



**SYNTELLIS**  
PERFORMANCE SOLUTIONS

**Productivity:  
Bi-Weekly Performance Reporting  
Syntellis Performance Solutions, LLC**

**June 2023**

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## Purpose

Compare actual worked (productive) hours per unit of service to a benchmark worked hours per unit of service. The benchmark can come from an outside industry benchmark or the current year budget.

## Data requirements

The following data is required for this process:

- Actual Hours by JobCode by PayType (Bi-weekly Labor Distribution file for Payroll27 tables)
- Actual key statistics by department
  - Load through an import
  - Load through a save to database report
- Budget Hours by JobCode by PayType (may already be stored in your BUD\_Pay27\_20XX tables) through use of reverse utility, Monthly to Biweekly Payroll Accrual
- Actual bi-weekly contract labor hours (if available)

## Outcome

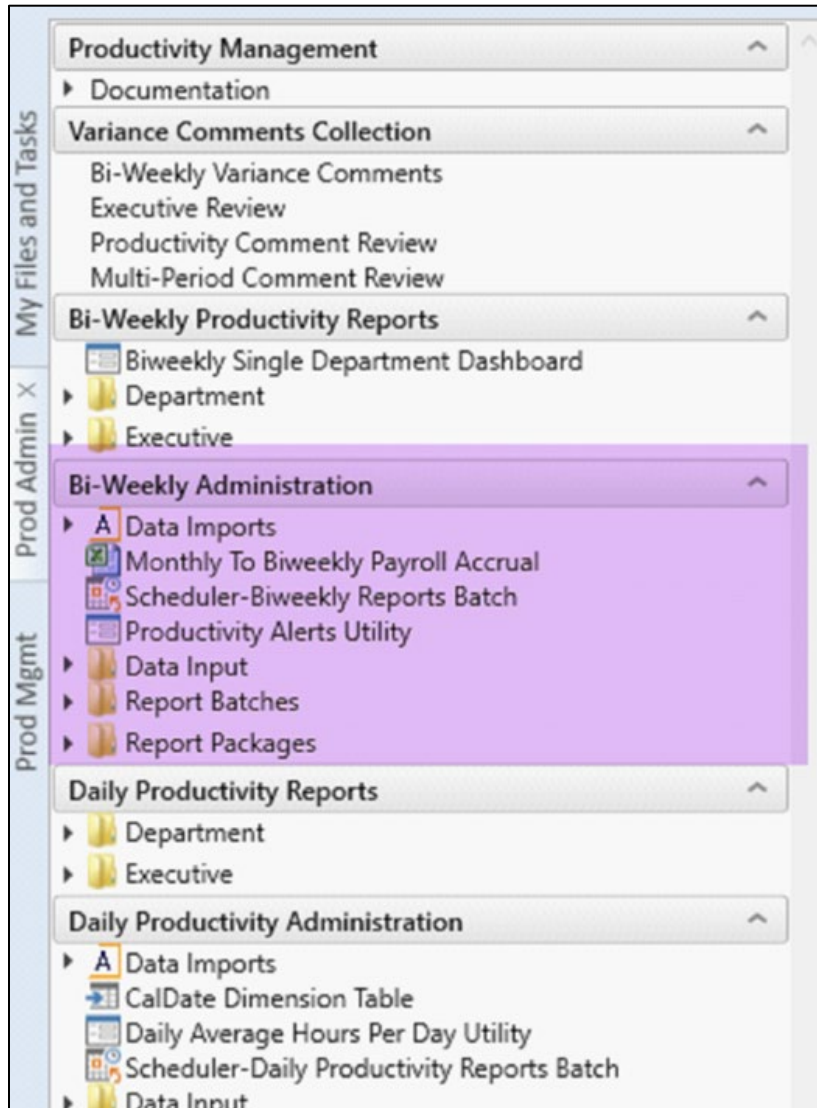
Timely and accurate payroll reporting identifies salary hour and dollar opportunities that can improve month end performance. Use productivity reporting to identify variances to benchmark so that they can be corrected before month-end close. Labor variances are categorized by efficiency, rate, and volume.

## Steps summary

1. Load and reconcile actual payroll data.
2. Load actual statistical data
3. Load actual contract labor data (if available).
4. Reverse accrued hours from BudPay12\_20XX tables to BudPay27\_20XX tables (required only at the start of new year).
5. Reverse accrued statistics from BudPay12\_20XX tables to BudPay27\_20XX tables (required only at the start of new year).
6. Process productivity reports.

## Productivity administration

Access the required tools to process the Bi-Weekly productivity reports from the Product Admin task pane.



To bring payroll hours and statistics into the Axiom system, expand **Data Imports**. The Data Input folder stores two saved database reports (manual report or RevUsage file) that you can use to import contract labor hours and manual bi-weekly statistics into the Act\_Pay27\_20XX data tables.

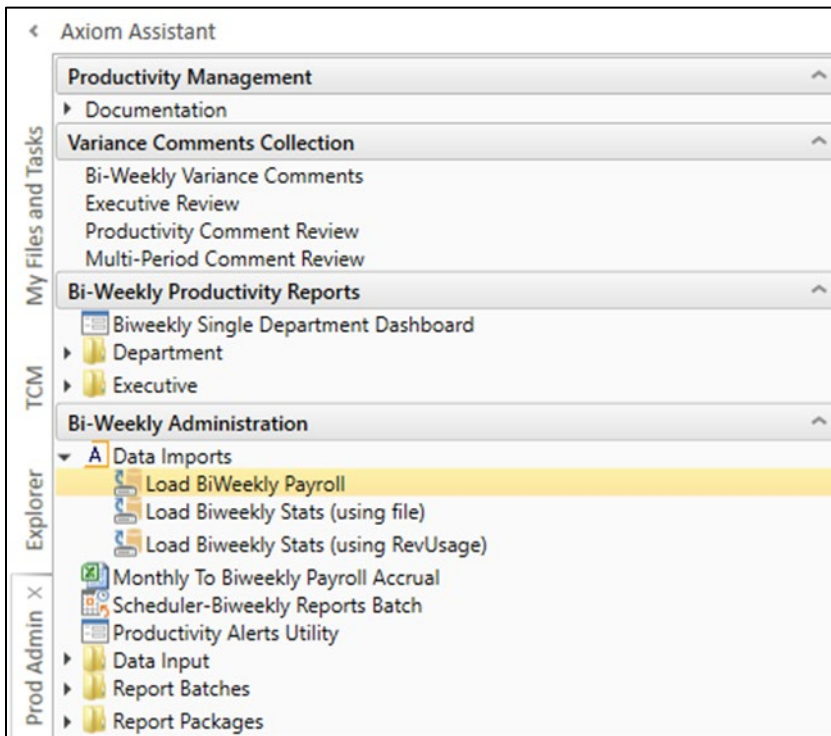
# Data imports

The following processes provide information about importing data.

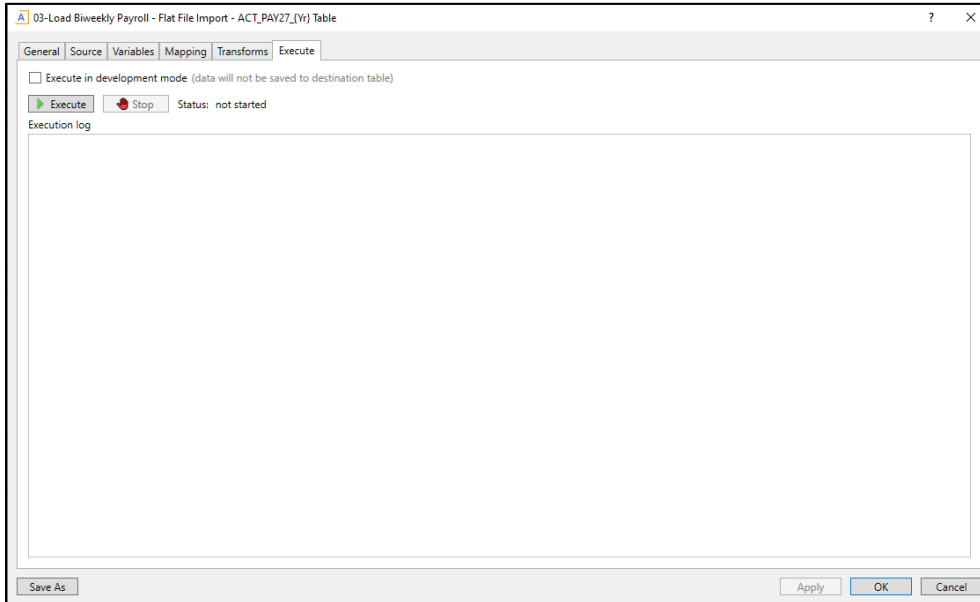
## Load actual payroll data to Payroll27 tables

1. From the task pane, click **Data Imports > Load BiWeekly Payroll** to access the Payroll import.

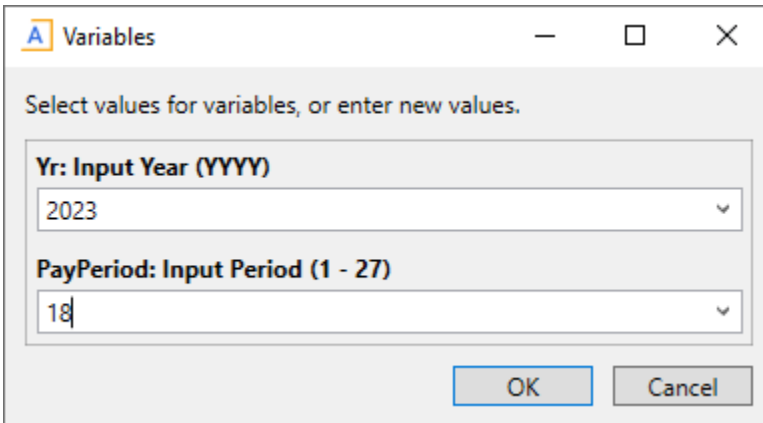
This import was set up for you during your implementation.



- Click the **Execute** tab, and then click **Execute**.



- On the Refresh Variables dialog, enter the applicable **Year** and **Pay Period**.



You can repeat this step for other pay periods by clicking **Execute** again and entering a different year or pay period.

## Error checking and validation

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

If an error is detected, an Import Error Message is displayed.

1. Click the link to access the tab that contains the error. Only one error is displayed at a time. After you resolve the current error message, a new message may appear.
2. Add the missing dimension elements, and then rerun the import.

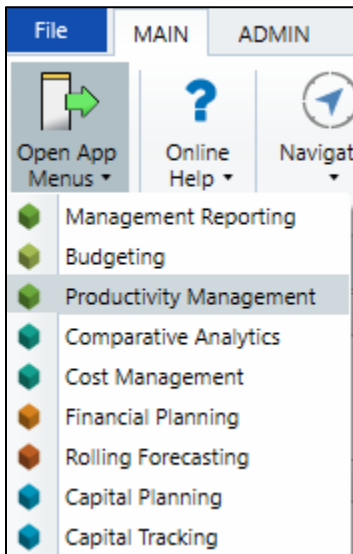
## Load bi-weekly key statistics

Load statistics for bi-weekly productivity using one of these methods:

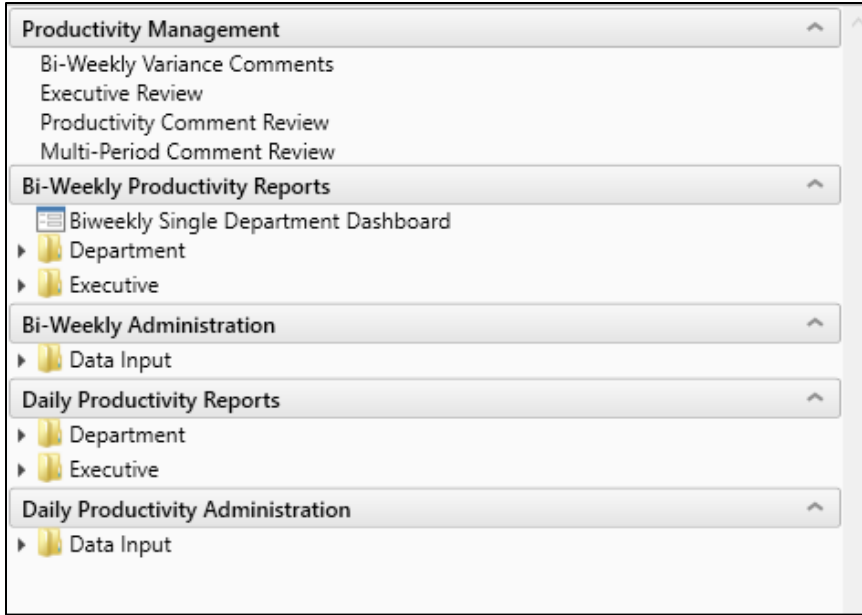
- Load bi-weekly key statistics from a report.
- Set up a bi-weekly stats import that loads to the Stats column in the Payroll27 tables.
- Set up bi-weekly import that is a copy of the RevUsage import, but posts to the statistics sequence in the Payroll27 tables.

You can access everything you need to process Bi-weekly Productivity reports from the Productivity Management task pane.

1. To access this task pane, log into Axiom.
2. From the ribbon, click Open App Menus > Productivity Management.

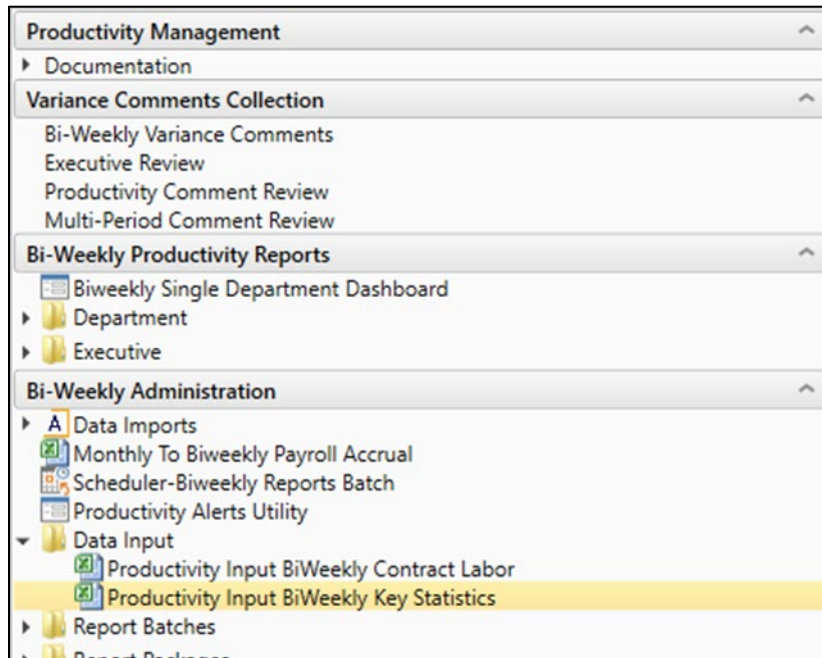


The task pane opens in the left side of the page.



## Load bi-weekly key statistics from a report

From the task pane, access Bi-weekly Administration and click **Data Input > Productivity Input BiWeekly Key Statistics**.



Use the top section of the report to enter data for new departments and the bottom section to bring in existing data from the database.

The first time that you use this report, you must manually add enough rows to enter all new departments:

1. Highlight an existing row, and then copy the entire row.
2. Highlight the number of rows you want to add, and then click **Insert copied cells** to add the rows.
3. After data appears in the database, click **Refresh Data** from the Axiom main ribbon.

The data in the report is refreshed. You can enter data by pay period, change existing pay period data, or type into any blue-shaded cell.

**Bi-Weekly Statistic Data Entry**

Portland Health C>Select REFRESH to Populate. Use Quick Filter to minimize results

Click "Save" to save values to database **No changes made**

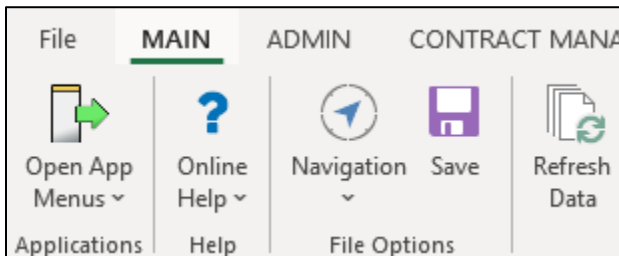
**Statistics - JobCode** JSTAT  
**Statistics - PayType** PSTAT  
**Columns to Update:** Stats  
**Refresh from Table:** ACT\_PAY27\_2021  
**Save to table:** ACT\_PAY27\_2021

Operation	Department	Description	JobCode	PayType	EMPID	10/1/2020 Stats1	10/15/20 Stats2	10/29/20 Stats3	11/12/20 Stats4
Add New Depts									
No Save		<Enter a valid Dept!	JSTAT	PSTAT	0				
No Save		<Enter a valid Dept!	JSTAT	PSTAT	0				
No Save		<Enter a valid Dept!	JSTAT	PSTAT	0				
No Save		<Enter a valid Dept!	JSTAT	PSTAT	0				
No Save		<Enter a valid Dept!	JSTAT	PSTAT	0				
No Save		<Enter a valid Dept!	JSTAT	PSTAT	0				
<Copy above rows and insert here if more are needed>									
Change Existing Depts									
[Save]	10001010	PHC Internal Medicine (Provider Detail)	JStat	PStat	0	1,814	1,814	1,862	1,875
[Save]	10001020	PHC Internal Medicine (Provider Summary)	JStat	PStat	0	696	696	714	719
[Save]	10048001	MCW General Institutional (MCW Demo)	JStat	PStat	0	14	14	14	14
[Save]	100060000	PDX00 Administration	JStat	PStat	0	14	14	14	14
[Save]	100060100	PDX00 Research Institute	JStat	PStat	0	14	14	14	14

The top of the report displays dimension and table configuration settings. You do not need to change these settings unless you want to:

- Post to a different table. Table settings default to the current year unless you change them.
- Store statistics using a different JobCode and PayType combination (default is JStat and PStat).

4. After you complete data entry, click **Save** from the main Axiom ribbon.

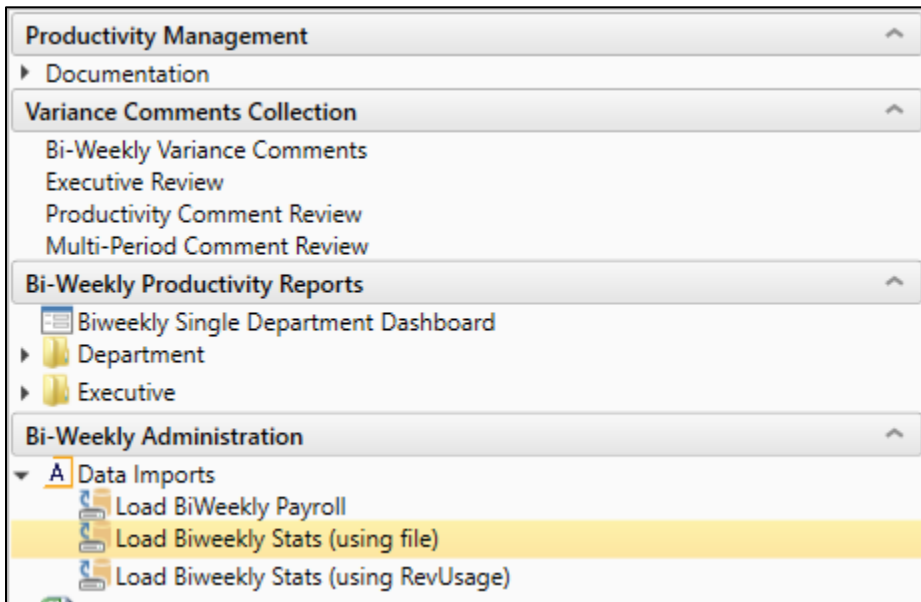


## Load actual statistical data to Payroll27 tables

1. From the task pane, click **Data Imports > Load BiWeekly Stats (using file)** to access the Statistic import.

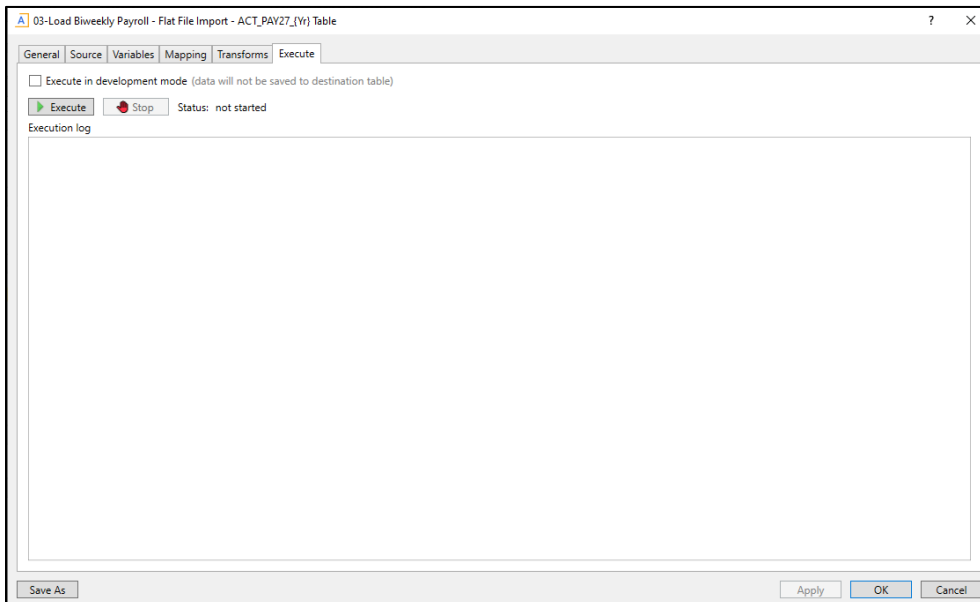


**Note:** Using this process depends on how you load statistics. You can also load some or all of the statistics by saving them to the database report.

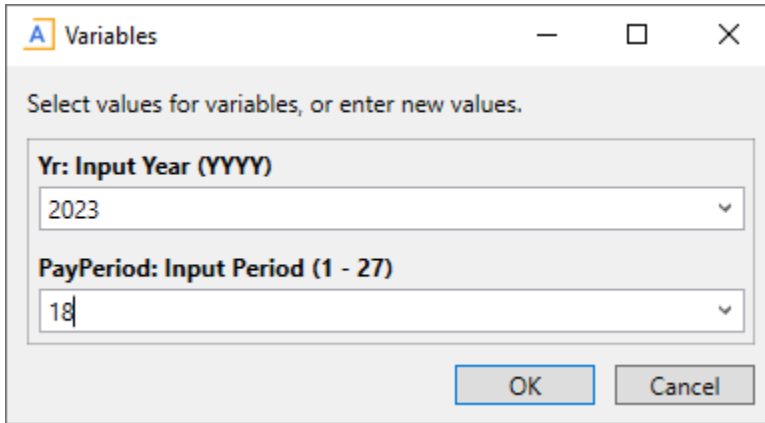


This import was set up for you during your implementation.

2. Click the **Execute** tab, and then click **Execute**.



3. On the Refresh Variables dialog, enter the applicable **Year** and **Pay Period**.



You can repeat this step for other pay periods by clicking **Execute** again and entering a different year or pay period.

## Error checking and validation

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

If an error is detected, an Import Error message is displayed.

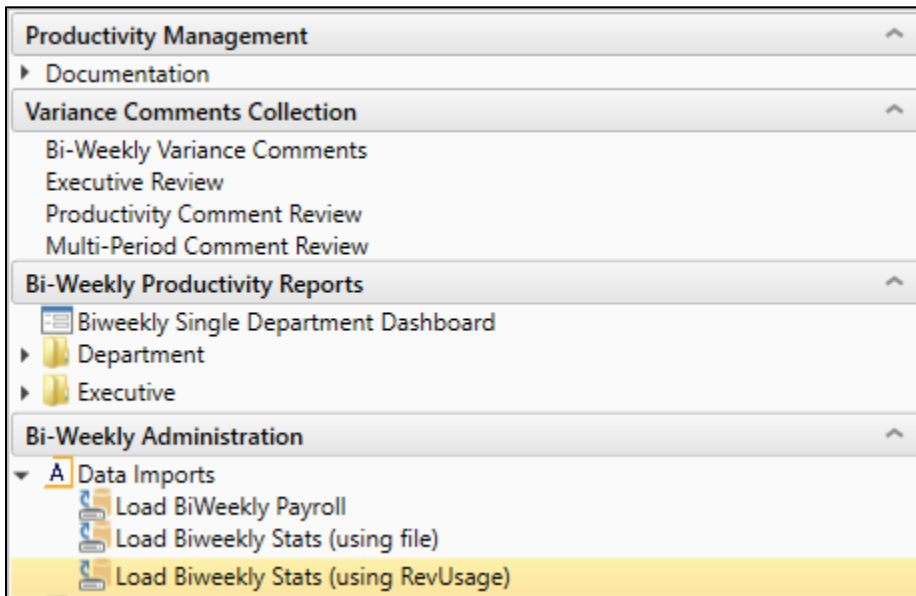
1. Click the link to access the tab that contains the error. Only one error is displayed at a time. After you resolve the current error message, a new message may appear.
2. Add the missing dimension elements, and then rerun the import.

## Load actual statistical data (from RevUsage data) to Payroll27 tables

1. From the task pane, click **Data Imports > Load BiWeekly Stats (using RevUsage)** to access the Statistic import.

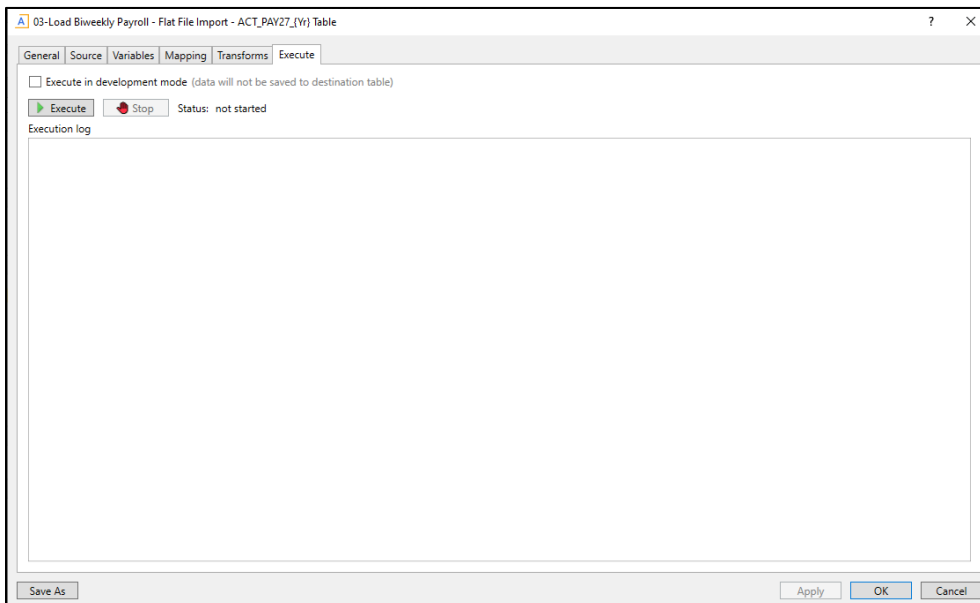


**Note:** Using this process depends on how you load statistics. You can also load some or all of the statistics by saving them to the database report.

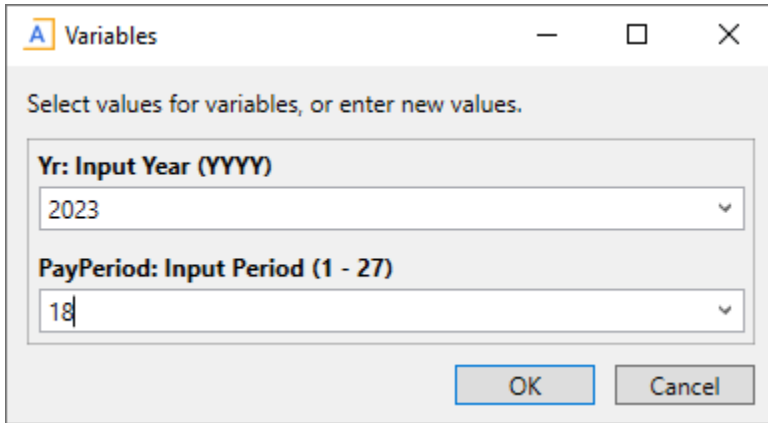


This import was set up for you during your implementation.

2. Click the **Execute** tab, and then click **Execute**.



3. On the Refresh Variables dialog, enter the applicable **Year** and **Pay Period**.



You can repeat this step for other pay periods by clicking **Execute** again and entering a different year or pay period.



**Note:** The data is not stored by **CDMCode**, but instead summarizes volume by pay period based on the **CDMCode.KeyStat='Yes'** and **CDMCode.RVU** settings in the **CDMCode** dimension.

## Error checking and validation

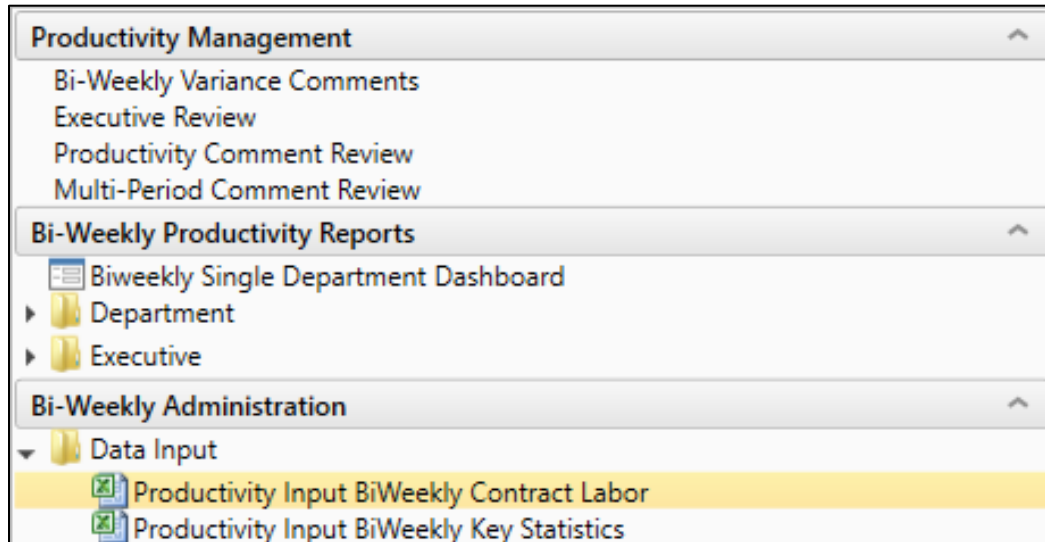
As you complete the import settings, the Import Wizard performs error checking for missing required and invalid settings. If the destination table has linked columns (columns that are assigned to a lookup column), data is validated automatically against the lookup column before importing.

If an error is detected, an Import Error Message is displayed.

1. Click the link to access the tab that contains the error. Only one error is displayed at a time. After you resolve the current error message, a new message may appear.
2. Add the missing dimension elements, and then rerun the import.

## Load actual contract labor data

If data is available, access Bi-weekly Administration and click **Data Input > Productivity Input BiWeekly Contract Labor**.

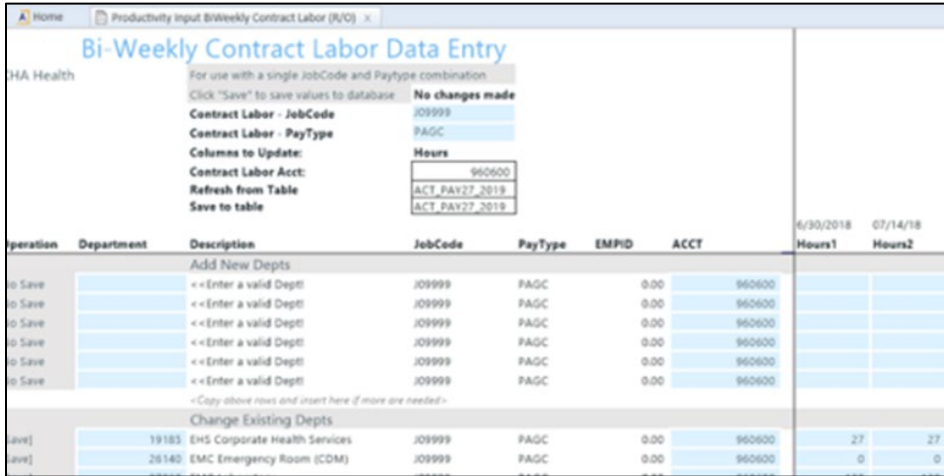


Use the top section of the report to enter data for new departments and the bottom section to bring in existing data from the database.

The first time using this report, you must manually add enough rows to enter all new departments:

1. Highlight an existing row, and then copy the entire row.
2. Highlight the number of rows you want to add, and then click **Insert copied cells** to add the rows.
3. After data appears in the database, click **Refresh Data** from the Axiom main ribbon.

The data in the report is refreshed. You can enter data by pay period, change existing pay period data, or type into any blue-shaded cell.



Operation	Department	Description	JobCode	PayType	EMPID	ACCT	6/30/2018	07/14/18
							Hours1	Hours2
<b>Add New Depts</b>								
Save		< Enter a valid Dept	J09999	PAGC	0.00	960600		
Save		< Enter a valid Dept	J09999	PAGC	0.00	960600		
Save		< Enter a valid Dept	J09999	PAGC	0.00	960600		
Save		< Enter a valid Dept	J09999	PAGC	0.00	960600		
Save		< Enter a valid Dept	J09999	PAGC	0.00	960600		
Save		< Enter a valid Dept	J09999	PAGC	0.00	960600		
<b>Change Existing Depts</b>								
[save]	19183	EHS Corporate Health Services	J09999	PAGC	0.00	960600	27	27
[save]	26140	EMC Emergency Room (CDM)	J09999	PAGC	0.00	960600	0	0

The top of the report displays dimension and table configuration settings. You do not need to change these settings unless you want to:

- Post to a different table. Table settings default to the current year unless you change them.
- Store contract labor hours using a different JobCode and PayType combination (default is J09999 and PAGC).

4. After you complete data entry, click **Save**.

## Accrue budget labor and statistical data to Payroll27 tables

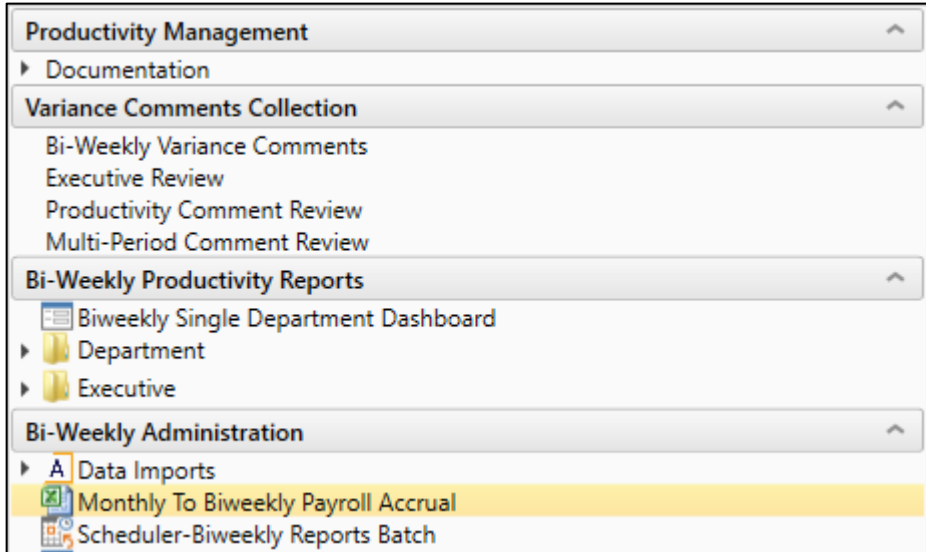
After the budget is complete, this report accrues the following data from the Payroll12 budget tables to Payroll27 budget tables:

- Monthly budget payroll hours
- Statistics
- Dollars

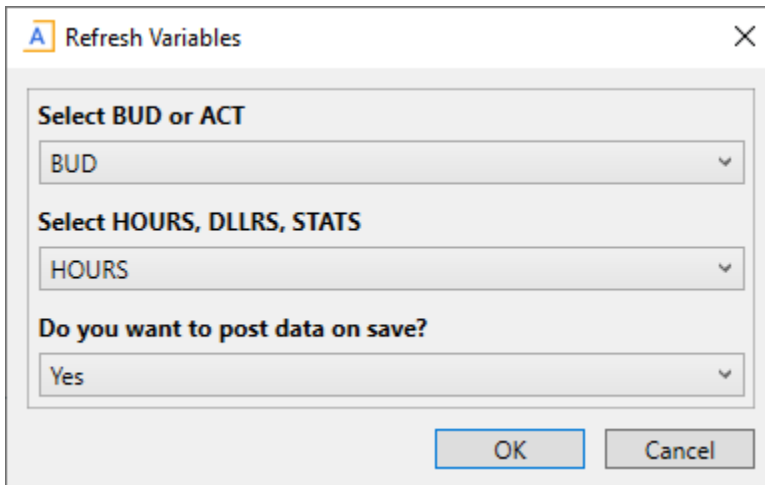


**Note:** Budgeting only needs to be done once per fiscal year at the beginning of the year.

1. From the Task pane, access Bi-weekly Administration and click **Data Imports > Monthly To Biweekly Payroll Accrual**.



When the report opens, a Refresh Variables dialog prompts you on whether to accrue hours or dollars, and then post to the database.



2. To accrue hours or dollars and post to the database, click **Hours**, and then click **Yes** to post.
3. After the report is opened, click **Process File** from the File Processing task pane.

- To accrue dollars, click **Refresh data** (Axiom main menu), click **Dllrs**, and then click **Yes** to post.

Payroll12 to Payroll27 - Reverse Accrual							
Row	Month	Input Col	Days	DaysChk	PayPeriod >		
1	13	July	AL	31	31	14	
2	14	August	AM	31	31		
3	15	September	AN	30	30		
4	16	October	AO	31	31		
5	17	November	AP	30	30		
6	18	December	AQ	31	31		
7	19	January	AR	31	31		
8	20	February	AS	29	29		
9	21	March	AT	31	31		
10	22	April	AU	30	30		
11	23	May	AV	31	31		
12	24	June	AW	30	30		
Total				366	366	14	
<b>Monthly Allocation % Matrix</b>				Mth1 %	0.452	0.4	
				Mth2 %	0.000	0.0	
				Mth3 %	0.000	0.0	
				Mth4 %	0.000	0.0	
				Mth5 %	0.000	0.0	
				Mth6 %	0.000	0.0	
				Mth7 %	0.000	0.0	
				Mth8 %	0.000	0.0	
				Mth9 %	0.000	0.0	
				Mth10 %	0.000	0.0	
				Mth11 %	0.000	0.0	
				Mth12 %	0.000	0.0	

Sequence	Tables
CY BUD HOURS	BUD_PAY12_2020
CY BUD HOURS	BUD_PAY27_2020

- After you open the report, click **Process file** from the File Processing task pane.

My Files and Tasks

### File Processing Settings ?

Processing Type: Save Data

Save Data Mode: Save Once at the End

Save Data tags are static for all passes

---

Sheet Assistant

### MultiPass Settings [Show Advanced View](#)

Source Column: DEPT.DEPT

Preview Multipass List

---

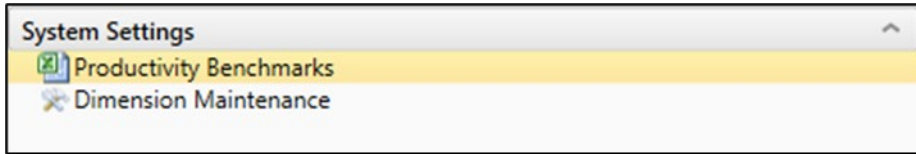
File Processing

### Actions

- [Refresh settings from workbook](#)
- [Process file](#)
- [Process file multipass](#)

## Update Benchmarks table (optional)

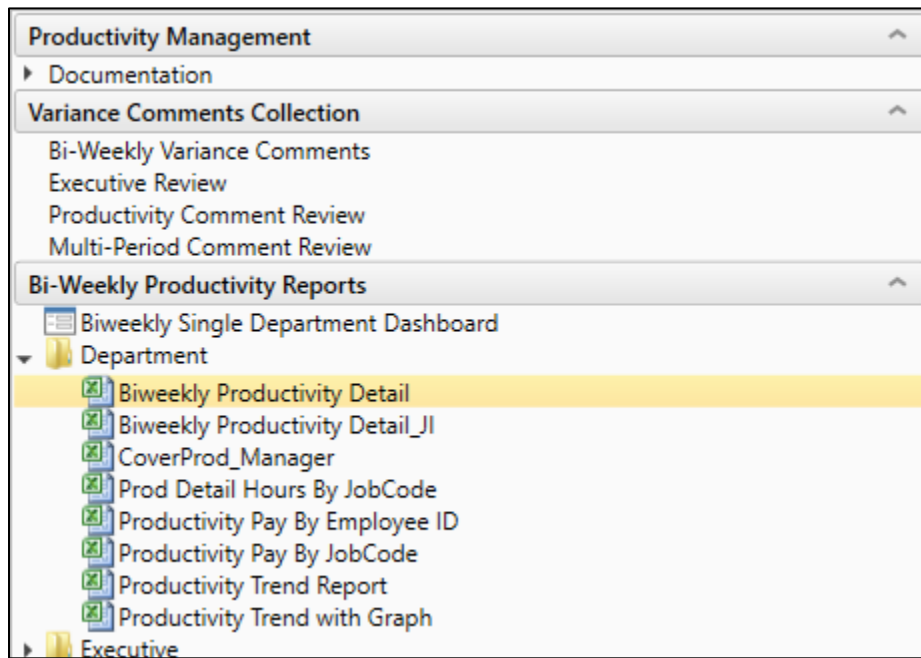
- To update benchmarks, click **System Settings > Productivity Benchmarks** from the task pane.



- Make any additions or changes, and then click **Save** from the Axiom main menu.

## Available reports for managers and directors

From the task pane, click **Bi-Weekly Productivity Reports > Department > Biweekly Productivity Detail** to access the reports.



When you refresh the report, a refresh variable dialog prompts you to select either **Budget** or **Benchmark** as the standard.

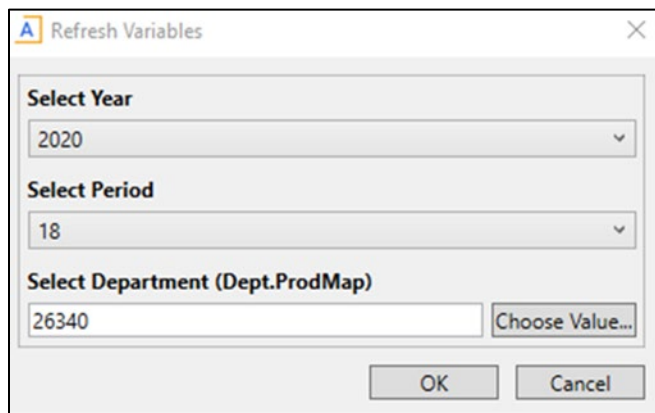
Benchmark Factors						
Used in Productivity & Budgeting (Data is saved to Table=BENCHMARK)						
Dept	Department Name	Worked Hours per Unit	Paid Hours per Unit	Salaries per Unit	Supplies per Unit	Total Expense per Unit
10001010	PHC Internal Medicine (Provider Detail)	3.84	4.22	0.00	0.00	0.00
10001020	PHC Internal Medicine (Provider Summary)	3.93	4.32	0.00	0.00	0.00
100060000	PDX00 Administration	85.61	94.17	0.00	0.00	0.00
100060100	PDX00 Research Institute	55.39	60.93	0.00	0.00	0.00
100060200	PDX00 Administration- VP	47.34	52.07	0.00	0.00	0.00

## Biweekly Productivity Detail report

**Description:** Displays actual and budget payroll data by JobCode and Category for the current pay period. A productivity index is also available for the current period and year to date.

Additional information:

- Tracks productive hours and targeted productivity by JobCode
- Is generated on a biweekly basis by department
- Focuses on productivity index by JobCode



A dialog box titled "Refresh Variables" with a close button (X) in the top right corner. It contains three sections: "Select Year" with a dropdown menu showing "2020"; "Select Period" with a dropdown menu showing "18"; and "Select Department (Dept.ProdMap)" with a text input field containing "26340" and a "Choose Value..." button. At the bottom are "OK" and "Cancel" buttons.

Biweekly Productivity Detail KHA Health For The Pay Period Ending: 03/08/19 26340 - EMC CCU (Staffing)		Actual					Budget						
		Regular & Other	Over Time	Agency	Total Productive	Non Productive	Total Paid	Actual Per Unit	Regular & Other	Over Time	Agency	Total Productive	Non Productive
JobCode	Description												
	Workload Statistic: Days					80							
	Total Hours	1,671	147	0	1,818	141	1,959	24.49	3,626	304	0	3,930	416
	Total FTEs	20.89	1.84	0.00	22.73	1.76	24.49		45.33	3.80	0.00	49.12	5.20
	Total Dollars	\$44,392	\$6,084	\$0	\$50,476	\$2,287	\$52,764	\$660	\$90,953	\$12,585	\$0	\$103,538	\$9,665
	Total Hours per Unit	20.89	1.84	0.00	22.73	1.76	24.49		40.09	3.36	0.00	43.44	4.60
	Units per Hour	0.05	0.54	0.00	0.04	0.57	0.04		0.02	0.30	0.00	0.02	0.22
	Average Hourly Rate	\$26.57	\$41.28	\$0.00	\$27.76	\$16.26	\$26.93		\$25.08	\$41.45	\$0.00	\$26.35	\$23.23
	Summary of Paid Dollars												
00191	Staff RN	0	0	0	0	0	0.00		74,604	12,113	0	86,717	8,486
00303	Manager-Nursing	2,471	30	0	2,501	0	31.26		1,414	69	0	1,483	0
00318	Staff RN	34,774	6,047	0	40,821	1,613	42,434	530.42	0	0	0	0	0
00324	Unit Clerk II	2,225	0	0	2,225	409	2,635	32.94	4,559	262	0	4,822	601
00905	Physical Therapist	9,154	0	0	9,154	0	9,154	98.58	8,540	0	0	8,540	0

## CoverProd\_Manager report

**Description:** Cover page for distributed packages for Managers and Directors; displays the reports in the package.

Additional information:

- Can be customized for your organization
- Is generated on a biweekly basis by department

✕

**Refresh Variables**

**Select Year**

**Select Period**

## Pay The Period Ending: 2/22/2020

---

**Department 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.*

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

---

**REPORT TYPES**

<b>Tab Name</b>	<b>Type of Report</b>
Prod_Dept Number	Hours and Dollars by JobCode
ProdJC_Dept Number	Hours by JobCode
ProdTrend_Dept Number	Productivity by Pay Period, with Graph
ProdGraph_Dept Number	Productivity by Pay Period
ProdID_Dept Number	Pay By Employee ID
JCProd_Dept Number	Pay By JobCode

## Prod Detail Hours by JobCode report

**Description:** Displays actual and budget payroll data by JobCode and Category for the current pay period. A productivity index is also available for the current period and year to date

Additional information:

- Tracks productive hours and targeted productivity by JobCode.
- Is generated on a biweekly basis by department
- Focuses on productivity index by JobCode

Productivity Detail Hours by JobCode		Actual Data										Target Data Using Budget	
JobCode	Description	Statistic	Non Productive	Over Time	Other	Agency	Total Regular	Total Productive	Total Paid Hours	FTEs	Productive Hours	Operating Standard	
Workload Statistic: Days		80											
J00191	Staff RN		0	0	0	0	0	0	0	0.00	2,521	31,509	
J00303	Manager-Nursing		0	1	0	0	80	81	81	1.01	41	0,507	
J00318	Staff RN		70	146	0	0	1,109	1,255	1,325	16.56	0	0,000	
J00324	Unit Clerk II		38	0	0	0	199	199	237	2.96	366	4,572	
J00595	Clinical Director		0	0	0	0	80	80	80	1.00	139	1,739	
J00772	Patient Care Associate		32	1	0	0	203	204	236	2.95	409	5,114	
J00973	Staff Nurse/Clinical Lead		0	0	0	0	0	0	0	0.00	0	0,000	
<b>Total</b>			<b>141</b>	<b>147</b>	<b>0</b>	<b>0</b>	<b>1,671</b>	<b>1,818</b>	<b>1,959</b>	<b>24.49</b>	<b>3,475</b>	<b>43,442</b>	

## Productivity Pay by Employee ID report

**Description:** Displays actual data by Employee ID for the following categories:

- Productive
- Overtime
- Contract
- Non-Productive

Additional information:

- Trended by pay category
- Trended for multiple periods

Productivity Payroll Summary - By Employee ID				Pay Period Ending: Current PayCycle: 2				
Job Code	Description	Employee ID	Employee Name	12/14/18 PP-12 Hours	12/28/18 PP-13 Hours	01/11/19 PP-14 Hours	01/25/19 PP-15 Hours	02/08/19 PP-16 Hours
J00688	Diagnostic Medical Sonograg	27179	Waggoner, Asher	63	69	70	80	64
J00527	Radiologic Technologist	27591	Sayles, Holly	67	62	77	80	80
J00629	Technologist Assistant-Ra	27733	Beth, Martha	68	80	54	74	68
J00631	Physician Assistant	88888	Porter, Anthony	90	80	42	80	75
<b>Total - Productive Hours (excluding OT)</b>				<b>845</b>	<b>886</b>	<b>801</b>	<b>888</b>	<b>929</b>
<b>Total FTEs Productive (excluding OT)</b>				<b>11.82</b>	<b>11.07</b>	<b>10.02</b>	<b>11.10</b>	<b>11.61</b>
J00506	Team Leader-MRI	21979	Porter, Anthony	14	15	11	17	11
J00527	Radiologic Technologist	22071	Swaminathan, Subudh	0	0	0	0	0
J00527	Radiologic Technologist	26042	Ford, Joyce	1	1	2	7	1
J00527	Radiologic Technologist	26309	Hamel, Ruth	0	0	0	0	1
J00688	Diagnostic Medical Sonograg	26315	Cornelius, Rosa	6	2	0	0	0
J00688	Diagnostic Medical Sonograg	27179	Waggoner, Asher	0	10	19	1	16
J00527	Radiologic Technologist	27591	Sayles, Holly	0	0	0	4	2
J00629	Technologist Assistant-Ra	27733	Beth, Martha	0	5	1	0	0
J00631	Physician Assistant	88888	Porter, Anthony	14	15	11	17	11
<b>Total - Overtime Hours</b>				<b>38</b>	<b>62</b>	<b>70</b>	<b>74</b>	<b>60</b>

## Productivity Pay by JobCode report

**Description:** Displays actual data by JobCode for the following categories:

- Productive
- Overtime
- Contract
- Non-Productive

Additional information:

- Trended by pay category
- Trended for multiple periods

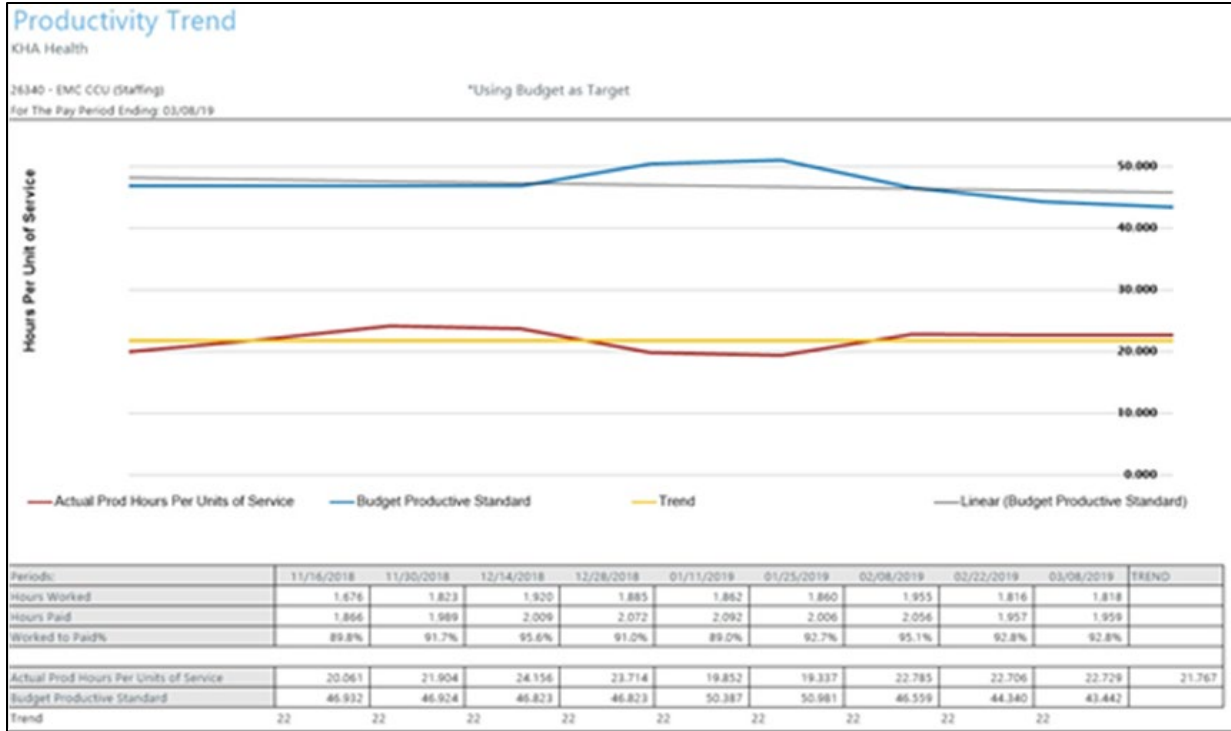
Productivity Pay By JobCode		Pay Period Ending: 12/14/18, 12/28/18, 01/11/19, 01/25/19, 02/08/19, 02/22/19, 03/08/19						
IDHA Health For The Pay Period Ending: 03/08/19 27200 - EMC Radiology - MRI (JobCode)		PP-12	PP-13	PP-14	PP-15	PP-16	PP-17	PP-18
Job Code	Description	Hours	Hours	Hours	Hours	Hours	Hours	Hours
/TargetAdj	Productivity Target Adjustment	0	0	0	0	0	0	0
	Total - Productive Hours (excluding OT)	845	886	801	888	929	927	8
	Total FTEs Productive (excluding OT)	11.82	11.07	10.02	11.10	11.61	11.58	11
J00200	Technologist Assistant	0	0	0	0	0	0	0
J00287	Team Leader	0	0	0	0	0	0	0
J00498	Record Clerk	1	0	0	0	1	0	0
J00506	Team Leader-MRI	14	15	11	17	11	17	5
J00507	Radiologic Technologist	4	10	7	17	6	10	0
J00609	Technologist Assistant-Rs	0	5	1	0	0	5	5
J00646	Radiology Technician	0	0	0	0	0	0	0
J00651	Physician Assistant	14	15	11	17	11	17	5
J00688	Diagnostic Medical Sonographer	6	17	40	22	32	27	0
	Total - Overtime Hours	38	62	70	74	60	52	0
	Total FTEs Overtime	0.47	0.77	0.88	0.92	0.75	0.65	0

## Productivity Trend with Graph report

**Description:** Displays actual and target payroll hours data for one department, trended by pay period. The actual hours per unit of service is compared to the target per unit of service. A trend line shows the current trend.

Additional information:

- Tracks volume and hours per unit on a biweekly basis
- Based on a 9-week pay period rolling cycle
- Compares actual hours per unit of service to a benchmark standard



## Biweekly Productivity Trend report

**Description:** Displays actual and budget payroll data by jobcode and category for the current pay period.

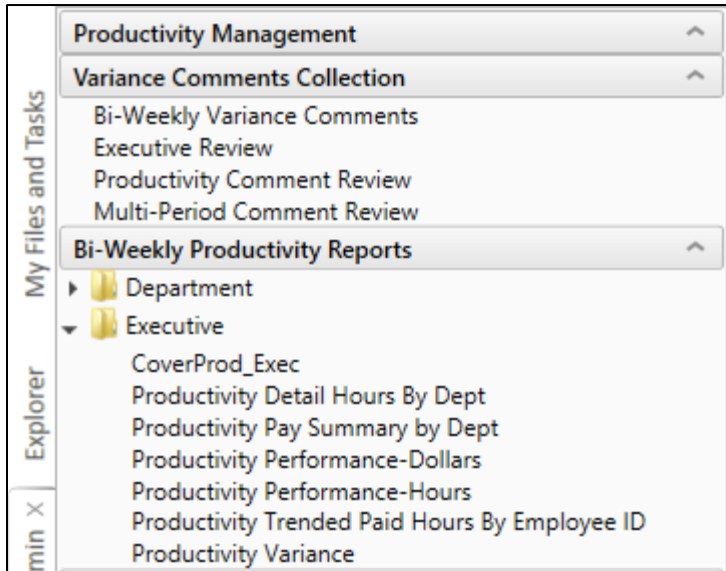
Additional information:

- Tracks volume, productive hours, and productive hours per unit-actual to target
- Based on cumulative YTD pay period cycle
- Exceptions created based on Productivity Index

Productivity Trend											
KHA Health For The Pay Period Ending: 03/08/2019 DEPT.ProdMap = 27200 - EMC Radiology - MRI (JobCode)											
Pay Period	Period End Date	Actual Data			Target Data - Budget		Variance Analysis			Summary	
		Workload Procedures	Productive Hours	Prod Hrs / Statistic	Productive Hours	Prod Hrs / Statistic	Prod Hrs / Statistic	Hours	FTEs	Productivity Index	Alert
1	07/13/18	592	1,133	1.914	811	1.370	(0.544)	(322)	(4.02)	71.6%	
2	07/27/18	592	1,129	1.907	811	1.370	(0.538)	(318)	(3.98)	71.8%	
3	08/10/18	641	1,299	2.027	879	1.372	(0.655)	(420)	(5.24)	67.7%	
4	08/24/18	654	1,223	1.870	898	1.373	(0.497)	(325)	(4.07)	73.4%	
5	09/07/18	590	1,092	1.850	809	1.370	(0.481)	(284)	(3.55)	74.0%	
6	09/21/18	543	1,260	2.321	742	1.368	(0.953)	(517)	(6.47)	58.9%	R
7	10/05/18	529	1,255	2.374	725	1.371	(1.003)	(530)	(6.63)	57.8%	R
8	10/19/18	510	1,110	2.177	702	1.377	(0.800)	(408)	(5.10)	63.2%	
9	11/02/18	528	1,299	2.462	725	1.374	(1.088)	(574)	(7.18)	55.8%	R
10	11/16/18	593	917	1.545	809	1.363	(0.182)	(108)	(1.35)	88.2%	
11	11/30/18	589	1,344	2.280	804	1.364	(0.916)	(540)	(6.75)	59.8%	R
12	12/14/18	541	1,387	2.566	744	1.376	(1.189)	(643)	(8.03)	53.7%	R
13	12/28/18	541	1,352	2.500	744	1.376	(1.124)	(608)	(7.59)	55.0%	R
14	01/11/19	597	1,172	1.962	818	1.369	(0.593)	(354)	(4.43)	69.8%	
15	01/25/19	607	1,245	2.052	830	1.368	(0.684)	(415)	(5.19)	66.7%	
16	02/08/19	656	1,328	2.026	894	1.363	(0.663)	(435)	(5.43)	67.3%	
17	02/22/19	683	1,348	1.975	929	1.360	(0.615)	(420)	(5.25)	68.9%	
18	03/08/19	683	1,137	1.667	936	1.372	(0.295)	(201)	(2.51)	82.3%	
<b>YTD Total</b>		<b>10,667</b>	<b>22,031</b>	<b>2.065</b>	<b>14,609</b>	<b>1.370</b>	<b>(0.696)</b>	<b>(7,421)</b>	<b>(5.15)</b>	<b>66.3%</b>	
<b>YTD Average</b>		<b>593</b>	<b>1,224</b>	<b>2.065</b>	<b>812</b>	<b>1.370</b>	<b>(0.696)</b>	<b>(412)</b>	<b>(5.15)</b>	<b>66.3%</b>	

## Available reports for executives

From the task pane, click **Bi-Weekly Productivity Reports > Executive** to access the reports.



## CoverProd\_Exec report

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

Additional information:

- Can be customized for your organization
- Is generated on a biweekly basis by Vice President

For The Pay Period Ending: 2/22/2020

Executive 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.*

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

**REPORT TYPES**

Tab Name	Type of Report
ProdHrs_	Productivity by Department, by pay category
PerformanceDlrs_	Productivity by Department Dollars-red, yellow, green summary
PerformanceHrs_	Productivity by Department Hours-red, yellow, green summary
ProdVar_	Productivity by Department
PayProd_	Pay Detail by Department
PaidTrend_	Paid Hours by Employee

## Productivity Detail Hours by Department report

**Description:** Displays actual and budget payroll data by department and category for the current pay period. A productivity index is available for the Current Period and Year To Date.

Additional information:

- Tracks actual hours and targets productivity by department
- Is generated on a biweekly basis by Vice President
- Focuses on productivity index by department

Productivity Detail Hours by Dept		Actual Data										Target Data
Dept	Description	Workload Statistic	Workload Volume	Non Productive	Over Time	Other	Agency	Total Regular	Total Productive	Total Paid Hours	FTEs	Productive Hours
101104	EMA Urgent Care Pediatrics		91	2	1	0	0	201	201	203	2.54	0
101200	EMA Ob/Gyn		992	217	22	0	0	2,602	2,625	2,842	35.52	0
101300	EMA Medical Specialties		0	146	8	0	0	1,747	1,755	1,901	23.77	0
101301	EMA Cardiology		1,187	123	32	0	0	1,526	1,558	1,681	21.01	0
101305	EMA Dermatology		292	36	5	0	0	420	426	461	5.77	0
101306	EMA Oncology		935	202	14	0	0	2,352	2,366	2,568	32.10	0
101307	EMA Genetics		20	5	0	0	0	75	75	80	1.00	0
101309	EMA Neurology		111	29	1	0	0	280	281	310	3.88	0
101329	EMA Nutrition		46	8	0	0	0	60	60	68	0.85	0
101353	EMA Gastroenterology		194	53	4	0	0	596	600	653	8.17	0
101400	EMA Surgical Specialties		869	114	1	0	0	1,077	1,078	1,191	14.89	0
101401	EMA General Surgery		635	179	10	0	0	1,750	1,761	1,940	24.25	0
101408	EMA Ophthalmology		1,051	102	3	0	0	1,203	1,207	1,309	16.36	0
101510	EMA Radiology Services		638	81	7	0	0	910	917	998	12.47	0
101710	EMA BH		420	22	7	0	0	651	658	680	8.50	0
102002	EMA Dental		946	186	30	0	0	2,119	2,150	2,336	29.20	0
102200	EMA Optical		140	22	1	0	0	317	318	340	4.25	0
107060	EMA Laboratory		5,079	193	32	0	0	2,191	2,223	2,416	30.20	0
107090	EMA Pathology		2,670	92	55	0	65	1,906	2,027	2,119	26.48	0
107200	EMA Radiology Services		935	98	11	0	0	920	930	1,028	12.85	0
107300	EMA Pharmacy		0	98	23	0	0	1,396	1,418	1,516	18.96	0
107370	EMA Rehab Services		1,269	102	10	0	0	1,197	1,207	1,308	16.36	0
109120	EMA Business Operations		0	190	5	0	0	2,151	2,156	2,347	29.33	0
109310	EMA Facility Operations		0	228	77	0	0	2,846	2,923	3,151	39.39	0
<b>Total</b>			<b>17,400</b>	<b>7,689</b>	<b>0</b>	<b>567</b>	<b>216,894</b>	<b>225,250</b>	<b>242,650</b>	<b>3,033.12</b>	<b>190,530</b>	

## Productivity Payroll Summary by Department report

**Description:** Displays actual data by department for the following categories:

- Productive
- Overtime
- Contract
- Non-Productive

Additional information:

- Trended by multiple pay period
- Trended by pay category

Department Payroll Summary - By Department									
KHA Health For The Pay Period Ending: 03/02/19		12/09/18	12/22/18	01/05/19	01/19/19	02/02/19	02/16/19	03/02/19	FY 20
Department	Description	PP-12 Hours	PP-13 Hours	PP-14 Hours	PP-15 Hours	PP-16 Hours	PP-17 Hours	PP-18 Hours	YTD-A Hours
101306	EMA Oncology	2,374	2,463	2,315	2,560	2,527	2,708	2,352	
101307	EMA Genetics	80	80	80	40	80	80	75	
101309	EMA Neurology	280	316	264	304	227	240	280	
101329	EMA Nutrition	70	49	65	64	57	44	60	
101353	EMA Gastroenterology	623	695	590	599	596	436	596	
101400	EMA Surgical Specialties	959	1,190	916	1,066	958	1,006	1,077	
101401	EMA General Surgery	1,750	1,957	1,711	1,789	1,653	1,541	1,750	
101408	EMA Ophthalmology	1,050	1,311	1,169	1,360	1,389	1,373	1,203	
101510	EMA Radiology Services	915	967	806	932	901	965	910	
101710	EMA BH	688	703	623	695	619	748	651	
102002	EMA Dental	2,146	2,332	1,898	1,983	1,848	2,043	2,119	
102200	EMA Optical	295	303	267	287	271	286	317	
107060	EMA Laboratory	2,127	2,316	2,078	2,172	2,254	2,349	2,191	
107090	EMA Pathology	1,992	2,071	1,722	2,156	2,017	2,052	1,906	
107200	EMA Radiology Services	941	923	849	931	872	939	920	
107300	EMA Pharmacy	1,447	1,480	1,316	1,365	1,264	1,456	1,396	
107370	EMA Rehab Services	1,252	1,242	1,196	1,300	1,205	1,317	1,197	
109120	EMA Business Operations	1,985	2,206	2,012	1,988	2,001	1,855	2,151	
109310	EMA Facility Operations	2,903	3,267	3,215	3,463	3,134	3,202	2,846	
<b>Total - Productive Hours (excluding OT)</b>		<b>220,907</b>	<b>222,938</b>	<b>217,609</b>	<b>215,356</b>	<b>214,866</b>	<b>217,998</b>	<b>216,994</b>	<b>3.81</b>
<b>Total FTEs Productive (excluding OT)</b>		<b>2,750.09</b>	<b>2,786.73</b>	<b>2,720.12</b>	<b>2,691.95</b>	<b>2,685.83</b>	<b>2,724.98</b>	<b>2,712.42</b>	<b>2.1</b>

## Productivity Performance – Hours reports

**Description:** Displays actual and budget payroll dollars hours by department for the current pay period. A productivity index is also available for the Current Period and Performance Flag.

Additional information:

- Tracks actual and target/budget dollars and dollars per statistic
- Is generated on a biweekly basis by Vice President
- Focuses on unfavorable totals and productivity index
- Stratifies performance into three categories based on user-defined criteria

Productivity Performance - Hours				Above Threshold %		95.0%					
KHA Health For The Pay Period Ending: 03/02/19				Below Threshold %		15.0%					
Dept	Description	Workload Statistic	Actual Data		Target Data-Using Budget		Variance		Summary		
			Workload Volume	Productive Hours	Prod Hours / Statistic	Prod Hours / Statistic	Productive Hours	Hours	/Stat	Productivity Index	Flag
<b>Favorable Totals</b>			<b>144,155</b>		<b>157,540</b>		<b>13,385</b>		<b>109.3%</b>		
<b>Unfavorable Totals</b>			<b>81,095</b>		<b>32,991</b>		<b>(48,105)</b>		<b>40.7%</b>		
17840	EHS Sports Medicine	Calendar Days	14	520	37.14	38.14	534	14	1.00	102.7%	▲
17880	EPG Phys Clinic-North	Calendar Days	14	80	5.71	18.94	265	185	13.22	331.4%	▲
17881	EPG Phys Clinic-Occ Hlth East	Calendar Days	14	80	5.71	0.00	0	(80)	(5.71)	0.0%	▼
17883	EPG Phys Clinic-Occ Hlth Midtown	Calendar Days	14	402	28.70	0.00	0	(402)	(28.70)	0.0%	▼
17885	EPG Phys Clinic-East	Calendar Days	14	240	17.14	15.81	221	(19)	(1.33)	92.2%	▼
17886	EPG Phys Clinic-Occ Hlth/West	Calendar Days	14	80	5.71	0.00	0	(80)	(5.71)	0.0%	▼
17891	EPG Phys Clinic-South	Calendar Days	14	240	17.14	11.59	162	(78)	(5.55)	67.6%	▼
17894	EPG Phys Clinic-Uptown	Calendar Days	14	160	11.43	0.00	0	(160)	(11.43)	0.0%	▼
17895	EPG Phys Clinic-West	Calendar Days	14	80	5.71	5.74	80	0	0.02	100.4%	▲
19000	EHS Administration	Calendar Days	14	839	59.94	71.07	995	156	11.13	118.6%	▲
19050	EHS Trust	Calendar Days	14	200	14.26	0.00	0	(200)	(14.26)	0.0%	▼

**Productivity Performance - Hours**  
For The Pay Period Ending: 03/02/19

Below Threshold			Warning			Above Threshold		
Dept	Description	Performance	Dept	Description	Performance	Dept	Description	Performance
17881	EPG Phys Clinic-Occ Hlth East	0.00%	17885	EPG Phys Clinic-East	92.22%	17840	EHS Sports Medicine	102.69%
17883	EPG Phys Clinic-Occ Hlth Midtown	0.00%	17891	EPG Phys Clinic-South	67.63%	17880	EPG Phys Clinic-North	331.41%
17886	EPG Phys Clinic-Occ Hlth/West	0.00%	19060	EHS Corporate Communications	94.36%	17895	EPG Phys Clinic-West	100.41%
17894	EPG Phys Clinic-Uptown	0.00%	19080	EHS Teleservices	92.21%	19000	EHS Administration	118.57%
19050	EHS Trust	0.00%	19100	EHS Accounting Operations (Employee)	94.99%	19105	EHS Payroll	135.31%
26611	EMC Home Health	0.00%	19160	EHS Audit Services	85.25%	19110	EHS Administrative Finance	130.87%
101014	EMA Urgent Care Adult	0.00%	19170	EHS Medical Information Network	74.40%	19150	EHS Information Services	126.77%
101020	EMA Internal Medicine (Provider Summa)	0.00%	19185	EHS Corporate Health Services	93.87%	19220	EHS Human Resources	103.01%
101100	EMA Pediatrics	0.00%	19250	EHS Performance Improvement	83.38%	19370	EHS Risk Management And Safety	95.70%
101104	EMA Urgent Care Pediatrics	0.00%	26140	EMC Emergency Room (CDM)	78.44%	26100	EMC Nursing Administration	101.71%
101200	EMA Ob/Gyn	0.00%	26430	EMC Well Baby Nursery	77.05%	26230	EMC CVS	120.77%
101300	EMA Medical Specialties	0.00%	26440	EMC Mother/Baby	85.83%	26310	EMC 3 East	122.16%
101301	EMA Cardiology	0.00%	26450	EMC NICU	90.31%	26320	EMC 3 West (CM_NonLabor)	115.91%

## Productivity Performance – Dollars report

**Description:** Displays actual and budget payroll dollars data by department for the current pay period. A productivity index is also available for the Current Period and Performance Flag.

Additional information:

- Tracks actual and target/budget dollars and dollars per statistic
- Is generated on a biweekly basis by Vice President
- Focuses on unfavorable totals and productivity index
- Stratifies departments into three categories based on user-defined criteria

**Productivity Performance - Dollars**  
KHA Health  
For The Pay Period Ending: 03/02/19

Dept	Description	Workload Statistic	Actual Data		Target Data-Using Budget		Variance		Summary		
			Workload Volume	Productive Dollars	Prod Dollars / Statistic	Prod Dollars / Statistic	Productive Dollars	Dollars	/Stat	Productivity Index	Flag
<b>Favorable Totals</b>			2,321,975		2,713,180		(391,204)		116.8%		
<b>Unfavorable Totals</b>			2,663,607		1,075,349		1,588,257		40.4%		
17840	EHS Sports Medicine	Calendar Days	14	7,688	549.16	562.47	8,155	466	33.31	106.1%	▲
17880	EPG Phys Clinic-North	Calendar Days	14	5,192	370.86	662.52	9,275	4,083	291.66	178.6%	▲
17881	EPG Phys Clinic-Occ Hlth East	Calendar Days	14	5,769	412.09	0.00	0	(5,769)	(412.09)	0.0%	▼
17883	EPG Phys Clinic-Occ Hlth Midtown	Calendar Days	14	7,365	526.06	0.00	0	(7,365)	(526.06)	0.0%	▼
17885	EPG Phys Clinic-East	Calendar Days	14	15,799	1,128.49	986.35	13,809	(1,990)	(142.14)	87.4%	▼
17886	EPG Phys Clinic-Occ Hlth/West	Calendar Days	14	2,846	203.31	0.00	0	(2,846)	(203.31)	0.0%	▼
17891	EPG Phys Clinic-South	Calendar Days	14	19,231	1,373.66	931.90	13,047	(6,185)	(441.76)	67.8%	▼
17894	EPG Phys Clinic-Uptown	Calendar Days	14	8,615	686.79	0.00	0	(8,615)	(686.79)	0.0%	▼
17895	EPG Phys Clinic-West	Calendar Days	14	6,923	494.51	511.45	7,160	237	16.93	103.4%	▲
19000	EHS Administration	Calendar Days	14	19,643	1,403.09	3,542.57	49,596	29,953	2,139.48	252.5%	▲
19050	EHS Trust	Calendar Days	14	5,329	380.68	0.00	0	(5,329)	(380.68)	0.0%	▼
19060	EHS Corporate Communications	Calendar Days	14	13,024	930.32	908.25	12,716	(309)	(22.02)	97.6%	▼
19080	EHS Teleservices	Calendar Days	14	9,826	701.83	661.82	9,265	(561)	(40.02)	94.3%	▼
26140	EMC Emergency Room (CDM)	Calendar Days	14	51,400	564.00	669.00	51,400	(500)	(14.50)	90.6%	▼

**Productivity Performance - Dollars**  
For The Pay Period Ending: 03/02/19

Below Threshold			Warning			Above Threshold		
Dept	Description	Performance	Dept	Description	Performance	Dept	Description	Performance
17881	EPG Phys Clinic-Occ Hlth East	0.00%	19060	EHS Corporate Communications	97.63%	17840	EHS Sports Medicine	106.0
17883	EPG Phys Clinic-Occ Hlth Midtown	0.00%	19080	EHS Teleservices	94.30%	17880	EPG Phys Clinic-North	178.6
17885	EPG Phys Clinic-East	87.40%	19100	EHS Accounting Operations (Employee)	99.49%	17895	EPG Phys Clinic-West	103.4
17886	EPG Phys Clinic-Occ Hlth/West	0.00%	19185	EHS Corporate Health Services	96.33%	19000	EHS Administration	252.4
17891	EPG Phys Clinic-South	67.84%	19370	EHS Risk Management And Safety	96.70%	19105	EHS Payroll	123.6
17894	EPG Phys Clinic-Uptown	0.00%	26440	EMC Mother/Baby	94.88%	19110	EHS Administrative Finance	135.7
19050	EHS Trust	0.00%	26450	EMC NICU	93.67%	19150	EHS Information Services	132.5
19160	EHS Audit Services	87.79%	26790	EMC Same Day Surgery	99.41%	19220	EHS Human Resources	132.9
19170	EHS Medical Information Network	68.67%	26850	EMC Labor And Delivery	99.58%	26100	EMC Nursing Administration	110.3
19250	EHS Performance Improvement	87.48%	27030	EMC Central Supply	99.57%	26230	EMC CVS	123.5
26140	EMC Emergency Room (CDM)	82.25%	27240	EMC Radiology - Diagnostics	95.27%	26310	EMC 3 East	130.6
26611	EMC Home Health	0.00%	27300	EMC Pharmacy	99.91%	26320	EMC 3 West (CM_NonLabor)	128.1
26760	EMC Women Services	87.76%	27380	EMC Rehab Svcs-Midtown	96.80%	26340	EMC CCU (Staffing)	199.0
26770	EMC Oncology Services	89.83%	27430	EMC Mobile Cardiac Care Unit	99.68%	26350	EMC AICU	113.6
27090	EMC Pathology	80.17%	27450	EMC CV Diagnostics-EKG	94.76%	26430	EMC Well Baby Nursery	108.2

## Productivity Trended Paid Hours by Employee report

**Description:** Displays actual paid hours by Employee.

Additional information:

- Trended over multiple periods
- Sorted by the highest average paid hours by Employee

Trended Paid Hours - By Employee ID											
KHA Health											
For The Pay Period Ending: 03/02/19											
				Pay Period Ending:							
Job Code	Description	Employee ID	Employee Name	12/08/18 PP-12 Hours	12/22/18 PP-13 Hours	01/05/19 PP-14 Hours	01/19/19 PP-15 Hours	02/02/19 PP-16 Hours	02/16/19 PP-17 Hours	03/02/19 PP-18 Hours	Average Hours
J00002	Executive Vice President	99999	JobCode Budget	1,120	1,120	1,120	1,120	1,120	0	0	800
J00862	Staff RN	17098	Fuller, Todd	233	244	257	244	241	247	242	244
J00935	Unit Clerk II	12384	Sinacola, Kevin	226	233	225	234	227	241	221	230
J00318	Staff RN	11937	Berry, Priscilla	195	212	212	202	212	211	211	208
J00323	LPN	17037	Cline, Lorenzo	221	194	211	194	216	201	201	206
J00318	Staff RN	12052	Link, Jennifer	190	182	294	172	187	181	179	198
J00995	Physician	14205	Grayer, Tammy	199	195	202	184	195	190	190	194
J00318	Staff RN	18872	Berryhill Jr, Angela	196	203	213	172	177	186	187	191
J00331	Unit Clerk I	13529	Ross, Glenda	209	186	170	188	192	181	187	181

## Productivity Variance report

**Description:** Displays actual and target payroll hours data for multiple departments. A productivity index for the Current Pay Period and Flag is displayed when departments fail to meet their productivity index. This report also features a summary section for favorable and unfavorable departments.

Additional information:

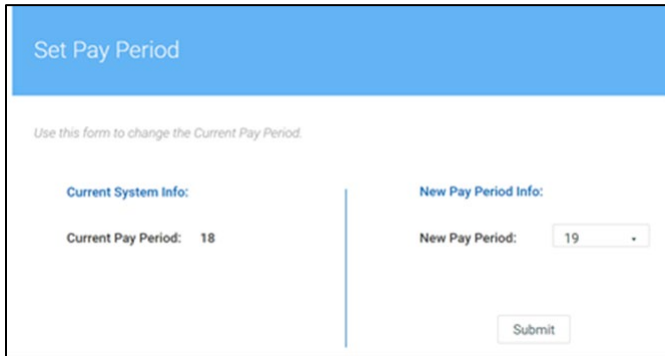
- Tracks actual and target/budget hours and hours per statistic
- Is generated on a biweekly basis by Vice President
- Focuses on unfavorable totals and productivity index

Productivity Variance Analysis											
KHA Health											
For The Pay Period Ending: 03/02/19											
Dept	Description	Workload Statistic	Actual Data		Target Data Using Budget		Variance Analysis				
			Workload Volume	Productive Hours	Prod Hrs / Statistic	Productive Hours	Prod Hrs / Statistic	Prod Hrs / Statistic	Hours	FTEs	Estimated Dollar Impact
<b>Favorable Totals</b>			<b>184,070</b>		<b>157,506</b>			<b>(26,484)</b>	<b>(331)</b>	<b>(1,123,131)</b>	
<b>Unfavorable Totals</b>			<b>41,180</b>		<b>32,944</b>			<b>(8,236)</b>	<b>(103)</b>	<b>(262,354)</b>	
17840	EHS Sports Medicine	Calendar Days	14	520	37,143	534	38,140	0.998	14	0.17	206
17880	EPG Phys Clinic-North	Calendar Days	14	80	5,714	265	18,938	13,223	185	2.31	12,015
17881	EPG Phys Clinic-Occ Hlth East	Calendar Days	14	80	5,714	0	0.000	(5,714)	(80)	(1.00)	(5,769)
17883	EPG Phys Clinic-Occ Hlth Midtown	Calendar Days	14	402	28,696	0	0.000	(28,696)	(402)	(5.02)	(7,365)
17885	EPG Phys Clinic-East	Calendar Days	14	240	17,143	221	15,810	(1,333)	(19)	(0.23)	(1,228)
17886	EPG Phys Clinic-Occ Hlth West	Calendar Days	14	80	5,714	0	0.000	(5,714)	(80)	(1.00)	(2,846)
17891	EPG Phys Clinic-South	Calendar Days	14	240	17,143	162	11,594	(5,549)	(78)	(0.97)	(6,225)
17894	EPG Phys Clinic-Uptown	Calendar Days	14	160	11,429	0	0.000	(11,429)	(160)	(2.00)	(9,615)
17895	EPG Phys Clinic-West	Calendar Days	14	80	5,714	80	5,738	0.024	0	0.00	28
19000	EHS Administration	Calendar Days	14	839	59,844	995	71,073	11,129	156	1.95	3,647
19050	EHS Trust	Calendar Days	14	200	14,257	0	0.000	(14,257)	(200)	(2.49)	(5,329)

## Change the current period for report distribution

To ensure that the Current Period and Year To Date values are correct in reports, you must change the current period of the payroll tables to the most recently loaded pay period.

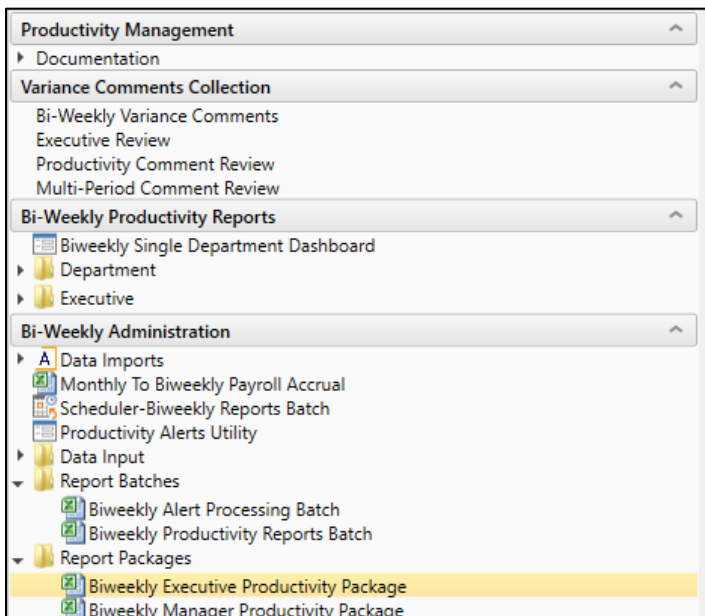
1. From the Management Reporting Admin Task Pane, double-click **Change Payroll 27 Tables – Current Period** in the Data Maintenance section.
2. Select the **Current Period** and click **Submit**.



## Process file collect packages using Biweekly Productivity

Run the Biweekly Productivity reports batch to process Budgeting file collect packages.

1. From the task pane, click **Bi-Weekly Administration > Report Packages > Biweekly Manager or Executive Productivity Package**.

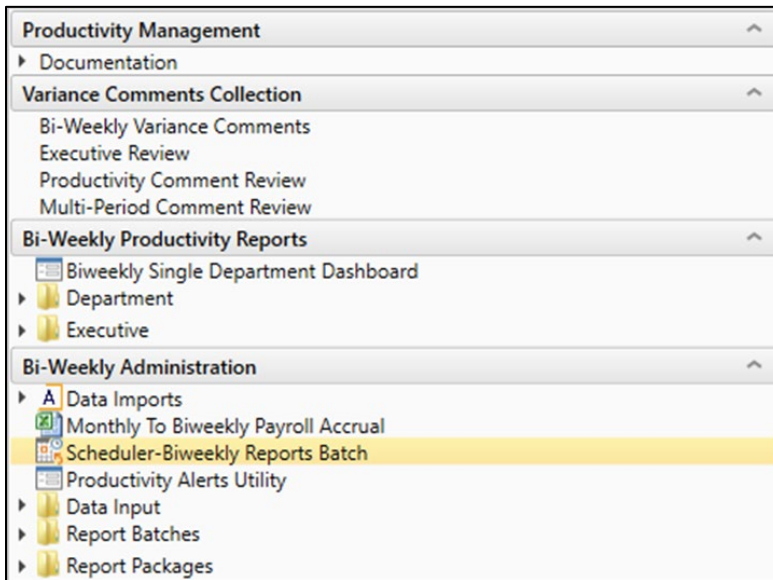


You can change specific configuration settings in the batch to match your report distribution package. Batches are set up to run all reports.

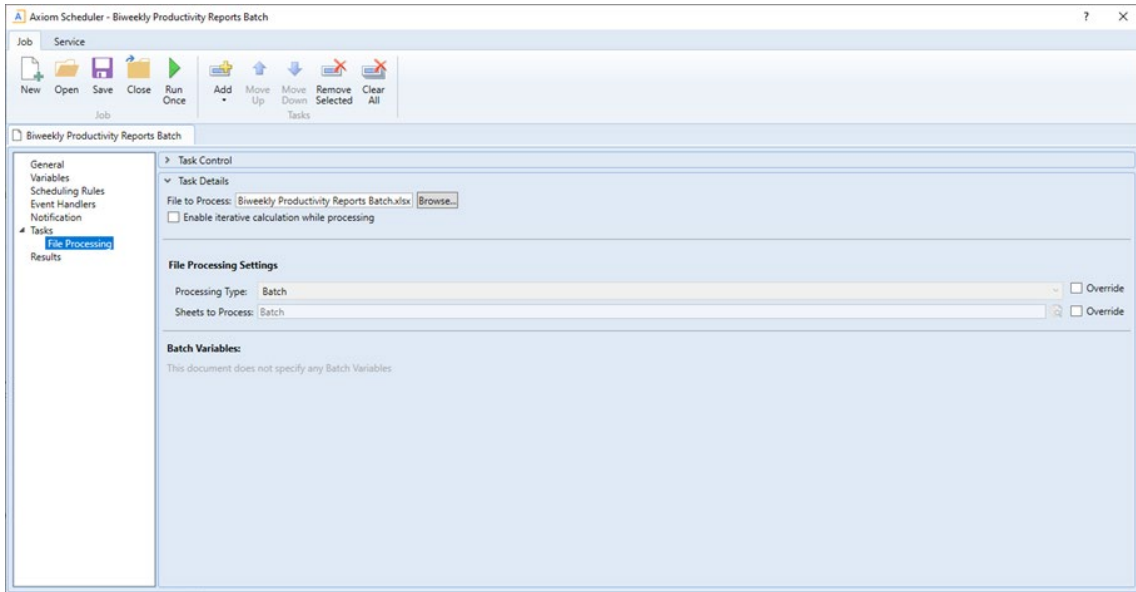
2. To turn on or turn off specific reports, change the settings in the Enabled column.
3. To permanently remove a report, delete the report row.

BATCH CONTROL SHEET				
File Path	Enabled	Process Multipass	Multipass Source Column	Multipass Data Filter
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Biweekly Productivity Detail.xlsx	On	On	Dept.ProdMap	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Prod Detail Hours By JobCode.xlsx	On	On	Dept.ProdMap	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend Report.xlsx	On	On	Dept.ProdMap	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend with Graph.xlsx	On	On	Dept.ProdMap	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Detail Hours By Dept.xlsx	On	On	Dept.VP	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Performance-Dollars.xlsx	On	On	Dept.VP	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Performance-Hours.xlsx	On	On	Dept.VP	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Variance.xlsx	On	On	Dept.VP	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\CoverProd_Exec.xlsx	On	On	Dept.VP	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\CoverProd_Manager.xlsx	On	On	Dept.ProdMap	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Pay By Employee ID.xlsx	On	On	Dept.ProdMap	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Pay By JobCode.xlsx	On	On	Dept.ProdMap	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Pay Summary by Dept.xlsx	On	On	Dept.VP	
\\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Trended Paid Hours By Employee ID.xlsx	On	On	Dept.VP	

4. To schedule when to run the batch, click Bi-Weekly Administration > Scheduler-Biweekly Reports Batch.



- To run the batch on demand, click **File Processing**, and then click **Run Once** from the top ribbon.



- Select the collect package to process (**Manager Package** or **VP Package**).

The BuildSetup sheet lists:

- The reports to include in the package
- The table code (Dimension) for which reports are processed
- The grouping column that the report references to determine how reports are collected and distributed (for example, "VP" to group reports into packages for each vice president)

Configuration for Auto Build:			
Number of Reports to Collect (max 15)		7	
<u>FileName</u> Builder		<u>Prefix</u>	
		<u>CoverProdExec</u>	
		<u>ProdHis</u>	
		<u>PerformanceDlrs</u>	
		<u>PerformanceHrs</u>	
		<u>ProdVar</u>	
		<u>PayProd</u>	
		<u>PaidTrend</u>	
<u>Dimension</u> <u>Gr ouping</u> Column>>>	DEPT	DEPT.DEPT	(Ex. if using <u>KHARptCode</u> or <u>RptMap</u> )
<u>Sum By</u> >>>	VP	DEPT.VP	(E.g. <u>Manager</u> , <u>Director</u> , etc)

The FileCollect sheet has a column for each package to be generated.

	C	K	L	M
1	<b>FILE COLLECT CONFIGURATION</b>	10000	15000	15300
39	Auto-generate file list	Off	Off	Off
40	Continue On Error	On	On	On
41	Include common files in package	Off	Off	Off
42				
43	File List	File List	File List	
44				
45		\Axiom\Reports Library\Productivity Utilities\Biweek	\Axiom\Reports Library\Productivity Utilities\Biweek	\Axiom\Reports Library\Productivity Utilities\Biweek
46	CoverProd_10000.xlsx	CoverProd_15000.xlsx	CoverProd_15300.xlsx	
47	Prod_10000.xlsx	Prod_15000.xlsx	Prod_15300.xlsx	
48	ProdJC_10000.xlsx	ProdJC_15000.xlsx	ProdJC_15300.xlsx	
49	ProdTrend_10000.xlsx	ProdTrend_15000.xlsx	ProdTrend_15300.xlsx	
50	ProdGraph_10000.xlsx	ProdGraph_15000.xlsx	ProdGraph_15300.xlsx	
51	ProdID_10000.xlsx	ProdID_15000.xlsx	ProdID_15300.xlsx	
52	JCProd_10000.xlsx	JCProd_15000.xlsx	JCProd_15300.xlsx	

Each package consists of the following:

- An optional name, such as "Biweekly Manager Report Package."
- A list of source files to be collected into the output file. You can manually enter hard-coded file names and generate the list automatically using the BuildSetup tab.
- The name and file type of the output file.
- The target folder path, if you plan to save the output file. You can save the file to a shared network drive or a folder within the Axiom Reports Library.
- Email information, if you plan to email the output file. Use the plus sign to expand the configuration sections. Access Row 19 to set the Email function as on or off.

	C	K	L	M
1	<b>FILE COLLECT CONFIGURATION</b>	10000	15000	15300
11	Director	Tom Gilbert	Charlie Credit	Charlie Credit
12	Email Settings			
13	Email to list			
14	Email CC list			
15	Email from			
16	Subject text	PPE-03-01-2014 Reports	PPE-03-01-2014 Reports	PPE-03-01-2014 Reports
17	Body text	Attached are your PPE 03-01-2014 reports. If you have any questions please contact your Finance liaison.	Attached are your PPE 03-01-2014 reports. If you have any questions please contact your Finance liaison.	Attached are your PPE 03-01-2014 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
20				
21	Source Folder Settings			
22	File source (Axiom or Local)	Axiom Repository	Axiom Repository	Axiom Repository
23	Source folder path	\Axiom\Reports Library\Productivity Utilities\Biweek	\Axiom\Reports Library\Productivity Utilities\Biweek	\Axiom\Reports Library\Productivity Utilities\Biweek
24	File filter list			
25	Source folder path			
26	File filter list			
27	Output File Settings			
28	Output location (local file or Axiom)	Axiom Repository	Axiom Repository	Axiom Repository
29	Output folder path	\Axiom\Reports Library\Productivity Utilities\Biweek	\Axiom\Reports Library\Productivity Utilities\Biweek	\Axiom\Reports Library\Productivity Utilities\Biweek
30	Output file name (no extension)	10000_PPE-03-01-2014	15000_PPE-03-01-2014	15300_PPE-03-01-2014
31	Output file type	.xlsx	.xlsx	.xlsx
32	Save or email generated files	Save File	Save File	Save File
33	Open output file after collect	Off	Off	Off

7. Click **Refresh Data** or **F9** to ensure that columns are created for each grouping item (for example, each vice president) that was set up on the BuildSetup tab.
8. Open the File Processing task pane and click **Process file collect** to generate report packages based on the configuration settings for the collect.

Report packages are saved to the designated folders and emailed to the recipients designated on the FileCollect sheet, depending on how you have set up the FileCollect.