

*KaufmanHall*

# **Productivity Management EPM**

## Daily Performance Reporting

Updated June 15, 2015

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**Notes:**

# Daily Productivity – EPM Platform

## Purpose

To compare actual worked (productive) hours per unit of service to a benchmark worked hours per unit of service on a daily basis. The benchmark can come from an outside industry benchmark, or can come from the current year budget.

## Data Needed

1. Actual Hours by JobCode by PayType (Daily Hours From The Time and Attendance System)
2. Actual key statistics by department. This can be loaded through an import and/or from a save to database report.
3. Actual Daily contract labor hours if that data is available.

## Outcome

Timely payroll reporting that identifies salary hours and dollar variances so that those variances can be corrected, with the goal of avoiding a daily or monthly budget variance. Timely and accurate productivity reporting can help identify each of these variances so that they can be corrected before month-end close. Salary expense usually makes up about 50-65% of a hospital's total expenses. Labor variances are broken into three categories: Efficiency, Rate, and Volume.

## Summary of Steps

1. Load Daily Payroll data
2. Load Daily Statistical data
3. Load Daily Contract labor data
4. Process productivity reports

## CalDate Dimension Table and Daily Data Table

The CalDate Dimension table is used to store the Daily data to the Daily table. Each record is stored by calendar date (CalDate). Each year, this dimension table needs to be updated for the new fiscal year.

Data Type		Integer	String	Integer	Integer	Integer	Integer	String	Integer	String
String Length			50					5		10
Description										
Delete Row	CALDATE	Description	CalYear	CalMonth	CalDay	FiscalYear	Holiday	PayPeriod	DayOfWeek	
	20141005	October 5, 2014	2014	10	5	2015	N		8	Sunday
	20141006	October 6, 2014	2014	10	6	2015	N		8	Monday
	20141007	October 7, 2014	2014	10	7	2015	N		8	Tuesday
	20141008	October 8, 2014	2014	10	8	2015	N		8	Wednesday
	20141009	October 9, 2014	2014	10	9	2015	N		8	Thursday
	20141010	October 10, 2014	2014	10	10	2015	N		8	Friday
	20141011	October 11, 2014	2014	10	11	2015	N		8	Saturday
	20141012	October 12, 2014	2014	10	12	2015	N		8	Sunday

CalDate dimension table

The Daily table is where all of the daily data is stored by CalDate, Department, JobCode, PayType, and EMPID.

Data Type		Integer	Integer	String	String	Integer	String	Numeric	Numeric	Numeric	String
String Length				25	25		50				10
Description											
Delete Row	CalDate	Dept	JobCode	PayType	EMPID	EMPIDDesc	Hours	Stats	Revenue	DayOfWeek	
	20141201	19100	J00017	P0001	38449	Joe Smith	22.50	0.00	0.00	Monday	
	20141201	19100	J00017	P0004	38449	Joe Smith	4.50	0.00	0.00	Monday	
	20141201	19100	J00017	P0024	14388	Mary Jones	4.00	0.00	0.00	Monday	
	20141201	19100	J00017	POVT	14388	Mary Jones	4.75	0.00	0.00	Monday	
	20141201	19100	J00018	P0001	28189	Fred White	15.00	0.00	0.00	Monday	
	20141201	19100	J00018	P0004	28189	Fred White	4.00	0.00	0.00	Monday	

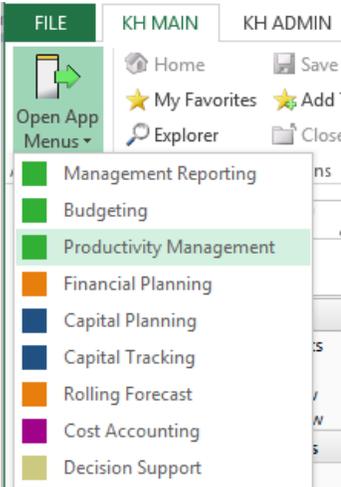
Daily dimension table

## Loading Daily Key Statistics

There are three ways to load statistics for daily productivity.

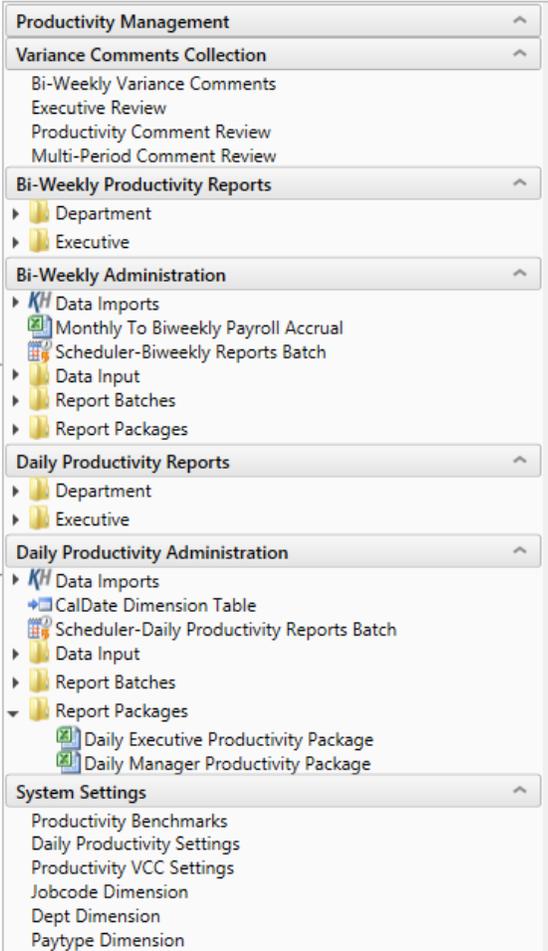
1. Daily key stats save to database report.
2. Setup a Daily stats import that loads to the Daily table.
3. Setup a Daily import that is a copy of the RevUsage import (adding service date as column), but posts to the Daily tables.

Everything needed to process Daily Productivity reports can be access from the ProdMgmt task pane. To get to this task pane, log into the Kaufman Hall EPM system. Once logged in, on the upper left hand corner of the ribbon, select *Open App Menu > Productivity Management*.



Productivity Management in the KH Main Open App Menus button

The task pane will open on the left hand side of the screen.



## Loading Daily Key Statistics from a Report

From the task pane, under *Daily Productivity Administration*, select *Data Input > Input Daily Productivity Statistics*.



Input Daily Productivity Statistics report in the Productivity Management task pane

The top section of the report is used to enter data for new departments. The bottom section will bring in existing data from the database. The first time using this report, you will need to manually add enough rows to enter all new departments. To do this, highlight an existing row, and copy the entire row, highlight how many rows you want to add, then choose insert copied cells to add the rows. Once there is data in the database, you can select **Refresh** from the *KH Main Ribbon*. The data will be refreshed into the report and you can enter data by CalDate (Day) or change existing Daily data by day. You can type into any yellow shaded cell. The top of the report is setup with dimension and table configuration settings. You should not have to change this unless you are trying to post to a different table (table setting will default to the current year unless changed) or if you would like to store statistics using a different JobCode and PayType combination (default is JStat and PStat). Once entry is completed, select **Save** from the *KH Main Ribbon* to save to the database.



Save button in the KH Main ribbon

Daily Productivity Statistics Data Entry								
EPM Healthcare								
Click "Save" to save values to database				No changes made				
Statistics - JobCode			JSTAT					
Statistics - PayType			PSTAT					
Columns to Update:			Stats					
Refresh from Table			Daily					
Save to table			Daily					
CalDate	Description	Department	Description	JobCode	PayType	Employee ID	Stats	Total
Add New Depts								
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	JSTAT	PSTAT	0		0.00
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	JSTAT	PSTAT	0		0.00
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	JSTAT	PSTAT	0		0.00
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	JSTAT	PSTAT	0		0.00
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	JSTAT	PSTAT	0		0.00
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	JSTAT	PSTAT	0		0.00
<Copy above rows and insert here if more are needed>								
Change Existing Depts								
20141201		27200 EMC Radiology - MRI (JobCode)		JStat	PSTAT		13	13
20141202		27200 EMC Radiology - MRI (JobCode)		JStat	PSTAT		22	22
20141203		27200 EMC Radiology - MRI (JobCode)		JStat	PSTAT		18	18
20141204		27200 EMC Radiology - MRI (JobCode)		JStat	PSTAT		17	17
20141205		27200 EMC Radiology - MRI (JobCode)		JStat	PSTAT		15	15
20141206		27200 EMC Radiology - MRI (JobCode)		JStat	PSTAT		14	14
20141207		27200 EMC Radiology - MRI (JobCode)		JStat	PSTAT		16	16

Daily Productivity Statistics report

## Loading Actual Contract Labor

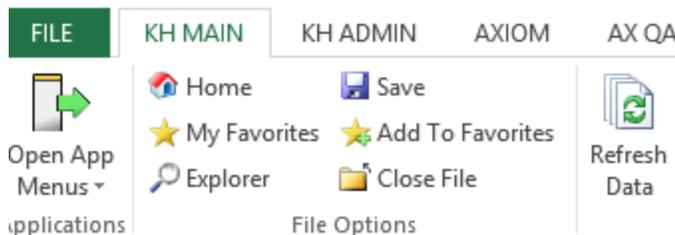
If the data is available: from the task pane, under *Daily Productivity Administration*, select *Data Input > Input Daily Productivity Contract Labor*.



Input Daily Productivity Contract Labor report in the Productivity Manager task pane

The top section of the report is used to enter data for new departments. The bottom section will bring in existing data from the database. The first time using this report, you will need to manually add enough rows to enter all new departments. To do this, highlight an existing row, and copy the entire row, highlight how many rows you want to add, then choose

insert copied cells to add the rows. Once there is data in the database, you can select **Refresh** from the *KH Main Ribbon*. The data will be refreshed into the report and you can enter data by pay period or change existing pay period data. You can type into any yellow shaded cell. The top of the report is setup with dimension and table configuration settings. You should not have to change this unless you are trying to post to a different table (table setting will default to the current year unless changed) or if you would like to store contract labor hours using a different JobCode and PayType combination (default is J09999 and PAGC). Once entry is completed, select **Save** from the *KH Main Ribbon* to save to the database.



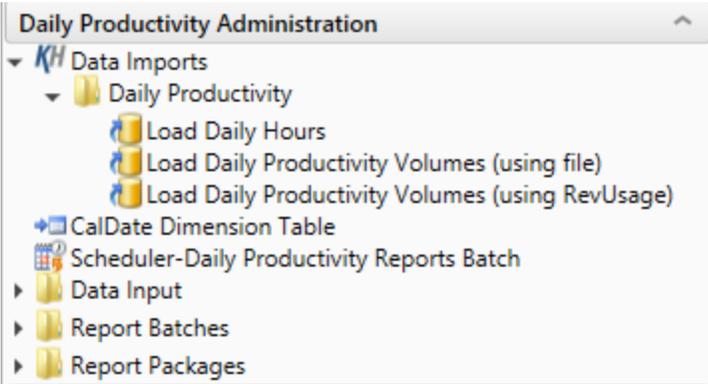
Save button in the KH Main ribbon

Daily Productivity Contract Labor Data Entry									
EPM Healthcare									
Click "Save" to save values to database					No changes made				
Contract Labor - JobCode		J09999							
Contract Labor - PayType		PAGC							
Columns to Update:		Hours							
Refresh from Table		Daily							
Save to table		Daily							
CalDate	Description	Department	Description	JobCode	PayType	Employee ID	Hours	Total	Daily Hours
Add New Depts									
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	J09999	PAGC	0		0	
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	J09999	PAGC	0		0	
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	J09999	PAGC	0		0	
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	J09999	PAGC	0		0	
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	J09999	PAGC	0		0	
	<<Input CalDate! (YYYYMMDD)		<<Invalid Dept!	J09999	PAGC	0		0	
<Copy above rows and insert here if more are needed>									
Change Existing Depts									
<b>Total</b>							<b>0.00</b>		

Daily Productivity Contract Labor report

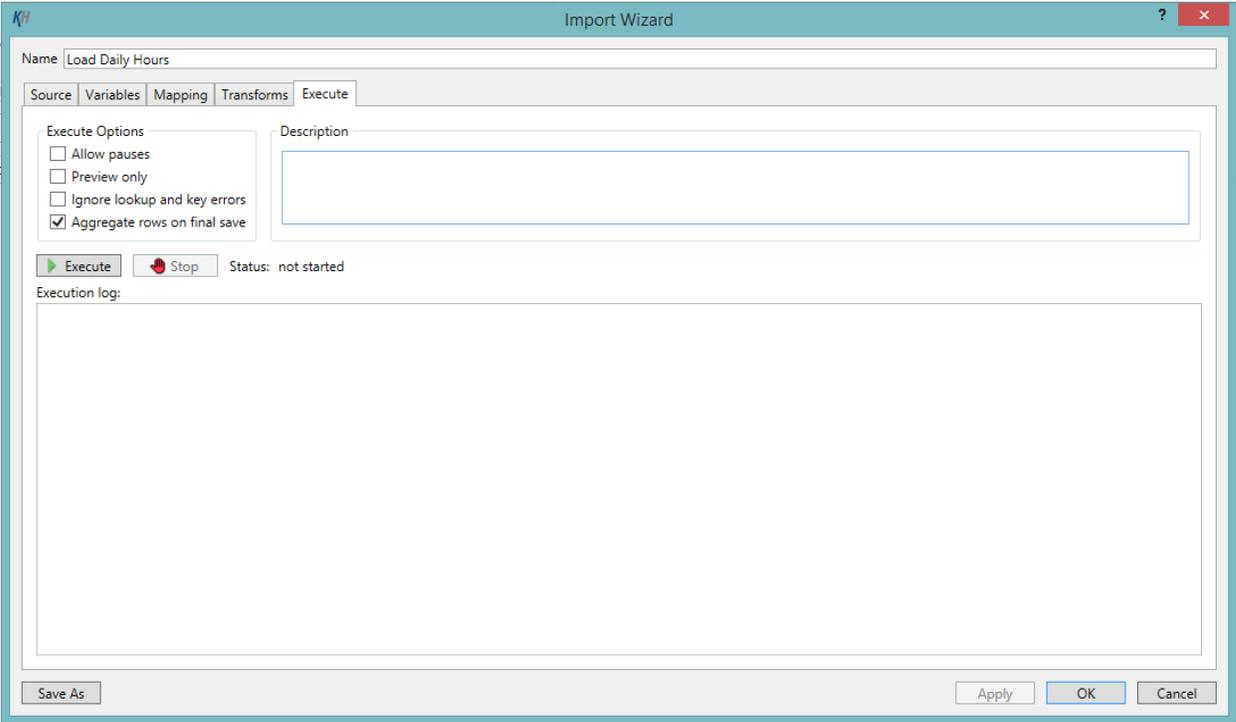
## Loading Actual Payroll data to the Daily Table

From the task pane under the *Daily Productivity Administration > Data Imports > Daily Productivity*, select **Load Daily Hours** import.



Load Daily Hours in the Productivity Management task pane

The import has been setup for you during your implementation. Select the *Execute* tab, then select the **Execute** button.



Import Wizard dialog box

### Error Checking and Validation

As you complete the import settings, the Import Wizard performs error checking for missing required settings and invalid settings. If the destination table has linked columns (columns that are assigned to a lookup column), data is automatically validated against the lookup column before importing.

If an error is detected, an error message displays in the bottom of the dialog.

## Import Error Message

You can click the link to be taken to the tab that contains the error. Only one error is displayed at a time; once you resolve the current error message, a new message may appear. Add the missing dimension elements, then re-run the import.

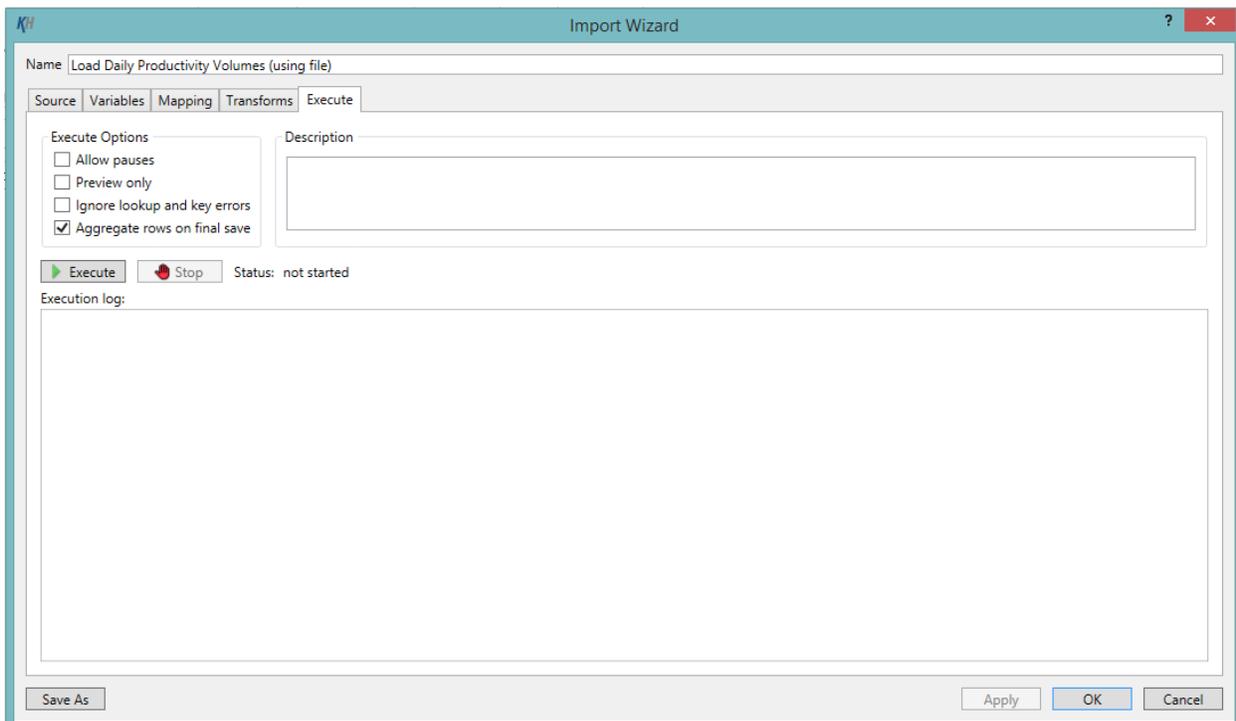
## Loading Actual Statistic Data to Daily Tables

From the task pane under the *Daily Productivity Administration > Data Imports > Daily Productivity*, select **Load Daily Productivity Volumes (using file)** import.



Load Daily Productivity Volumes (using file) in the Productivity Management task pane

The import has been setup for you during your implementation. Select the *Execute* tab, then select the **Execute** button.



## Import Wizard dialog box

## Error Checking and Validation

As you complete the import settings, the Import Wizard performs error checking for missing required settings and invalid settings. If the destination table has linked columns (columns that are assigned to a lookup column), data is automatically validated against the lookup column before importing.

If an error is detected, an error message displays in the bottom of the dialog.

## Import Error Message

You can click the link to be taken to the tab that contains the error. Only one error is displayed at a time; once you resolve the current error message, a new message may appear. Add the missing dimension elements, then re-run the import.

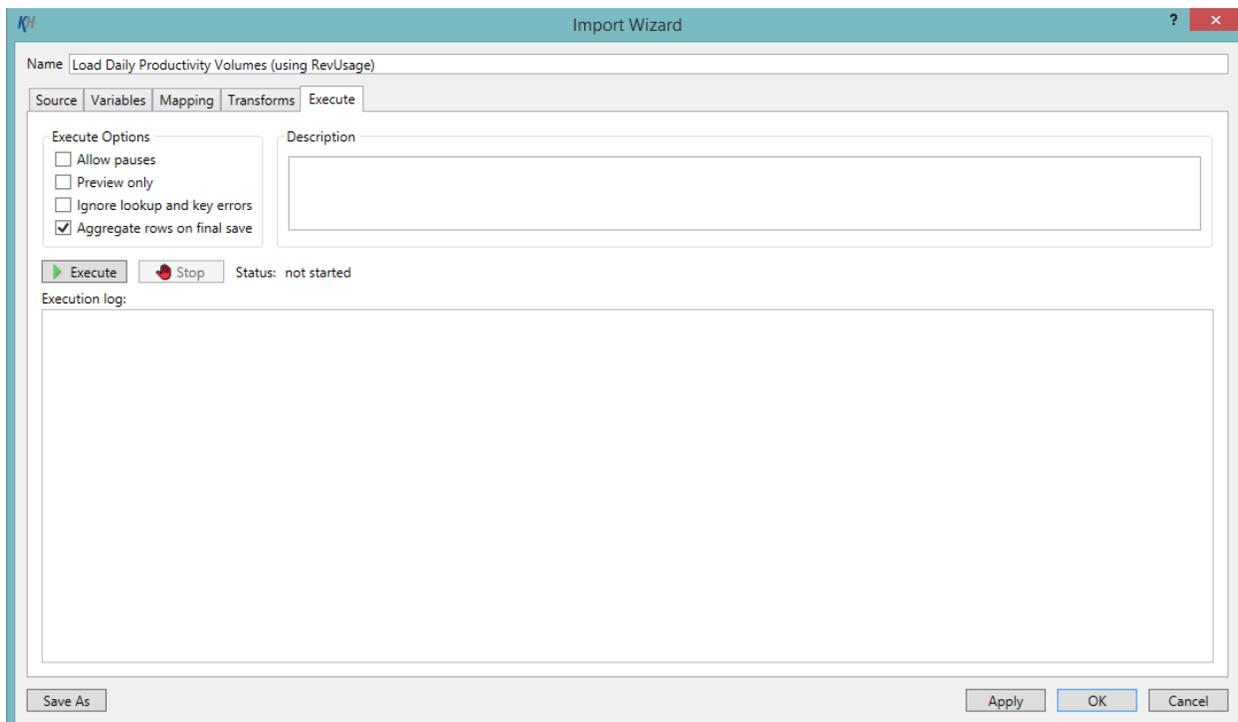
## Loading Actual Statistic data (From RevUsage Data) to Daily Tables

From the task pane under the *Daily Productivity Administration > Data Imports > Daily Productivity*, select **Load Daily Productivity Volumes (using RevUsage)** import.



Load Daily Productivity Volumes (using RevUsage) in the Productivity Management task pane

The import has been setup for you during your implementation. Select the Execute tab, then select the **Execute** button.



Import Wizard dialog box

## Error Checking and Validation

As you complete the import settings, the Import Wizard performs error checking for missing required settings and invalid settings. If the destination table has linked columns (columns that are assigned to a lookup column), data is automatically validated against the lookup column before importing.

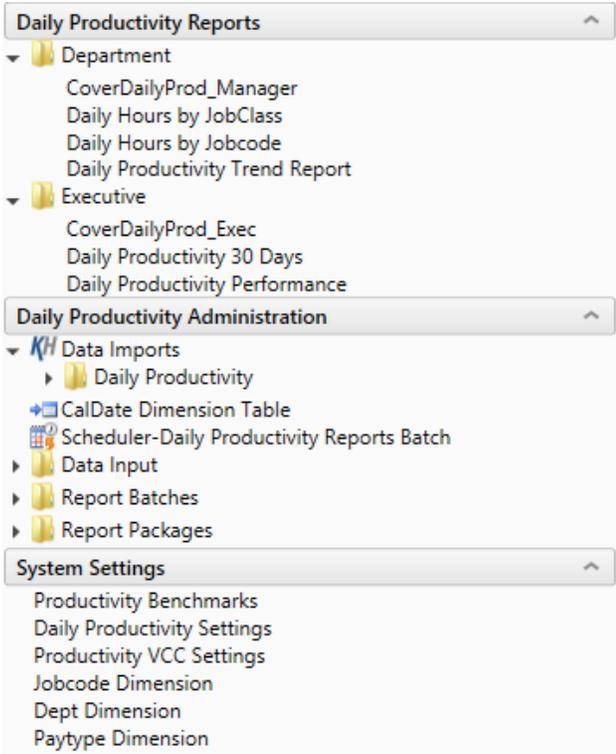
If an error is detected, an error message displays in the bottom of the dialog.

## Import Error Message

You can click the link to be taken to the tab that contains the error. Only one error is displayed at a time; once you resolve the current error message, a new message may appear. Add the missing dimension elements, then re-run the import.

## Available Reports-For Managers/Directors

All reports can be accessed from the task pane under the *Daily Productivity Reports* section select the *Department* folder. Descriptions of each report listed below. Before running reports, there is a **Daily Productivity Settings** table under the *System Settings > Daily Productivity Settings*. This table is used to set the daily hours per day by department. This allows you to make different selections by day or weekdays vs weekend days. Once the table is opened, make any additions or changes, then select **Save** from the *KH Main* menu.



Daily Productivity Settings in the Productivity Management task pane

Daily Productivity Average Hours Per Day		Enter the daily productivity standard.							
DEPT	Department Name	Total	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	Default Hours	8.000	8.000	8.000	8.000	8.000	8.000	0.000	0.000
19100	EHS Accounting Operations (Employee)	12.621	12.621	12.621	12.621	12.621	12.621	12.621	12.621
26140	EMC Emergency Room (CDM)	6.991	6.991	6.991	6.991	6.991	6.991	6.991	6.991
26310	EMC 3 East	9.941	9.941	9.941	9.941	9.941	9.941	9.941	9.941
27200	EMC Radiology - MRI (JobCode)	9.752	9.752	9.752	9.752	9.752	9.752	9.752	9.752

Daily Productivity table

The Daily Productivity reports also can use an outside Benchmark stored in the **Productivity Benchmark** table found under the *System Settings > Productivity Benchmarks* from the Task Pane. Once the table is opened, make any additions or changes, then select **Save** from the *KH Main* menu.

Benchmark Factors		Worked Hours per Unit	Paid Hours per Unit	Salaries per Unit	Supplies per Unit	Total Expense per Unit
17840	EHS Sports Medicine	37.14	40.86	0.00	0.00	0.00
17880	EPG Phys Clinic-North	5.71	6.29	0.00	0.00	0.00
17881	EPG Phys Clinic-Occ Hlth East	5.71	6.29	0.00	0.00	0.00
17883	EPG Phys Clinic-Occ Hlth Midtown	17.30	19.03	0.00	0.00	0.00

Productivity Benchmark table

## CoverDailyProd\_Manager

**Description:** Cover page for distributed packages for Managers/Directors displaying the reports in the package.

**Notes:**

- Can be customized for your organization
- Generated Daily by department

### Daily Productivity Reports for: 06/02/2015

Department Daily Productivity Package-- Security Test DEPT

This package contains a copy of your current Daily Productivity reports for your review and records. Please review the contents for accuracy and omissions.

**Need Help?**  
Please call/email Finance at 123-456-7890

**REPORT TYPES**

Tab Name	Type of Report
DailyJClass_Dept Number	Hours and Dollars by JobClass
DailyJCode_Dept Number	Hours and Dollars by JobCode
DailyTrend_Dept Number	Trended Daily Productivity

Cover page for Daily Productivity reports

## Daily Hours By JobClass

**Description:** Report for distribution to department managers daily for review of daily productivity trends by JobClass by day for the past 14 days.

**Notes:**

- Tracking of volume and hours per unit on a daily basis by JobClass.
- Based upon a 14 day rolling cycle
- Highlights are 5% above (Red) or 5% below (Green) Average for 14 day period.

Daily Productivity Hours by JobClass										
EPM Healthcare For the 14 Day Period Ending: 12/14/14 27200 - EMC Radiology - MRI (JobCode)										
JobClass	Monday		Tuesday		Wednesday		Thursday		Friday	
	1-Dec 2014	8-Dec 2014	2-Dec 2014	9-Dec 2014	3-Dec 2014	10-Dec 2014	4-Dec 2014	11-Dec 2014	5-Dec 2014	12-Dec 2014
Workload Statistic: Procedures	13	20	22	15	18	19	17	18	15	17
Productive Hours per Unit	10.596	6.888	6.888	9.517	7.500	7.250	7.691	6.764	9.450	8.559
Total Hours per Unit	14.577	9.475	9.475	12.733	10.317	9.974	10.735	9.639	13.000	11.603
<b>Productive Hours</b>										
Assistant	51.25	51.25	56.38	51.25	50.23	54.25	39.25	51.25	51.25	54.00
Technical	86.50	86.50	95.15	91.50	84.77	83.50	91.50	70.50	90.50	91.50
<b>Total - Productive Hours</b>	<b>137.75</b>	<b>137.75</b>	<b>151.53</b>	<b>142.75</b>	<b>135.00</b>	<b>137.75</b>	<b>130.75</b>	<b>121.75</b>	<b>141.75</b>	<b>145.50</b>
<b>Non-Productive Hours</b>										
Assistant	13.50	13.50	14.85	10.00	13.23	13.50	13.50	13.50	15.00	13.50
Technical	38.25	38.25	42.08	38.25	37.49	38.25	38.25	38.25	38.25	38.25
<b>Total - Non-Productive Hours</b>	<b>51.75</b>	<b>51.75</b>	<b>56.93</b>	<b>48.25</b>	<b>50.72</b>	<b>51.75</b>	<b>51.75</b>	<b>51.75</b>	<b>53.25</b>	<b>51.75</b>
<b>Total Hours</b>	<b>189.50</b>	<b>189.50</b>	<b>208.45</b>	<b>191.00</b>	<b>185.71</b>	<b>189.50</b>	<b>182.50</b>	<b>173.50</b>	<b>195.00</b>	<b>197.25</b>

Daily Productivity Hours by JobClass report

### Daily Hours By JobCode

**Description:** Report for distribution to department managers daily for review of daily productivity trends by JobCode by day for the past 14 days.

**Notes:**

- Tracking of volume and hours per unit on a daily basis by JobCode.
- Based upon a 14 day rolling cycle
- Highlights are 5% above (Red) or 5% below (Green) Average for 14 day period.

Daily Productivity Hours by JobCode										
EPM Healthcare For the 14 Day Period Ending: 12/14/14 27200 - EMC Radiology - MRI (JobCode)										
JobCode	Monday		Tuesday		Wednesday		Thursday		Friday	
	1-Dec 2014	8-Dec 2014	2-Dec 2014	9-Dec 2014	3-Dec 2014	10-Dec 2014	4-Dec 2014	11-Dec 2014	5-Dec 2014	12-Dec 2014
Workload Statistic: Procedures	13	20	22	15	18	19	17	18	15	17
Productive Hours per Unit	10.596	6.888	6.888	9.517	7.500	7.250	7.691	6.764	9.450	8.559
Total Hours per Unit	14.577	9.475	9.475	12.733	10.317	9.974	10.735	9.639	13.000	11.603
<b>Productive Hours</b>										
J00200 Technologist Assistant	51.25	51.25	56.38	51.25	50.23	54.25	39.25	51.25	51.25	54.00
J00287 Team Leader	43.00	43.00	47.30	43.00	42.14	40.00	48.00	27.00	47.00	48.00
J00646 Radiology Technician	43.50	43.50	47.85	48.50	42.63	43.50	43.50	43.50	43.50	43.50
<b>Total - Productive Hours</b>	<b>137.75</b>	<b>137.75</b>	<b>151.53</b>	<b>142.75</b>	<b>135.00</b>	<b>137.75</b>	<b>130.75</b>	<b>121.75</b>	<b>141.75</b>	<b>145.50</b>
<b>Non-Productive Hours</b>										
J00200 Technologist Assistant	13.50	13.50	14.85	10.00	13.23	13.50	13.50	13.50	15.00	13.50
J00287 Team Leader	21.00	21.00	23.10	21.00	20.58	21.00	21.00	21.00	21.00	21.00
J00646 Radiology Technician	17.25	17.25	18.98	17.25	16.91	17.25	17.25	17.25	17.25	17.25
<b>Total - Non-Productive Hours</b>	<b>51.75</b>	<b>51.75</b>	<b>56.93</b>	<b>48.25</b>	<b>50.72</b>	<b>51.75</b>	<b>51.75</b>	<b>51.75</b>	<b>53.25</b>	<b>51.75</b>
<b>Total Hours</b>	<b>189.50</b>	<b>189.50</b>	<b>208.45</b>	<b>191.00</b>	<b>185.71</b>	<b>189.50</b>	<b>182.50</b>	<b>173.50</b>	<b>195.00</b>	<b>197.25</b>

Daily Productivity Hours by JobCode report

### Daily Productivity Trend Report

**Description:** Report for distribution to department managers daily for review of daily productivity trends for the past 14 days.

**Notes:**

Part 1

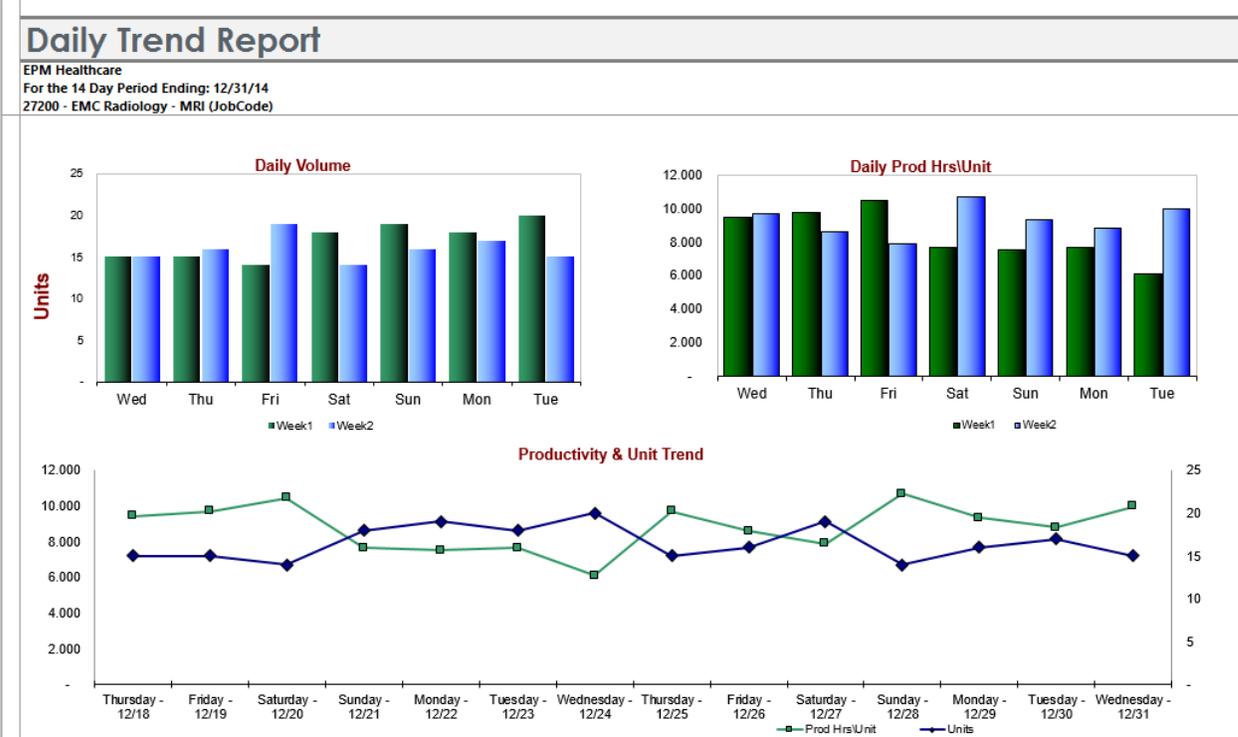
- Tracking of volume and hours per unit on a daily basis.
- Based upon a 14 day rolling cycle
- Reports are intended to allow comparison of same day of week within 14 day cycle

Part 2

- Comparison of volume and hours per unit on dual axis graph.
- Last graph point is 14 day cycle.
- Other graph points are actual daily values from Payroll27 Tables.

Part 3

- Comparison of actual vs target data on a daily basis.
- Source of target is Current Budget Hours in Payroll27 tables for the next pay period.
- Threshold Limits is set as a Refresh Variable in the report to control “Outside Limits” results.



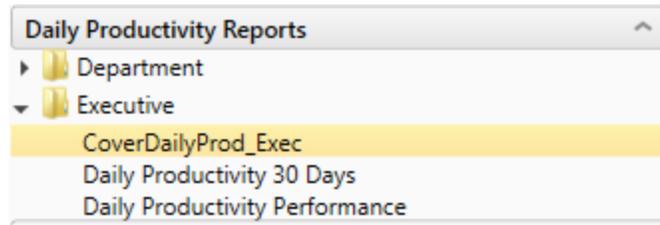
Daily Productivity Trend report

27200 - EMC Radiology - MRI (JobCode)										
Period	Actual Data			Target Data		Variance Analysis			Summary	
	Workload Procedures	Productive Hours	Prod Hrs / Unit	Productive Hours	Prod Hrs / Unit	Prod Hrs / Unit	Hours	FTEs	Productivity Index	Outside Limits?
Thursday - 12/18	15	142	9.450	146	9.752	0.302	5	0.79	103.2%	Above
Friday - 12/19	15	146	9.717	146	9.752	0.035	1	0.09	100.4%	Above
Saturday - 12/20	14	146	10.446	137	9.752	(0.695)	(10)	(1.70)	93.3%	Warning
Sunday - 12/21	18	138	7.653	176	9.752	2.099	38	6.61	127.4%	Above
Monday - 12/22	19	143	7.513	185	9.752	2.239	43	7.44	129.8%	Above
Tuesday - 12/23	18	138	7.653	176	9.752	2.099	38	6.61	127.4%	Above
Wednesday - 12/24	20	122	6.088	195	9.752	3.664	73	12.82	160.2%	Above
Thursday - 12/25	15	146	9.700	146	9.752	0.052	1	0.14	100.5%	Above
Friday - 12/26	16	138	8.609	156	9.752	1.142	18	3.20	113.3%	Above
Saturday - 12/27	19	150	7.868	185	9.752	1.883	36	6.26	123.9%	Above
Sunday - 12/28	14	150	10.679	137	9.752	(0.927)	(13)	(2.27)	91.3%	Below
Monday - 12/29	16	150	9.344	156	9.752	0.408	7	1.14	104.4%	Above
Tuesday - 12/30	17	150	8.794	166	9.752	0.958	16	2.85	110.9%	Above
Wednesday - 12/31	15	150	9.967	146	9.752	(0.215)	(3)	(0.56)	97.8%	Warning
<b>Total</b>	<b>231</b>	<b>2,005</b>	<b>8.677</b>	<b>2,253</b>	<b>9.752</b>	<b>1.074</b>	<b>248</b>	<b>43.43</b>	<b>112.4%</b>	<b>Above</b>
Target-PayPeriod 14	19,547		9.752							
<b>Daily Average</b>	<b>17</b>	<b>143</b>	<b>8.677</b>	<b>161</b>	<b>9.752</b>	<b>1.074</b>	<b>18</b>	<b>3.10</b>	<b>112.4%</b>	<b>Above</b>
Target Average	1,396		9.752							

Daily Productivity Trend report

## Available Reports-For Vice Presidents

All reports can be accessed from the task pane under the *Daily Productivity Reports Executive* folder. Descriptions of each report listed below.



Executive Daily Productivity Reports in the Productivity Management task pane

## CoverDaily Prod\_Exec

**Description:** Cover page for distributed packages for Vice Presidents displaying the reports in the package.

**Notes:**

- Can be customized for your organization
- Generated daily by Vice President

Daily Productivity Reports for: 06/02/2015	
Executive Daily Productivity Report Package	
This package contains a copy of your current productivity reports for your review and records. Please review the contents for accuracy and omissions.	
<b>Need Help?</b> Please call/email Finance at 123-456-7890	
<b>REPORT TYPES</b>	
<b>Tab Name</b>	<b>Type of Report</b>
Dly_Prod_30	30/31 day Productivity by Department
Dly_Prod_Perf	Productivity by Department

Cover page for Daily Productivity Reports

## Daily Productivity 30 Days

**Description:** Displays actual paid hours per unit of service by department trended for 30 days

**Notes:**

- Generated daily by Vice President
- Focus on paid hours per unit by department

Daily Productivity by Department											
EPM Healthcare For the 30 days ending: 12/31/2014											
Paid Hours Per Unit of Service											
	12/2/2014	12/3/2014	12/4/2014	12/5/2014	12/6/2014	12/7/2014	12/8/2014	12/9/2014	12/10/2014	12/11/2014	12/12/2014
26140 EMC Emergency Room (CDM)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
27200 EMC Radiology - MRI (JobCode)	6.89	7.50	7.69	9.45	10.41	9.14	6.89	9.52	7.25	6.76	8.56

Daily Productivity by Department, 30 days

### Daily Productivity Performance

**Description:** Displays daily productivity by department for a chosen day.

**Notes:**

- Productivity performance by department by day

Daily Productivity Performance				Below> 93%		Above> 98%				
EPM Healthcare		For the period ending: 12/31/2014								
Dept	Department	Workload Statistic	Actual Data		Target Data		Variance		Summary	
			Workload Volume	Productive Hours	Prod Hrs / Statistic	Productive Hours	Prod Hrs / Statistic	Hours	FTEs	Productivity Index
Favorable Totals			0	0	0	0	0.00	0.0%		
Unfavorable Totals			6,848	316	(6,532)	(81.65)	4.6%			
26140 EMC Emergency Room (CDM)	Visits	-	1,283	-	-	3.17	(1,283)	(16.04)	-100.00%	▼
26310 EMC 3 East	Days	-	2,818	-	-	11.91	(2,818)	(35.23)	-100.00%	▼
27200 EMC Radiology - MRI (JobCode)	Procedures	231	2,747	11.89	316	1.37	(2,431)	(30.38)	11.51%	▼
<b>Total</b>			<b>6,848</b>	<b>316</b>	<b>(6,532)</b>	<b>(81.65)</b>	<b>4.6%</b>			

Daily Productivity Performance report

### Processing File Collect Packages-Daily Productivity

To process Daily file collect packages, you can run the **Daily Productivity Reports Batch**.



Daily Productivity Reports Batch in the Productivity Management task pane

You can make specific configuration settings in the batch to match your desired report distribution package. If you want to run all reports, the batch is setup as a default to do that. The **Enabled** column is where you can turn on or off specific reports, or you can delete the row of that report if you want to permanently remove the report.

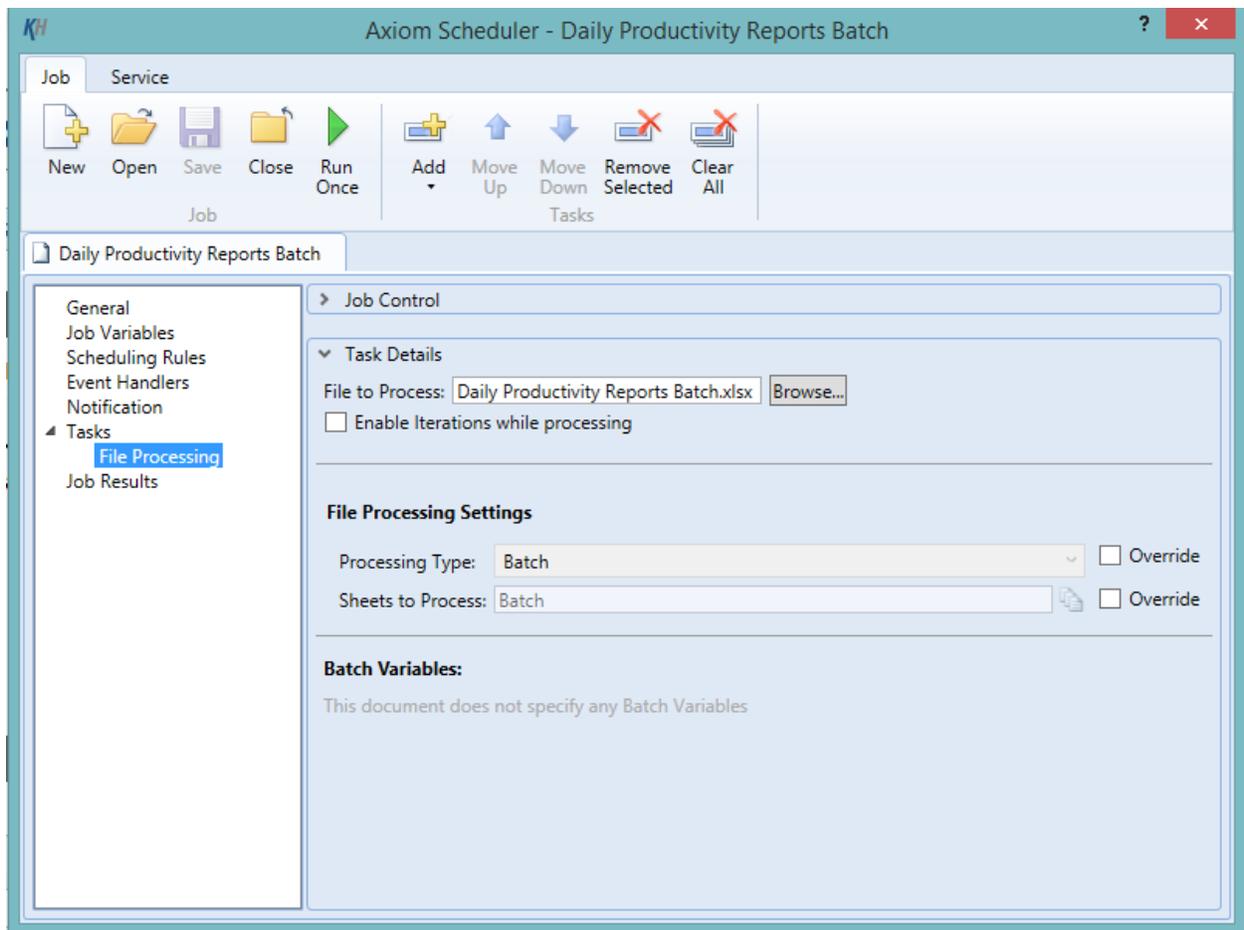
BATCH CONTROL SHEET			
File Path	Enabled	Process Multipass	Multipass Source Column
\\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Department\CoverDailyProd_Manager.xlsx	On	On	Dept.ProdMap
\\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Department\Daily Hours by JobClass.xlsx	On	On	Dept.ProdMap
\\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Department\Daily Hours by Jobcode.xlsx	On	On	Dept.ProdMap
\\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Department\Daily Productivity Trend Report.xlsx	On	On	Dept.ProdMap
\\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Executive\CoverDailyProd_Exec.xlsx	On	On	Dept.VP
\\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Executive\Daily Productivity 30 Days.xlsx	On	On	Dept.VP
\\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Executive\Daily Productivity Performance.xlsx	On	On	Dept.VP

Batch Control sheet

You can schedule the batch to run using the **Scheduler** from the task pane. To run on demand, select the File Processing task, then select Run Once from the top ribbon. The completed reports will be stored in the *Report Distribution > Source Files* folder.



Scheduler in the Productivity Management task pane



Scheduler

Select the collect package you wish to process, either the **Manager** or **VP Package**. There is a default package setup for each.



	C	K	L	M
1	<b>FILE COLLECT CONFIGURATION</b>	10000	15000	15300
2				
3	d3:d4	.xlsx	.xlsx	.xlsx
4		.xlsm	.xlsm	.xlsm
5		.xls	.xls	.xls
6		2 .pdf	.pdf	.pdf
8	Package name (Optional)			
9	Active	On	On	On
11	Director	Tom Gilbert	Charlie Credit	Charlie Credit
39	Auto-generate file list	Off	Off	Off
40	Continue On Error	On	On	On
41	Include common files in package	Off	Off	Off
43		File List	File List	File List
45		Axiom\Reports Library\Productivity Utilities\DailyR	Axiom\Reports Library\Productivity Utilities\DailyR	Axiom\Reports Library\Productivity Utilities\DailyR
46		CoverDailyProd_10000.xlsx	CoverDailyProd_15000.xlsx	CoverDailyProd_15300.xlsx
47		DailyJClass_10000.xlsx	DailyJClass_15000.xlsx	DailyJClass_15300.xlsx
48		DailyJCode_10000.xlsx	DailyJCode_15000.xlsx	DailyJCode_15300.xlsx
49		DailyTrend_10000.xlsx	DailyTrend_15000.xlsx	DailyTrend_15300.xlsx

FileCollect sheet

Each package consists of the following:

- An optional name, such as "Daily Manager Report Package."
- A list of source files to be collected into the output file. This list can be "hardcoded" by manually typing in file names, or you can automatically generate the list by using the **BuildSetup** tab.
- The name and file type of the output file.
- The target folder path, if the output file is to be saved. The file can be saved to a shared network drive or to a folder within the Kaufman Hall EPM Reports Library.
- Email information, if the output file is to be emailed. Use the plus sign on the left to expand the configuration sections. On Row 19 is where you can set the Email function to be on/off.

	C	K	L	M
1	<b>FILE COLLECT CONFIGURATION</b>	10000	15000	15300
2				
3	d3:d4	.xlsx	.xlsx	.xlsx
4		.xlsm	.xlsm	.xlsm
5		.xls	.xls	.xls
6		2 .pdf	.pdf	.pdf
8	Package name (Optional)			
9	Active	On	On	On
11	Director	Tom Gilbert	Charlie Credit	Charlie Credit
12	<b>Email Settings</b>			
13	Email to list			
14	Email CC list			
15	Email from			
16	Subject text	Daily Productivity Reports 06/07/2015	Daily Productivity Reports 06/07/2015	Daily Productivity Reports 06/07/2015
17	Body text	Attached are your 06/07/2015 Productivity reports. If you have any questions please contact your Finance liaison.	Attached are your 06/07/2015 Productivity reports. If you have any questions please contact your Finance liaison.	Attached are your 06/07/2015 Productivity reports. If you have any questions please contact your Finance liaison.
18	Message priority	Normal	Normal	Normal
19	Attach file to email	On	On	On
21	<b>Source Folder Settings</b>			
22	File source (Axiom or Local)	Axiom Repository	Axiom Repository	Axiom Repository
24	Source folder path	Axiom\Reports Library\Productivity Utilities\DailyR	Axiom\Reports Library\Productivity Utilities\DailyR	Axiom\Reports Library\Productivity Utilities\DailyR
25	File filter list			
27	Source folder path			
28	File filter list			
30	<b>Output File Settings</b>			
31	Output location (local file or Axiom)	Axiom Repository	Axiom Repository	Axiom Repository
32	Output folder path	Axiom\Reports Library\Productivity Utilities\DailyR	Axiom\Reports Library\Productivity Utilities\DailyR	Axiom\Reports Library\Productivity Utilities\DailyR
33	Output file name (no extension)	Daily_10000_06072015	Daily_15000_06072015	Daily_15300_06072015
34	Output file type	.xlsx	.xlsx	.xlsx
35	Save or email generated files	Save File	Save File	Save File
36	Open output file after collect	Off	Off	Off

**FileCollect Configuration sheet**

Click Refresh Data or F9 to ensure that columns are created for each grouping item (e.g., each vice president) that was setup on the BuildSetup tab.

Open the File Processing task pane and select "Process file collect" to generate report packages based on the configuration settings for the Collect.

Report packages will be saved to the folder(s) and emailed to the recipient(s) designated on the FileCollect sheet. This will depend on how you wish to setup the FileCollect.