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2018

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Creating and Distributing HR Documents from your SAP system

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About presenters

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Dorset County Council

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EPI-USE Labs

Today’s session

- About Dorset County Council
- Our Reporting & document challenges
- What is Query Manager?
- What is Document Builder?

Context

Dorset County Council

- Over 40 Payroll Areas,
- 18,000 employees,
- 21,000 employments (excluding pensioners)
- Multiple pension schemes
  (LGPS, TP, NHS, NEST etc.)
- Lots of staff with multiple employments
- Wide variety of staff and terms and conditions
- A large number of external customers

Richard Cain

- HR Adviser (Systems)
- SAP development, configuration, support (Payroll and HR)
- Using Query Manager since 2013
- Over 500 reports in QM3 and QM4
- Started using Document Builder in 2017

Employee Contracts

- Individual cover letter
  - 30 conditional paragraphs, just for DCC
  - Different letters for school based staff and external customers
  - Decisions based on data from across the system (and beyond)
- Section A
  - Individual contract details: pay, hours, fixed-term dates etc.
- Section B
  - Attach relevant Conditions of Service document
- Job Description
  - Select from several thousand in library

Previous method

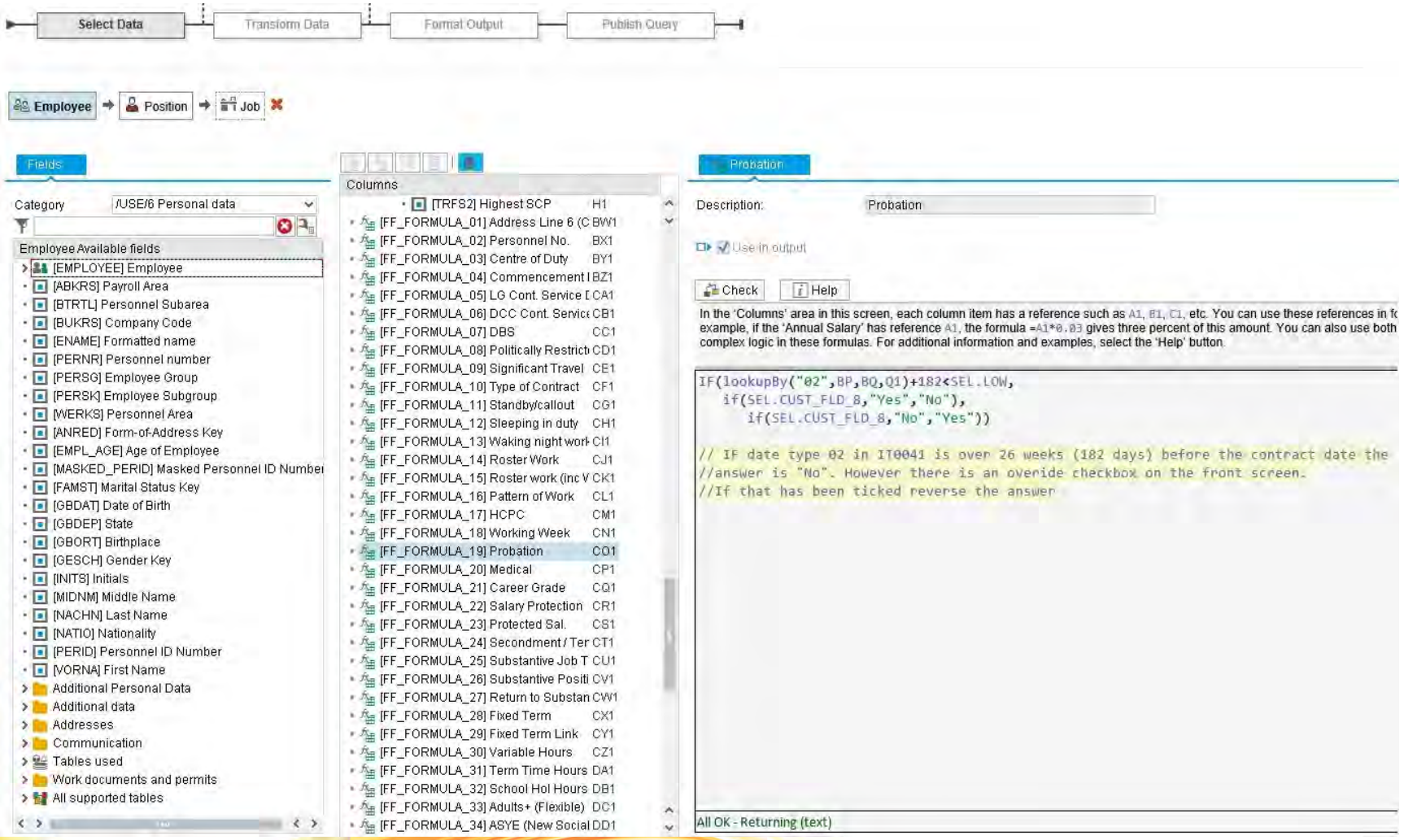
- Manual input into an Excel spreadsheet with a macro to create the cover letter
- IT0906 - select relevant subtype to create Section A
- Attach relevant Section B and job description

- Very time consuming and open to error
- Changes to IT0906 forms require scarce IT resource, QA testing, transports etc.

A new hope – Query Manager / Document Builder

- The Query Manager 4 part:
  - Basic employee information from infotypes
    (0001, 0002, 0006, 0007, 0008, 0016, 0019, 0033, 0041, 0052, 0071, 0185)
  - Position information from Authorities and Resources and Planned Compensation
  - Job data from Survey Results
  - Configuration data (e.g. T510)
  - Custom tables
  - Secret ingredient
  - Over 80 formula fields

Select data screen



- Easy to work with business objects (e.g. Employee, Position, Job)
- Pulls in data from all areas of system (and beyond)
- Formulas can incorporate data entered by users on front screen

Fun with formulas

```
IF(isBlank(lookupBy("34",BD,BE,Q1)) or lookupBy("34",BD,BE,Q1)<SEL.LOW,"No",
  IF(SEL.LOW>CB1,"Yes - Internal",
    "Yes - External"))

//If the AYSE expiry date in IT0019 is either blank or before the contract date then "No"
//IF the expiry date is after the DCC commencement date (in IT0041) then "Yes - Internal"
//otherwise "Yes - External"
```

```
{"BC":"Basic Check",
"RA/EC":"Regulated Activity (Adults), Enhanced Check (Children)",
"RC/EA":"Regulated Activity (Children), Enhanced Check (Adults)",
"EAC":"Enhanced Check (Children and Adults)",
"EA":"Enhanced Check (Adults)",
"EC":"Enhanced Check (Children)",
"RAC":"Regulated Activity (Children and Adults)",
"RA":"Regulated Activity (Adults)",
"RC":"Regulated Activity (Children)",
lookupBy("9016",I,K,Q1):lookupBy("9016",I,K,Q1)}

[lookupBy("9016",I,K,Q1)]

//This works as a Case statement based on subtype 9016 in the position's authorities and
//resources intotype
```

```
IF(DAY(DATE(YEAR(BZ1),MONTH(BZ1)+3,DAY(BZ1)))<DAY(BZ1),EOMONTH(DATE(YEAR(BZ1),MONTH(BZ1)+3,DAY(1)),0),
   DATE(YEAR(BZ1),MONTH(BZ1)+3,DAY(BZ1)))

// If 3 months after the commencement date goes into the next month because it is shorter than the first one,
// use the end of the 3rd month
// e.g. 3 months after 30/11/2017 is 02/03/2018 but this will show 28/02/2018
```

the secret ingredient…

Server Input Files

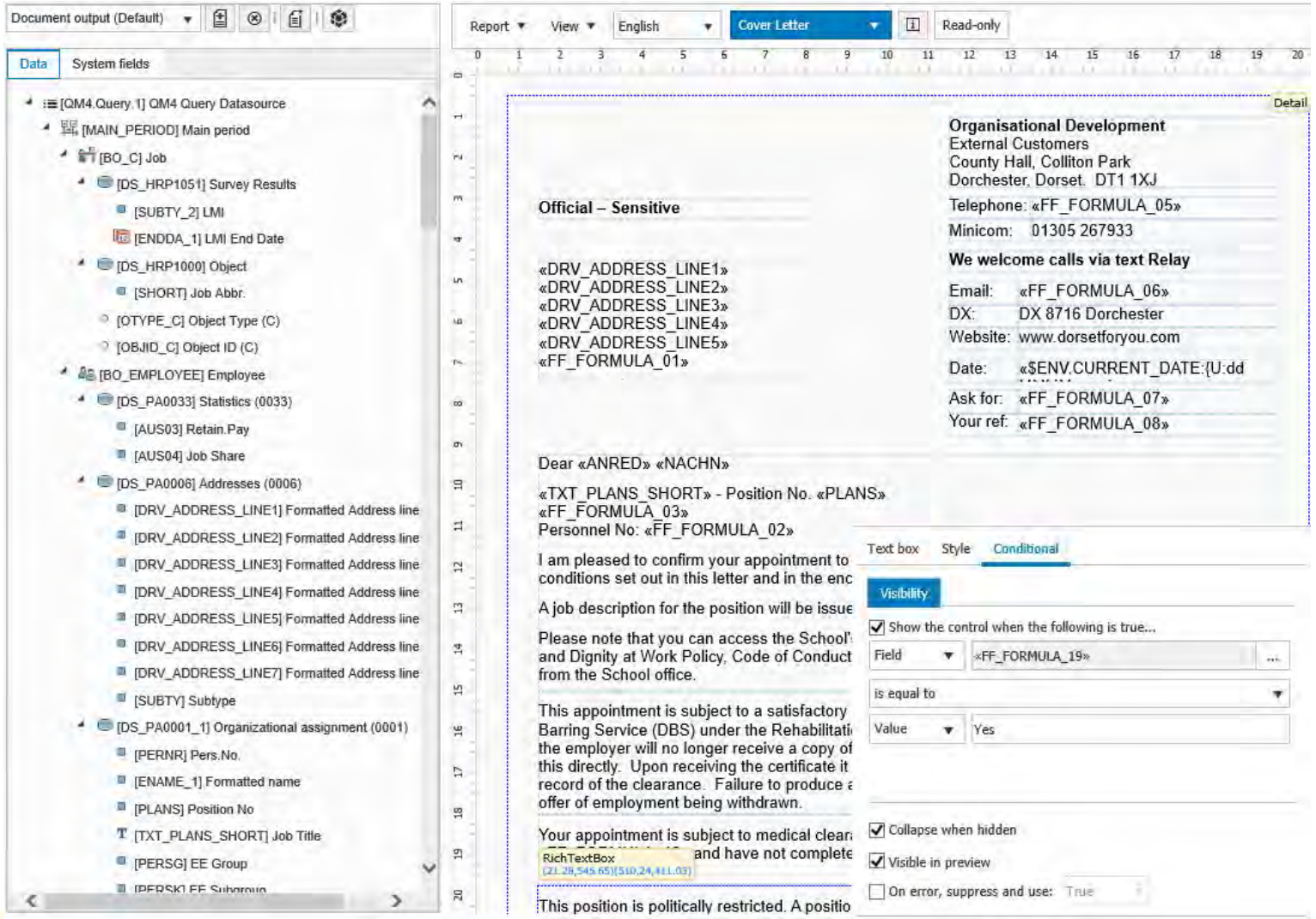
Incorporate data from one or more spreadsheet(s) in the query ☺

1) Individual HR/Pay staff member's contact details from a spreadsheet the team can maintain themselves (for the address header)
2) Wage types categorised in a variety of ways – used for a number of reports (in this case, to group Teachers' allowances: TLR1, 2, 3, SEN etc.)

Document Builder

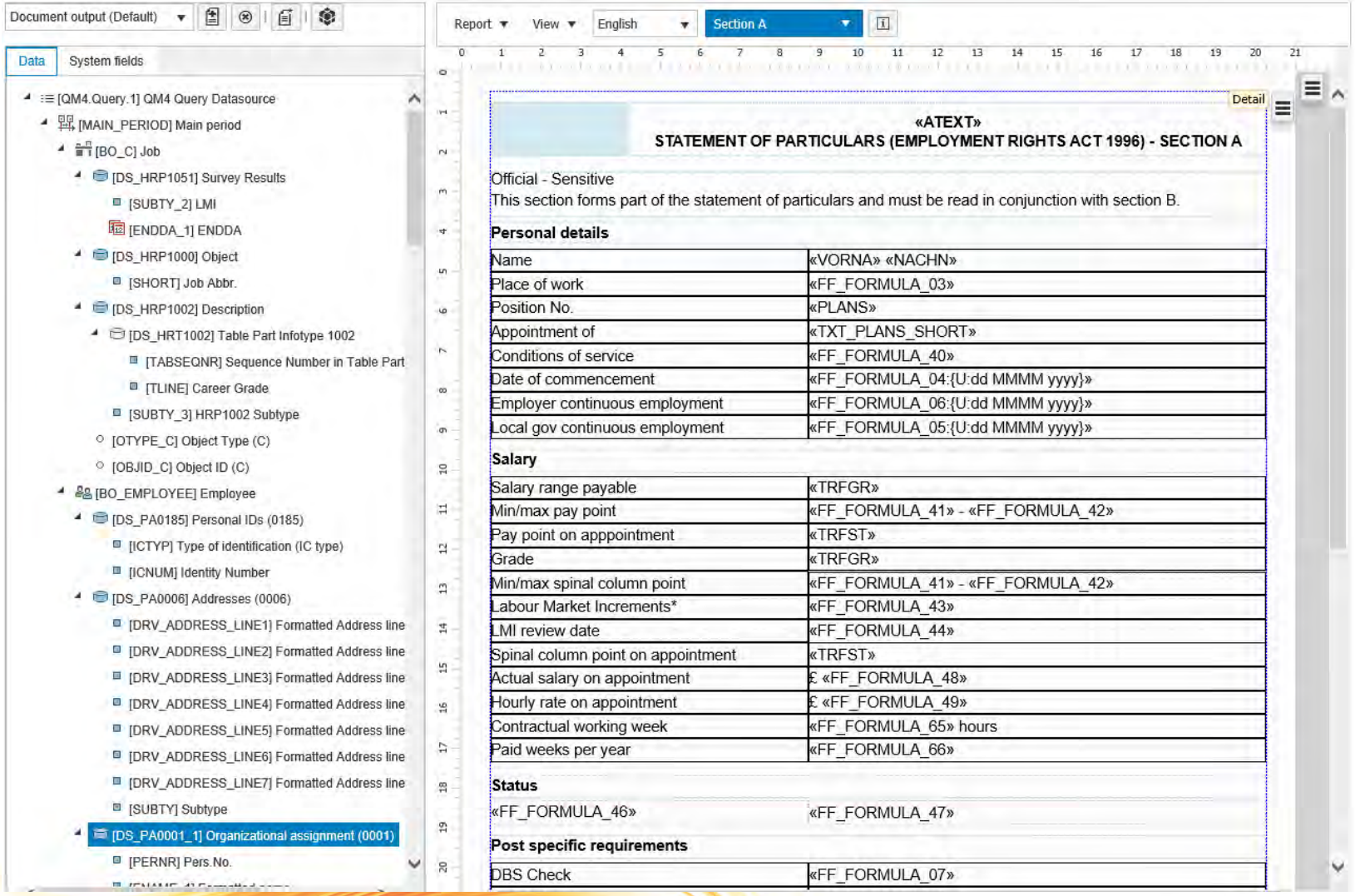
- Use all the Query Manager goodness to create a fully featured document
- Derived address fields – avoids blank lines where a field in IT0006 is missing
- Fixed-length or auto-flow pages
- Conditional paragraphs – logic available in Document Builder but it can also use the results of formulas in the main query
- Conditional pages – different versions for customers
- Dynamic images – e.g. logo based on payroll area

Format data (cover letter)



'Telephone', 'Email', 'Ask for' and 'Your ref.' fields taken from Server Input File (easy to maintain spreadsheet)

Format data (section A)

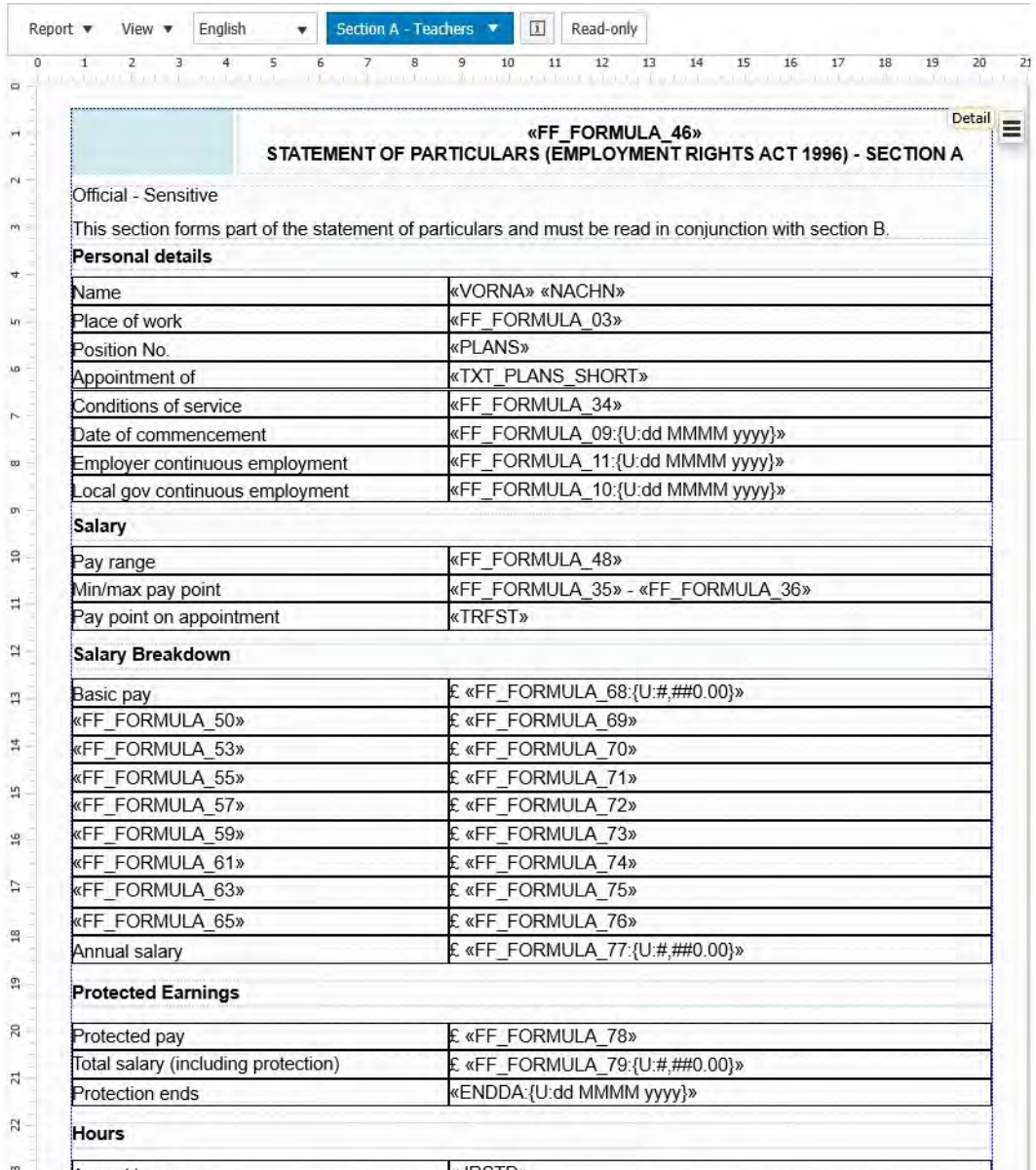


A number of the table rows are conditional and only appear for certain types of staff

The blue rectangle is a dynamic image

(Logo based on payroll area)

Format data (section A – Teachers)



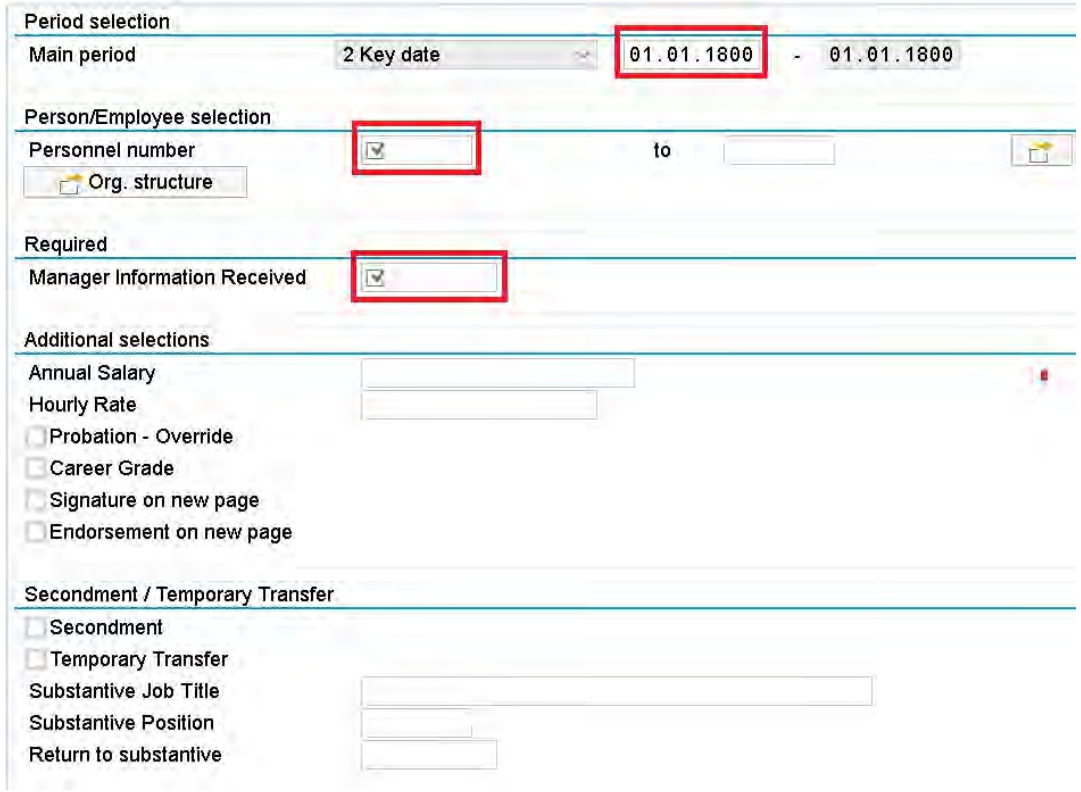
Salary breakdown has multiple conditional rows to allow for combination of allowances

The Annual salary at the bottom is the total of the monthly figures and produces exactly the right figure (not always the case in IT0906)

Bringing it all together

- Document text and the decision making for conditional paragraphs are based on data from the system wherever possible
- For unusual, difficult scenarios, the user can enter data manually or make decisions by ticking check-boxes on the front screen
- The filename can be built from data and formula results in the query
- We add extra information to enable the population of a KPI spreadsheet and to combine the document with the relevant Section B and Job Description (using a brilliant PowerShell script written by an IT colleague)
- The data in the KPI spreadsheet can then be brought into a QM4 report as a Server Input File!

What the user sees



- Forces entry of
  - contract date
  - personnel number
  - date information received from manager
- Allows override of decisions made in query
- Easy entry of data difficult to determine in system
- The user entry fields can be set as the relevant data type for instant validation ☺

Benefits and next steps

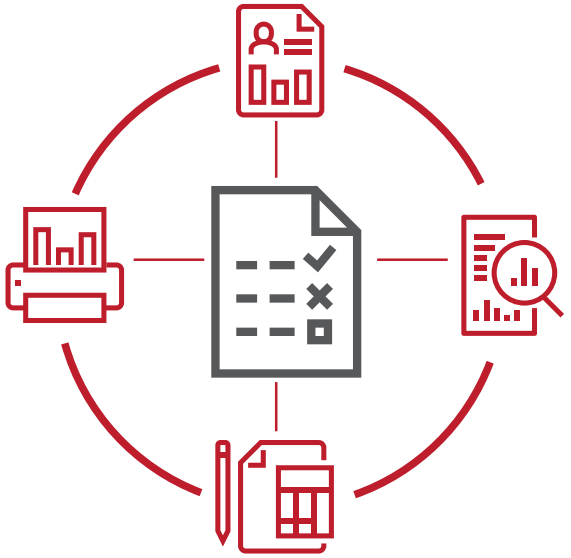
Benefits

- Huge time saving
- Easy to make adjustments (no transports etc.)
- Simple process for the user
- Avoids manual errors
- Conditional paragraphs and pages
- Documents look really good
- Very positive comments from users

Next steps

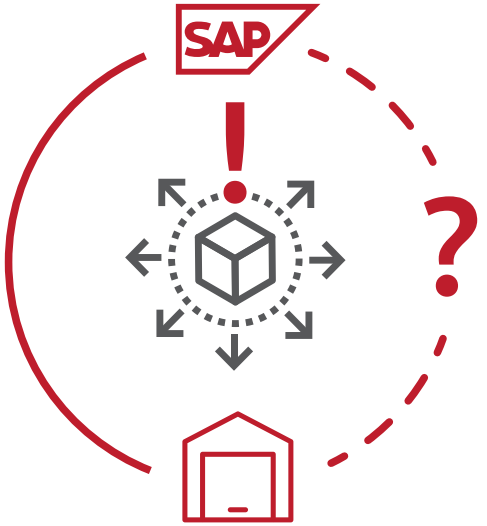
- Variation letters
- Casual employments
- Unpaid leave
- Starting to add the automatic emailing of letters as an additional output to reports

What problem does Query Manager solve?



You need multiple tools to create reports

You have to rely on IT

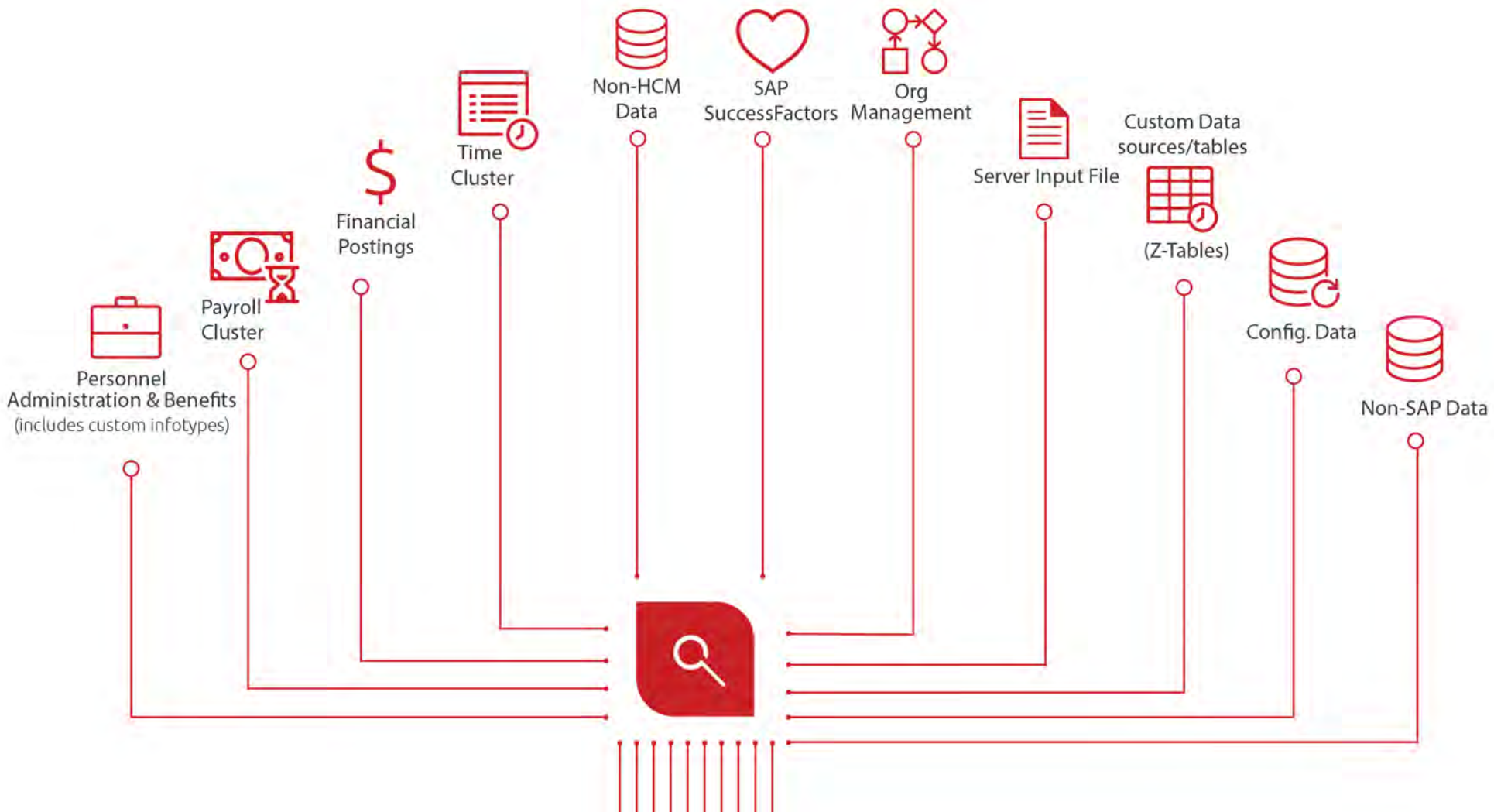


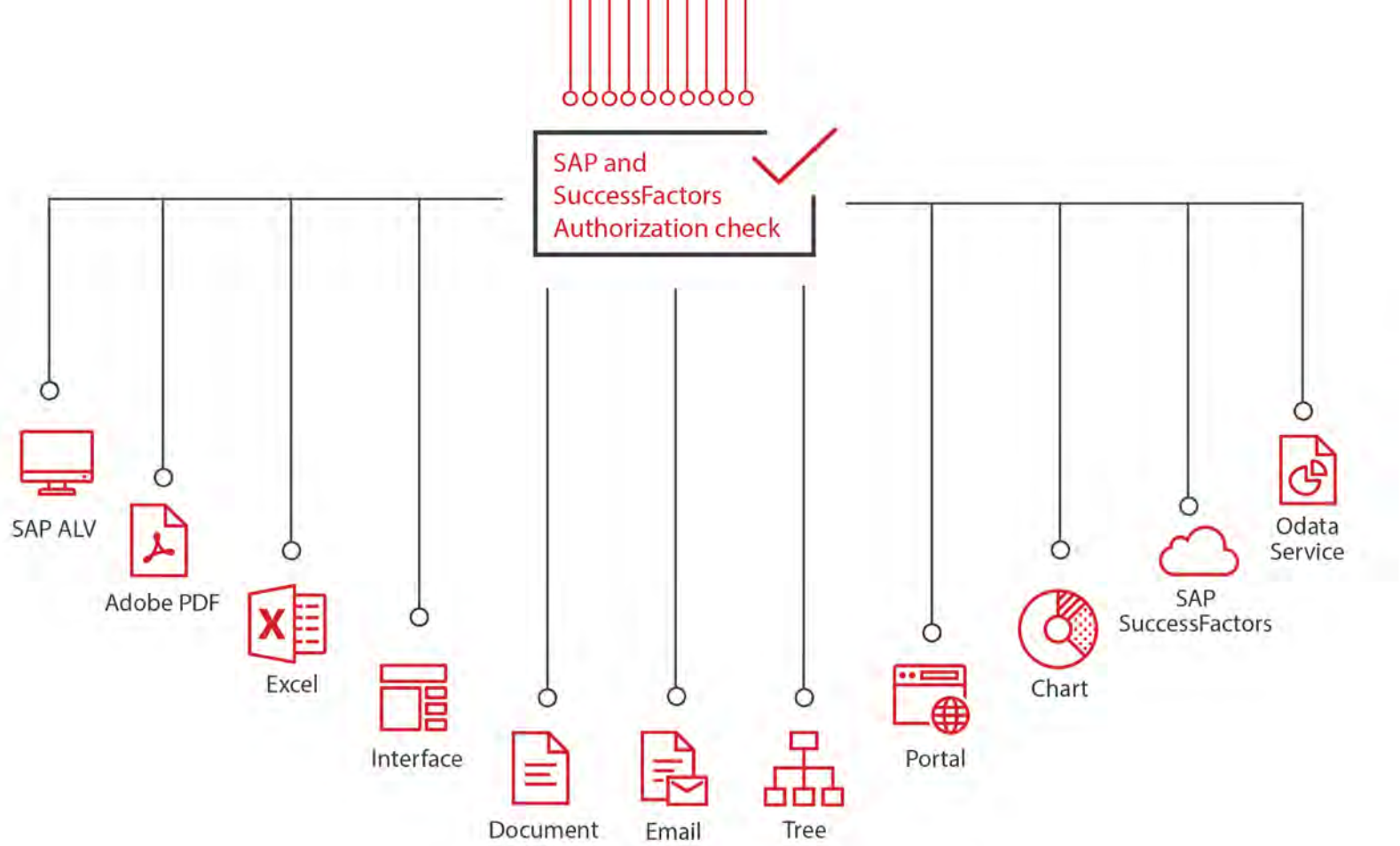
Your critical data is not available in SAP Business Warehouse (BW)

- Access to all the data you need via a single solution
- A simple user interface puts reports at your fingertips
- All this – and so much more

Sample inputs

Query Manager provides access to all of the data users need in an easy-to-use format, so end users can be empowered to create their own reports in SAP without reliance on technical resources.

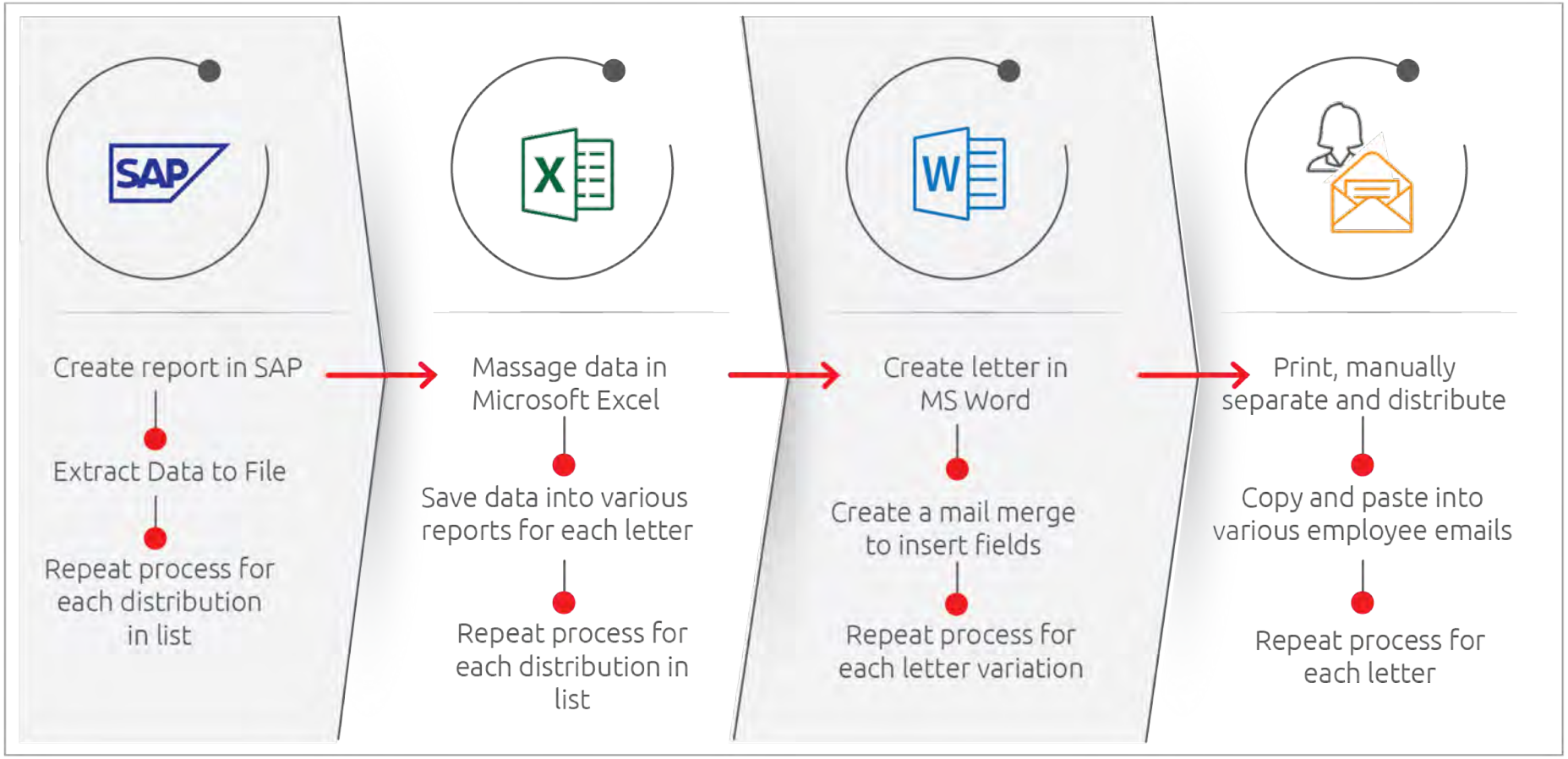




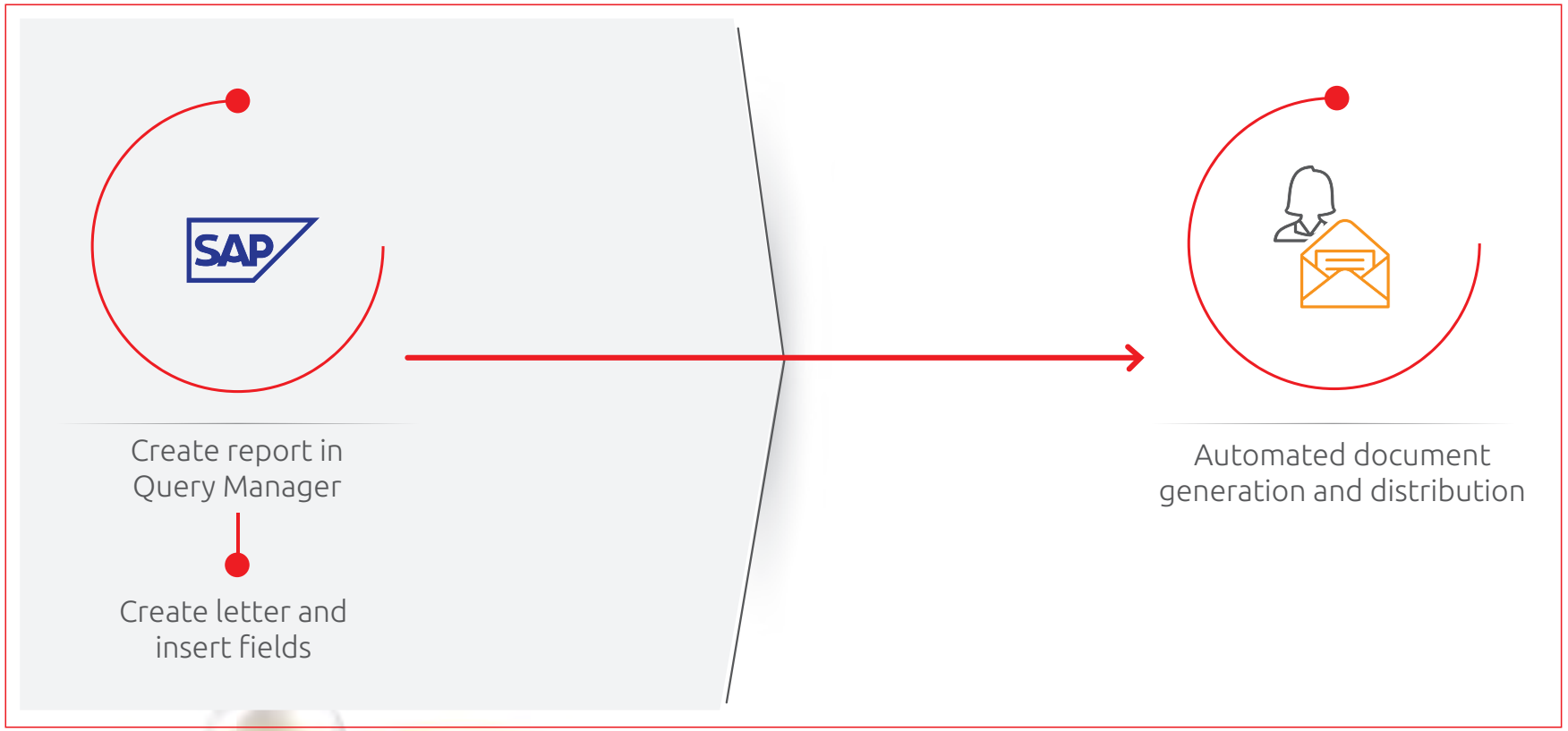
Sample outputs

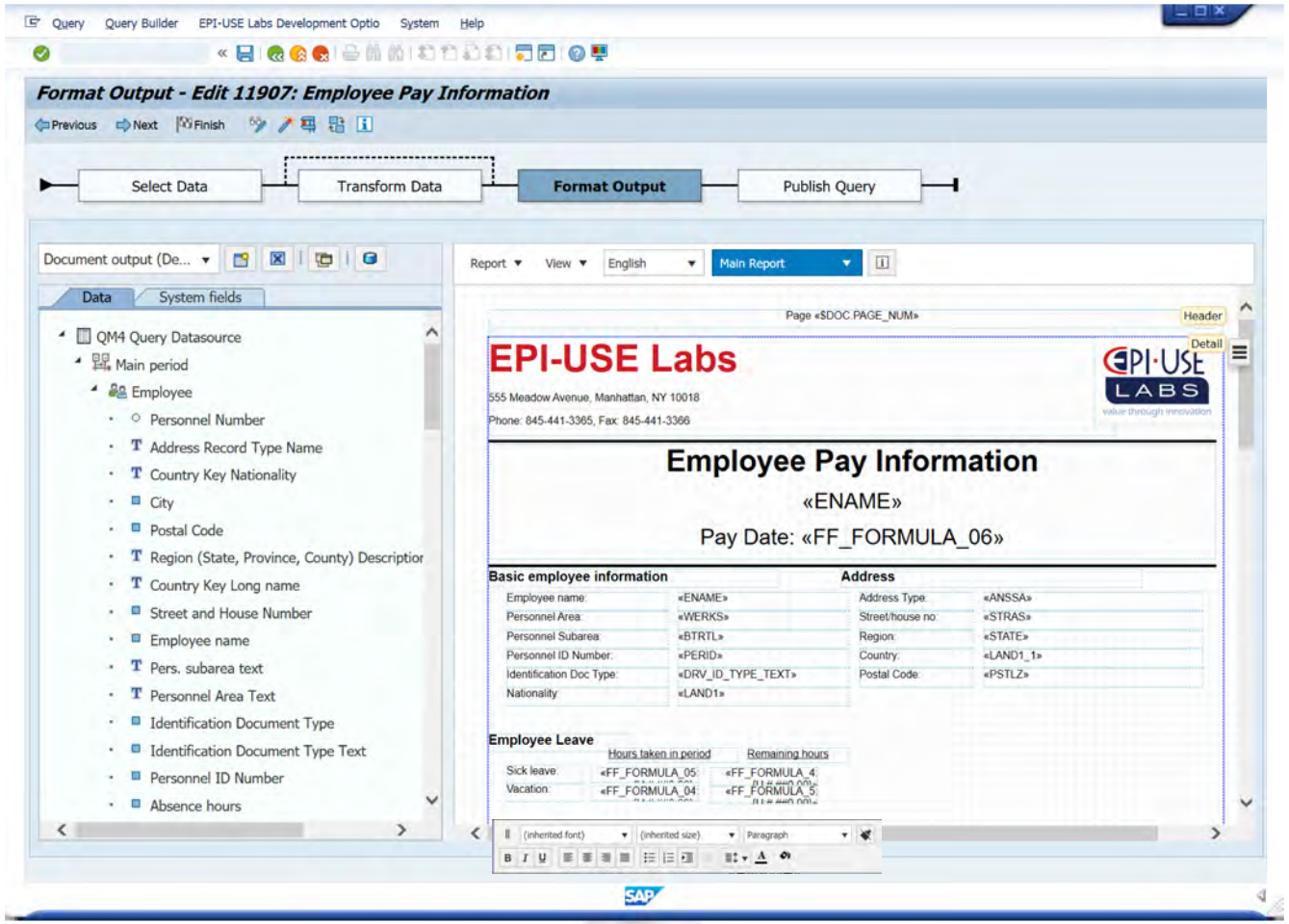
Your output options are not limited to reports; you can create documents, interface files for vendors, emails, charts etc. that can be visible via portals, Odata services or even your SuccessFactors Homepage.

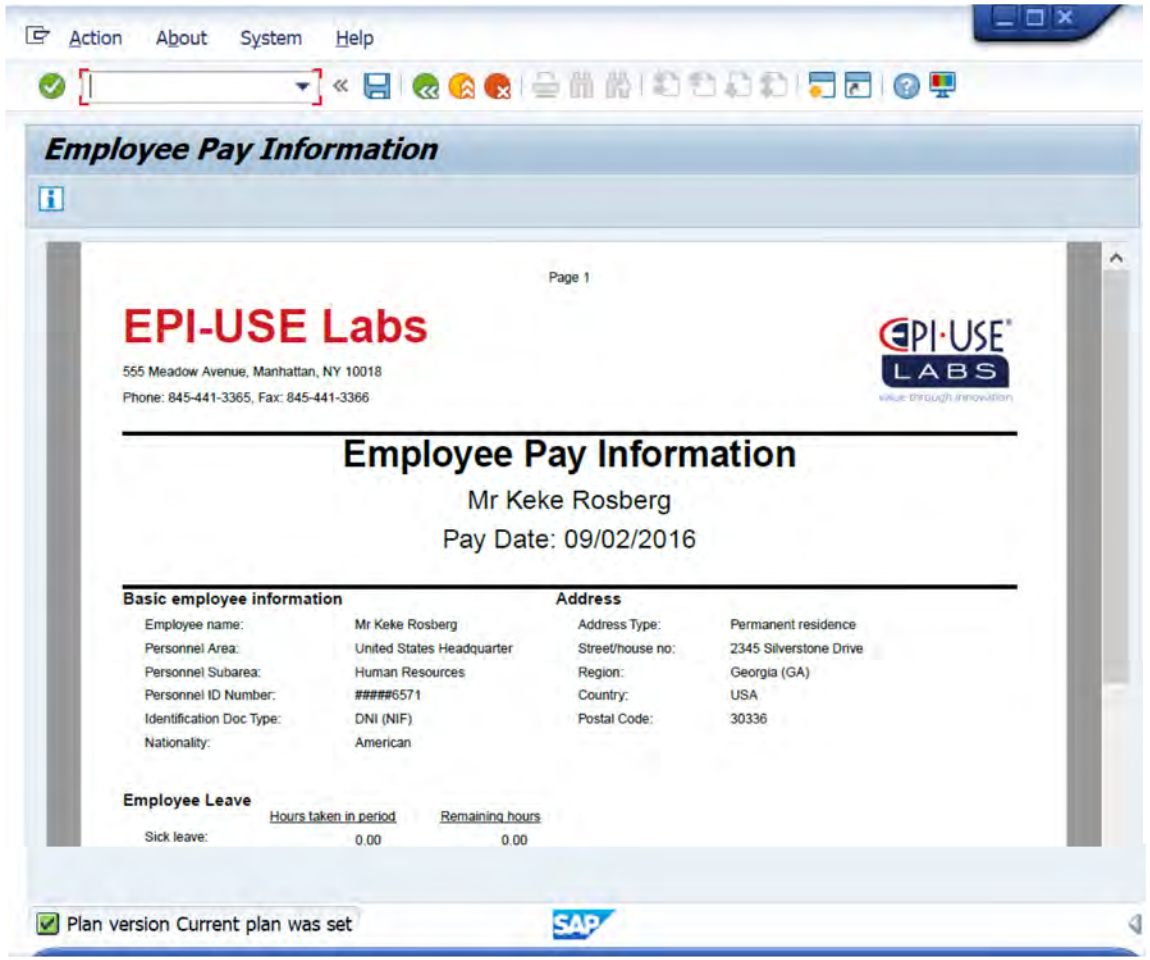
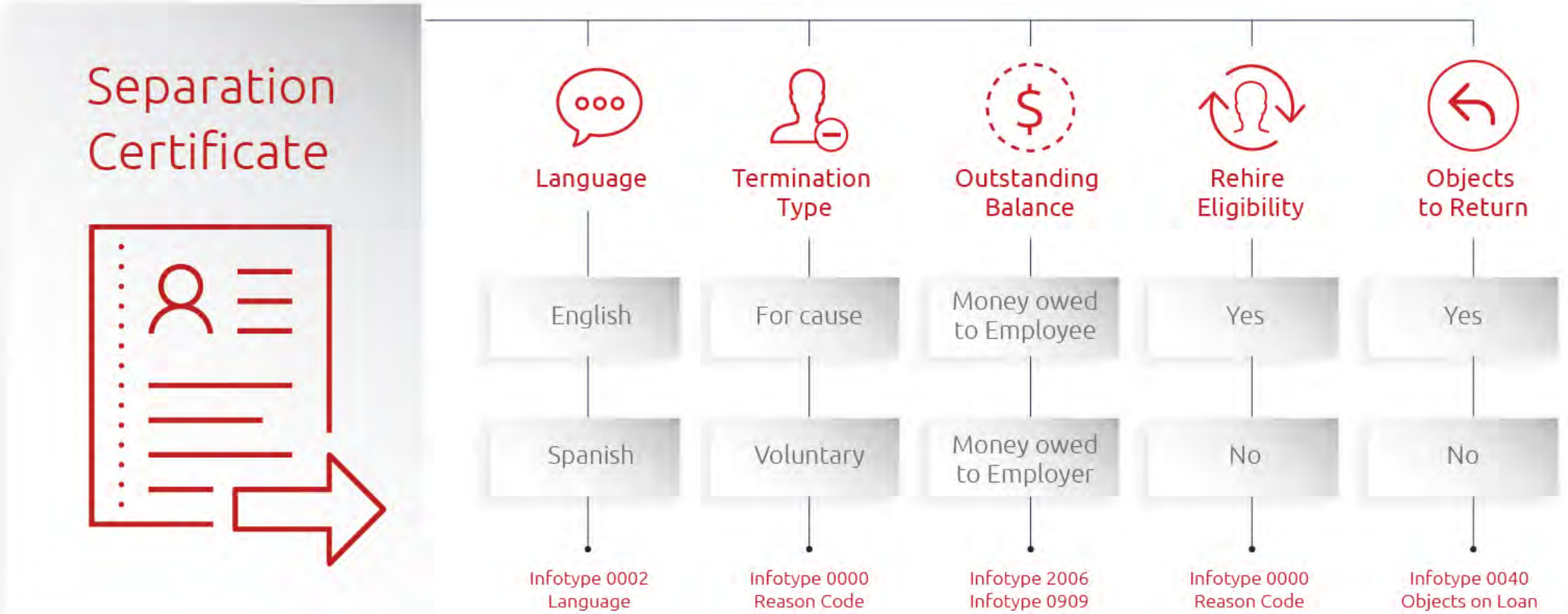
What challenge does Document Builder solve?



How Document Builder solves the challenge




Query Query Builder EPI-USE Labs Development Optio System Help
Format Output - Edit 11907: Employee Pay Information
Previous Next Finish
Select Data
Transform Data
Format Output
Publish Query
Document output (De...
Data
System fields
QM4 Query Datasource
Main period
Employee
Personnel Number
Address Record Type Name
Country Key Nationality
City
Postal Code
Region (State, Province, County) Descriptior
Country Key Long name
Street and House Number
Employee name
Pers. subarea text
Personnel Area Text
Identification Document Type
Identification Document Type Text
Personnel ID Number
Absence hours
Report View English Main Report
Page «$DOC.PAGE_NUM»
Header
Detail
EPI-USE Labs
555 Meadow Avenue, Manhattan, NY 10018
Phone: 845-441-3365, Fax: 845-441-3366
Employee Pay Information
«ENAME»
Pay Date: «FF_FORMULA_06»
Basic employee information
Employee name: «ENAME»
Personnel Area: «WERKS»
Personnel Subarea: «BTRTL»
Personnel ID Number: «PERID»
Identification Doc Type: «DRV_ID_TYPE_TEXT»
Nationality: «LAND1»
Address
Address Type: «ANSSA»
Street/house no: «STRAS»
Region: «STATE»
Country: «LAND1_1»
Postal Code: «PSTLZ»
Employee Leave
Hours taken in period
Remaining hours
Sick leave: «FF_FORMULA_05» «FF_FORMULA_4»
Vacation: «FF_FORMULA_04» «FF_FORMULA_5»


Action About System Help
Employee Pay Information
Page 1
EPI-USE Labs
555 Meadow Avenue, Manhattan, NY 10018
Phone: 845-441-3365, Fax: 845-441-3366
Employee Pay Information
Mr Keke Rosberg
Pay Date: 09/02/2016
Basic employee information
Employee name: Mr Keke Rosberg
Personnel Area: United States Headquarter
Personnel Subarea: Human Resources
Personnel ID Number: #####6571
Identification Doc Type: DNI (NIF)
Nationality: American
Address
Address Type: Permanent residence
Street/house no: 2345 Silverstone Drive
Region: Georgia (GA)
Country: USA
Postal Code: 30336
Employee Leave
Hours taken in period
Remaining hours
Sick leave: 0.00 0.00
Plan version Current plan was set

Each document can have varied content based on conditions