



SIM-Integrated Idea Management

Version 6.5

Office Automation Features

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SIM version 6.5 was released in January. Before creating this new version of SIM-Integrated Idea Management, we reviewed customer feedback, finding our most popular features have been:

- ✓ Our powerful management reports.
- ✓ Automation.
- ✓ Flexibility to adapt to a wide variety of suggestion systems and employee involvement processes. As your process changes, SIM can adapt to it.
- ✓ On-line access by employees (submitters, evaluators or managers) via the intranet (SIM-Net) or regular network (SIM-Easy).
- ✓ Integrates with e-mail to notify evaluators and other participants (SIM-Mail).
- ✓ Links it to other software applications.

In designing this new version of SIM, we added features that make your job easier while improving reporting and on-line access. Included are some of the concepts we are designing into our new SIM-Enterprise (7.0). We wanted to let you take advantage of some of these features now.

SIM-Integrated Idea Management now supports many features that directly work with Microsoft Office using office automation:

- ✓ Automatically creating graphs in Excel via our Participation Summary report.
- ✓ Directly linking to Word to create mail merge letters in Word (Note: our other mail merge options are still supported).
- ✓ Statistical reports can have their output stored in a Word (and HTML) format.
- ✓ Attachments in SIM that are Office documents directly link with that Office product for viewing.

This document reviews the two features of creating merge letters automatically in Word and graphs directly in Excel. Please note that earlier versions of Office may function differently with these automation features – our testing was on Office 97 and 2000 platforms.

If you have any questions or comments, please contact us at (928)527-0002.

CREATING MAIL MERGE LETTERS THAT LINK TO MICROSOFT WORD

SIM in the past supported two methods of creating mail merge letters:

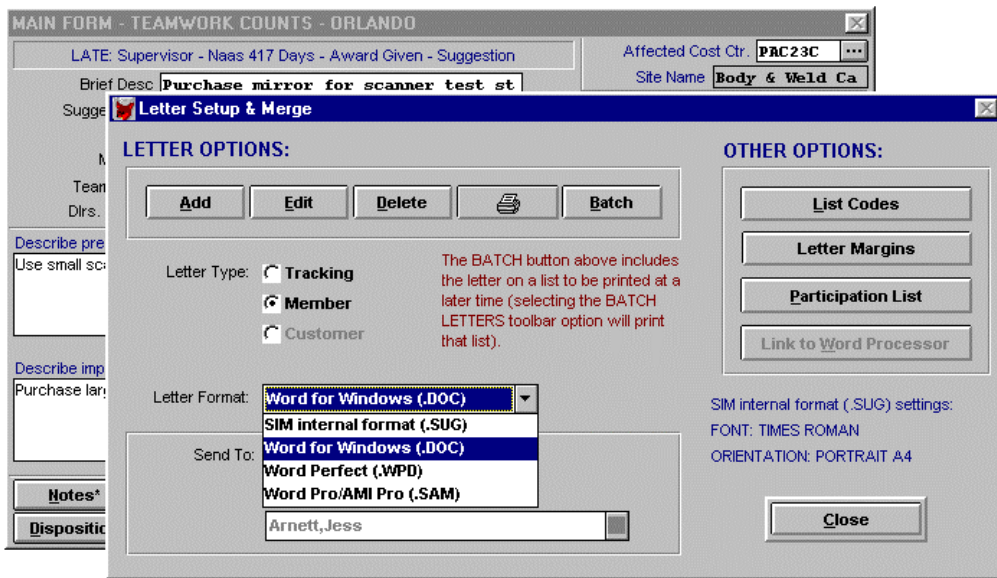
- ◆ **Internal SIM** – SIM has a tool to create merge letters and print them or link them to our SIM-Mail e-mail module.
- ◆ **Using External Word Processor** – In this case SIM created an export list of names to merge and the user then manually opened up the word processor. For a new word processor mail merge letter, the user also had to set up the merge letter and the appropriate data source. It was necessary to have the correct ODBC driver for that data source.

Now there is a third option that directly links to Microsoft WORD documents for the 32-bit version of SIM 6.5. SIM automatically integrates with WORD to add, edit or create a merge document. This feature works for standard batch print letters as well as any report that can also create mail merge letters (e.g., QUERY, TRACKING STATUS and EMPLOYEE PARTICIPATION).

1. Via TOOLS in SIM, click on MAIL MERGE LETTER SETUP or optionally click on the LETTERS button within any valid idea.
2. Change the letter format to MICROSOFT WORD DOCUMENT.
3. Click on ADD to enter a new idea or EDIT to update an existing one.
4. If ADD was selected type in a name for the letter (up to eight characters). For EDIT, select the correct letter. We recommend storing all letters related to SIM merge letters in the \LETTERS folder below the SIM data.
5. SIM will identify a default list of merge fields you can use, since WORD has a limit to the number of fields that can be included and SIM has a potential list of over 100. **Only include the needed merge fields – the WORD mail merge process runs faster with fewer fields.**
6. Optionally change the list of merge fields. Please note that if you do this for an existing WORD document, WORD will not automatically remove the incorrect removed fields. The LIST CODES option from the SIM letter setup screen will list all of the merge codes you can include.
7. Modify the document and insert merge fields where needed. Save the document.
8. To print the document, go into an idea and select the LETTER button. Insure the letter format is set to MICROSOFT WORD DOCUMENT. Click on the BATCH option and select the letter. Now go to the BATCH LETTERS option on the main menu and click on WORD
9. A list of letters to be merged will appear which gives you the option of printing certain letters (see previous section for more details). Click on MERGE when ready.
10. WORD will open three documents for each mail merge letter to be printed. A copy of the original document (any changes will not be saved in the primary one), a copy of the idea data to be included in the letter and a merge result that is in a print preview screen. When finished printing, close the screens.
11. The WORD letters can also be driven to e-mail via WORD's e-mail interface.

If you have existing WORD documents, using the external word processor export option and you do not want to update them to the new format, do not use the EDIT button in SIM to modify them. SIM will update them to the new format.

NOTE: With the SIM-Mail e-mail module, SIM can send merge letters out via e-mail to evaluators, submitters or other participants. The SIM internal merge letter format must be used for these letters.



CREATING GRAPHS AUTOMATICALLY IN MICROSOFT EXCEL

For SIM 6.5, a new graphing feature links the Participation Summary report directly to Microsoft Excel. To work you must have Microsoft Excel loaded on the workstation being used.

1. From the REPORT menu option, select the MANAGEMENT OVERVIEW option and then GRAPHS-PARTICIPATION SUMMARY.
2. A setup screen will appear that is almost identical to the standard PARTICIPATION SUMMARY setup screen. The graphing setup information replaces the idea type selection section
3. Select the type of graph and the data to be included. Each data item checked will be included on the same graph. We recommend for readability to only include 2-3 data items on a graph.
4. If printing for a all managers (manager building feature), each manager will get a graph of their area's data.
5. When finished setting up the report, the STORED REPORT feature can be used to store it.
6. When ready to create the graph(s), click on OK.
7. After running a query, EXCEL will open up with the data on the primary worksheet and a separate chart for each graph (if multiple managers).

SETUP SCREEN FOR GRAPH OF PARTICIPATION SUMMARY REPORT

Participation Summary Report

Summarize For

All
 All Manager/Bldg
 Specific Mgr/Bldg
 Report Group
 Specific Report Group

Criteria - Date Range & Period Interval

From: 01/01/1998 To: 03/31/2001

None
 Weekly
 Monthly
 Quarterly
 Annual

Periods: 13

Employee Participation

Base Participation On: Date Received
Eligible Employees: ...
Employee status: All Employees

For Savings Calculations Use: Date Decision
For Implement Cost Calculations Use: Date Decision
For Award Calculations Use: Date Decision

\$ Value of Points: 0.000 (Set to 0 to skip)

Graphing

Graph Type: Line

Eligible
 # Participating as Submitters
 % Participating
 Beg. Balance Open
 # Received
 # Decision
 End. Balance Open

Average Days to Process
 % Adopted
 # Implemented
 Ave. Total Days to Process
 Actual Savings
 Bottom Line Savings
 ROI

For GRAPHS select which data will appear on the graph.

Stored Report OK Cancel

Below is a sample graph automatically created by SIM in EXCEL.

- ◆ This was a line graph with the number of ideas received and decided graphed.
- ◆ ACME _SUGGESTION PROGRAM is the name of the process managed by SIM (set up in TOOLS-CUSTOMIZATION-SYSTEM SET).
- ◆ JANE DOE-MARETKING is the manager name on the manager/building list.
- ◆ Decided refers to closed ideas in regards to a decision to adopt or not adopt. Adopted ideas may still be in queue waiting for implementation. However in terms of the review evaluation, they are closed.
- ◆ Please note that how you specifically use dates in SIM may vary significantly to fit your process.

