# Table of Contents

## AAPlanner™ User’s Agreement

Chapter 1: Introduction to AAPlanner

- Minimum System Requirements ................................................................. 10
- Installing AAPlanner .................................................................................. 10
  - Before You Begin .................................................................................. 10
  - Regular Installation ............................................................................. 10
  - Network Installation ............................................................................ 10
  - Sharing Facility Files on Your Network ............................................. 11
- Starting AAPlanner ................................................................................... 11
- Displaying Information about AAPlanner .............................................. 12
- Getting Help with AAPlanner ................................................................. 13
  - If You Need Assistance ...................................................................... 13
  - Customer Support ............................................................................... 13
  - Training .............................................................................................. 13

Chapter 2: A Brief Introduction to AAP Theory

- What is an Affirmative Action Program (AAP)? ..................................... 14
- Who is Required to Prepare an AAP? .................................................... 14
- What are the Regulations Governing an AAP? ..................................... 14
- Who is Charged with Enforcement and How do They Accomplish This? ...................................................................................... 15
- What is Included in an AAP? ................................................................. 15
- What Data are Required to Prepare an AAP? ........................................ 15
  - Internal to the Contractor’s Organization ........................................... 15
  - External to the Contractor’s Organization .......................................... 15
- What are the Statistical Reports in an AAP? ......................................... 16
  - The Organizational Display ............................................................... 16
  - The Work Force Analysis ................................................................. 16
  - The Job Group Analysis .................................................................... 16
  - The Availability Analysis ................................................................... 17
  - The Incumbency v. Estimated Availability Analysis .......................... 17
- Potential Discrimination/Adverse Impact Analysis .............................. 18
  - What are the Analyses? ..................................................................... 18
  - What are the Regulations Governing these Analyses? ................. 18
  - Who must Conduct the Analyses? .................................................... 18
  - Why should a Contractor be Concerned with These Analyses? ..... 18

Chapter 3: Using AAPlanner to Create an Affirmative Action Plan

- Processing Steps .................................................................................... 20
- Defining Facilities .................................................................................... 20
- Setting Up Employee Data ...................................................................... 21
- Preparing the Organizational Profile .................................................... 22
- Setting Up Job Groups .......................................................................... 24
- Preparing the Job Group Analysis ......................................................... 25
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setting Up Census Data</td>
<td>26</td>
</tr>
<tr>
<td>Preparing an Availability Analysis</td>
<td>26</td>
</tr>
<tr>
<td>Preparing an Incumbency v. Availability Analysis</td>
<td>28</td>
</tr>
<tr>
<td>Preparing the Goals Attainment Report</td>
<td>29</td>
</tr>
<tr>
<td>Process Summary</td>
<td>30</td>
</tr>
<tr>
<td>Chapter 4: Working with AAPlanner Data</td>
<td>31</td>
</tr>
<tr>
<td>Setting Up Employee Data</td>
<td>31</td>
</tr>
<tr>
<td>Data Entry Options</td>
<td>32</td>
</tr>
<tr>
<td>Using Summary vs. Detailed Data</td>
<td>32</td>
</tr>
<tr>
<td>Including and Excluding Employees from the Facility</td>
<td>33</td>
</tr>
<tr>
<td>Making Global Changes to Employee Data</td>
<td>34</td>
</tr>
<tr>
<td>Assigning Grade Sort Values</td>
<td>34</td>
</tr>
<tr>
<td>Assigning Wage Codes</td>
<td>35</td>
</tr>
<tr>
<td>Maintaining the Job Group List</td>
<td>36</td>
</tr>
<tr>
<td>Assigning Job Groups, Census Codes, and EEO Codes to Job Titles</td>
<td>36</td>
</tr>
<tr>
<td>Preparing Your Job Titles</td>
<td>37</td>
</tr>
<tr>
<td>Defining Job Group Codes and Names</td>
<td>37</td>
</tr>
<tr>
<td>OFCCP Guidelines</td>
<td>37</td>
</tr>
<tr>
<td>Suggested Procedure</td>
<td>38</td>
</tr>
<tr>
<td>Assigning Census Codes</td>
<td>38</td>
</tr>
<tr>
<td>Assigning Organization Hierarchy Codes</td>
<td>38</td>
</tr>
<tr>
<td>Setting Up Census Data</td>
<td>39</td>
</tr>
<tr>
<td>Standard Census Areas</td>
<td>39</td>
</tr>
<tr>
<td>Custom Census Areas</td>
<td>40</td>
</tr>
<tr>
<td>Chapter 5: Selecting Sort Options for the Work Force Analysis and the Job Group Analysis</td>
<td>41</td>
</tr>
<tr>
<td>The Sort Options Window</td>
<td>41</td>
</tr>
<tr>
<td>Sort Options Settings</td>
<td>42</td>
</tr>
<tr>
<td>Sorting Job Titles by Annualized Wages</td>
<td>42</td>
</tr>
<tr>
<td>Sorting Job Titles by Grade</td>
<td>44</td>
</tr>
<tr>
<td>Sorting Job Titles by Grade Sort Value</td>
<td>45</td>
</tr>
<tr>
<td>Guidelines for Choosing Sort Options</td>
<td>47</td>
</tr>
<tr>
<td>Displaying Wages for All Employees</td>
<td>50</td>
</tr>
<tr>
<td>Displaying Wage Codes for All Employees</td>
<td>51</td>
</tr>
<tr>
<td>Displaying Grades for All Employees</td>
<td>52</td>
</tr>
<tr>
<td>Displaying Grades in Grade Sort Order</td>
<td>53</td>
</tr>
<tr>
<td>Using Grades When Wages are Missing</td>
<td>54</td>
</tr>
<tr>
<td>Using Grade Sort Values When Wages are Missing</td>
<td>55</td>
</tr>
<tr>
<td>Using Wages When Grades are Missing</td>
<td>56</td>
</tr>
</tbody>
</table>
Chapter 6: Preparing an Availability Analysis .................................................................61

General Procedure .............................................................................................................61

Factor 1 .................................................................................................................................64

JGA + Census Disk Method .................................................................................................65
  Setting Factor Options ........................................................................................................66
  If you change the Source of Components/Counts to Census Disk or Manually Entered Data...68
  If you have already entered job title data, and you change the Aggregation Method to Weighted...68
  If you have already manually entered job title data, and you change the Source of Components/Counts...68
  Viewing Data ......................................................................................................................69

Census Disk Method ............................................................................................................69
  Setting Factor Options ........................................................................................................70
  Importing Job Titles .............................................................................................................71
  Adding and Editing Job Titles .............................................................................................73
  Adding Job Titles ................................................................................................................73
  Editing Job Title Information .............................................................................................74
  Deleting Job Titles ..............................................................................................................74
  Completing the Calculations ...............................................................................................74

Manual Method (Using Data from another Source) .............................................................75
  Setting Factor Options ........................................................................................................76
  Importing Job Titles .............................................................................................................77
  Adding and Editing Job Titles .............................................................................................78
  Adding Job Titles ................................................................................................................78
  Editing Job Title Information .............................................................................................78
  Deleting Job Titles ..............................................................................................................79
  Completing the Calculations ...............................................................................................79

Factor 2 .................................................................................................................................79

Feeder Method ......................................................................................................................80
  Setting Factor Options ........................................................................................................80
  Adding and Editing Data ......................................................................................................82
  Adding Feeder Data .............................................................................................................82
  Editing Feeder Data .............................................................................................................84
  Completing the Calculations ...............................................................................................84

Manual Method ...................................................................................................................84
  Setting Factor Options ........................................................................................................85
  Adding and Editing Data ......................................................................................................85

Factor 3 .................................................................................................................................87

Displaying Factor Availability Calculations ........................................................................87

Calculation Rules ..................................................................................................................88
  Simple Aggregation ..............................................................................................................88
  Weighted Aggregation .........................................................................................................89

Assigning Value Weights .....................................................................................................90
  What Is a Value Weight? ......................................................................................................90
  Entering Value Weights .......................................................................................................91

Entering Value Weight Sources and Rationales .................................................................92
  Manually Entering Sources and Rationales ......................................................................93
  Copying Sources and Rationales .........................................................................................94

Printing Components, Availability Percentages, and the Availability Analysis Report ........95
Chapter 7: AAPlanner Reports ................................................................. 99

Chapter 8: Occupational Categories (Census Codes) ............................... 116

Chapter 9: Troubleshooting ................................................................. 137
Chapter 10: Import and Export File Specifications .................................................................152

Creating an Import File ...........................................................................................................153
Import File Requirements - Text Files .....................................................................................153
Comma-Delimited and Tab-Delimited Files .............................................................................153
Flat/Fixed Length ASCII Files ..................................................................................................153
Using Microsoft® Excel® to Create Data Import Files .........................................................154
Using Microsoft® Access® to Create Data Import Files .........................................................155
Correcting Errors .........................................................................................................................156
Employee Data Import and Export File Specifications ..........................................................156
Record Format ..............................................................................................................................156
Import Protocol ............................................................................................................................159
Add To .........................................................................................................................................159
Erase and Replace .......................................................................................................................160
Clear Codes and Replace ...........................................................................................................160
Sample Import Files ....................................................................................................................160
Import Errors ...............................................................................................................................161
Default Export File .......................................................................................................................161
Employee Import Special Import File Specifications .............................................................161
Record Format ..............................................................................................................................161
Import Protocol ............................................................................................................................161
Sample Import File .......................................................................................................................161
Import Errors ...............................................................................................................................162
Summary Movement Data and Goals Attainment Report Import and Export File Specifications ..162
Record Format ..............................................................................................................................162
Import Protocol ............................................................................................................................164
Sample Import File .......................................................................................................................164
Import Errors ...............................................................................................................................164
Default Export File .......................................................................................................................164
Detailed Movement Data for Goals Attainment Report Import and Export File Specifications ..164
Record Format ..............................................................................................................................165
Import Protocol ............................................................................................................................165
Add To .........................................................................................................................................165
Erase and Replace .......................................................................................................................166
Sample Import File .......................................................................................................................166
Import Errors ...............................................................................................................................166
Default Export File .......................................................................................................................166

Chapter 11: Formulas for Incumbency v. Availability Tests ....................................................167
Formula Variables .......................................................................................................................167
Any Difference Rule .....................................................................................................................168
80% Rule............................................................................................................................................... 168
The Two Standard Deviation Test and the Three Standard Deviation Test................................. 169
Exact Binomial Test with a .05 Significance Threshold ........................................................................ 170
Separate Tests for Large and Small Job Groups Using the Rule of 9.................................................. 171

Chapter 12: Self-Guided Demonstration ............................................................................................... 172
Step 1: Start AAPlanner ........................................................................................................................ 172
Step 2: Define a Facility .......................................................................................................................... 174
Step 3: Import Employee Data ............................................................................................................. 175
Step 4: Add Employee Data .................................................................................................................. 175
Step 5: Edit Employee Data .................................................................................................................. 177
Step 6: Delete Employee Data .............................................................................................................. 178
Step 7: Print Employee Data ................................................................................................................. 179
Step 8: Prepare the Organizational Profile .......................................................................................... 181
Step 9: Create the Organizational Display ........................................................................................... 183
Step 10: Specify a Department Order for the Organizational Display ................................................. 183
Step 11: View Included and Excluded Employees .............................................................................. 184
Step 12: Assign Job Group Codes and Names for the Job Group Analysis ........................................ 185
Step 13: Prepare the Job Group Analysis Reports ............................................................................... 187
Step 14: Load the Census Data ............................................................................................................ 188
Step 15: Display Census Counts .......................................................................................................... 190
Step 18: Enter Value Weights .............................................................................................................. 194
Step 20: View the Goals Report .......................................................................................................... 196
Step 21: Print All AAP Reports at Once ............................................................................................... 197
Step 22: Prepare a What If Analysis ..................................................................................................... 197
Step 23: Check Progress on Goals Attainment .................................................................................... 199
Step 25: End the Demonstration .......................................................................................................... 199
CHAPTER 1: INTRODUCTION TO AAPPlanner

AAPPlanner is a computer program that helps you work through the steps necessary to create the numerical reports required in an Affirmative Action Plan (AAP).

First, the program helps you assemble and organize the employee data needed for an AAP. Next, AAPPlanner uses methodology accepted by the Office of Federal Contract Compliance Programs (OFCCP) to prepare Organizational Profile and Job Group Analysis reports for inclusion with your AAP. When these reports have been completed, AAPPlanner helps you access and organize additional data to prepare an Availability Analysis and Incumbency v. Availability Analysis using methodology accepted by the OFCCP.

The program provides easy access to U.S. Census data and performs complex calculations quickly and accurately. Each step of the way, AAPPlanner produces reports that you can include in your final AAP. AAPPlanner’s carefully organized screens make the program easy to use. No programming or special computer skills are necessary.

Note: See Chapter 12: Self-Guided Demonstration for a brief tutorial to help guide you through using AAPPlanner.

AAPPlanner allows you to:

- Enter or import detailed employee data, and assign each employee’s job title to the appropriate job group code, census occupation code, and EEO code.
- Define your own job groups. Five sample job group lists come with the program.
- Prepare the Organizational Profile and Job Group Analysis.
- Prepare an Availability Analysis, using your preferred data source for each factor and job group. For Factor 1, you can use the census data provided with the program.
- Assign value weights to each factor. Using the weights, the program produces final weighted availability percentages for each job group.
- Prepare an Incumbency v. Availability Analysis using one of five comparison tests. AAPPlanner identifies job groups in which the percentage of minorities and women is less than would be reasonably expected and helps you set goals for the upcoming year.
- Produce presentation-quality Organizational Display, Job Group Analysis, Availability Analysis, Incumbency v. Availability Analysis, and Goals reports for inclusion with your AAP.
- Monitor progress toward goals attainment during the AAP year by comparing hire, promotion, and transfer activity to the current year’s goals.
- Perform What If Analyses to determine how different value weights, work force data, or comparison tests affect the Availability Analysis and Incumbency v. Availability Analysis.
- Update the AAP annually by updating work force counts and making any other needed adjustments.

With AAPPlanner, you can create an AAP more efficiently. However, the program does not create an AAP for you, nor does it teach you how to create one.

To obtain maximum benefit from the program’s features, you should be familiar with the basics of AAPs. If you need resource materials or assistance in regard to AAP regulations or methodology, contact Peopleclick Affirmative Action division.
CHAPTER 2: A BRIEF INTRODUCTION TO AAP THEORY

What is an Affirmative Action Program (AAP)?

An affirmative action program is a management tool designed to ensure equal employment opportunity. Affirmative action programs contain a diagnostic component which includes a number of quantitative analyses designed to evaluate the composition of the workforce of the contractor and compare it to the composition of the relevant labor pools. Affirmative action programs also include action-oriented programs. Effective affirmative action programs also include internal auditing and reporting systems as a means of measuring the contractor’s progress toward achieving the workforce that would be expected in the absence of discrimination. An affirmative action program includes those policies, practices, and procedures that the contractor implements to ensure that all qualified applicants and employees are receiving an equal opportunity for recruitment, selection, advancement, and every other term and privilege associated with employment. (41 CFR 60-2)

- Management tool
- Diagnostic component
- Action-oriented programs
- Internal auditing and reporting systems
- Policies, practices, and procedures

Who is Required to Prepare an AAP?

Government contractors that have 50 or more employees and

- Have a contract of at least $50,000 or more; or,
- Have Government bills of lading $50,000 or more; or,
- Serve as a depository of Government funds in any amount; or,
- Are a financial institution which is an issuing and paying agent for U.S. Savings bonds and savings notes in any amount.

This definition of a contractor, for example, would include defense contractors, companies leasing buildings to the government, banks, hospitals/medical centers (receiving federal research grants), and colleges and universities (receiving federal research grants or student loans).

What are the Regulations Governing an AAP?

Executive Order 11246 was signed by President Lyndon B. Johnson in 1964 and forms the basis, as amended, for the regulations governing the preparation of the AAP. This appears in 41 CFR 60-1, 60-2 and other related sections. It provides very broad guidance and leaves a lot to be interpreted.

The enforcement agency, OFCCP, also has a Compliance Manual which is used by their staff. It is interpretive of the regulations and is not considered, especially by those outside of the agency, as authoritative.
Who is Charged with Enforcement and How do They Accomplish This?

The Office of Federal Contract Compliance Programs (OFCCP), which is an agency under the Employment Standards Administration at the U.S. Department of Labor, is primarily responsible for conducting compliance reviews of contractors' AAPs.

The OFCCP has district offices throughout the country (for example, there is a district office in Raleigh, NC) and personnel in these offices actually conduct the compliance reviews. Although each government contractor is obligated to prepare/update their AAP annually, they do not submit the AAP to the government. Instead, the OFCCP selects contractors for a compliance audit (much like the Internal Revenue Service audits taxpayers' income tax returns) and sends them a letter informing the contractor they have been selected.

The 30-day letter requests a copy of the written AAP and other data. This is reviewed at the OFCCP office as part of a desk audit and is then followed by an on-site review at the contractor's facility.

The OFCCP conducted 3,750 compliance reviews in fiscal year 1997 with over 65% cited for violations.

What is Included in an AAP?

- Written narrative detailing commitment to EEO, organization policy, description of program, establishment of goals (for deficiencies), etc.
- Statistical reports such as Organizational Analysis, Job Group Analysis, Availability Analysis, Incumbency v. Estimated Availability Analysis, and Goals, which are based on the employer's work force as of a particular date (the snapshot date).
- Other data may need to be submitted to the OFCCP as part of a compliance review.

What Data are Required to Prepare an AAP?

Internal to the Contractor's Organization

Employees in contractor's work force (as of the AAP date):

- Name
- Job title
- Department
- Compensation, such as wage rate or grade
- Race
- Sex
- EEO-1 category

External to the Contractor's Organization

2000 Census data that provides data on availability of minorities and women from specific geographic areas such as a county, metropolitan area, state, or the United States. General statistics, such as population, as well as that broken down by occupation.
What are the Statistical Reports in an AAP?

- Organizational Profile
  - Work Force Analysis and/or
  - Organizational Display
- Job Group Analysis
- Availability Analysis
- Incumbency v. Availability Analysis (including Goals)

**Note:** Peopleclick’s AAPlanner program prepares all of these reports.

**The Organizational Display**

- Detailed graphical or tabular chart, text, spreadsheet, or similar presentation of contractor’s organizational structure
- Must include name of organizational units; job title, gender, race, and ethnicity of each organizational unit supervisor; the total number of male and female incumbents; the total number of male and female incumbents in each minority group
- Required part of AAP (mentioned specifically in the regulations), if you are not preparing the Work Force Analysis

**The Work Force Analysis**

- Aggregates employees by department and job title (no individual employees are listed on reports).
- Calculates race and sex counts by job title within each department (how many white males, white females, black males, etc.).
- Orders job titles within department by compensation from lowest to highest.
- Required part of AAP (mentioned specifically in the regulations), if you are not preparing the Organizational Profile.

**The Job Group Analysis**

- Aggregates employees by job group and job title (no individual employees are listed on reports).
- Job groups are sets of job titles that share similar wages, content, and opportunities. An example of job groups in an organization is:
  - Executives
  - Managers
  - Computer Professionals
### The Availability Analysis

In an Availability Analysis, you identify the various labor pools from which the contractor selects employees that move into each of its job groups. The contractor also estimates the proportion of females and minorities in each pool. The AAP regulations identify two standard pools from which employees are selected. The following table describes the two factors.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Description</th>
<th>Internal/External</th>
<th>Data Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Those with requisite skills in the reasonable recruitment area</td>
<td>External</td>
<td>2000 Census EEO File (available from Peopleclick)</td>
</tr>
<tr>
<td>2</td>
<td>Promotable, transferable, or trainable employees within the contractor's organization</td>
<td>Internal</td>
<td>Contractor’s work force data</td>
</tr>
</tbody>
</table>

### The Incumbency v. Estimated Availability Analysis

For each job group:

- Compare representation of minorities and females in contractor’s work force to the availability estimate calculated in the Availability Analysis.

- If the work force representation is less than availability, the contractor needs to determine whether there are fewer minorities or women than would reasonably be expected.

  To make this determination, the contractor can select from among several different rules:
  - Any Difference Rule
  - 80% Rule
  - Standard Deviation Rule (either Two or Three)
  - Exact Binomial Rule

  **Note:** To deal with the issue of smaller job groups, there has been some use in the past with the Rule of 9.

- Set a goal where number of females or minorities is less than would be reasonably expected. The goal, which is equal to the availability percentage calculated in the Availability Analysis, would be to fill \( p \) % of openings in a job group with minorities or women (wherever the number of minorities or women is less than would be reasonably expected). For example, a goal for the Engineering Professionals job group might be 12.10% females.
CHAPTER 3: USING AAPlanner TO CREATE AN AFFIRMATIVE ACTION PLAN

AAPlanner has been carefully designed to help you work through the steps required to create an Affirmative Action Plan (AAP).

The Facility window, shown below, is the first window displayed after you sign onto AAPlanner. Note the row of buttons at the top of the screen, beginning with Employee on the left and continuing to Census on the right. These buttons are your gateway to creating an AAP. Each button leads you to a specific area of AAPlanner, where you can perform one of the steps required to create an AAP.

Note: AAPlanner displays the Facility window after it displays the AAPlanner Welcome window. If you have suppressed display of the Welcome window, AAPlanner first displays the Employee window instead of the Facility window. To suppress display of the Welcome window, see Step 1: Start AAPlanner.

This chapter describes the process that you should use to create an AAP using AAPlanner. For detailed information about using AAPlanner, refer to Chapter 12: Self-Guided Demonstration. Additional detailed information is available in the AAPlanner Help system.
Processing Steps

The steps you follow when using AAPlanner are described briefly in this section.

Defining Facilities

The first step is to define the facilities, or organizational entities, for which you are preparing data and reports. The Facility window, shown below, lists the facilities you have defined.

AAPlanner allows you to compile data for as many facilities as you wish. You must assign each facility a unique name and AAP date. Each facility's working data are stored separately within the file paths you specify. To work with a facility, you select it from a list of those that have been defined.
Setting Up Employee Data

The next step is to set up the facility’s employee data. You can import the data from another source, such as a spreadsheet or a personnel database, or you can enter the data manually using the keyboard.

The Employee-View All window, shown above, shows your current employee data. The data requirements for each employee include race, sex, wage information, job title, department, and include/exclude status. To protect the confidentiality of wage information, AAPlanner allows you the option of providing wage codes instead of wage amounts on some or all employee records. If your organization has already summarized its employee data by job title, you can choose to enter data by job title instead of by individual employee.

After the employee data are entered, AAPlanner allows you to sort them, print them, edit them, and make global changes.
Preparing the Organizational Profile

Once the facility’s data are set up, you can use AAPlanner to prepare the Organizational Profile, which can be either a Work Force Analysis (WFA) or an Organizational Display.

The Work Force Analysis is a list of all job titles within a department or work unit ranked from the lowest-paid job to the highest-paid job.

AAPlanner offers several options for sorting the job titles so that they are accurately ranked and for displaying information on the Work Force Analysis. You can print reports of the Work Force Analysis in both detailed and summary formats.
The **Organizational Display**, shown below, is a listing of the organizational units within a facility. For each organizational unit, the unit’s supervisor is shown. AAPlanner allows you to display the organizational units in the order you specify.

![Organizational Display](image)

<table>
<thead>
<tr>
<th>Organizational Unit</th>
<th>Tot</th>
<th>Min</th>
<th>Fem</th>
<th>White</th>
<th>Hispanic</th>
<th>Black</th>
<th>Native American</th>
<th>Asian</th>
<th>Other Race</th>
<th>Sex</th>
<th>Male</th>
<th>Female</th>
<th>White</th>
<th>Hispanic</th>
<th>Black</th>
<th>Native American</th>
<th>Asian</th>
<th>Other Race</th>
<th>Sex</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td>5</td>
<td>0</td>
<td>4</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Administration (+)</td>
<td>39</td>
<td>0</td>
<td>27</td>
<td>21</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Maintenance</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>78</td>
<td>0</td>
<td>18</td>
<td>16</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Research &amp; Development (+)</td>
<td>23</td>
<td>0</td>
<td>21</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>17</td>
<td>0</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

(*) Organizational Unit contains employees included from another facility
(-) Organizational Unit contains employees excluded from this facility’s EEO
CHAPTER 7: AAPlanner REPORTS

AAPlanner allows you to create several types of printed reports, including reports that display:

- Employee data
- Work Force Analysis
- Organizational Display
- Job Group Analysis
- Factor components
- Factor availabilities
- Availability Analysis
- Incumbency v. Availability Analysis
- Placement Goals

The following sections contain examples of the various reports you can print in AAPlanner.

Employee Data - Sample Reports

When you print employee data in AAPlanner, the printed report contains only the employees who are currently listed in the Employee-View All window. Employee records appear on the report in the order in which they appear in the Employee-View All window.

If you want to print data for a different group of employees, create and display a subset that contains just the employee records whose contents you want to print.

**Note:** To create and display a subset of employees, see “Creating a Subset of Employee Record” in the AAPlanner Help system.

If a subset is currently displayed and you want to print data for all employees, click the arrow next to the View list, and click All Employees.
Employee Data - Abbreviated Report

The following is a sample of the Abbreviated report for employee data. To print this report, select Abbreviated Report on the Employee-Print Options window, or select Employee Abbreviated on the Print All-Reports window.

Employee Data - Ad Hoc Report

The following is a sample of the Ad Hoc report for employee data. To print this report, select Ad Hoc Report on the Employee-Print Options window.

On the Employee-Print Options window, the area next to the Ad Hoc Report option shows the fields that will be displayed in the report. To change these fields, click the Fields to Print button and take these steps:

- To add a field to the Ad Hoc report, highlight the field you want to include in the Available Fields list and click the > button.
- To remove a field from the Ad Hoc report, highlight the field you want to remove in the Fields to Include list and click the < button.
- Use the << and >> buttons to remove all the fields from the Fields to Include list or to add all the fields to the Fields to Include list.
**Note:** You cannot print an Ad Hoc report that contains no fields. If you remove all of the fields from the Fields to Include list, AAPlanner automatically includes Last Name, First Name, ID, Race, and Sex on the report.

### Organizational Profile – Sample Reports

In the Organizational Profile area of AAPlanner, you can print the Work Force Analysis, the Organizational Display, and a list of employees who work at the current facility but who were excluded from the AAP, or who do not work at the current facility but who are included in the AAP.
Work Force Analysis – Detailed Version

The following is a sample of the detailed Work Force Analysis report, which is printed when you select the Work Force Analysis option and the options All, including summary page, All, or Subset on the Org Profile-Print Options window, or when you select Work Force Analysis Detail on the Print All-Reports window.

![Work Force Analysis Report](image)

<table>
<thead>
<tr>
<th>Job Title</th>
<th>EER</th>
<th>Grades Range</th>
<th>Total Brackets</th>
<th>Total Min</th>
<th>Male</th>
<th>Female</th>
<th>Total</th>
<th>Male</th>
<th>Female</th>
<th>Total</th>
<th>Male</th>
<th>Female</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting Clerk</td>
<td>5</td>
<td>13.18 - 13.25</td>
<td>3</td>
<td>1</td>
<td>Male</td>
<td>Female</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable Clerk</td>
<td>5</td>
<td>14.26</td>
<td>1</td>
<td>1</td>
<td>Male</td>
<td>Female</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior Accounting Clerk</td>
<td>5</td>
<td>16.76</td>
<td>1</td>
<td>1</td>
<td>Male</td>
<td>Female</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accountant</td>
<td>2</td>
<td>C</td>
<td>1</td>
<td>1</td>
<td>Male</td>
<td>Female</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior Accountant</td>
<td>2</td>
<td>O</td>
<td>1</td>
<td>1</td>
<td>Male</td>
<td>Female</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager of Accounting</td>
<td>1</td>
<td>E</td>
<td>1</td>
<td>1</td>
<td>Male</td>
<td>Female</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll Manager</td>
<td>1</td>
<td>E</td>
<td>1</td>
<td>1</td>
<td>Male</td>
<td>Female</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CHAPTER 12: SELF-GUIDED DEMONSTRATION

This chapter presents a step-by-step self-guided demonstration of the AAPlanner program. The demonstration moves you quickly through most AAPlanner menus and functions in the order you normally use them.

The demonstration takes from one to two hours to complete. You should plan to complete all the steps, since the data you enter in one step directly affect later steps. Doing so will also give you an overall understanding of how parts of the program work together. Because the demonstration uses sample data, you needn’t worry that your practice will affect any real data in the program.

If you need to take a break, just finish the step you’re on, and resume with the next step when you get back.

Throughout the program, AAPlanner presents options from which you can select to meet your organization’s requirements. The self-guided demonstration shows some of the many possible ways to use AAPlanner. For more detailed information about any of the program functions, see the AAPlanner Help system.

Before beginning the demonstration, you must install AAPlanner on your computer.

Note: If you have not yet installed AAPlanner, see Chapter 1 for detailed instructions.

Step 1: Start AAPlanner

To start AAPlanner:

Select Programs > Peopleclick EEO > AAPlanner 7 from the Windows Start menu or click the AAPlanner icon that installed to your desktop.
The **Welcome** window displays. If you do not want the Welcome window to display again, select the **Don’t show this welcome screen again** check box and click **OK**.

For more information, see [Starting AAPlanner](#).
Step 2: Define a Facility

A facility is the location or organizational unit for which you are preparing an AAP (for example, a regional office, a division, or an entire company). You must define each facility by giving it a name and date and indicating where its files should be stored.

In this step, we will define a facility for this demonstration.

1. In most cases, AAPPlanner first displays the Facility window. If the Facility window is not displayed, click the Facility button at the top of the AAPPlanner window.

2. Click the Add button.

3. AAPPlanner automatically creates a new facility and displays information describing the new facility on the right side of the window.

4. Enter the following information about the new facility:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Name</td>
<td>Enter Demo Facility and press Enter.</td>
</tr>
<tr>
<td>AAP Date</td>
<td>AAPPlanner automatically enters today's date.</td>
</tr>
<tr>
<td>Work Folder</td>
<td>AAPPlanner automatically enters a work folder for the demo facility.</td>
</tr>
<tr>
<td>Census Folder</td>
<td>AAPPlanner automatically enters a census folder for the demo facility.</td>
</tr>
<tr>
<td>Backup Folder</td>
<td>AAPPlanner automatically enters A:\ for your backup folder. This means that you can backup facility data on a floppy diskette.</td>
</tr>
<tr>
<td>Facility Code for Imports</td>
<td>Leave this field blank.</td>
</tr>
</tbody>
</table>

5. To exit the Facility window, click the Employee button at the top of the AAPPlanner window. AAPPlanner displays a message stating that the work folder for the demo facility does not exist.