COMMONWEALTH OF

PENNSYLVANIA

AAPlanner

Quick Guide

PREPARED BY

OFFICE OF ADMINISTRATION

EQUAL EMPLOYMENT

OPPORTUNITY DIVISION

222 Finance Building

Harrisburg, PA 17120

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**Requesting Access to IRIS**

In order to prepare the statistical reports for the EEO Plan, the preparer must have access to the Commonwealth Technology Oracle Database. Please confirm you have access before proceeding any further. In order to obtain access individuals will be required to complete the online [HRISD Authorization Request Form](http://oaiss.state.pa.us/hrisdauthorization) to obtain a new Oracle username and password. A link to the form can be found on the Equal Employment Opportunity Division website.

Requests to access Interim Reporting Information System (IRIS) will be reviewed and approved by the employee's supervisor, HR Director (or designee), and finally, by the OA/HRM Applications Division. All approved individuals will obtain department-wide access to all views contained in IRIS. Please contact the Office of Administration, Equal Employment Opportunity Division (EEO) for more information. **(717-783-1130)**

**Obtain Employee Data**

Use this only when “new” or “updated” data needs to be brought in from IRIS (to compile year-end or quarterly reports, prior to auditing a division where up to the minute info is required, etc.). For the annual EEO Plans, use the Frozen Data only. Please note that the Active Data is updated in IRIS each Saturday, not daily!

* Go to the EEO Division website
* Click on Reports on the left hand side
* Scroll down to section titled Data, click on **Frozen IRIS data for MS Access**
* Box will pop up asking “Do you want to open or save this file?” Click **SAVE**

*Within Save As Screen:*

Select appropriate icon to save database on **Desktop**

Use file name **Frozen\_Employee\_Data\_IRIS(**or assign another name)

* Click **Save,** then click **Close** when box saying “Download Complete” appears
* **Close** web page by clicking the **“x”** in the upper right hand corner of web browser
* On your desktop double click the Access icon entitled “**Frozen\_Employee\_Data\_IRIS**”
* Enter your agency’s 2 digit Personnel Area code (67 for Health, 81 for Executive Offices, etc.)
* Click **OK**
* Enter your Oracle user ID and Password
* Click **OK**

An Excel spreadsheet containing your agency’s data should be created. **Please note**: The program is designed with an automatic default to save the document directly to your desktop. If it does not appear on the desktop or you get an error box, please call the EEO Division for additional instructions.

You may choose to rename and relocate this document to another location if you prefer.

**Change to CSV File**

Please note that AAPlanner will not function properly using Excel spreadsheets and these files must be converted to CSV files.

* Open Excel spreadsheet
* Click **File** then **Save As**
* Within *Save As* box, click on the drop down menu next to *Save as type* and scroll down to select **CSV (comma delimited)** and then click **OK**
* Once the file is saved as a CSV file, **DO NOT OPEN** it prior to importing it into the AAPlanner software.

**Start AA Planner**

* Open AA Planner 9.0.1 by double-clicking on icon
  + Click **Add** button near bottom of screen
  + Click radio button for 2010 Census and click **OK**
* Name your facility
  + Click **Save** and the newly created facility will appear in the column at left
  + Double-click on your facility to open
* Click **File** and scroll down to **import** and click
  + When box pops up, click on button to right of **Folder Location and File Name** area to browse for the file containing your agency data.

*Please remember: Excel files must be saved as CSV files prior to importing.*

* + Once you locate file with data, click on it to highlight and then click **OK**
  + Before importing make sure box under Treatment of Current Data is set to **Add To** or **Erase and Replace**
  + Before importing make sure you check the box next to **“Treat the first record as a header line and do not import it”**
  + Click **Import** and when box pops up saying how many records were imported click **OK**
* Click **Org Profile** tab near the top and then click one of the subheadings such as **WFA View All**. You will see a box pop up with a bar moving.
  + When that is finished, click **Print Options** tab
    - Check **Work Force Analysis** box
    - Click **Summary Only** radio button
* Click **JGA** tab near the top and you will see a box pop up with a bar moving
  + Click **Print Options** tab
    - Click **Job Group Analysis** box
    - Unclick box next to **“Included/Excluded Employees”**
    - Click **Summary Only** radio button
    - Click radio button next to **“Total, Female, and race/ethnic breakdowns”**
* Click **Availability** tab at top
  + Click on number **1** next to **Reas Recruit Area**
    - For each job group, go to block under **Census Area** and click then select **Pennsylvania**
  + Click on **Value Wgts** tab
    - Click on number **2** next to **Promotable**

For each job group, go to cell containing the word **Feeders** and either leave the word “Feeders” in place or click on cell and select “None” if there are no job groups that can promote into the current group (i.e. Job Group 11 is for entry level positions so there are no job groups from which people are selected for promotion into that specific job group)

*If you are not sure of the feeder groups for a specific job group, please refer to the Feeder Groups Job List attached to the end of these instructions*

* + Once you complete selections for each job group, click on **Components** tab
    - For each job group that says “Feeder” you must identify the feeder groups. To do so, click on the small box titled **“Pick List”** and then select the radio button next to **Feeder Job Groups**. Click on **Next** to follow the **Feeder Pick List Wizard**.
    - To move through the job groups and make your selections, hit the small **Next** button located right above the job group names
    - Once you complete this for each job group with feeders, hit the **Value Wgts** tab again
  + Click **Value Wgts** tab; this will display the **Availability-Val Wgts** for the first job group
    - Place cursor in the **Value Weight** cell for **Factor 1** and enter appropriate weight and press enter
    - Place cursor in the **Value Weight** cell for **Factor 2** and enter appropriate weight, then press Enter

*Factor 1 represents the percentage of employees hired externally and Factor 2 represents employees promoted from within the agency. Together Factor 1 and Factor 2 must add up to 100%*

*If you are not sure of the percentages for each area, you may wish to refer to your agency’s EEO Plan from previous years or contact the Human Resources Office*

* + - Click **Next** to move through the job groups
    - Repeat the above steps until value weights are entered for each job group
  + Click **Print Options** tab
    - Unclick boxes next to **Factor Components** and **Factor Availabilities**
    - Click box next to **Availability Analysis**
    - Click box next to **Print Race/Ethnic Breakdowns** (under Global Options at the bottom)
* Click **Incumbency** tab
  + Select radio button next to **80%**; make sure the box next to **“Use the Whole Person Rule”** is checked
  + Click **Print Options**
    - Unclick box next to **Print ‘Yes’ Flags**
    - Click box next to **Print Facility Totals**
    - Click box next to **Print Placement Goals**
    - Under Global Options, make sure boxes next to **Print Page Numbers** and **Print Race/Ethnic Breakdowns** are checked
* Click **Print All** tab
  + Select the following reports to run by checking the box next to each:
    - Work Force Analysis Summary
    - Job Group Analysis Summary
    - Availability Analysis
    - Incumbency v. Availability - Detail
    - Placement Goals
  + Check box next to **Print Race/Ethnic Breakdowns on Reports**
* Click the **Print to one PDF** filebox (right hand side near top of window) to print all of the reports without interruption
  + Click the **PDF** button to save reports directly to computer (you may then print off at a later time) or
  + Click the **printer icon** to print reports immediately
  + When finished, click **File** and then scroll down and click **Exit**
  + A box will pop saying “Would like to backup the current facility?” If you wish to save a backup file, Click Yes and then save to the location of your choice

|  |  |  |
| --- | --- | --- |
| **JOB GROUP** | **FEEDER GROUP** | **BARGAINING UNITS REPRESENTED** |
| 11 |  | A1,A4,B1,B4,G1,G4,J1,K1,K7,N1,V1,V4,V8,X1 |
| 12 | 11 | A2,B2,G2,G5,H2,J2,K2,K8,N2,V2 |
| 13 |  | H1 |
| 15 |  | M1 |
| 17 | 39 | L1 |
| 18 | 15 | M2 |
| 19 | 11, 12 | P4 |
| 20 | 19 | P5 |
| 21 |  | F1,F4 |
| 22 | 21 | F5 |
| 23 | 99 | 15 – UC Referees |
| 24 |  | E4 |
| 25 |  | D4 |
| 26 |  | T4 |
| 27 | 26 | T5 |
| 29 |  | R1 |
| 30 | 29 | R2 |
| 31 |  | C4 |
| 32 | 31 | C5 |
| 33 |  | S4 |
| 35 |  | L4 |
| 36 |  | K4 |
| 37 | 36 | K5 |
| 38 |  | R4 |
| 39 |  | L6 |
| 70 |  | M7 |
| 71 |  | A7,N7 |
| 72 | 19, 20 | P7 |
| 73 |  | E7 |
| 94 | 11, 33 | A5,B5,S5,Z5 |
| 97 | 11, 12, 13, 17, 18, 20, 22, 25, 27, 30, 32, 33, 37, 38, 72, 94 | Management (A3,A8,B3,C3,D3,F3,G3,H3,J3,K3,  M3,M8,N3,P3,R3,S3,T3) |
| 98 |  | 99 |
| 99 |  | 98 |

**FEEDER GROUP LIST FOR AAPLANNER**