Welcome to the Productives SHA Template v2 User Guide. This guide will take you through how to use the updated tool (as of September 2012).

The process of gathering individual organisations data has been automated with this version of the tool, totally removing the need for manual calculation and (providing these instructions are followed) removes human error from the equation, thus improving accuracy of the final result.

**IMPORTANT** – Historically, either Trusts or SHAs have deleted any module worksheets that aren’t relevant to them on the templates.

*Do not do this with the new templates.* They are designed a particular way and removing tabs that you aren’t using will cause operational issues elsewhere in the process.
Enabling Macros
In Excel 2007

On opening up the template, you may be presented with the following message.

Click ‘Options’. In the box that appears, select ‘Enable this content’ and click ‘OK’. Your Excel screen will appear as normal now.
In Excel 2003

Click ‘Enable Macros’ in the box that appears and your Excel screen will appear as normal now.
Setting up the correct file structure –

It is important the SHA template keeps the name:

‘New Productive Care SHA Template v2’.

Any changing of this file name will result in the automated data gathering not working.
1. By now you will have been sent three Excel files:

**New Productive Care Organisational Template** – To be sent to individual organisations. You may wish to re-name the file according to which organisation you are sending it to. This is a simple process achieved by opening it and using the ‘Save As’ option, changing the name as appropriate.

**New Productive Care SHA Template v2** – This is the automated calculation tool that should be used only by the SHA to evaluate the forms returned by the individual sites.

**PRODUCTIVE CARE BLANK TEMPLATE - LEAVE EMPTY** – This is the same as **New Productive Care Organisational Template**, though for quick and easy clearing of all data on the SHA Template, this is useful.

This template is useful when you wish to refresh the data to show the current data submission i.e. refresh from March 2012 data to September 2012 data.

Also, you may have updated the results and noticed an error in the source data which will affect the collated total. In this instance, clear the data, amend the source data and then update the results again to refresh the total.
2. For the templates to work most effectively, you will need to arrange the files tidily in whichever drive you save them on.

In the example below, the three main files have been kept together, with the example uploads in another folder to avoid any potential for trying to import the wrong file.

*It is important the SHA template keeps the name ‘New Productive Care SHA Template v2’. Any changing of this file name will result in the automated data gathering not working.*
How to use the SHA template to import data
1. Open **New Productive Care SHA Template v2**. You will see a slightly different version of the form you have sent to the individual sites within the SHA.

Starting in ‘1. Productive Ward’, click on ‘Update Results’.
2. In the navigation window that appears, go to where you have saved the returns from individual organisations. Select all of the files by clicking on the top one, holding **Shift** and then clicking on the bottom one. Then click ‘Open’.
3. The command will open up each file in turn and then close it again.

You will see that with the exception of ‘Organisation Name’, ‘Reporting Date’ and the text boxes lower down the screen, all numerical calculations have been worked out automatically based on the forms you just imported. The empty boxes need to be populated with the name of the SHA and the date of the import (circled).
4. Click on the navigation button ‘PW Comments’. You will see that any comments made on the forms are automatically populated against the organisation and date. This should help you keep track of any qualitative trends.

*Repeat steps 7 – 10 for each of the following tabs:*

2. Productive Community Hospital  
3. Productive Mental Health  
4. Productive Community Services  
5. Productive Operating Theatre
Other features –
1. Deleting data
2. Re-sizing the page view
Deleting data

1. Click on ‘Update Results’
Deleting data

2. Navigate to the ‘**PRODUCTIVE CARE BLANK TEMPLATE - LEAVE EMPTY**’. Import as per steps 7 – 9 for each of the five main tabs. Your SHA template is now ready for the latest lot of data.
3. The formatting issue below may occur, and is a quirk of Excel settings. It can be easily remedied by following the instructions on the next slide.
4. Simply click the ‘80% View’ button on the right. This automatically corrects the screen view.
Need Help?

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