Fiori My Tax Forms Custom Tile at City of Mississauga

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Agenda

About Mississauga

My Tax Forms

- Background/business need
- Requirements/solution—high level
- Solution—ERP, form, Fiori

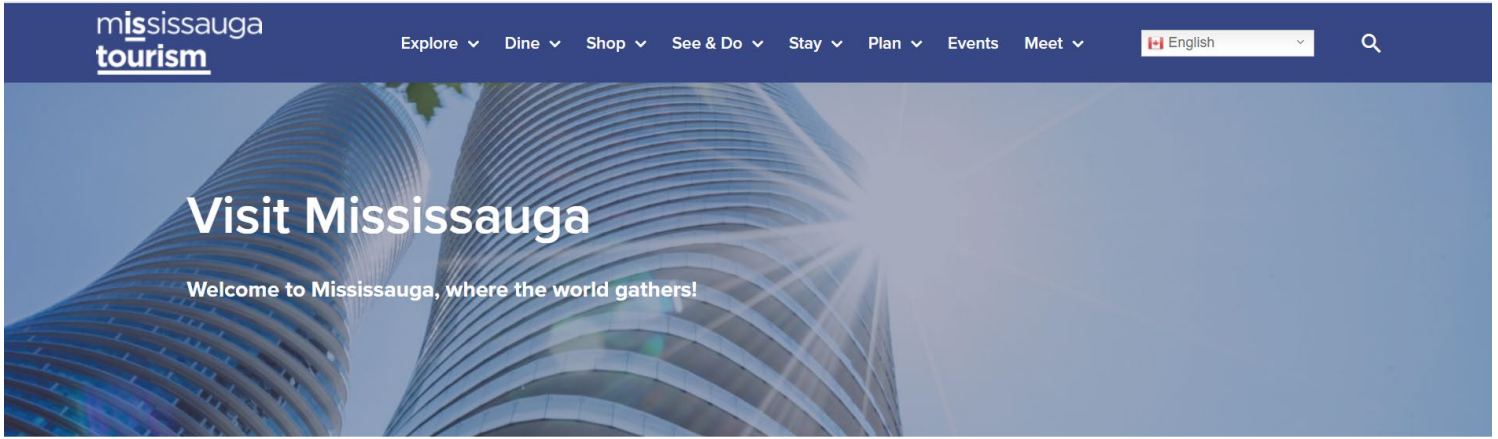
Change management

Key Learnings

Questions

About Mississauga

https://www.visitmississauga.ca/about-mississauga/



Welcome to Mississauga

Mississauga is Canada's sixth largest city, located in Southern Ontario on the beautiful waterfront of Lake Ontario. Conveniently a 30-minute drive from downtown Toronto, Mississauga is also within close reach of Niagara Falls and other day trips and less than 90 minutes from the US border. With so much to see and do, Mississauga has something for everyone! Come visit us, and see for yourself.

City of Mississauga: Who we are

- 7th largest city in Canada, 3rd largest in Ontario, over 700,000 residents
- Home of Toronto Pearson Airport
- A great place to live, work and play
- Over 7,000 union and non-union employees across 5 departments
  - Community Services (e.g. Fire, Library, Recreation, Parks & Forestry)
  - Corporate Services (e.g. IT, Finance, HR)
  - Transportation & Works (e.g. Transit, Works, Enforcement)
  - Planning & Building (e.g. Building, Development & Design)
  - City Manager's Office (e.g. Economic Development Office, Internal Audit)

SAP at the City

= First Canadian Municipality

- 1995: SAP live with FI/CO and MM on R3
- 2007: Migrated to ECC 6
- 2010: Migrated PeopleSoft to SAP HCM including Portal ESS and MSS
- 2013: ECC Enhancement Pack 6
- 2014: Upgraded BObj to 4.1
- 2014: HR Processes and Forms (ESS Personal Info Change, Personnel Authorization Form on MSS)
- 2015: Fiori Leave Tiles
- 2016: Fiori My Paystubs, BObj to 4.2 and Lumira
- 2017: SuccessFactors (SF) Talent modules (Rctg/Onbdg, etc.) project start
- 2018: SF CDP live March, Recruiting and Onboarding live July
- 2019: SF PMGM live February, Succession live March
- 2020: SF Compensation live February
- 2021: My Tax Forms internally developed custom tile
- 2021: Migrated to S4 1809 (May)

Background/business need

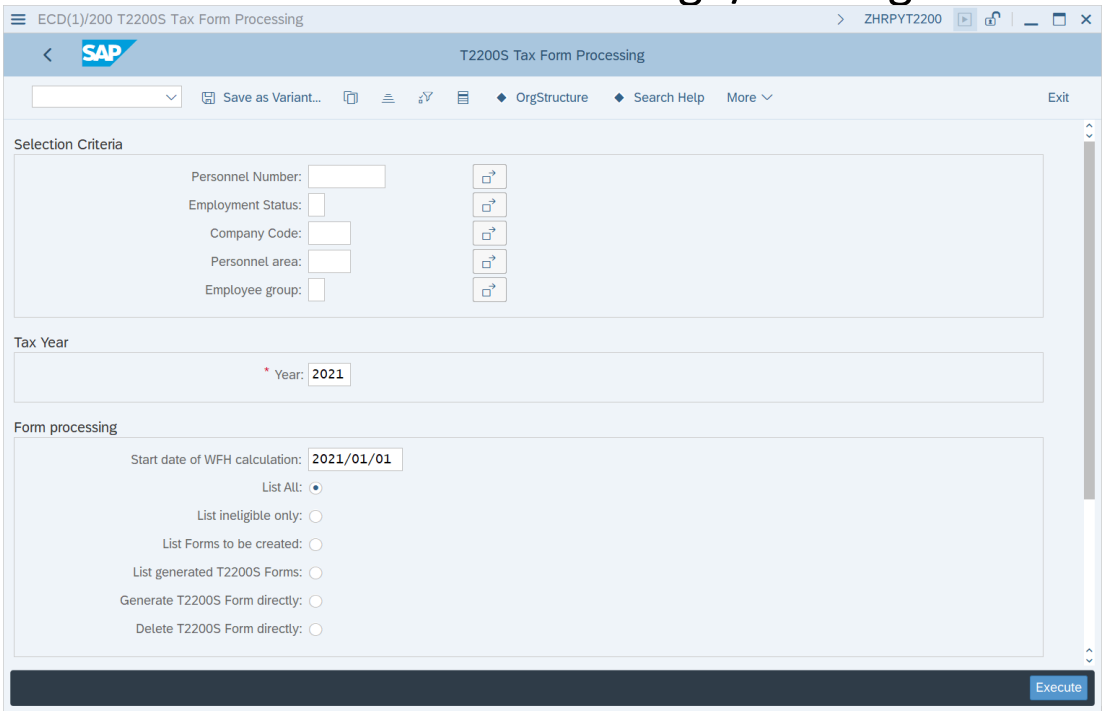
- During the pandemic, CRA has allowed employees to claim a flat rate deduction for home office expenses if employees receive a T2200S form from their employer
- The City needed a flexible way to assign and distribute forms to employees
- SAP has no standard T2200S or T4 tile on Fiori for employees (closest standard functionality: ESS Tax Form Reprint)
- CRA's guidance had provided high level direction and specifics became available in late 2020

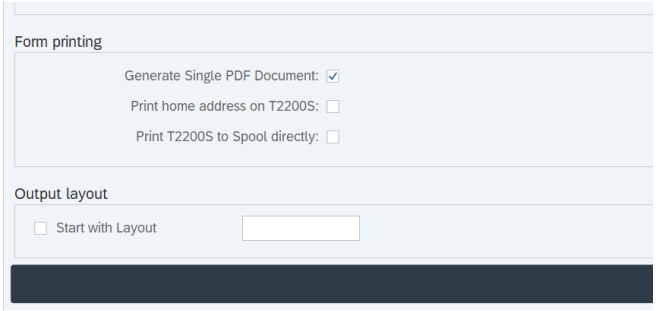
Requirements/Solution—high level

- IT and Finance were interested in developing a Fiori tile for all active, eligible employees to access the form
- Finance needed a way to choose employees en masse and assign or unassign for exceptions or after review
- Finance needed a way to produce hard copy forms for mail out to terminated or retired employees

Solution—ERP

- ERP transaction to assign/unassign form





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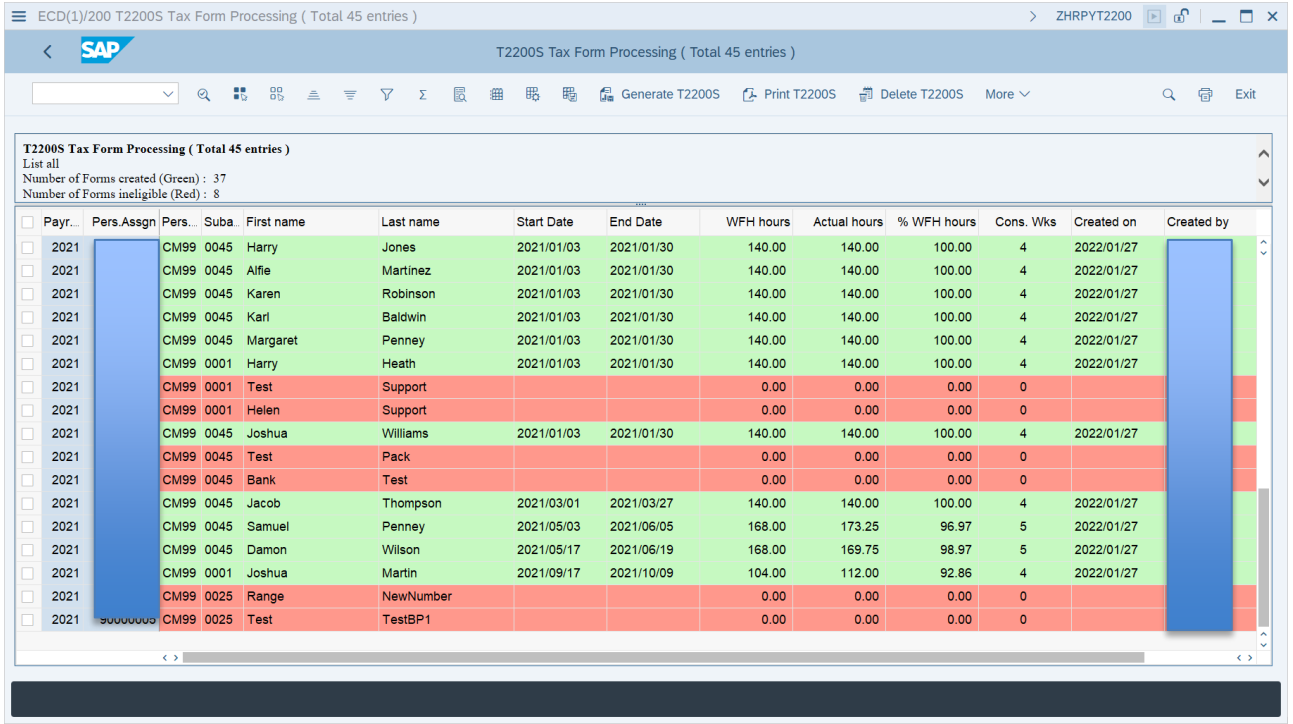
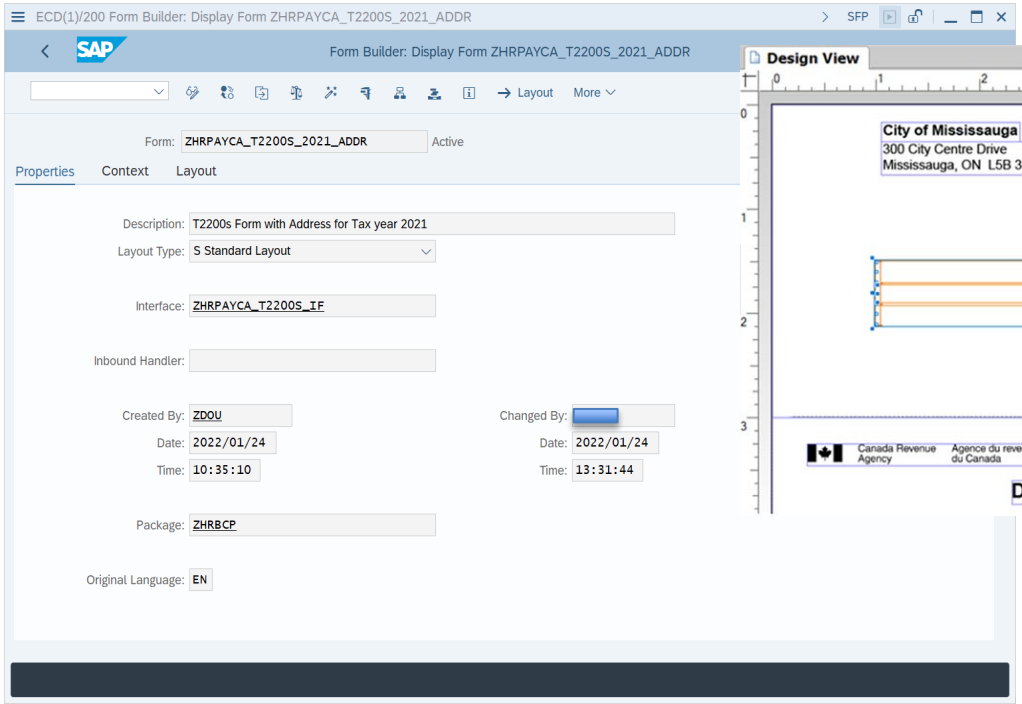


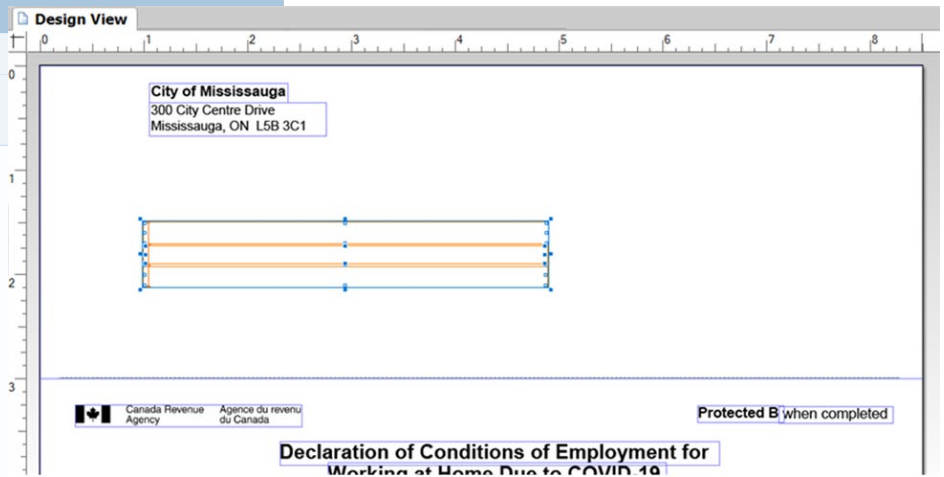
Payr...	Pers.Assgn	Pers...	Suba...	First name	Last name	Start Date	End Date	WFH hours	Actual hours	% WFH hours	Cons. Wks	Created on	Created by
2021		CM99	0045	Harry	Jones	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99	0045	Alfie	Martinez	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99	0045	Karen	Robinson	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99	0045	Karl	Baldwin	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99	0045	Margaret	Penney	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99	0001	Harry	Heath	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99	0001	Test	Support			0.00	0.00	0.00	0		
2021		CM99	0001	Helen	Support			0.00	0.00	0.00	0		
2021		CM99	0045	Joshua	Williams	2021/01/03	2021/01/30	140.00	140.00	100.00	4	2022/01/27	
2021		CM99	0045	Test	Pack			0.00	0.00	0.00	0		
2021		CM99	0045	Bank	Test			0.00	0.00	0.00	0		
2021		CM99	0045	Jacob	Thompson	2021/03/01	2021/03/27	140.00	140.00	100.00	4	2022/01/27	
2021		CM99	0045	Samuel	Penney	2021/05/03	2021/06/05	168.00	173.25	96.97	5	2022/01/27	
2021		CM99	0045	Damon	Wilson	2021/05/17	2021/06/19	168.00	169.75	98.97	5	2022/01/27	
2021		CM99	0001	Joshua	Martin	2021/09/17	2021/10/09	104.00	112.00	92.86	4	2022/01/27	
2021		CM99	0025	Range	NewNumber			0.00	0.00	0.00	0		
2021		CM99	0025	Test	TestBP1			0.00	0.00	0.00	0		

Sample output in Dev showing eligible (green) and ineligible (red) based on criteria, totals

Solution—ERP

- ERP form using Adobe Document Services





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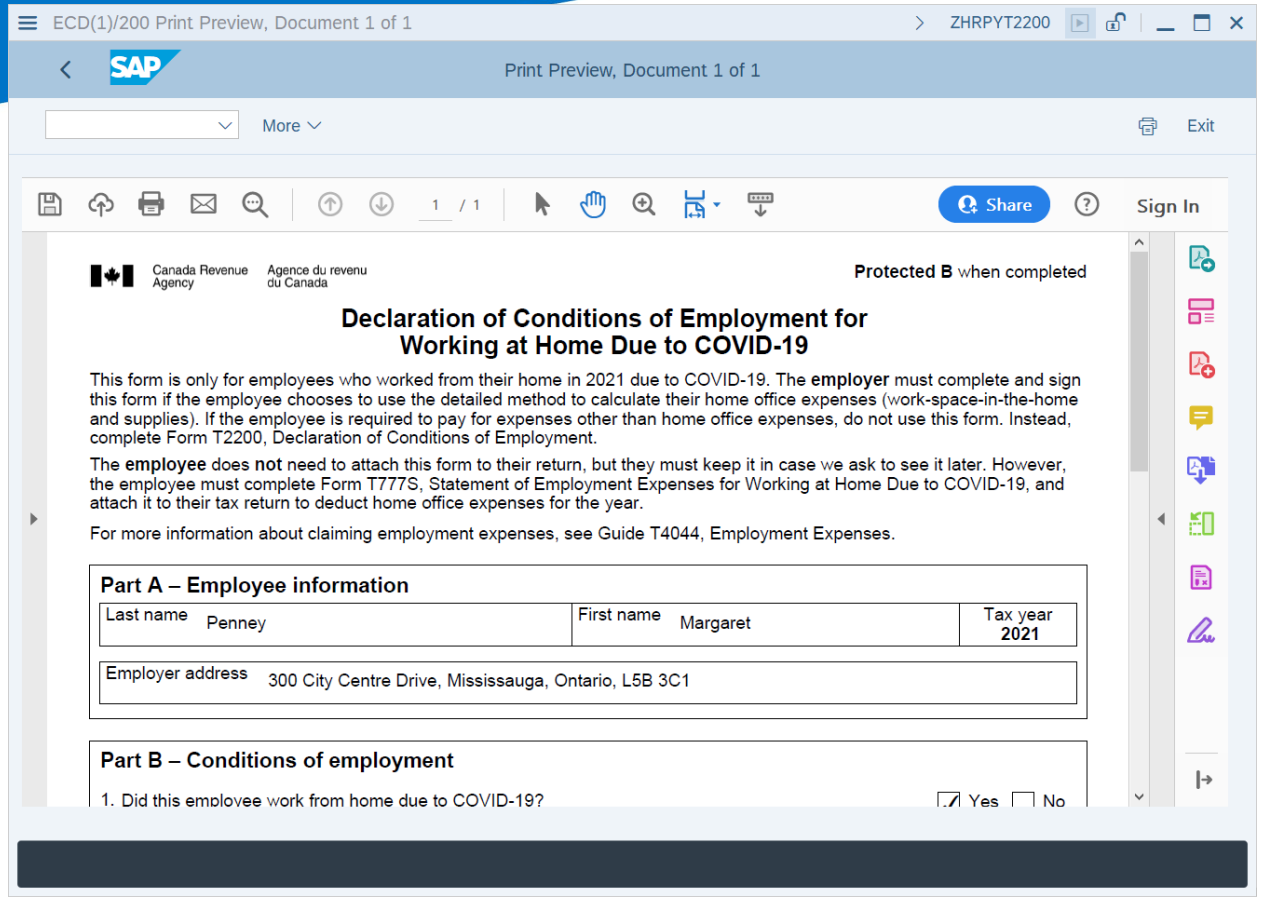
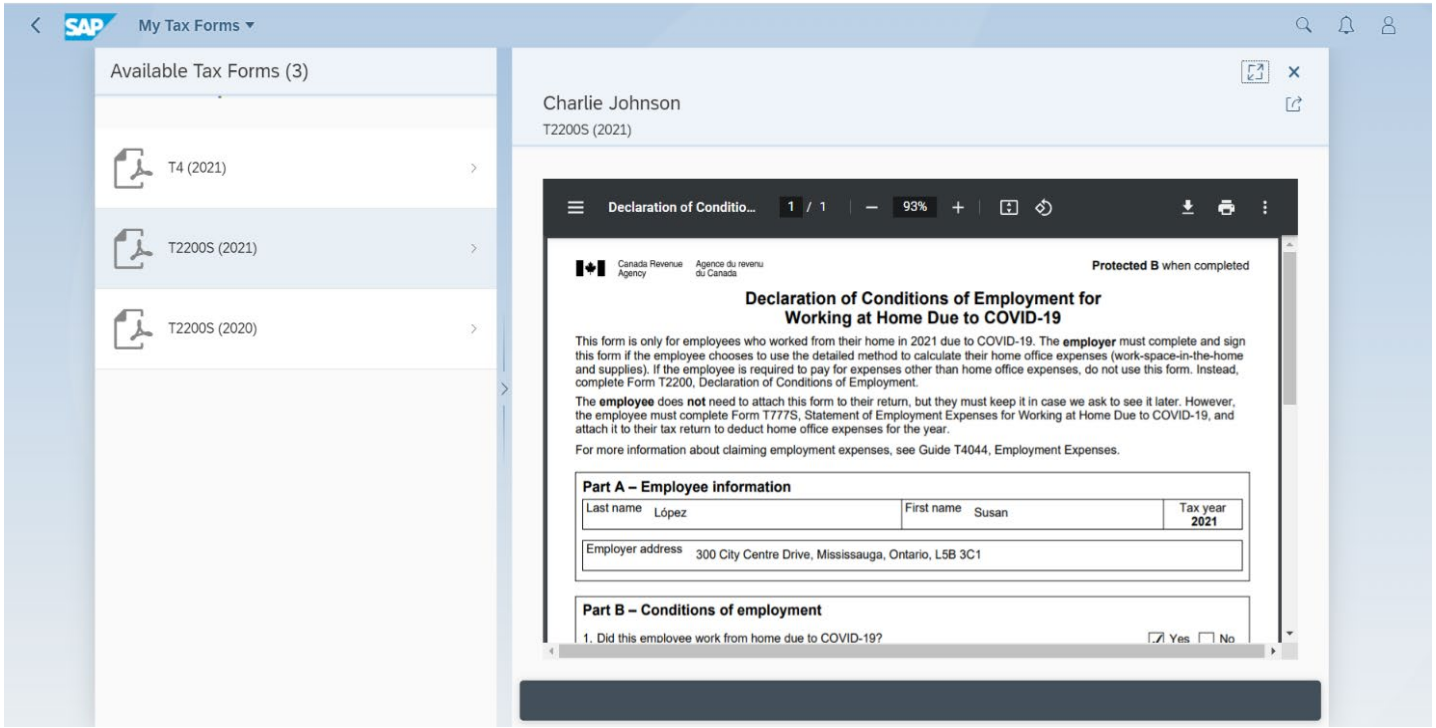


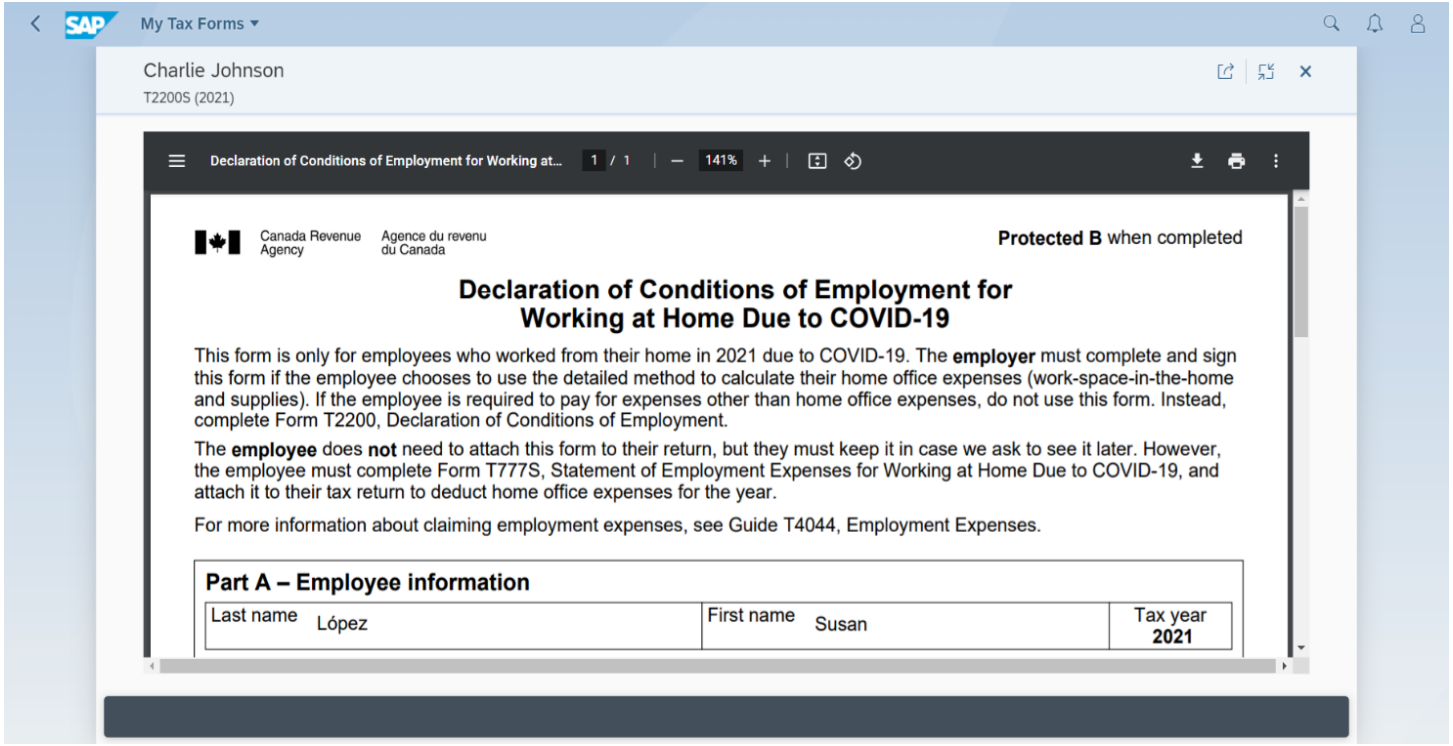
Sample form in Dev; address on form for printing doesn't appear in display of form in Fiori (print only feature)

Solution—Fiori

- Custom tile developed on WebIDE using Adobe Document Services to display employee's tax forms (any T2200S, T4); Dev example below, employee has 3 forms available



Overview on left and form on right; standard controls for download and print



Ability to turn off overview/full screen view

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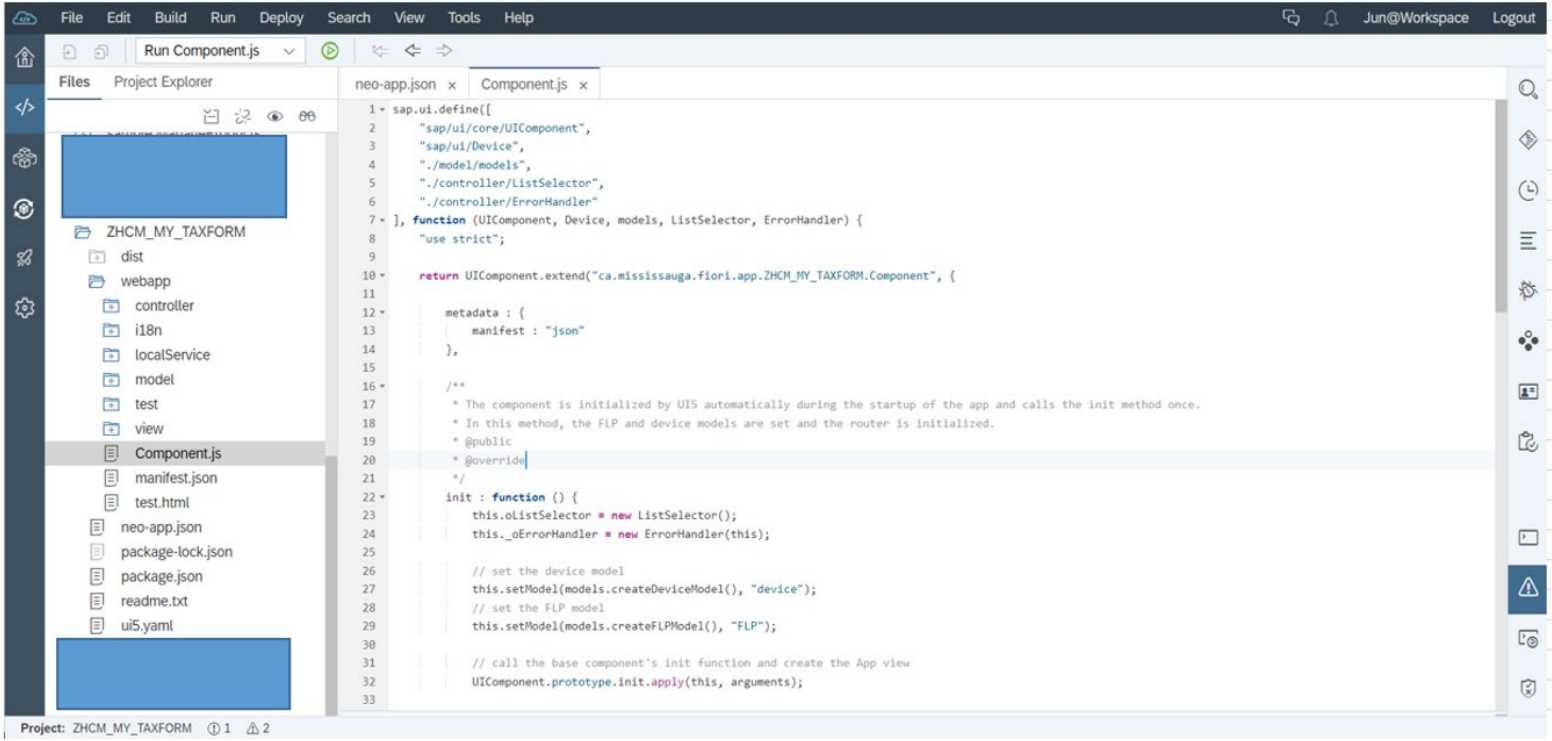
SAP Web IDE:

Develop front end of Fiori App: My Tax Forms and deploy it to Fiori Launchpad.



Change Management:

- City staff have used Fiori for pay statement
  - good familiarity with using tiles
- Staff transferred time to QA using Clone & Test and ran process with good data in QA
- Finance normally communicates with employees on T4s so employees were naturally expecting info
- Team created job aid to help employees use and print if needed
- Team worked with Print Services on printing, sorting, inserting and mailing

Change Management:

- Initially used externally developed and purchased T4 tile to minimize risk in 2021 (risk mitigation)
  - My Tax Forms tile and T4 capability was ready when T4s needed to be distributed
  - Disabled display of T4s temporarily in My Tax Forms
- City switched to City developed My Tax Forms tile for T4 in 2022
- Slight differences in navigation and updated job aid and communication to employees

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Job Aid SAP Fiori My Tax Forms and My T4... 1 / 3 67%

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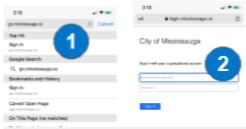
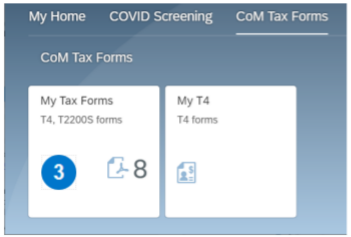
SAP Fiori My Tax Forms (T4)

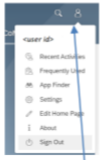
SAP Fiori has a My Tax Forms tile available as of February 2021 for eligible staff to access their T4 form(s) prepared by Finance.

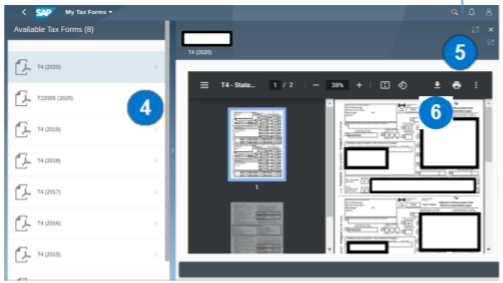
Note: if you are on the City's network and can access the SAP Fiori link from the Apps menu on Inside Mississauga, skip steps 1 and 2.



1. If you are not logged into the City network, type go.mississauga.ca in a browser on a device with an internet connection.
2. Enter your network user id and password. If you have forgotten your password or your password has expired, contact the IT HelpDesk.
3. Click on My Tax Forms tile to get to your T4 form(s)
4. Use the left side list to select the tax form you wish to view.
5. Use the printer icon to print if necessary (**Note:** Printing requires the device has a printer set up; be careful printing confidential info.)
6. Use the download button to save the file (**Note:** Be careful when saving confidential info).







Note: above screen shot for Chrome browser; other browser pdf controls may be slightly different. **If Chrome pdf error occurs**, ensure PDF Documents is set to not download/off in Settings>Privacy and security>Site settings>(Additional content settings)>PDF Documents.

CAUTION: ensure you Sign Out from your session (see top right), close all windows or lock or shut down your device to protect your confidential info.

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Key Learnings and Benefits:

- Able to deploy a custom tile and transaction within a short period of time
- Addition of the address to the first page helped Print Services print forms for retired and terminated employees
- Payroll liked the features in the custom transaction e.g. selection and display variants, ability to specify attendance types, ability to grant/remove to individuals, etc.

Next steps for City:

- May develop an employment verification letter tile (no SAP standard tile)
- May develop a tile to gather consent or other info from employees (e.g. United Way campaign, etc.)
- May develop a tile to display info for employees (e.g. employee directory)
- Deployment of other development tools (eclipse, ADT, etc.)

Questions?

Humour/fact: the City's custom tile is not agnostic i.e. is not *'a person who claims neither faith nor disbelief in God'*

Rhetorical questions: Is something that is browser agnostic mean that it doesn't have faith in or disbelieve in browsers? Should someone really say that it works on all or most browsers?

Mark Twain said "Don't use a five dollar word when a fifty cent one will do " (or is more accurate)

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