SpinifexIT Easy Reporter

Blue Print and Report Generator

User Guide

1. About this guide

The Blue Print and Report Generator is a web app for SpinifexIT consultants working with Easy Reporter. It does two jobs:

- **Create a Blueprint** - turns an existing report's /ALG/GENTK load file into a Blueprint workbook that documents the report for review and client sign-off.
- **Create a report** - turns a Blueprint back into a load file you can upload into Easy Reporter, together with a Build Guide.

This guide explains how to use both, what the files contain, and what to check before anything goes to a client or into a client system.

Opening the app

Open **https://easyreportergenerator.com** in Chrome or Edge. Always use this address: it shows the latest version. If the page looks out of date, press Ctrl+F5 to reload it fully. You can open this guide at any time from **View / download user manual** near the top of the page.

Your files

Files are processed in memory while the app works on them and are not stored. The largest file you can upload is 3 MB.

2. Choosing what to do

The top of the page asks *What would you like to do?* Click either option to jump to that section. Both sections are always on the page, one under the other.

What would you like to do?

Create a Blueprint Document an existing report for review and sign-off. Load file .xls to Blueprint .xlsx	**Create a report** Build an Easy Reporter load file from a Blueprint. Blueprint .xlsx to Load file + Build Guide

Figure 1 - Choosing a task

You have	You want	Use
A report's load file (.xls) exported from Easy Reporter	A Blueprint to review or send to the client	Create a Blueprint
A Blueprint (.xlsx), created here or filled in by hand	A load file to upload into Easy Reporter	Create a report

3. Create a Blueprint

Before you start, export the report from Easy Reporter as a load file. It is a tab-delimited file, usually named .xls, containing the /ALG/GENTK tables for that report.

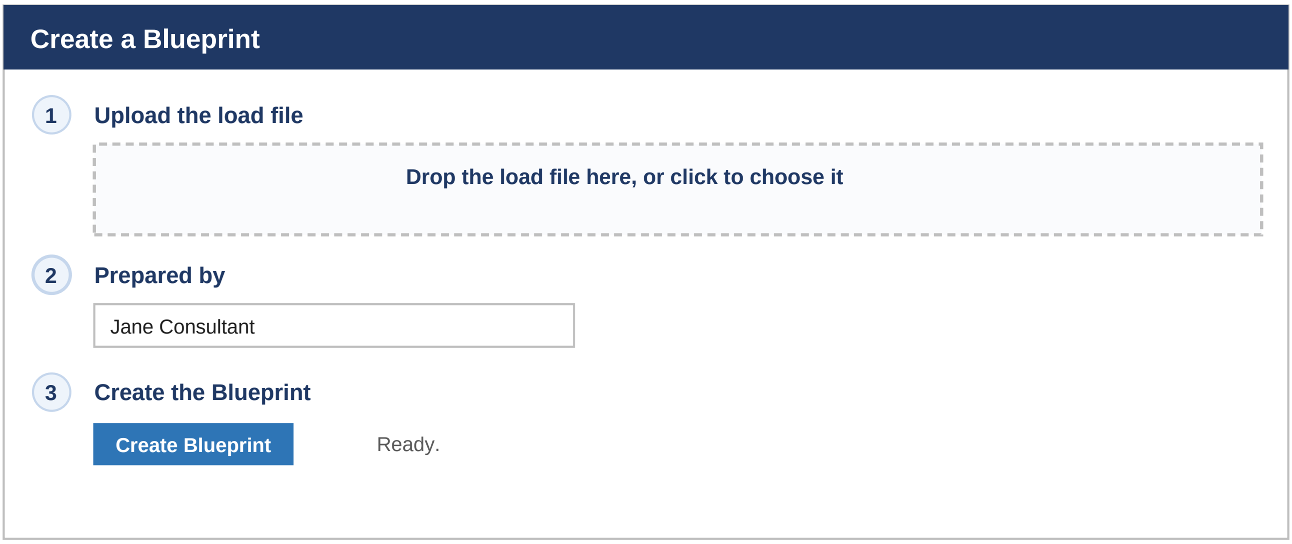

Figure 2 - The Create a Blueprint section

1. **Upload the load file.** Drag it onto the box, or click the box and choose it. The box turns blue and shows the file name. Click it again to choose a different file.
2. **Enter your name** under Prepared by. It appears on the Blueprint's Version Control sheet. The app remembers it and fills it in for both sections.
3. **Click Create Blueprint.** The message next to the button shows progress. Most reports take a few seconds.

When the Blueprint is ready

The steps fold away and a green panel shows the result: the report name and ID, the number of columns, and whether the integrity checks passed.

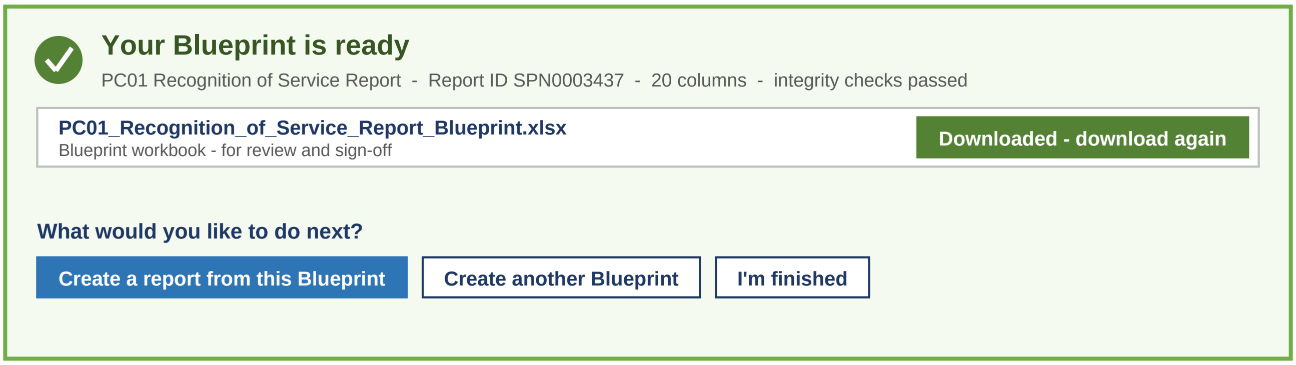

Figure 3 - Blueprint ready, with download and next steps

- **Download** - saves the Blueprint workbook. The button turns green once clicked; you can download again at any time.
- **Open items to review** - click to expand the issues found, graded high, medium and low.
- **Change the file or options** - reopens the steps if you picked the wrong file.
- **Create a report from this Blueprint** - loads the new Blueprint straight into the report section.
- **Create another Blueprint** - clears the section for the next load file.
- **I'm finished** - clears both sections and returns to the top of the page.

What's in the Blueprint

Sheet	What it contains	Who it's for
Version Control	Document history, author and date	Everyone
Blue Print format	The report on the SpinifexIT Blue Print template: description, how the report works, columns, selection fields, filters and output	Client and consultant
Report tab (e.g. PC01)	Detailed view of Easy Reporter Tabs 1-5: every column, its source, settings, calculations and key logic	Consultant
Technical Reference	Easy Reporter back-end tables and integrity check results	Consultant only
Open Items	Issues to resolve before sign-off, with a proposed action	Consultant, then client

Before you send a Blueprint to a client

- **Check amber cells.** Amber means the value was inferred rather than read directly from the load file. Confirm or correct each one.
- **Work through the Open Items.** Resolve or agree each item and update its status.
- **Remove the Technical Reference sheet.** It is written for consultants.

4. Reading the Blue Print format sheet

Tab 2 (Report Columns) lists each report column across the page. The rows under each column heading follow the SpinifexIT template:

Row	What goes in it	Examples
Column Heading	The column name shown in the report	Employee No., Paid, /560 Net Pay
Specify Source Data	Where the value comes from	MASTER P0001 BUKRS; PAY RESULTS COLUMN; CALCULATION: Paid - Unpaid
Field Settings	How the value is worked out: calculations, rounding, headcount, payroll result options and Advanced Mapping rules	Headcount: Full; Advanced mapping: ...
Column Selection	Wage types selected for payroll result columns	Wage type selection: /560
Column Settings	How the column is displayed	Hide; Hide & Clear; Display Key & Text; Currency format; Totalled
Additional Features	Column filters and other notes	Column filter: New Hires / Terminated (AMP01) I CP *Term*

Tab 4 (Define Filters) shows each report filter with its field, include/exclude, equator and value. *Apply Filter at* uses Easy Reporter's wording, for example **(21a) Per Record**.

How the report works in the description area is written in plain English for the client. The technical logic is on the report tab.

5. Create a report

You can create a report from any Blueprint: one created by this app, or a Blue Print format sheet filled in by hand for a new report.

1. **Upload the Blueprint** (.xlsx), or use *Create a report from this Blueprint* after creating one.
2. **Check the report details.** *Prepared by* is shown in the Build Guide. *Report ID* is optional: 3 to 10 letters or numbers. Leave it blank to keep the Blueprint's ID, or to get a new ID (starting ZBP) for a new report.
3. **Choose how to build it.** Tick *Build a new report from the Blue Print format sheet* to build from what the sheet says. Leave it unticked to regenerate a Blueprint created here from its original report, with your edits applied.
4. **Click Create report.**

Never reuse the ID of a report that already exists in the target system - uploading the file would overwrite that report.

When the report is ready

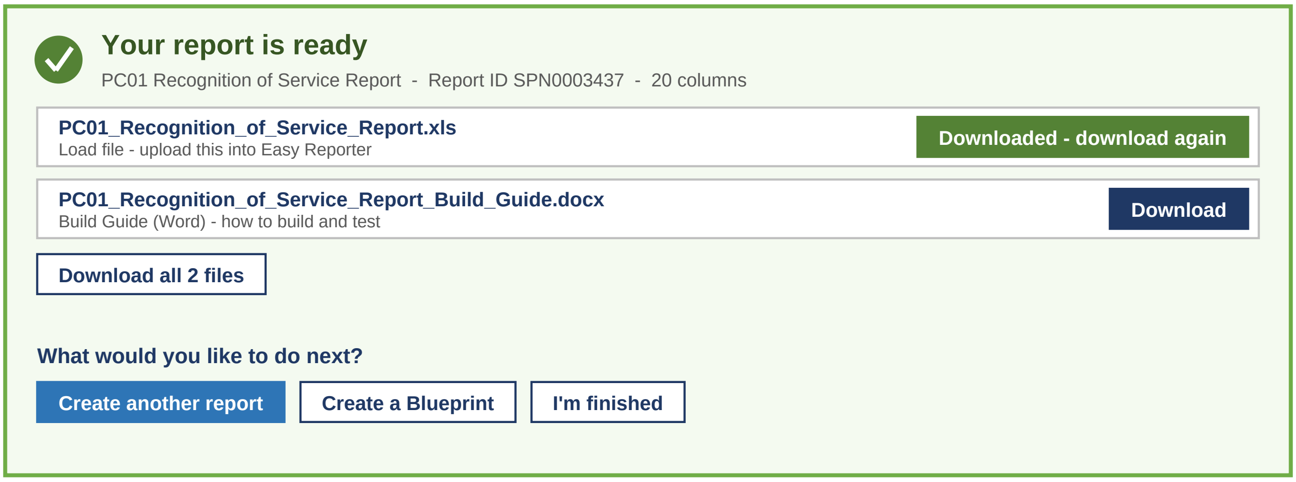

Figure 4 - Report ready, with files and next steps

File	What to do with it
Load file (.xls)	Upload it into Easy Reporter in a development client
Build Guide (.docx)	Follow it to check and finish the report in Easy Reporter

Use *Download all* to save both files at once. Expand *What was generated* to see each part of the report and its status. Anything marked **Not generated** must be added in Easy Reporter by hand.

What the app builds, and what it doesn't

Built automatically	Added by hand in Easy Reporter
Report settings, description, header and menu entry	Variants
Columns from infotypes, Easy Reporter master fields and headcount counters	Substring fields
Payroll result columns with wage types	Mapping and Advanced Mapping
Calculations based on other columns	Email and file output
Hide, Key & Text, currency, totals, rounding, headcount	Columns whose source isn't recognised
Sort and subtotal fields, selection fields, column and report filters	

Before you use the report

1. Upload the load file into a **development client** first - never straight into production.
2. Compare the report with the Blueprint and add anything marked Not generated.
3. Run the report with a test variant and check the results.
4. Transport it only when it has been tested and signed off.

6. Writing a Blueprint for a new report

To build a brand-new report, fill in the Blue Print format sheet and create a report with the tick box ticked. The app reads *Specify Source Data* to decide how each column is built:

Source	Write it as
Infotype field	MASTER P0001 BUKRS (infotype, then field)
Easy Reporter master field	EMPNO, PNAME, MAHIR, MADOB, MAAGN, MASVL, or MACN1... for headcount counters
Payroll result amount	PAY RESULTS COLUMN, with the wage types in Column Selection
Calculation	CALCULATION: Paid - Unpaid (other column headings or numbers)
Column filter	In Additional Features: Column filter: <heading> (<field>) I EQ <value>

Columns whose source the app doesn't recognise are listed as Not generated; the rest of the report is still built.

7. Troubleshooting

What you see	What to do
The page looks like an older version	Use https://easyreportergenerator.com and press Ctrl+F5
That isn't a load file / That isn't a Blueprint	Use an .xls load file to create a Blueprint, and an .xlsx Blueprint to create a report
That file is over 3 MB	Check it's the right file - load files and Blueprints are normally much smaller
Something went wrong while processing the file	Open the file in Excel to check it isn't damaged, then try again. If it still fails, send the file to the Easy Reporter team
Integrity checks failed	The load file is incomplete or inconsistent. Export it again from Easy Reporter
Items marked Not generated	Add them in Easy Reporter by hand - see the Build Guide

Questions or feedback about the app: contact the SpinifexIT Easy Reporter team.

