SpinifexIT Health Check

Health Check Analysis Generator

User Manual

Version 0.7 (In Pre-Production Release)

Builds the standard SpinifexIT Health Check Analysis workbook from a client's SAP / SpinifexIT usage exports. The workbook applies the same counting rules as every health check delivered to date, so figures can be compared across clients.

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1. What the generator does

The generator reads the usage exports a client runs from SAP (the SpinifexIT execution log, report lists and menu/role tables) and returns one Excel workbook: **{CODE}_-_Health_Check_Analysis_{DD_MM_YYYY}.xlsx**, plus a matching SpinifexIT-branded PowerPoint presentation, **{CODE}_-_Health_Check_Presentation_{DD_MM_YYYY}.pptx**. It builds only the tabs and slides the client's products and files support, and tells you which tabs it skipped and why.

Every number in the presentation is read from the finished workbook, so the two always agree. Charts in both files are native and editable, and the Key observations slide states facts from the data only. The slides are: cover (client, period, presenter and date), Solution usage, Foreground vs background, At a glance, Report library usage by folder (the ER Execution Analysis table), Monthly trend, Top foreground reports, Top background jobs, Top Easy PCC reports, Easy STP, Easy Document (executions by document), Easy Help Desk (monthly executions and top reports), User roles and Menu roles (the role tabs as tables, continued over up to three slides each; the workbook has the full list), Key observations and Thank you. Slides are left out when their tab isn't built. Bar charts and tables run highest to lowest; monthly charts stay in month order. Add your own recommendations before presenting.

It is the same build used for earlier health checks, so tab layouts, colours, charts and totals match those deliverables.

Files are read in your browser and are not uploaded or stored. Only the counts the workbook needs (executions by product, menu item, date and run type, and the menu and role rows) are sent, processed in memory for the length of the request, and not kept once the workbook has been returned to your browser.

Health check types

Choose the type first; it decides what is needed and what is generated. The types come from the Client Solution Health Check Framework Matrix (kept in healthCheckTypes.json, so they can be edited as the matrix changes).

Type	When	Inputs	You get
1 – Customer Success "At Risk" Embedment	Champion or leadership change, low engagement, churn risk	Usage exports + interview	Workbook, narrative playback deck, Word report, consultant brief
2 – Solution Audit & Usage Assessment	Pre-migration, usage or performance analysis, upgrade planning	Usage exports only	Workbook and presentation (as before)
3 – Customer Engagement	Proactive engagement, innovation, thought leadership	Usage exports + interview	Workbook, narrative playback deck, Word report, consultant brief

Types 1 and 3 – the narrative health check. Add the **interview transcript** (a Fathom transcript as .txt, .vtt, .docx or .pdf), the **customer feedback form / interview guide** (the consultant's notes, Word, PDF or Excel), or both – at least one. Drop them with the exports in the main drop area (loose or in a zip) and they go to the interview step, or add or paste them there. The transcript is the main source when you have it; without it, the health check is written from the form, and the consultant brief says so. Fathom layouts vary, so speakers and timestamps are recognised from the patterns in the text; in the guide only the topic and the customer's feedback are used, not the prompting questions. Phone numbers and emails are removed, and people are anonymised ("Client participant 1", or their role from the guide) unless you list them under *Names you can confirm*. The AI then writes the playback in the style of SpinifexIT's gold-standard health checks: executive summary, purpose, client summary, evaluation, solution feedback and usage (only for

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the solutions in the data), general observations, the type's own sections (Type 1: executive alignment, stakeholder engagement plan, recovery roadmap; Type 3: thought leadership briefing, PoC/pilot proposal, innovation roadmap), summary, recommendations, KPIs with baselines from the usage data, and next steps. Talking points go in the deck's speaker notes.

Checks on the AI's writing. Every statement cites the usage facts, transcript lines or guide lines behind it. Statements without a valid source are removed; a second, independent read removes statements their sources don't support; quotations not found in the interview lose their quote marks; figures not in the cited sources are flagged; KPI baselines must come from the usage data. Everything removed or flagged, the **points to confirm** (where the transcript and guide differ, or only the guide says something), and how speakers were anonymised are in the **consultant brief** – internal, never sent to the client. Read it before presenting.

The interview text is sent to the AI service for that request only and is not stored.

2. Files to collect from the client

Only the execution log is required. Each extra file unlocks more tabs. Each file is recognised from its contents (its column headings, and its data where two exports share the same headings), so the file names don't matter. The file name is only used if the contents can't be recognised.

Export (usual name)	What it is	Unlocks
Product_Execution	SpinifexIT execution log. **Required.**	Solution Analysis, BG vs. FR, monthly trend, Easy STP, Easy Document, Complete ER list
Foreground	Easy Reporter foreground report list	ER Top Foreground Reports, folder analysis figures
Background	Easy Reporter background report list	# Reports executed in background on ER Execution Analysis
Menu01 / MENU001	Menu structure (folders and reports)	ER Execution Analysis, report folders
Menu03 / MENU003	Menu roles (id to description)	User Roles, Menu Roles
Menu04 / MENU004	Menu role to menu items	# Menu Items Accessible – optional, asked only if Menu06 has no user assignments
Menu05 / MENU0005	User roles to menu roles	Menu Roles Analysis
Menu06 / MENU006	Users to user roles	# Users Assigned
/ALG/GENTK001	Background variants (REFER) and their original report (ORRFR). Recommended	Used first to match background jobs to their report: Complete ER list and # Reports executed in background

Accepted formats: Excel-web **.MHTML**, SpreadsheetML **.XML**, **.xlsx** and SAP GUI list **.xls** exports, or a **.zip** containing them. SAP page headers, client columns and table-download preambles are removed automatically. There is no file size limit.

SAP text downloads (.txt, .dat, .csv – any of SAP's *Save list in file* options) are read too: *Unconverted* lists with | column lines, tab-delimited, CSV or ; delimited, and fixed-width columns, in UTF-8, UTF-16 or Windows encoding. Titles, rules and repeated page headings are dropped, SAP numbers (1.234) and dates (05.07.2025, 20250705) are converted, and shortened column headings (for example *Initiating Prod.* or *Run Type*) are matched. If the headings can't be matched, the execution log columns are recognised from their data, and the file list says which column was used for each.

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Access needed in SAP. The **Access requirements** tab on the home page lists what to ask the client for: a read-only dialog User ID in each production system in scope (for example S/4HANA and ECP), connection details, remote access if needed, and the ability to download files; the minimum authorisations (S_TCODE for /SPIN/ER*, SE16, SE16N and SM37; S_TABU_DIS or S_TABU_NAM display on the /ALG/* and /SPIN/* tables; S_SPO_DEV LOCL); the transaction codes and the tables /ALG/MENU001, 003, 005 and 006 (002 and 004 optional); and what is collected. No employee master data or payroll results are needed. **Download (.docx)** on that tab gives the document to send to the client. If the access can't be granted, the client's SAP team can run the extracts and send the files.

One client per run. Upload one client's files at a time. If two execution logs are added, the generator uses the one that has the run-type column and warns you.

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3. Creating a health check

Step 1 – Client details. Enter the client name and a short client code (for example *ACME*). The code is used in the workbook file name. *Presented by* is optional: it goes on the presentation cover with today's date.

Step 2 – Add the export files. Drop all of the client's exports onto the upload area, or click it to choose them. Each file is checked and appears in the checklist with what it was recognised as, and whether that came from its contents or its file name. Files that aren't used are marked *Not used*, or *not needed* for Menu02 and Menu07, and nothing from them is sent. A .zip is unpacked and each export in it gets its own row. Remove any file with the × button.

The coverage panel beside the checklist shows which workbook tabs the current files can support, so you can see gaps before generating.

Missing files. If the execution log is missing, a red panel explains where to export it, with **Add the execution log** and **Cancel health check** buttons; Generate stays off until it is added. If only optional files are missing, an amber panel lists what each gap costs, with **Add missing files**, **Generate without them** and **Cancel health check**. If Menu04 is loaded but Menu06 has no user assignments, you're asked whether to use Menu04 (see *Roles* in section 6). Cancel clears the files and client details; nothing is generated or sent.

Step 3 – Generate. Select **Generate health check** once every file has been read. **Cancel generation** stops a build in progress and keeps your files loaded. Each file shows a progress bar while your browser reads it; a very large execution log can take up to a minute. Building the workbook then usually takes a few seconds.

Step 4 – Results. A green panel confirms the workbook is ready and shows:

- the execution period detected from the log
- total executions, split into background (batch) and foreground (online), and whether they reconcile
- executions by product
- the tabs built, and anything skipped with the reason

Download the workbook, the presentation, or both. Under *What would you like to do next?* you can start another health check or open this manual.

4. What's in the workbook

Tab	Contents	Built when
Solution Analysis	Executions per product, with a live total	Always
BG vs. FR	Background vs foreground split, percentages, pie chart	Always
ER Execution Analysis	Reports per folder (Company, User, Draft): total, not executed, executed at least once in foreground, percentage and # Reports executed in background (per folder and in total), and Total background executions; two charts, highest to lowest	Easy Reporter used and Menu01 provided

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Tab	Contents	Built when
ER Monthly Execution Analysis	Monthly trend of Easy Reporter, SuccessFactors, Web Reporting and Easy Reporter Web (Easy PCC excluded), with line chart. If the client doesn't use Easy Reporter, the dominant product is trended instead	Always
ER Top Foreground Reports	Top 20 reports by foreground executions, one row per report: Report Reference (as on the Complete ER list), name, folder and bar chart	Easy Reporter used
ER Top Background Reports	Top 20 reports by background executions in the log, one row per report: Report Reference, the Report Job(s) (BCK / BCKA) that ran it, name, folder and bar chart	Easy Reporter used
Complete ER list	One row per Easy Reporter report in the execution log: references, background jobs, menu folder, foreground (O) and background (B) executions in the period, run mode, first and last run, and a reconciliation to the log. STP and PCC reports excluded. Filters on every column	Easy Reporter used
Easy PCC Top Reports	Easy PCC background runs by report, highest first, with folder and bar chart	Background runs with PCC in the report name
Easy STP Monthly Execution Analysis	Single Touch Payroll and Easy Payment Summary executions by month and report, with a monthly column chart	Easy STP used
Easy Document	Same layout as Easy STP: executions by month and document, with a monthly column chart	Easy Document used
EHD Monthly Execution Analysis	Easy Help Desk in the Easy STP layout: executions by month and menu item (payslips, Viewed Employee, certificates…), with a monthly column chart	Easy Help Desk used
EHD Top Reports	Top 20 Easy Help Desk menu items by executions, with a bar chart	Easy Help Desk used
User Roles Analysis	# Users Assigned per user role from Menu06, plus # Menu Items Accessible if you choose to use Menu04	Menu06 has user assignments, or Menu04 chosen
Menu Roles Analysis	Menu role, user role assigned and # Users Assigned (plus # Menu Items Accessible if Menu04 is chosen)	Role files provided

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5. Counting rules applied

These rules are applied on every run so figures are consistent across clients.

- **Blank run types are never counted.** Only rows marked O (online / foreground) or B (batch / background) are counted. Blank rows are duplicates or undated rollups, and counting them would roughly triple the totals.
- The export's own rollup row (no product, large count) is excluded from the grand total.
- **Solutions are reported by licence, not by the log's Initiating Product.** A record is *Easy PCC* when it is a background (B) run and its report name contains PCC (any case), whatever the initiating product – PCC policy runs are logged as Easy Reporter background runs. Easy PCC is left out of every Easy Reporter figure. Other records the log gives an Easy PCC initiating product (e.g. manual foreground runs of pre-delivered PCC reports) aren't counted; a note on Solution Analysis and BG vs. FR says how many. A PCC report without PCC in its name is counted under Easy Reporter, so clients should keep PCC in the name. These rules live in hc/classify.py.
- Easy Reporter, Easy Reporter (Custom Report), SuccessFactors and Web Reporting are reported together as Easy Reporter; Easy Reporter Web has its own line on Solution Analysis and is added to the Easy Reporter monthly trend. Single Touch Payroll, Easy Single Touch Payroll and Easy Payment Summary are reported together as Easy STP. Easy Documents is reported as Easy Document. **Easy Help Desk is its own solution** (Easy HelpDesk, Help Desk and EHD are reported as Easy Help Desk): its runs are never part of an Easy Reporter tab or slide, it has its own tabs and slides, and an Easy Reporter monthly trend is never built from it. **One STP rule for every tab:** a report is an STP report when its name has STP (STP2 …) or Single Touch Payroll anywhere in it, is a name the log also records under an Easy STP product, or is *Report Summary Document Details* (SPN1004562), which the log records under Easy Document. **Anything STP is Easy STP**, whatever the log's initiating product: STP reports the log records under Easy Reporter (usually background jobs), Easy Document, Easy PCC or any other product except Easy Help Desk (an employee viewing an STP report in Easy Help Desk is Easy Help Desk usage) are counted under Easy STP only; a note on Solution Analysis says how many, from which products, and until when.
- A report's reference is the one that starts its menu item (for example *SPN0003425 - MD01 Employee Details*); codes inside the report name are not references. Unsaved runs with no reference (- *NEWREPORT*, - *NEWDOCUMENT*) are left out of every figure – totals, foreground/background, monthly trends, Easy Document and the top-report lists – since the client can't be told which report they were. A note under Solution Analysis, BG vs. FR, the monthly trend and Easy Document says how many were left out of that sheet (only when there were any); the presentation doesn't repeat it. The Complete ER list is the exception: it lists them on a row of their own, *NEWREPORT (unsaved report, no reference)*, so it ties to the log.
- IDs with leading zeros (roles, keys, PEC/BCK/SPN references, type codes) stay as text. Counts are numbers.
- **ER Top Foreground and Background Reports have one row per report, so nothing is counted twice.** Each line (a menu item, or a BCK / BCKA background job – 2-digit jobs such as BCK33 included) is matched to its report as the Complete ER list matches it (GENTK001 first, then the reference, then the report name); lines of the same report are combined and their executions added up. *Report Reference* is the report's reference on the Complete ER list and *Report Job* (ER Top Background Reports) lists the background jobs that ran it (for example BCK484, BCK485); online runs are started from the report itself, so the foreground tab has no job column. The report name and folder are the Complete ER list's; a line not on that list keeps a row of its own, and unmatched folders show *(not in menu)*.

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- **ER Execution Analysis.** A Menu01 report counts as *executed at least once in Foreground* if it appears in the execution log with an online (O) run – once, however often it ran; Easy Reporter bundle only, Easy PCC excluded. # *Reports executed in background* counts the distinct Menu01 reports (by key) that a job in the Background list runs: a job whose reference is a Menu01 key or Report Reference (CPM…, PEC…) is that report only; a BCK job GENTK001 maps is its original report (ORRFR) only; any other job matches the reports whose description is its report name (before its trailing reference), ignoring case and spacing (from the log's background runs when there is no Background list). # *Reports not Executed* = total reports – reports executed in the foreground. *Percentage* = executed in the foreground / total × 100, on every row and the total. *Total background executions* is the Complete ER list's background total: Easy Reporter background runs, STP reports excluded. Reports counted in more than one folder are a warning in the results panel naming the reports.
- When the Foreground/Background report lists aren't supplied, report-level tabs are derived from the execution log instead.
- **Complete ER list.** Built from the execution log's Easy Reporter runs: online (O) runs are foreground and batch (B) runs are background. Runs are combined by report name (ignoring case and spacing), so a report run under several background jobs, or both online and in background, has one row: its CPM/SPN/PEC references, its BCK jobs (in number order), its folder (Company, then Draft, User, SpinifexIT Pre-delivered, by reference or else by name; otherwise *(not in menu)*) and its first and last run. STP reports (the STP rule above) and PCC reports (the Product Execution Log, and Menu01's Payroll Control Center folder) are left out. A reconciliation under the Total row starts from the log's Easy Reporter executions, takes off the STP and PCC reports and checks the list total (0). **GENTK001 first:** when /ALG/GENTK001 is supplied, each background job (REFER) it maps is combined with its original report (ORRFR), named after that report in Menu01, so jobs that share a name but run different reports get a row each; jobs it doesn't map are combined by report name. The results panel and the footnote say how many jobs GENTK001 matched, warn when it covers fewer than half of them, and warn when most of its names differ from the log (another client's export). *Run mode*: Foreground only, Background only or Both.
- Totals are live Excel formulas, and chart labels show values only.

6. Reading the results

- **Period.** Figures cover the period detected in the log, usually an Australian financial year (July to June). Quote it with every figure.
- **Reconciliation.** Solution Analysis total equals background plus foreground. The results panel flags it if these don't match.
- **Roles.** The role tabs show # *Users Assigned* from Menu06 whenever it has user assignments, however few; user IDs can be names or numbers. The Menu06 row in the file list says how many user assignments and user roles were read, and warns if none were found. If Menu06 is missing or has none and Menu04 is loaded, the page asks whether to use Menu04 and lists exactly what it adds: # *Menu Items Accessible* per user role and per menu role, which is menu access, not a user count. Generate stays off until you choose; **Change** on the Menu04 row lets you choose again. If you don't use it, User Roles Analysis is skipped and Menu Roles Analysis lists the roles without counts.
- **Skipped tabs.** A skipped tab means the product isn't used or a file is missing. The generator never fills a tab with estimated data.

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7. Spinny, the AI guide

Select **Ask Spinny** (the blue arrow with eyes) next to the user manual buttons. Spinny is an AI guide that knows this manual and can see what's on the page: the files you've added, how each was recognised, the tabs they support and any message showing. Spinny never sees what's inside the export files you add to the generator, only files you attach to the chat. Its eyes blink now and then, and look around while it's thinking.

- **Ask a question.** For example *What files do I need?*, *Why is ER Execution Analysis missing?* or *What does Not used mean?*
- **Attach images and files to ask about them.** Select the paperclip, paste a screenshot into the message box, or drag files onto Spinny: images (PNG, JPEG, GIF, WebP), PDF, Excel, Word, CSV and text files, up to 5 per message. Spinny can read an error on a screenshot, check an export's columns, or compare a finished workbook or slide with what you expected. Large screenshots are scaled down, Excel is read sheet by sheet, and the files stay with the chat for follow-up questions until you press New chat or close the browser tab. Attach only what you need Spinny to see.
- **Download the functional specification.** Select **Download functional specification** (or ask Spinny for it) and then **Download (.docx)** in the card. It is the functional specification of this generator – what it does, the inputs, the counting rules, the outputs, the narrative engine, Spinny, configuration and testing – in the SpinifexIT document template, with the current version. It works even when the AI isn't switched on.
- **Leave a comment or suggestion for Marinus.** Tell Spinny what you'd like changed or what went wrong, select **Suggest an improvement** or **Report a problem**, or type @ to mention **@Marinus**. Spinny asks for anything that's missing, then drafts a note.
- **Check and save.** Edit the draft's type, area, title, summary and details, add your name and, if you'd like a reply, your email. Nothing is kept until you select **Save for Marinus**; the note and your conversation with Spinny are then saved for Marinus, and Marinus is also sent the note by email (a reply goes to the email address you gave). **Discard** throws the draft away.
- **Comments report (Marinus).** Ask Spinny for the comments report. Spinny shows a password box; with the admin password it lists every saved note, grouped into themes and priorities, with **Download report (.md)** and **Download notes (.csv)**. Tick **Also email the report to Marinus** to have the report and the notes emailed as well. Under **Delete notes**, tick one or more notes (or **Select all**) and select **Delete selected** to remove them from storage for good; open the report again to see it without them.

> If the AI isn't switched on for the site, Spinny still takes notes for Marinus, and the report lists them without the summary.

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8. Troubleshooting

Message or problem	What to do
The execution log is missing	None of the files has the execution log columns (Initiating Product, # Times Executed, Report Run Type). Use **Add the execution log**, or **Cancel health check**.
A file shows as Not used	Its columns don't match any export the health check uses. Check it's the right export and that it opens in Excel. For a SAP text download, save it again as *Unconverted* or *Text with Tabs* with the column headings included.
The summary of these files is too large to send	Rare: the log has an unusually large number of distinct reports and days. The message names the file; check it's the right export, or split it by period.
The workbook couldn't be built	Open the execution log in Excel and check it has the columns Initiating Product, Menu Item Executed, Date, # Times Executed and Report Run Type (Online or Batch).
A tab I expected is missing	Check the skipped-tab messages in the results panel. They name the file that's needed.
Figures look about three times too high	The log may have been edited before export. Re-export it from SAP without changes.

For help or to report a problem, contact Marinus Hennop at mhennop@spinifexit.com.

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9. Version history

Version	What changed
0.7	• A new Access requirements tab: the SAP access, authorisations, transaction codes and tables a consultant needs for a Solution Health Check, with the document to download
0.6	• ER Top Foreground and ER Top Background Reports show one row per report, so nothing is counted twice, with a new Report Reference column (as on the Complete ER list); ER Top Background Reports also shows the Report Job(s) that ran each report
0.5	• Easy Help Desk has its own line on Solution Analysis, its own tabs (EHD Monthly Execution Analysis, EHD Top Reports) and slides • Report Summary Document Details now counts under Easy STP • Spinny can download the generator's functional specification • a prompt to choose the health check type first • Type 1 outputs never use the word "risk"
0.4	• health check types 1 and 3 (narrative playback, Word report and consultant brief) working with the AI • Totals on Menu Roles Analysis, as on User Roles Analysis

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