the compensation analysis shows the midpoint salary figure for females, males, whites and minorities. The **Average** results of the compensation analysis shows the average of the sum of all salaries being analyzed divided by the number of salaries being analyzed. The report shows the relative percent between female and male and between minority and white salaries. The report also shows the dollar difference between male and female and between white and minority median and average salaries.

Sample Company Denver, CO 1234 Broadway Denver, CO 80222				
<b>Salary Analysis</b>				
<i>All Employees With Part-Time Converted To Full-Time Equivalent</i>				
CONFIDENTIAL				
Job - 1 : Administrative Assistant				
	Incumbents	Base Salary	Relative %	\$ Difference
AVERAGE				
Female	4	\$26,133		
Male	1	\$25,000	96%	\$1,133
Minority	3	\$26,347		
White	2	\$25,245	96%	\$1,102
MEDIAN				
Female	4	\$25,992		
Male	1	\$25,000	96%	\$992
Minority	3	\$26,087		
White	2	\$25,245	97%	\$842

## Salary Regression Analysis

The Salary Regression Analysis tests for possible compensation disparity within each job. The analysis takes into consideration such factors as race, gender, hire date, and other factors you may have included for this purpose. If a “Yes” appears in the **Significant?** column for any group you may wish to research these salaries further to determine the cause of the discrepancy.

Sample Company Denver, CO 1234 Broadway Denver, CO 80222				
<b>Salary Regression Analysis</b>				
<i>All Employees, Part-Time Base Salaries Converted To Full-Time Equivalent</i>				
CONFIDENTIAL				
Job - 1 : Administrative Assistant (5 Employees)				
	Employees	Avg Salary	Significant?	Std Dev
Female	4	\$26,133		
Male	1	\$25,000	No	1.23
Minority	3	\$26,347		
White	2	\$25,245	Yes	11.84
Job - 11 : Database Data Entry (1 Employee)				
	Employees	Avg Salary	Significant?	Std Dev
Female	1	\$19,000		
Male	0	\$0	N/A	
White	1	\$19,000		
Minority	0	\$0	N/A	

## Executive Summary

The Executive Summary is intended for internal use only, and it is recommended that you not submit it to an OFCCP auditor. The purpose of this report is to present AAP findings to management in a summarized, user-friendly format. This report displays the current number of total employees, females, minorities, current annual goals, previous goals and the hire, promotion and termination rates for each job group. Adverse impact for each group is also noted in the **Statistically Significant** columns.

Sample Company Denver, CO  
1234 Broadway  
Denver, CO 80222

**Executive Summary/Management Presentation**

	Current	Current Goal	Previous Goal	Hire Rate	Statistically Significant?	Promotion Rate	Statistically Significant?	Term Rate	Statistically Significant?
<b>1A: Executives (4 Employees)</b>									
Italo	3			0% (0)		0% (0)		0% (0)	
Females	1	0% (0)	0%	0% (0)	N	0% (0)	N	0% (0)	N
White	2			0% (0)		0% (0)		0% (0)	
Minorities	2	0% (0)	0%	0% (0)	N	0% (0)	N	0% (0)	N
White	2								
Black	1	0% (0)	0%	0% (0)	N	0% (0)	N	0% (0)	N
Hispanic	0	0% (0)	0%	0% (0)	N	0% (0)	N	0% (0)	N
Asian	1	0% (0)	0%	0% (0)	N	0% (0)	N	0% (0)	N
American Indian	0	0% (0)	0%	0% (0)	N	0% (0)	N	0% (0)	N
Hawaiian/Pac. Islander	0	0% (0)	0%	0% (0)	N	0% (0)	N	0% (0)	N
Two or More	0	0% (0)	0%	0% (0)	N	0% (0)	N	0% (0)	N



# Chapter 10

## Support Data

## Back Up Your AAP

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- 1) Launch The Complete AAP.
- 2) Open the company you wish to backup. Pro users must either open an AAP or must choose **Work with All Plans**; both yield the same backup.
- 3) Click on **Utilities** and then **Backup**.
- 4) The default back up location is C:\COMPLETE AAP 11\AAPDATA\AAPBACKUP, but you can click the browse, "... " button to select a different drive and folder.
- 5) Click **OK**.
- 6) Click **OK** on the next window.

The PRO icon is a red arrow pointing right with the word "PRO" in white text inside.

The **Backup** tool in the Pro version will back up the entire company, not individual AAPs.

## Restore Your AAP

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- 1) Launch The Complete AAP.
- 2) Open the company you wish to restore over, or if you do not wish to restore over an existing company, open any company.
- 3) Click on **Utilities** and then **Restore**.
- 4) In the box that appears, click on the browse "... " button.
- 5) In the window that appears, select the appropriate drive and folder.
- 6) Click once on the correct company in the **Restorable Companies** box.
- 7) Select either the **Restore the data over the currently opened Company** or **Create a new plan with the restored data** as it fits your circumstances.

The PRO icon is a red arrow pointing right with the word "PRO" in white text inside.

- a) Pro users may instead select Add the plans (in the backup file) into the currently open company. This will add one or more AAPs into a single company.
- 8) Click the **Restore** button.
  - 9) Click **OK** on the final window.

## Moving AAPs from One Computer to Another Computer

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To move a plan or plans from one computer's installation of The Complete AAP to another's installation of The Complete AAP, follow these instructions:

- 1) On the old computer, find the **AapData** folder and copy it to a CD, a flash drive, or a network that is accessible to both computers. This will effectively give you a copy of all companies, plans and settings.
- 2) On the new computer, place or paste the **AapData** folder (that you copied in step 1) anywhere you want. It could be on your local C drive, or you could even leave it on a network drive. Just know where you have placed it.
- 3) On the new computer:
  - a) Launch The Complete AAP.
  - b) When it asks if you would like to install **Typical**, **Custom**, or **Existing**, choose **Existing** and then click on the **OK** button.
    1. If you have already moved past this step, simply click the **Companies** icon and right click in the **PlanXXXX - \_:\complete aap 11\apdata\plans\PlanXXXX** box at the bottom of the **Select a company to work with** window.
    2. Choose **Select a different AAPData folder to work with** and map your software to the AAPData folder you brought over from the old computer. You should see your AAPs appear, and there is no need to proceed to step 4 below.
- 4) A directory dialog box will appear. Locate and select the folder called AapData and choose OK.

## **Additional Obligations as an Affirmative Action Employer**

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Below is a list of additional obligations to which government contractors are subject. The listing is specific to affirmative action, and may not cover additional obligations under other government regulations. Samples of the items below may be found later in this Chapter.

### *Purchase Orders/Contracts*

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An Equal Employment Opportunity (EEO) Clause must be incorporated into each non-exempt subcontract. The most common practice is to place the clause on all subcontracting documents without assessing on an individual basis whether each subcontractor is covered by affirmative action requirements. A sample EEO Clause is included in these materials. It should be placed on purchase orders and included in formal contracts.

### *Equal Opportunity Policy Statement*

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The Equal Opportunity Policy Statement, which reaffirms the commitment to qualified disabled individuals and covered veterans, must be posted on bulletin boards or other appropriate locations.

### *Notification of Employee Rights*

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Pursuant to Executive Order 13496 and its implementing regulations, 29 C.F.R. Part 471, Federal contractors and subcontractors, beginning on June 21, 2010, must notify employees about their rights under the National Labor Relations Act (NLRA). The NLRA is the primary law governing relations between unions and employers in the private sector, and guarantees the right of employees to organize and to bargain collectively with their employers, and to engage in other protected concerted activity with or without a union, or to refrain from all such activity. Additionally, Federal contracts and subcontracts must include a provision requiring Federal contractors and subcontractors to post the notice. Sample language is included in the Purchase Order/Subcontract Clauses below.

### *Letter to Vendors, Subcontractors & Suppliers*

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Current regulations suggest contractors notify subcontractors, vendors and suppliers of its equal opportunity policy and request appropriate action on their part. A sample letter has been included.

## Posters

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Posters with specific EEO language and notice of employee rights under the NLRA must be posted, visible to both current employees and applicants. The Office of Federal Contract Compliance Programs (OFCCP) or the Equal Employment Opportunity Commission (EEOC) office in your area can help you obtain the official poster.

## EEO-1 Form

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All companies required to have a written affirmative action plan must annually file a Standard Form 100 (EEO-1) with the Joint Reporting Committee. The form can be requested from your local EEOC office. Once requested, it will be automatically sent annually. The EEO-1 form and the Vets-100 form (discussed below) are the only affirmative action-related forms that you must annually report. See the EEO-1 Form Instructions for details on when and where to submit the form. Your affirmative action plan is updated annually, but is not submitted to any government agency unless you are selected for an audit.

## VETS-100A FORM

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All contractors and subcontractors with at least one government contract of \$100,000 or more entered into or modified on or after December 1, 2003 are required to submit a Vets-100A Form. Information regarding Disabled veterans, Armed Forces Service Medal veterans, Recently Separated veterans, and Other Protected veterans is reported. See the Vets-100A Reporting Instructions for details on when and where to submit the form.

## VETS-100 Forms

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All contractors and subcontractors with at least one government contract of \$25,000 or more entered into before December 1, 2003 are required to submit a Vets-100 form, and all contractors and subcontractors with at least one government contract of \$100,000 or more entered into on or after December 1, 2003 are required to submit a Vets-100A Form. Information regarding Vietnam era veterans, disabled veterans, and other eligible veterans is reported. See the Vets-100 Reporting Instructions for details on when and where to submit the form.

## Help Wanted Advertisements

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Help wanted solicitations must state that all qualified applicants will be considered without regard to race, color, religion, sex, or national origin. Companies typically use the abbreviation "Equal Opportunity Employer" or "EOE-M/F" to meet this obligation in advertisements. In addition to advertising you may undertake, you must also list all employment openings with your state Unemployment Security Commission (Job Service Center). "All employment openings" includes all positions except executive- and top management-level positions that are filled from within the contractor's organization, and positions that last three days or less. Listing with this agency does

not require that you hire any particular applicant. To avoid excess paperwork, some companies limit the number of referrals they accept when placing their job openings with the agency. Companies that accept unsolicited applications find that Job Service postings are helpful; rather than taking the applications and having to log and track them, unsolicited applicants are referred to the Job Service Center to fill out applications there. When the company has openings, Job Service refers qualified applicants. Only those persons actually referred to the company are considered applicants for purposes of tracking in their applicant log.

## Notifying Labor Unions

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Government contractors must notify each labor union with which it has a current collective bargaining agreement of its commitment to take affirmative action to employ qualified disabled veterans and other protected veterans. Although it is not specifically required, most companies also note their commitment to employ the non-veteran disabled, as well as women, and minorities. A sample letter of notification has been included for your convenience.

## Availability of The AAP For Employee Inspection

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The Disabled and Veterans portion of the AAP must be available for inspection to any employee or applicant. The Women & Minorities narrative and statistical materials need not be made available for viewing. A notice identifying the location and hours during which employees and applicants have access to the Disabled and Veterans AAP must be posted. This is usually done by placing the notice on company letterhead on a company bulletin board next to the EEO poster. A sample notice is included in these materials.

## Certification Of Non-Segregated Facilities

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Contractors must ensure that facilities provided for employees are not segregated on the basis of race, color, religion, national origin or gender. The Code of Federal Regulations 41, Section 60-1.8 was amended to eliminate the previous requirement that written certification be obtained from subcontractors.

## Record Retention

---

Personnel and employment records made or kept by a contractor must be preserved for two years from the date of the record or from the date of the personnel action, whichever occurs later. However, the record retention period is one year if the contractor has fewer than 150 employees or does not have a federal contract of at least \$150,000.

In addition, each establishment must maintain its current affirmative action plan and supporting documentation. Finally, each establishment must also keep the AAP and supporting documentation for the preceding affirmative action plan year.

- Regulations require that contractors maintain support data for the affirmative action plan, such as progression line charts, seniority rosters (if applicable), applicant flow data, adverse impact analysis reports, promotion data, transfer data, and termination data. The government most closely scrutinizes applicant flow and rejection data during an audit. Their purpose of the scrutiny is to identify minority or female applicants who were more qualified than white or male applicants who were hired. If a company cannot prove that persons who were hired were more qualified than those who were not hired, the auditor may insist that rejected applicants be offered positions and be given back pay to the date they were initially, wrongfully rejected.
- Attached is a sample voluntary identification form, The Pre-employment Information Form for Women and Minorities that should be given to each applicant to complete. Information from this form is intended to be entered into an applicant flow log. Once logged, the Voluntary Identification forms should be kept in a file separate from other applicant/employee information.
- The government allows contractors to visually determine race and gender when applicants refuse to self-identify. The contractor may directly log this information on the applicant flow log. This method is less defensible if questions arise about your visual determinations.
- The Vietnam Era Veterans Readjustment Assistance Act and the Rehabilitation Act requires affirmative action employers to invite all disabled applicants and disabled veterans and other eligible veterans to identify themselves. A form similar to the attached sample, The Post-Offer Information Form For Individuals with Disabilities, Disabled Veterans, & Other Eligible Veterans, should be given to all new-hires after they have been offered the job but before they begin their first day of work.
- An analysis of hiring practices must be performed at least annually. This should include an adverse impact analysis of minority and female hires.
- Copies of various job requisition requests, solicitations, and referral sources should be retained as support data for the AAP. Sample letters to these sources have been included in these materials.

## Sample Letter - Disseminated To Union

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Dear \_\_\_\_\_:

(Company) strives to comply with the requirement of Executive Order 11246, as amended, related to affirmative action; Section 503 of the Rehabilitation Act and the Americans with Disabilities Act, covering the employment of the disabled; and Section 402 of the Vietnam Era Readjustment Assistance Act of 1974, covering the employment of veterans. Please consider this letter as official notice that we will comply with all applicable Federal laws, regulations, and rulings in our hiring and employment activities.

We appreciate your cooperation in our effort to fully comply with these Federal requirements.

Sincerely,

(Name)  
EEO Coordinator



## Sample Letter - College Recruitment

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Dear \_\_\_\_\_:

In light of our recruitment efforts at your institution, we would like to take this opportunity to reaffirm (Company Name) position as an Equal Opportunity - Affirmative Action Employer. We request that among the applicants referred to us for interviews, you include qualified minority, women, veteran, and disabled individuals.

We appreciate your efforts and assistance in this area.

Sincerely,

(Name)  
EEO Coordinator

## Sample Letter - Recruitment Source

---

Dear \_\_\_\_\_:

(Company Name) has a long standing policy of Equal Opportunity in employment. Our practice is to fill positions by selecting applicants who can perform the work in a competent and professional manner. We do not discriminate on the basis of age, sex, race, color, religion, national origin, disabled, or veteran status. Our continued dealing with any community assistance group, agency, institute of higher learning, or placement service is predicated on an understanding of and compliance to this policy.

We expect your services to include active recruitment and referral of qualified minorities, women, disabled and veteran individuals.

Sincerely,

(Name)  
EEO Coordinator

## Purchase Order/Subcontract Clauses

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(Incorporated by Reference)

(The following clauses must be included in all Purchase Orders unless the contract is exempt under the rules and regulations of the Secretary of Labor issued pursuant to Executive Order 11246 and 13496, as amended.)

"The Equal Employment Opportunity Clause required under Executive Order 11246, the affirmative action commitment for disabled veterans and veterans of the Vietnam era, set forth in 41 CFR 60-300.5, the affirmative action commitment for disabled veterans and other protected veterans, set forth in 41 CFR 60-300.5, the affirmative action clause for disabled workers, set forth in 41 CFR 60-741.5, and the related regulations of the Secretary of Labor, 41 CFR Chapter 60, are incorporated by reference in this purchase order. By accepting this purchase order, vendor certifies that it complies with the authorities cited above, and that it does not maintain segregated facilities or permit its employees to perform services at locations where segregated facilities are maintained, as required by 41 CFR 60-1.8."

"The parties hereby incorporate the requirements of the Notification of Employee Rights Under Federal Labor Laws; Final Rule, 29 CFR Part 471, Appendix A to Subpart A, if applicable."

### **Alternative Language:**

The parties hereby incorporate the requirements of 41 C.F.R. Section 60-1.4(a)(7), 60-300.5 and 60-741.5, if applicable.

"The parties hereby incorporate the requirements of the Notification of Employee Rights Under Federal Labor Laws; Final Rule, 29 CFR Part 471, Appendix A to Subpart A, if applicable."

## Notice Of Affirmative Action Plan

### For Individuals With Disabilities, Disabled Veterans

### And Other Eligible Veterans

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It is the policy of this Company to seek and employ qualified individuals at all locations and facilities, and to provide equal employment opportunities for all applicants and employees in recruiting, hiring, placement, training, compensation, insurance, benefits, promotion, transfer, and termination. To achieve this, we are dedicated to taking affirmative action to employ and advance in employment qualified individuals with disabilities, disabled veterans, and other eligible veterans.

The objective in adopting the Affirmative Action Program is to place qualified individuals with disabilities, disabled veterans and other eligible veterans in all job classifications. This Affirmative Action Program is available for inspection by any applicant or employee by contacting the Company's EEO Coordinator, in the Human Resources office, Monday through Friday, 8am to 5pm.

(This Notice must be posted where employees and applicants will view it.)

## Pre-Employment Information Form for Women and Minorities

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Date: \_\_\_\_\_

Name: \_\_\_\_\_

Position Applied for: \_\_\_\_\_

Race/Ethnic Group:

Are you Hispanic/Latino?

☐

If yes, check box and skip to Gender.  
Others use the race categories below:

White

☐

Black

☐

Asian

☐

Am Indian/Alaska Native

☐

Hawaiian/Pacific Islander

☐

Two or More Races

☐

Gender: Male: \_\_\_\_\_ Female: \_\_\_\_\_

Signature: \_\_\_\_\_

*Qualified applicants are considered for employment, and employees are treated during employment, without regard to race, color, religion, sex, national origin, age, marital status, medical condition, or disability.*

*Please complete this information to assist us in complying with equal opportunity/affirmative action record keeping and reporting requirements. Providing this information is voluntary, refusal to provide the information will not result in any adverse treatment. This Information Form will be kept in a separate, confidential file and will be used only for safety and government reporting purposes.*

## Post-Offer Information Form For Individuals with Disabilities & Eligible Veterans

---

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Position Applied for: \_\_\_\_\_

- Check All That Apply
- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Disabled?  |
| <input type="checkbox"/> | Disabled Veteran?  |
| <input type="checkbox"/> | Other Protected Veteran?   |
| <input type="checkbox"/> | Recently Separated Veteran? (Date of Discharge ____ / ____ / ____) |
| <input type="checkbox"/> | Armed Forces Service Medal Veteran?                                |

This employer is a government contractor subject to section 503 of the Rehabilitation Act of 1973, as amended, and section 402 of the Vietnam Era Veterans Readjustment Assistance Act of 1974, as amended, which requires government contractors to take affirmative action to employ and advance in employment qualified individuals with disabilities, disabled veterans, and other eligible veterans. If you have a disability or are a covered veteran and would like to be considered under the affirmative action program, please fill out and return this form.

You may inform us of your desire to benefit under the program at this time and/or at any time in the future. This information may assist us in placing you in the appropriate position and in making any necessary reasonable accommodation.

It is the policy at *[Contractor's Name]* to provide equal employment and advancement opportunities to all qualified individuals. To achieve this goal, *[Contractor's Name]* is dedicated to taking affirmative action to employ and advance in employment, qualified disabled persons, disabled veterans, and other eligible veterans. All personnel actions, including recruitment, hiring, training, and promoting persons in all job titles, will be administered without regard to disability or covered veteran status, and all employment decisions are based solely on valid job requirements.

Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. Information you submit about your disability or veteran status will be kept confidential, except that (1) supervisors and managers may be informed regarding restrictions on the work or duties of individuals with disabilities, and regarding necessary accommodations; (2) first aid and safety personnel may be informed, when and to the extent appropriate, if the condition might require emergency treatment; and (3) government officials engaged in enforcing discrimination laws may be informed. The information provided will not be used in a manner inconsistent with section 503 of the Rehabilitation Act of 1973 and section 402 of the Vietnam Era Veterans Readjustment Assistance Act of 1974.

If you are an individual with a disability, a disabled veteran, or a covered veteran, we would like to include you in our affirmative action program. It would assist us if you tell us about (1) any special methods, skills, and procedures which qualify you for positions that you might not otherwise be able to do because of your disability so that you might be considered for any available positions of that kind, and (2) the accommodations which we could make which would enable you to perform the job properly and safely, including special equipment, changes in the physical layout of the job, elimination of certain duties relating to the job, provision of personal assistance services or other accommodations.

**Definitions:**

**“Disabled”** A person is disabled if he or she has a physical or mental impairment which substantially limits one or more of such person's major life activities, has a record of such impairment, or is regarded as having such an impairment.

**“Disabled Veteran”** (1) A veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs, or (2) A person who was discharged or released from active duty because of a service-connected disability.

**“Other Protected Veteran”** means a veteran who served on active duty in the U.S. military, ground, naval or air service during a war or in a campaign or expedition for which a campaign badge has been authorized, under the laws administered by the Department of Defense.

**“Recently Separated Veterans”** means any veteran who served on active duty in the U.S. military, ground, naval or air service during the three-year period beginning on the date of such veteran’s discharge or release from active duty.

**“Armed Forces Service Medal Veteran”** means any veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985.

## Sample Letter – Subcontractors, Vendors & Suppliers

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Dear \_\_\_\_\_:

It is the policy at (Company) to provide equal employment and advancement opportunities to all qualified individuals. To achieve this goal, (Company) is dedicated to taking affirmative action to employ and advance in employment qualified women, minorities, disabled persons, disabled veterans, and other protected veterans, in compliance with Executive Order 11246, Section 503 of the Rehabilitation Act of 1973 and Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended, 38 U.S.C. 4212 (2001) ("Section 4212" or "VEVRAA") and the implementing regulations. (Company) is committed to take voluntary, positive action in providing affirmative action and equal employment opportunity to women, minorities, disabled persons, disabled veterans, and other protected veterans. All personnel actions, including compensation, benefits, recruitment, hiring, training, and promoting persons in all job titles, will be administered without regard to race, ethnicity, national origin, gender, disability, veteran, or other protected status, and all employment decisions are based solely on valid job requirements. In addition, employees and applicants are protected from harassment, threats, coercion, intimidation, interference or discrimination for:

- (1) Filing a complaint;
- (2) Assisting or participating in an investigation, compliance review, hearing, or any other activity under Executive Order 11246, Section 503 of the Rehabilitation Act of 1973, Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended, 38 U.S.C. 4212 or any other law requiring equal opportunity for disabled persons, and other protected veterans;
- (3) Opposing any practice made unlawful by these laws, or
- (4) Exercising any other right protected by these laws.

As a federal government contractor, (Company) expects all of its subcontractors, suppliers and vendors to comply with all of their applicable obligations under Executive Order 11246, Section 503 of the Rehabilitation Act of 1973, Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended, 38 U.S.C. 4212 or any other law requiring equal opportunity for disabled persons, and other protected veterans. Further, the equal employment opportunity clauses set forth in 41 CFR 60-1.4(a), 41 CFR 60-250.5(a) and 41 CFR 60-741.5(a) are hereby incorporated by reference into all of the transactions between our companies.

We appreciate your cooperation in our effort to fully comply with these Federal requirements.

Sincerely,

(Name)  
EEO Coordinator



## Glossary

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The following glossary is an alphabetical listing of words commonly used in the context of affirmative action and The Complete AAP.

**AAP.** The written Affirmative Action Plan. See also Plan.

**Adverse impact.** A significantly different rate of selection in hiring, promotion, transfer, training, or other employment-related decisions for any race, gender or ethnic group. A finding of adverse impact in itself does not establish impermissible conduct and may be explained by considering job-relatedness or business necessity.

**Annotation.** Sec. 60-2.1(e) states that an employee included in an AAP other than where he is located must be annotated to identify the actual location of the AAP in which the employee is included as well as the AAP for the employee's work location. The Workforce Analysis and the Job Group Analysis must be annotated. The Complete AAP software uses an Organizational Display in lieu of a Workforce Analysis. The Organizational Display is not required to be annotated.

**Any Difference Rule.** The results of the Any Difference Rule can be but are not by default displayed in the Availability Analysis, Utilization Summary and Annual Goals reports. This calculation method compares the number of minorities and females in your organization to the exact calculated availability.

**Applicant.** For traditional applicants that are not recruited through the internet or related electronic data technologies, the precise definition of the term "Applicant" depends upon the user's recruitment and selection procedures. The concept of an applicant is that of a person who has indicated an interest in being considered for hiring, promotion, or other employment opportunities. This interest might be expressed by completing an application form, or might be expressed orally, depending upon the employer's practice. See Internet Applicant for applicants that are recruited through the internet or related electronic data technologies.

**Audit.** An audit in the context of affirmative action is an official review of an organization's AAP and practices by OFCCP (known officially as a Compliance Evaluation), or a self-review by the organization's human resources representative.

**Availability.** Availability in the context of affirmative action refers to the calculated percentage of females and minorities who are available in a contractor's recruiting pool. To determine the availability of qualified minorities and women available, the OFCCP indicates that contractors must consider at least 2 Factors, 1) the percentage of minorities or women with requisite skills in the reasonable recruitment area, and 2) the percentage of minorities or women among those promotable, transferable and trainable within the organization. 41 CFR 60-2.14.

**Base Salary.** The salary paid to individual employees at the beginning of the AAP year that does not include overtime, bonuses or shift differential.

**Census.** A governmental count of the United States population completed every 10 years for data used in affirmative action planning as well as for other government-related reporting.

**Census Area.** A geographic area that contains no less than 50,000 persons and that contains demographic information from a sampling of the population contained within. In the context of affirmative action, Census Areas are used as external statistical recruiting sources to determine female and minority availability against which contractors may compare their workforce population

to determine if underutilization exists. Statistics are derived from the census taken every decade by the US Census Bureau. In the context of The Complete AAP, the Local Census Area refers to the geographic area that surrounds your facility. The Non Local Census Area refers to the recruiting area beyond the Local Census Area.

**Census Code.** In the U.S. Census Bureau's decennial survey of the U.S. population, some households are asked to fill out the sample or "long" form that attempts to gather the economic characteristics of the population, which include questions about income and employment, transportation, industry, education and housing. The Census Bureau groups respondents' similar jobs, and the groups of jobs are given one common title and a code. Called the "Special EEO File", these census codes contain availability statistics for females, Whites, Blacks, Asians, Hispanics, American Indians, Pacific Islanders, Two or More Races, and minorities as a group. The availability statistics are based directly on the number (or percent) of respondents in the given geographic census area. OFCCP accepts this data for use in AAPs. The census codes are available in the census data that you download into your Complete AAP software. Up to three census codes can be assigned to each job.

**Company.** Within the context of The Complete AAP software, this refers to the unique name of a company in the File menu's Company Information option and may contain up to 96 characters. In the Pro version of The Complete AAP software, the term "Company" refers to an organization that contains several AAPs (i.e. Plans). In the other version of The Complete AAP software, the terms "Company" and "Plan" are interchangeable.

**Department Code.** Within the context of The Complete AAP software, this refers to a unique code representing a department or unit of supervision that contains up to 10 alphanumeric characters in length.

**Department Name.** Name for each department or unit of supervision.

**Discrimination.** The treatment of individuals or groups with consideration to race, color, religion, gender, national origin, disabled or veteran status. The Office of Contract Compliance Programs attempts to uncover not only overt discrimination, but also concealed discrimination such as when an employer uses a facially neutral selection standard (e.g., a test, an interview, a degree requirement) that disqualifies a member of a particular race or gender group at a significantly higher rate than others.

**EEO. Equal Employment Opportunity.** Prohibits employment decisions based on employees' or applicants' race, gender, creed, religion, color, or national origin or any other protected class.

**EEO Category.** See race/ethnicity.

**EEO-1 Code.** EEO-1 Codes are the bases of job groups for private employers. EEO-1 Codes include:

1.1 Executive/ Senior Level Officials and Managers: Individuals who plan, direct and formulate policies, set strategy and provide the overall direction of enterprises/organizations for the development and delivery of products and services, within the parameters approved by boards of directors or other governing bodies. Residing in the highest levels of organizations, these executives plan, direct, or coordinate activities with the support of subordinate executives and staff managers. They include, in larger organizations, those individuals within two reporting levels of the CEO, whose responsibilities require frequent interaction with the CEO. Examples of these kinds of managers are: chief executive officers, chief operating officers, chief financial officers, line of business heads, presidents or executive vice presidents of functional areas or operating groups, chief information

officers, chief human resources officers, chief marketing officers, chief legal officers, management directors and managing partners.

1.2 - First/Mid Level Officials and Managers: Individuals who serve as managers, other than those who serve as Executive/Senior Level Officials and Managers, including those who oversee and direct the delivery of products, services or functions at group, regional or divisional levels of organizations. These managers receive directions from Executive/Senior Level management and typically lead major business units. They implement policies, programs and directives of Executive/Senior Level management through subordinate managers and within the parameters set by Executive/Senior Level management. Examples of these kinds of managers are: vice presidents and directors; group, regional or divisional controllers; treasurers; and human resources, information systems, marketing, and operations managers. The First/Mid Level Officials and Managers subcategory also includes those who report directly to middle managers. These individuals serve at functional, line of business segment or branch levels and are responsible for directing and executing the day-to-day operational objectives of enterprises/organizations, conveying the directions of higher level officials and managers to subordinate personnel and, in some instances, directly supervising the activities of exempt and non-exempt personnel. Examples of these kinds of managers are: first-line managers; team managers; unit managers; operations and production managers; branch managers; administrative services managers; purchasing and transportation managers; storage and distribution managers; call center or customer service managers; technical support managers; and brand or product managers.

2 – Professionals: Most jobs in this category require bachelor and graduate degrees, and/or professional certification. In some instances, comparable experience may establish a person's qualifications. Examples of these kinds of positions include: accountants and auditors; airplane pilots and flight engineers; architects; artists; chemists; computer programmers; designers; dietitians; editors; engineers; lawyers; librarians; mathematical scientists; natural scientists; registered nurses; physical scientists; physicians and surgeons; social scientists; teachers; and surveyors.

3 – Technicians: Jobs in this category include activities that require applied scientific skills, usually obtained by postsecondary education of varying lengths, depending on the particular occupation, recognizing that in some instances additional training, certification, or comparable experience is required. Examples of these types of positions include: drafters; emergency medical technicians; chemical technicians; and broadcast and sound engineering technicians.

4 – Sales Workers: These jobs include non-managerial activities that wholly and primarily involve direct sales. Examples of these types of positions include: advertising sales agents; insurance sales agents; real estate brokers and sales agents; wholesale sales representatives; securities, commodities, and financial services sales agents; telemarketers; demonstrators; retail salespersons; counter and rental clerks; and cashiers.

5 – Administrative Support Workers (**formerly Office and Clerical**): These jobs involve non-managerial tasks providing administrative and support assistance, primarily in office settings. Examples of these types of positions include: office and administrative support workers; bookkeeping, accounting and auditing clerks; cargo and freight agents; dispatchers; couriers; data entry keyers; computer operators; shipping, receiving and traffic clerks; word processors and typists; proofreaders; desktop publishers; and general office clerks.

**6 – Craft Workers (formerly Craft Workers (Skilled)):** Most jobs in this category include higher skilled occupations in construction (building trades craft workers and their formal apprentices) and natural resource extraction workers. Examples of these types of positions include: boilermakers; brick and stone masons; carpenters; electricians; painters (both construction and maintenance); glaziers; pipelayers, plumbers, pipefitters and steamfitters; plasterers; roofers; elevator installers; earth drillers; derrick operators; oil and gas rotary drill operators; and blasters and explosive workers. This category includes occupations related to the installation, maintenance and part replacement of equipment, machines and tools, such as: automotive mechanics; aircraft mechanics; and electric and electronic equipment repairers. This category also includes some production occupations that are distinguished by the high degree of skill and precision required to perform them, based on clearly defined task specifications, such as: millwrights; etchers and engravers; tool and die makers; and pattern makers.

**7 – Operatives (formerly Operatives (Semi-skilled)):** Most jobs in this category include intermediate skilled occupations and include workers who operate machines or factory-related processing equipment. Most of these occupations do not usually require more than several months of training. Examples include: textile machine operators; laundry and dry cleaning workers; photographic process workers; weaving machine operators; electrical and electronic equipment assemblers; semiconductor processors; testers, graders and sorters; bakers; and butchers and other meat, poultry and fish processing workers. This category also includes occupations of generally intermediate skill levels that are concerned with operating and controlling equipment to facilitate the movement of people or materials, such as: bridge and lock tenders; truck, bus or taxi drivers; industrial truck and tractor (forklift) operators; parking lot attendants; sailors; conveyor operators; and hand packers and packagers.

**8 – Laborers and Helpers (formerly Laborers (Unskilled)):** Jobs in this category include workers with more limited skills who require only brief training to perform tasks that require little or no independent judgment. Examples include: production and construction worker helpers; vehicle and equipment cleaners; laborers; freight, stock and material movers; service station attendants; construction laborers; refuse and recyclable materials collectors; septic tank servicers; and sewer pipe cleaners.

**9 – Service Workers:** Jobs in this category include food service, cleaning service, personal service, and protective service activities. Skill may be acquired through formal training, job-related training or direct experience. Examples of food service positions include: cooks; bartenders; and other food service workers. Examples of personal service positions include: medical assistants and other healthcare support occupations; hairdressers; ushers; and transportation attendants. Examples of cleaning service positions include: cleaners; janitors; and porters. Examples of protective service positions include: transit and railroad police and fire fighters; guards; private detectives and investigators.

**EEO Company.** In the Complete AAP software's Narrative Info tab of the Plan Information window, the EEO Company is the name of the facility where the EEO Coordinator is located.

**EEO Coordinator.** The individual given responsibility by the Executive Officer for the development, implementation and monitoring of the AAP.

**EEO-4 Code.** EEO-4 Codes are the bases of job groups for state and local government employers. EEO-4 codes include:

1 – Officials/Administrators: Occupations in which employees set broad policies; exercise overall responsibility for execution of these policies; direct individual departments or special

phases of the agency's operations; or provide specialized consultation on a regional, district, or area basis. Includes: departmental heads; bureau chiefs; division chiefs; directors; deputy directors; controllers; examiners; wardens; superintendents; inspectors; and kindred workers.

2 – Professionals: Occupations which require specialized and theoretical knowledge which is usually acquired through college training or through work experience and other training which provides comparable knowledge. Includes: Personnel and labor relations workers; social workers; doctors; dietitians; psychologists; registered nurses; economists; lawyers; systems analysts; accountants; engineers; employment and vocational counselors; teachers and instructors; and kindred workers.

3 – Technicians: Occupations which require a combination of basic scientific or technical knowledge and manual skill which can be obtained through specialized postsecondary school education or through equivalent on-the-job training. Includes: computer programmers and operators; drafters; surveyors; licensed practical nurses; photographers; radio operators; technical illustrators; highway technicians; technicians (medical, dental, electronic, physical sciences); assessors; inspectors; police and fire sergeants; and kindred workers.

4 - Protective Service Workers: Occupations in which workers are entrusted with public safety, security, and protection from destructive forces. Includes: police patrol officers; fire fighters; guards; deputy sheriffs; bailiffs; correctional officers; detectives; marshals; harbor patrol officers; and kindred workers.

5 – Paraprofessionals: Occupations in which workers perform some of the duties of a professional or technician in a supportive role, which usually requires less formal training and/or experience normally required for professional or technical status. Such positions may fall within an identified pattern of staff development and promotion under a "new careers" concept. Includes: library assistants; research assistants; medical aids; child support workers; police auxiliary; welfare service aides; recreation assistants; homemaker aides; home health aides; and kindred workers.

6 – Office/Clerical: Occupations in which workers are responsible for internal and external communication, recording and retrieval of data and/or information, and other paperwork required in an office. Includes: bookkeepers; messengers; office machine operators; clerk/typists; stenographers; court transcribers; hearings reporters; statistical clerks; dispatchers; license distributors; payroll clerks; and kindred workers.

7 – Skilled Craft Workers: Occupations in which workers perform jobs which require special manual skill and a thorough and comprehensive knowledge of the processes involved in the work which is acquired through on-the-job training and experience or through apprenticeship or other formal training program. Includes: mechanics and repairers; electricians; heavy equipment operators; stationary engineers; heavy equipment operators; stationary engineers; skilled machining occupations; carpenters; compositors and typesetters; and kindred workers.

8 – Service/Maintenance: Occupations in which workers perform duties which result in or contribute to the comfort, convenience, hygiene, or safety of the general public, or which contribute to the upkeep and care of buildings, facilities, or grounds of public property. Workers in this group may operate machinery. Includes: chauffeurs; laundry and dry



cleaning operatives; truck drivers; bus drivers; garage laborers; custodial personnel; gardeners and grounds keepers; refuse collectors; construction laborers; and kindred workers.

**EEO-6 Codes.** See IPEDS Primary Occupational Activity Codes.

**Employee ID.** Within the context of The Complete AAP, Employee ID is a unique code assigned to each employee that may be up to 10 alphanumeric characters in length.

**Employee Name.** Within the context of The Complete AAP, Employee Name is the field in which an employee's name or equivalent can be imported or entered. This field may be up to 60 characters in length.

**Equal Opportunity Clause.** The subparagraphs contained in 41 CFR 60-1.4(a) or (b) required by Sections 202 and 301 of Executive Order 11246, as amended, to be part of contracts covered by the Executive Order. Pursuant to 41 CFR 60-1.4(e) and 60.49, the clause is a part of covered contracts regardless of whether it is physically incorporated into the contract or whether the contract between the agency and the contractor is written. See the example later in this chapter.

**Executive Officer.** The top-level company official who has overall responsibility for implementation of the Equal Employment Opportunity Policy as required by regulation.

**Facially Neutral Selection Standard.** An employment selection standard that does not make any reference to a prohibited factor and is equally applicable to everyone regardless of race, gender or ethnicity.

**Factor Weights.** Importance given to factors considered when determining availability. The "weight" in question refers to the percentage assigned to the factor.

**Feeder.** In the context of affirmative action, feeders are job or job group that are most likely to provide employees an opportunity for promotion to another job group.

**Fisher's Exact test.** A statistical test that is designed to determine if adverse impact exists in employment decisions. The Fisher's Exact test's parameters may be changed in The Complete AAP's Stats tab of the Options window found under the Utilities menu.

**Four-Fifths or 80% rule.** Broad, general test that compares the selection or utilization rates of minorities to whites, and females to males to determine if a substantial disparity exists. If the selection rate or utilization of minorities/females is within 80% of the selection rate or utilization of whites/males, then the 80% Rule is passed.

**Gender.** The Census Bureau recognizes two genders: male and female. Each employee must be identified as male or female in contractors' AAPs.

**Good Faith Efforts.** This term refers to a contractor's efforts to make all aspects of its AAP work. Designing and implementing an effective AAP requires sustained attention. The contractor must analyze its employment and recruitment practices as they affect equal opportunity, identify problem areas, design and implement measures to address the problems, and monitor the effectiveness of its program, making adjustments as circumstances warrant.

**Government Contract.** Any agreement or modification thereof between any contracting agency and any person for the furnishing or supplies or services, or for the use of real or personal property, including lease arrangements. The term "services," as used here, includes, but is not

limited to, the following: utility, construction, transportation, research, insurance, and fund depository, regardless of whether the Government is the purchaser or seller. The term "Government Contract" does not include (a) agreements in which the parties stand in the relationship of employer and employee and (b) Federally assisted construction contracts.

**Grid Edit.** Grid Edit in the software refers to a data table that is displayed in a spreadsheet format. This the default setting for most data tables in The Complete AAP. Both the Grid Edit and the Single Record Edit are available in the Locations, Department, Job Groups, Jobs and Employees tables' Tools options.

**Hire Date.** The date an employee was hired.

**Identifier.** Within the context of The Complete AAP, an identifier is an alphanumeric code of up to 10 characters that helps distinguish one AAP from another in the Company or Open Plan icon lists.

**Import.** Moving information or data from one program to another electronically. Two types of data can be imported into The Complete AAP software: workforce (employment information) and adverse impact.

**Internet Applicant.** According to 41 CFR Part 60-1, an Internet Applicant is any individual to whom the following four criteria apply:

- The individual submits an expression of interest in employment through the Internet or related electronic data technologies;
- The contractor considers the individual for employment in a particular position;
- The individual's expression of interest indicates the individual possesses the basic qualifications for the position; and,
- The individual at no point removes him or herself from further consideration or otherwise indicates that he or she is no longer interested in the position.

**IPEDS.** Integrated Postsecondary Education Data System. The primary source for data on colleges, universities, and technical and vocational postsecondary institutions in the United States.

**IPEDS Primary Occupational Activity Codes.** The principal activity of a staff member as determined by the institution. If an individual participates in two or more activities, the primary activity is normally determined by the amount of time spent in each activity. Within the context of affirmative action, IPEDS Codes are the bases of job groups for public educational employers. Please visit <http://nces.ed.gov/ipeds/> for a list of Primary Occupational Activity Codes.

**JAAR Analysis.** The Job Area Acceptance Range report compares the utilization of minorities and females in each department with the whole organization. This report is not required for an AAP but the OFCCP may run this report during their audit.

**Job Code.** Within the context of The Complete AAP, a job code is a unique code for each unique job name that contains up to 10 alphanumeric characters.

**Job Group.** Within the context of affirmative action, a job group is a group of jobs within the same EEO category having similar content, salaries and opportunities. OFCCP regulations indicate that you may use EEO category titles if your organization contains fewer than 150 employees.

**Job Group Code.** Within the context of The Complete AAP, a job group code is a unique code for each unique job group name. Job group codes should contain no more than 10 alphanumeric characters.

**Job Name/Title.** Title of position held by individual employees. By regulation, the Workforce Analysis and Job Group Analysis must display job names. The Organizational Display must show the title of the supervisor.

**Job Progression.** Within the context of The Complete AAP, the Job Progression field is a cell in the Jobs table that indicates progression from one job to another. The associated report is not required for an AAP however the OFCCP may request it during an audit.

**Location.** Within the context of The Complete AAP, the location field in the Employees table indicates the physical site where employee works. The locations are listed in the Locations icon table.

**Location Code.** Within the context of The Complete AAP, a location code is a unique code that identifies a location. This field may contain up to 10 alphanumeric characters.

**Minorities.** For affirmative action purposes, the six non-white and non-favored racial/ethnic categories : Persons of the minority groups Black or African American, Hispanic or Latino, Asian, American Indian or Alaskan Native, Native Hawaiian or Pacific Islander, or Two or More Races.

**MSA. Metropolitan Statistical Area.** a Census Bureau-defined urbanized area of at least 50,000 inhabitants.

**OFCCP.** Office of Federal Contract Compliance Programs. The government agency under the Federal Department of Labor that is charged with enforcing affirmative action regulations.

**Plan.** Within the context of The Complete AAP, a Plan refers to an AAP for one location.

**Plan Code.** A unique code that identifies an AAP in The Complete AAP software. A Plan Code may contain up to 10 alphanumeric characters.

**Plan Dates.** A Contractor's first AAP must be completed within 120 days of the original covered contract date. AAP dates should reflect the upcoming year (i.e. if your AAP is on a calendar year, the AAP dates should be January 1, 2015 through December 31, 2015). AAP dates can be changed, but Contractors should not wait longer than 1 year to update their AAP. Within the context of The Complete AAP, AAP dates are referred to as Plan Dates.

**Plan Name.** Within the context of The Complete AAP, a plan name is a unique name for an AAP. A plan name may contain up to 150 alphanumeric characters.

**PMSA Primary Metropolitan Statistical Area.** PMSAs are one or more large urbanized counties that have strong social and economic ties to neighboring communities except in New England where they are composed of cities and towns.

**Promotable.** Employees who are qualified and eligible for promotion based upon valid selection criteria. In the context of developing data for availability, "promotables" are those employees who are currently employed in a job group or groups that serve or could serve as a source from which selections are or could be made for other job groups.



**Promotions From.** This employment activity includes promotions within a job group as well as promotions out of a job group. These promotions appear in the Adverse Impact Report. Example of promotion within: Admin Assist I in Job Group 5A is promoted to Admin Assist II in Job Group 5A.

**Promotions To.** This employment activity consists of movement into a job group. "Promotions to" appear only in the Goals Progress Report. Example of Promotion To: Plant Manager in Job Group 1B is promoted to VP of Production in Job Group 1A.

**Race/Ethnicity.** Each employee in an AAP must be identified as one of the following race or ethnic categories as recognized by the OFCCP:

**White:** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

**Black or African American:** A person having origins in any of the Black racial groups of Africa.

**Hispanic or Latino:** A person of Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture or origin, regardless of race.

**Asian:** A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

**American Indian or Alaska Native:** A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.

**Native Hawaiian or Pacific Islander:** A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

**Two or More Races:** All persons who identify with more than one of five races: White, Black or African American, Native Hawaiian or Other Pacific Islander, Asian, or American Indian, or Alaska Native. Note that a Hispanic or Latino person cannot by definition be included in the Two or more race category.

**Recruitment Area.** The geographic area from which the contractor usually seeks workers for a particular job group.

**Recruitment Factors.** Methods of recruiting applicants for open positions. OFCCP requires that you consider two factors: external and internal recruitment. The Complete AAP software breaks these two down to six factors: local, non-local, training institutions, promotable and transferable, trainable, and user defined.

**Salary Basis.** Salary Basis indicates the frequency of employees' Base Salary. The choices include: hourly, weekly, semi-monthly, bi-weekly, monthly or annually.

**Salary Code.** A Salary Code is a unique alphanumeric code that can be up to 10 alphanumeric characters in length.

**Single Record Edit.** Single Record Edit displays details for only one record of a group as opposed to the Grid Edit's multi-record view. Both the Grid Edit and the Single Record Edit are available in the Locations, Department, Job Groups, Jobs and Employees tables' Tools options.

**Snapshot.** Refers to a count of all individuals employed as of the first day of the AAP year and not a count of all individuals employed within a date range.

**SSEG.** Formed for the purpose of conducting a compensation analysis, Similarly Situated Employee Groups consist of employees that have similar job duties and responsibilities and occupy positions that require similar skills and qualifications.

**Standard Deviation.** A statistical measure used to describe the probability that differences between similarly situated groups (such as in selection rates, wages, etc.) occurred by chance. In simple terms, a standard deviation shows how much variation there is from the norm or “mean”.

**Supervisor ID.** A supervisor ID refers to the employee ID of a supervisor. This ID is used by the program to determine department managers, to count employees in their managers’ AAPs (Pro version), and to annotate employees as required by OFCCP regulations.

**Total Salary.** Total salary refers to the salary of an employee for the 12 month period prior to the beginning of the new AAP year that includes all compensation, such as base salary, overtime, and bonuses.

**Two Standard Deviations Test.** The 2 Standard Deviation Analysis is commonly used to analyze selection rates for groups of all sizes, and it usually results in a lower showing of under representation than the Four-Fifths Rule. See also Standard Deviation.

**User-Defined Date.** Used for Multiple Regression reporting, a user-defined date is a field in the Employees data table. Up to 2 additional dates beyond Hire Date may be brought in as user defined date fields in the compensation Multiple Regression Test. Examples include: date of last increase, rehire date, date of last promotion, etc.

**User-Defined Number.** Used for salary regression reporting, a user defined number is a field in the Employees data table. Up to three user-defined numeric fields may be used in the compensation Multiple Regression Test. Examples include: experience, annual review rating, education, etc.