

Easy Documents

Technical Document

Version 1
July 2011
US




spinifex*IT*

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SAP Business Process Improvement Software

For SAP HR & Payroll



Easy Documents

Technical Information

(July 31 2011 Version - US)

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Summary

The Easy Documents is a fast, easy tool, to help the non technical payroll or HCM team to build and produce documents for the employee, or for management. These documents would normally be produced either manually, via mail merge, or by a custom program. Easy documents comes with 10 pre-delivered templates to allow you to get up and running quickly.

Easy documents has access to a huge source of HCM data, through the integration with the SpinifexIT Easy Reporter. This allows your team to leverage from existing knowledge in this product (Or to minimise training if using both products).

Easy Documents is compatible with all SAP standards, can be loaded in one day and includes automatic upgrades that have been pre tested and will load into your system error free. The Easy Documents can automate and email documents to numerous internal and external stakeholders without any input after initial setup. Easy Documents draws the information within SAP so there is no need to manipulate data in Word which saves time and the risk of error.

Dramatic time savings occur with this system and these will depend on your individual use. Some tasks however can improve from 10-60 minutes per document to 5 seconds per document.

The return on investment for this product will be recovered well within the first twelve months.

Background

Traditionally, when there has been the need to produce documents within the HCM team, this has either involved either manually copying and pasting information into word documents, performing mail merge, or the creation of Sapscript or Smartforms with programs to control these.

These existing processes can be either Time consuming for the HCM team to produce, or can result in months of coding and testing of these forms. They can also mean future maintenance as forms change, or many different versions of forms being created by different teams throughout the organisation.

Easy Documents is designed to simplify this entire process. It allows you to quickly and easily create a new document within the Easy Documents Product. Once created, it can be saved, for future use. These documents can then be run for one or more employees to quickly produce documents that could normally take many hours to produce.



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Easy Documents has access to a huge range of data sources from the HCM Module. It leverages off the Easy Reporter to allow you access to the majority of the hard to get at data areas, including (Employee Master Data – Infotypes, Organisational Information, Payroll and Time evaluation Cluster Results, Leave Quotas, Finance Posting Information etc). The data can also contain logic built into the Easy Reporter to return only the data you require. For example: When creating a New Hire Letter, the data can return only the employees who were hired in the last month. This removes the need to know exactly who you are creating the Documents for.

Until now, to truly automate your document production, SAP users had to create a SAP report, to gather data, and the build Sapscrip or Smartforms, to produce the output they require. This could take weeks and in some cases months of effort to produce one only form. Now, this can be done quickly and easily in production, with absolutely no ABAP code, Sapscrip or smartform knowledge.

To come up to speed on this product would take approximately 1 day for customers who already use the Easy Reporter, and 3 days for customers who have neither of the SpinifexIT products. Of course this would be only to create the documents. Execution of existing documents takes less than 1 hour or less (As it is similar to running a SAP report).

*Please note: The Easy Documents product is designed for the **output** of documents and letters in a formatted manner. This does not cater for, nor is designed as a data entry mechanism for replacing forms you might produce through tools such as Adobe Forms.*

To address the need for providing information out to employees and management in a formatted manner, SpinifexIT created Easy Documents©. The Toolkit greatly extends the capability of the existing SAP HR/Payroll solutions so that an end user can develop documents and utilize a suite of pre-delivered documents that cover the key documents that would be produced through most organisations. The Easy Documents© comes pre-delivered with over 10 document templates covering the following areas:

- New Hire Letter
- Termination Letter
- Statement of Earnings
- Change of Position
- Employee Master File Summary
- Pay Increase Letter
- Management Reporting

The Easy Documents© enhances the existing Human Resources and Payroll reporting solutions that have been provided within SAP. Before this tool was made available creating of Documents and Letters was extremely difficult and in most cases, the data and output required manual manipulation via Word and Excel to get it into an appropriate format.



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One of the aims of the Toolkit is to ensure that all document production is done within SAP without the need for manual manipulation through exporting to Word. All of the documents delivered through the toolkit are extremely customisable, and allow the User to manipulate the output of the data to suit their needs. Text and Fields on a document can easily be added or removed to create the same format of documents that the company would normally produce.

All of the documents can be automatically emailed out to a person (via SAPMail, Internet Mail or via the Organizational Structure), to fully automate the provision of the relevant data. The email will have the Document attached to it (As an Adobe PDF Document).

The Toolkit centralizes document production into the one area, within SAP. This means that the logistics of maintaining multiple mail merge documents and the procedures for the creation of these documents can be eliminated.

The one set of documents can now be accessed from team members throughout the organisation, but if there is the need to modify the output or contents, then this can also be done centrally, meaning that the individual users will simply get the new version of the document once it has been updated.

Return on Investment

- The toolkit reduces ABAP / Sapscrip development, thus reducing cost.
- Time consuming production of mail merge documents is fully eliminated.
- Complex Forms such as (Separation Certificate for Australia), can be produced into the Tool, meaning these do not need to go to a specialist group to produce.
- The Documents can be linked to the Easy Helpdesk, meaning these forms can be produced immediately when they ring the helpdesk.
- Distribution of these documents can be produced via email. This eliminates mailing expenses and printing costs, as well as any Labor associated with the production of this information.
- Management reporting can be easily produced and be fully automated, which means that managers can get access to the information they need in a common format for the entire company.
- The toolkit offers centralized document production, all in one place

Creating Documents

The Easy Documents is designed for end users *not* report writing specialists. Importantly, the Toolkit has been designed to use standard SAP R/3 functionality, thus delivering consistency in the look-and-feel for end users. The tool itself is designed for use in an easy step by step process. There are actually three options when creating documents using the Easy Documents:



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- Copy and modify an existing pre-delivered document
- Use a Template to create a document
- Build a document from scratch

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There are five tabs of the Easy Documents although not all are required to create a Document. Many include advanced options and selections, the five tabs include:

1. General Document Settings
2. Documents Setup
3. Output Options
4. Publish Document
5. Run Document



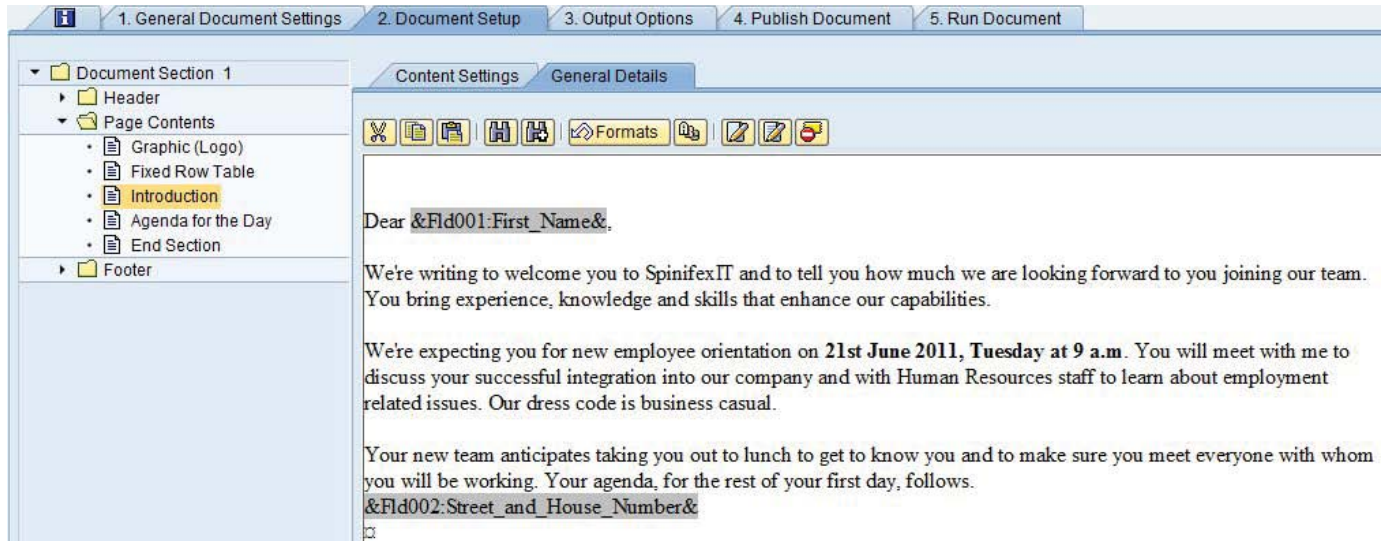
Tab 2, the Document Setup tab, is the core design screen of the Easy Documents. The screen has two sections. The first section shows the makeup of the document (Broken into Header, Page Contents and Footer), then further broken down into the individual section content types. To the Right of the screen is where you select the information that is to be displayed in the section.

For example: the following shows a makeup of a New Hire Letter. The Page is made up of a logo, some data shown in a tabular format, and 3 sections of text. The Introduction section is shown below, which shows the text to output onto the letter, as well as the fields which are to be shown.



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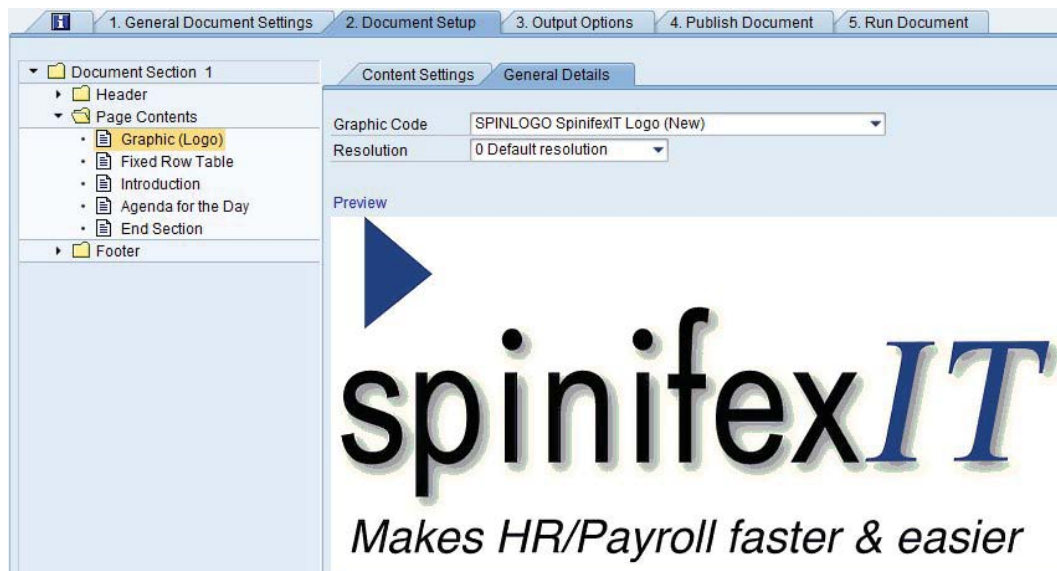
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Sample Content Types available to include in a document

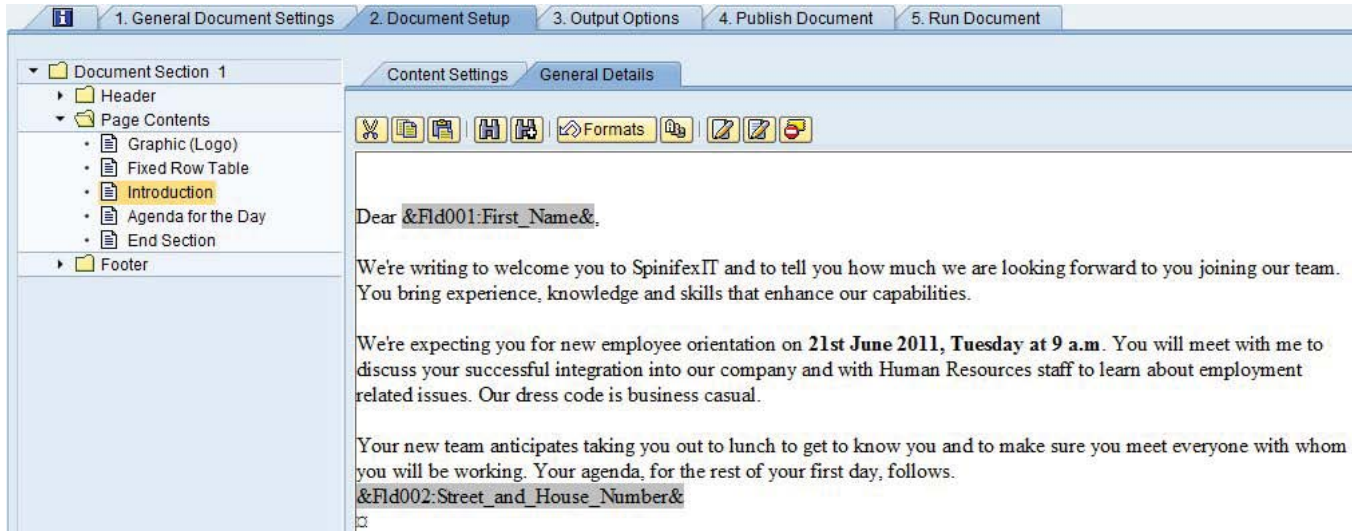
Graphic

The Graphic Type, will allow you to put Graphics (Such as logos or signatures) into a document. These can be uploaded into SAP from a local file on your PC. They can be positioned anywhere on a document



Free Text

A free text section allows you to simply type in the text you require, or to cut and paste this from another application such as word.



The text is shown as it would appear on the document, with the ability to select different fonts, font sizes, colors, formatting (Such as Bold, Underline, Italics etc)

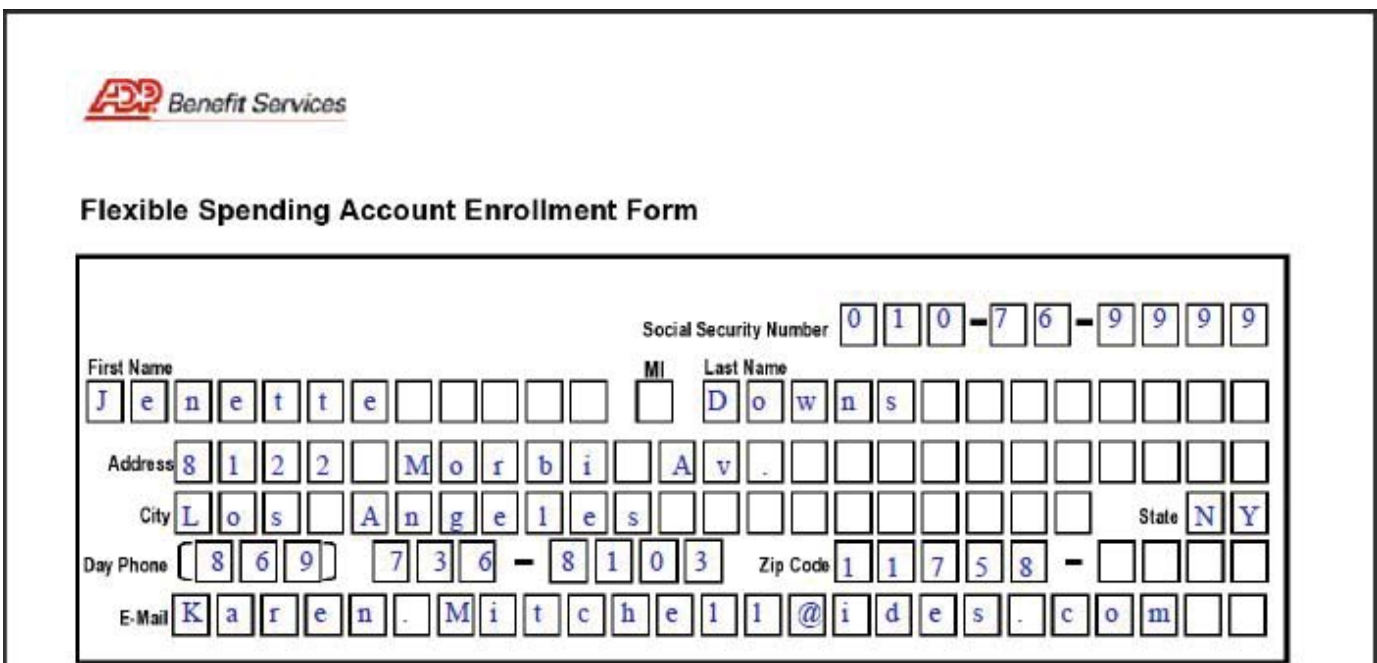
Through here, you can also select to insert fields by the click of the button and the selection of the fields from any linked Easy Reporter report.

Fixed Position

Fixed position fields allow you to put fields in any position on the form. The following is an example of filling a pre-defined form, with pre-set fields.

Content Settings		General Details					
Fixed Position Settings							
<input type="button" value="Add Row"/>							
No.	X Position	Y Position	Text Entry	Field	Format	Delete	
001	1.40	5.80		002 ADP FSA Form Report -> First Name			
002	11.00	5.80		002 ADP FSA Form Report -> Surname			
003	2.75	6.80		002 ADP FSA Form Report -> Street and House Number			
004	2.75	7.60		002 ADP FSA Form Report -> City			
005	18.66	7.60		002 ADP FSA Form Report -> Region (State Province County)			
006	13.20	4.50		002 ADP FSA Form Report -> SSN First 3			
007	15.50	4.50		002 ADP FSA Form Report -> SSN Middle 2			
008	17.30	4.50		002 ADP FSA Form Report -> SSN Last 4			
009	3.20	8.60		002 ADP FSA Form Report -> Area Code			
010	6.00	8.60		002 ADP FSA Form Report -> Phone 3 Nums			
011	8.70	8.60		002 ADP FSA Form Report -> Last 4 number			
012	13.10	8.40		002 ADP FSA Form Report -> Substring Fld 07			
013	2.75	9.12		002 ADP FSA Form Report -> UserID (Long)			

This can then results in a form looking like the following



ADP Benefit Services

Flexible Spending Account Enrollment Form

Social Security Number 0 1 0 - 7 6 - 9 9 9 9

First Name J e n e t t e MI Last Name D o w n s

Address 8 1 2 2 M o r b i A v .

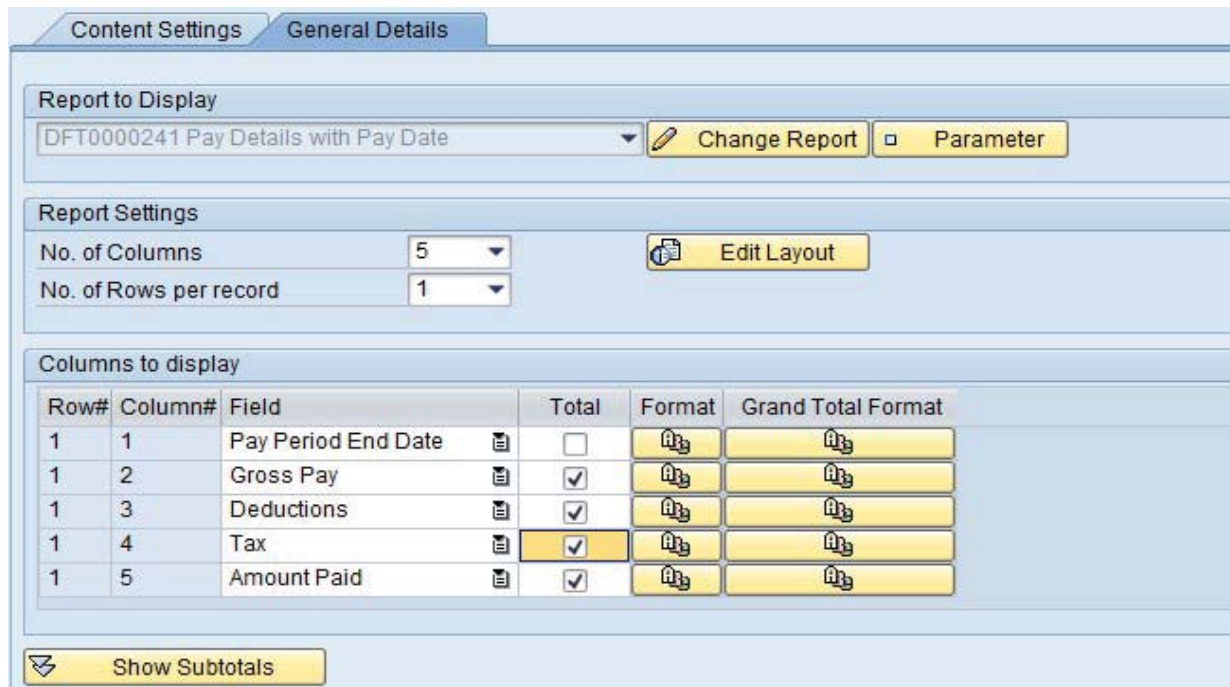
City L o s A n g e l e s State N Y

Day Phone (8 6 9) 7 3 6 - 8 1 0 3 Zip Code 1 1 7 5 8 -

E-Mail K a r e n . M i t c h e l l @ i d e s . c o m

Easy Report

An Easy report lets you call any existing Easy Reporter Report, to provide tabular output. For example: If you wanted to show the earnings over the last 12 months, period by period, you might call a report in the following manner



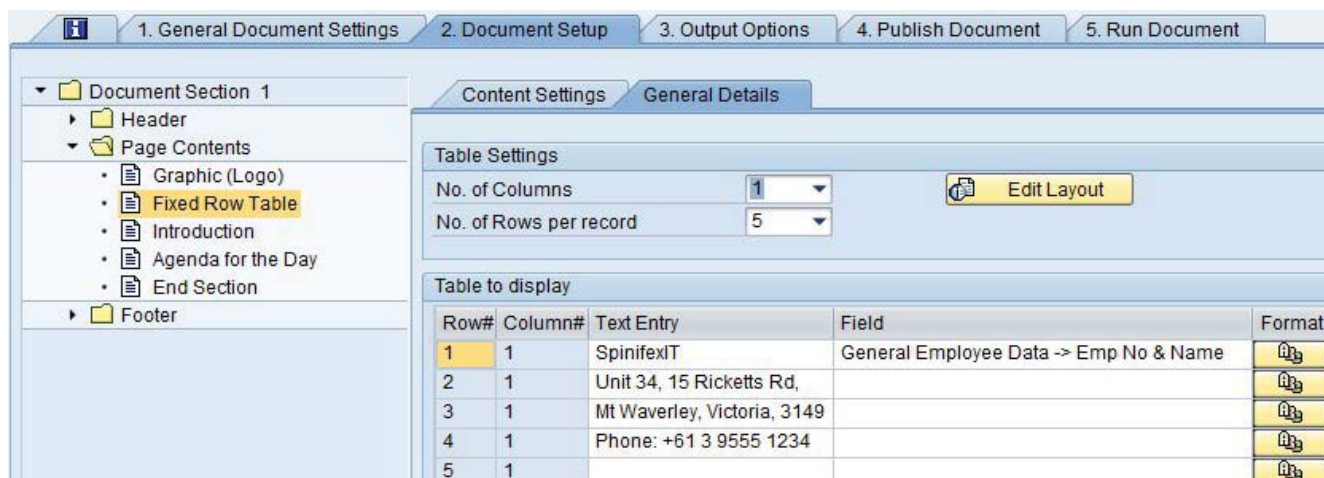
The screenshot shows the 'Easy Report' configuration window with the following settings:

- Report to Display:** DFT0000241 Pay Details with Pay Date
- Report Settings:**
 - No. of Columns: 5
 - No. of Rows per record: 1
- Columns to display:**

Row#	Column#	Field	Total	Format	Grand Total Format
1	1	Pay Period End Date	<input type="checkbox"/>	[Format Icon]	[Format Icon]
1	2	Gross Pay	<input checked="" type="checkbox"/>	[Format Icon]	[Format Icon]
1	3	Deductions	<input checked="" type="checkbox"/>	[Format Icon]	[Format Icon]
1	4	Tax	<input checked="" type="checkbox"/>	[Format Icon]	[Format Icon]
1	5	Amount Paid	<input checked="" type="checkbox"/>	[Format Icon]	[Format Icon]

Fixed Row Table

The fixed Row table allows you to easily output your field into a tabular format. Either by keying in text or selecting the fields to output

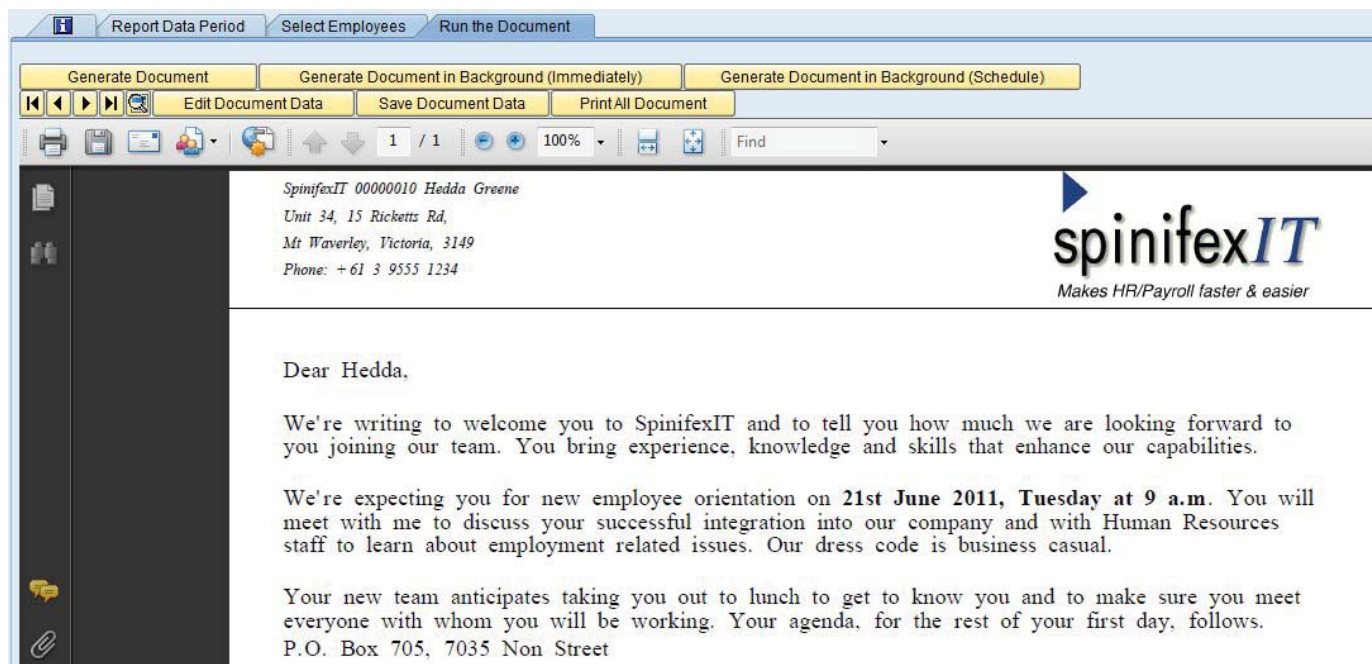


The screenshot shows the 'Fixed Row Table' configuration window with the following settings:

- Table Settings:**
 - No. of Columns: 1
 - No. of Rows per record: 5
- Table to display:**

Row#	Column#	Text Entry	Field	Format
1	1	SpinifexIT	General Employee Data -> Emp No & Name	[Format Icon]
2	1	Unit 34, 15 Ricketts Rd,		[Format Icon]
3	1	Mt Waverley, Victoria, 3149		[Format Icon]
4	1	Phone: +61 3 9555 1234		[Format Icon]
5	1			[Format Icon]

Your documents can be run from Tab 7, Review and Test Report, a sample of report output is shown below.



Report output displays as an Adobe PDF Document.

Report Distribution

One of the huge overheads on top of the actual creation of documents is the distribution of the documents to individuals or to key staff. Many companies on a regular monthly basis will manually create and distribute documents to multiple people. For example : As part of a salary review process. With the Easy Documents this distribution can be automated via email.

Types of Documents: Letters

Letters out to staff can be quickly built and stored for future usage. This might include common letters such as

- New Hire Letter
- Termination Letter
- Service Anniversary letter
- Change of Position Letter

Letters like the above ones can be created once and run when required. In addition, if you have the adhoc need to provide detail out to employees, this can be quickly done. For example: You might have the need to provide a "Once off" letter, to employees at a particular site, to notify them of something such as a change to working hours. This can be quickly done through Easy Documents.



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Types of Documents: Pre-filled Forms

Many companies have existing forms, or have the need to be able to fill out government forms. These can be quickly setup. The background of the form can be scanned in as a graphic and is stored in SAP, where the data can be quickly mapped to particular positions on the form.

Types of Documents: Information to the Employee

Often there is need to provide information out to the employee. This might contain more complex information than would normally be put into a simple letter.

- Confirmation of Master Data
- Pay Details Letter
- Pay Increase Detail
- Benefits Summary Letter

Erik Isaacs
8119 Clemens Avenue
West Hills CA 91304
00002673 HJO

Personnel Number : 00010270		Name of Employee : Henry Miller	
Personnel Area : Corporate - United States		Personnel Subarea : Philadelphia	
Employee Group : Active	Employee Subgroup : Salaried staff	Payroll Area : US:Semi-Monthly - US	

Dental

Standard Dental Plan

Attributes

Option 2

Costs Weekly

Employee Pre-Tax	13.50
Employer Cost	5.00

Medical

Medical Plan 1

Attributes

Option 1

Costs Weekly

Employee Pre-Tax	72.50
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Types of Document: Management Reporting

Most companies want to provide as much information out to their managers as they can, to allow them to manage their staff effectively. Now it can be easily provided with minimal work from the HCM team. A document can be produced containing lots of different information about the managers team, including Hires, Termination, Headcount Details, Leave Details, Absences, Overtime Payments, Birthdays in coming month, Employment Anniversary in coming month etc. The possibilities are endless.

Regional Manager Report						
Personnel Area : Chicago (3100)						
<i>Staff Headcount</i>						
The following will show the total staff at the end of the reporting month. The detail is broken down by the employee type (Full Time, Part Time etc), and is then further broken down by the employee Gender.						
Employee Type	Male Employees	Female Employees	Total Employees			
Salaried staff	25	19	45			
<i>Staff Age Demographics</i>						
The following shows the staff age demographics. This is broken down by the employees personnel subarea (Location), as well as the gender.						
Pers Subarea Desc	Gender	Age 0 - 25	Age 25 - 35	Age 35 - 45	Age 45 - 55	Age 55+
Chicago	Male	0	3	5	0	
Chicago	Female	0	11	3	0	
St. Louis	Female	0	3	0	0	
St. Louis	Male	0	2	3	0	
Ohio district	Male	0	2	5	1	
Ohio district	Female	0	0	1	0	
Ohio district		0	0	1	0	
		0	5	21	18	1
<i>Top 10 Leave Balances</i>						
The following section will display the employees with the top leave balances of your area. The goal is to reduce the leave balances down to under 200 hours of leave for all of your employees.						
Emp No & Name	Leave Balance (Hours)	Future Booked Leave (Hours)				
00010154 Mr. Trevor McDonald	55.00000	0.00000				
00010155 Mr. Paul Ashe	50.00000	0.00000				
00100010 Karen Mitchell	13.33334	0.00000				
00100011 Douglas Olson	10.00000	0.00000				



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If you have further technical questions please contact SpinifexIT

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