

SOCKEYE

Sockeye KPI Guide

VERSION 1.1

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Sockeye KPIs

Sockeye's KPI feature provides an automated approach to tracking Key Performance Indicators (KPIs).

Sockeye is set up with a dashboard of KPIs to the Society of Maintenance Reliability Professionals (SMRP) standards, though users have the ability to set their own organizational standards if required.

The KPIs identified in Sockeye are from a collection of industry recognized SMRP metrics. Users also have the option of adding their own organization's KPIs.

KPI Metric Calculations & Components

Sockeye's included KPI metrics are as follows:

Metric	Formula
Condition-based Maintenance Hrs	Condition-based Hrs ÷ Total Hrs x 100
Continuous Improvement Hrs	Continuous Improvement Hrs ÷ Total Hrs x 100
Corrective Maintenance Hrs	Corrective Hrs ÷ Total Hrs x 100
Planned Work	Planned Hrs ÷ Total Hrs x 100
Preventive Maintenance Hrs	Preventive Hrs ÷ Total Hrs x 100
Proactive Work	Proactive Hrs ÷ Total Hrs x 100
Reactive Work	Hrs not on weekly schedule ÷ Total Hrs x 100
Schedule Compliance Hrs (weekly)	Weekly Scheduled Hrs Performed ÷ Total Hrs x 100
Schedule Compliance Work Orders	Number of work orders performed as scheduled ÷ Total number of scheduled work orders x 100
Standing Work Orders	Hrs worked on standing work orders ÷ Total Hrs x 100
Unplanned Work	Unplanned Hrs ÷ Total Hrs x 100

Corrective Hours – Actual hours worked on corrective work orders

Continuous Improvement Hours – Actual hours on continuous improvement work orders

Condition-based Hours – Actual hours worked on condition based work orders

Planned Hours – Actual hours on planned work orders

Preventive Hours – Actual hours worked on preventive work orders

Proactive Hours – Preventive and predictive hours plus corrective hours identified from preventive and predictive work orders

Hours Not on Weekly Schedule – Actual hours on work orders not on weekly schedule

Weekly Scheduled Hours Performed – Actual hours on work orders on weekly schedule

Number of Work Orders Performed as Scheduled – number of work orders performed from weekly schedule

Hours Worked on Standing Work Orders – Actual hours on standing work orders

Unplanned Hours – Total hours minus planned hours

Metric Criteria Setup

In order for Sockeye to be able to calculate KPIs, it first needs to be able to identify which work orders contribute to which metric.

Step 1: In Sockeye, from the setup menu select 'Metric Criteria'

Step 2: Click on the name of the KPI at the top of the page to view a different KPI Metric Criteria

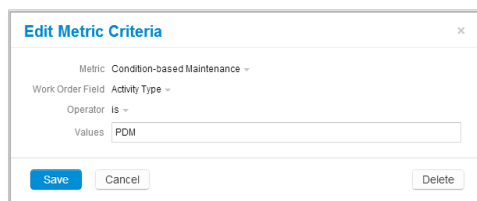


To Edit Metric Criteria

Step 1: Click on the data row that you would like to edit, the 'Edit Metric Criteria' dialog box should appear

Step 2: Make Desired Changes

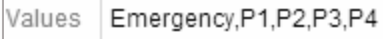
Step 3: Click 'Save'



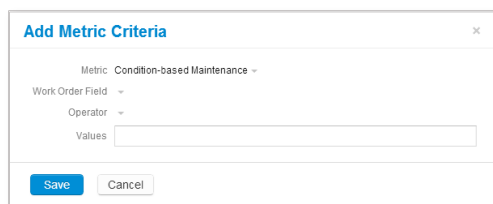
To Add Metric Criteria

Step 1: Click on the 'Add Criteria' button, the 'Add Metric Criteria' dialog box should appear

Step 2: Fill in each field with the desired data

- Multiple values can be separated by a comma: e.g. 

Step 3: Click 'Save'



Metric Criteria Definitions

Metric: The KPI that you are defining criteria for.

Work Order Field: The work order field that holds specific values that can be used to identify which tasks are the selected KPI tasks.

Operator: The qualifying condition for the specified values.

Values: The values associated with the work order field that will identify the selected KPI.

KPI Ranges

Sockeye's KPI ranges come pre-set to SMRP industry standard ranges. Sockeye allows the ability for users to set the ranges to their organization's standards.

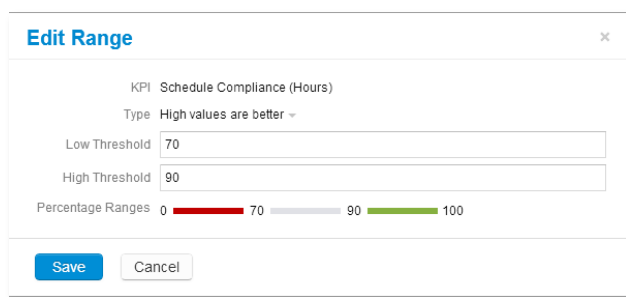
Editing KPI Ranges

Step 1: From the setup menu, select 'KPI Ranges'

Step 2: Click on the row of the KPI that you would like to make changes to, the 'Edit Range' dialog box should appear

Step 3: Make the desired changes

Step 4: Click 'Save'



The screenshot shows a dialog box titled "Edit Range" with a close button (X) in the top right corner. Inside the dialog, the KPI is identified as "KPI Schedule Compliance (Hours)". Below this, the "Type" is set to "High values are better". There are two input fields: "Low Threshold" with the value "70" and "High Threshold" with the value "90". Below these fields is a "Percentage Ranges" visualization showing a horizontal bar from 0 to 100. The bar is divided into three segments: red from 0 to 70, grey from 70 to 90, and green from 90 to 100. At the bottom of the dialog are two buttons: "Save" (in blue) and "Cancel" (in grey).

KPI Ranges Definitions

KPI: The tracked Key Performance Indicators.

Type: Defines which ends of the range are shown with a green (good), grey (neutral), red (bad) or no indicator.

Low Threshold: The user can set the low percentage threshold.

High Threshold: The user can set the high percentage threshold.

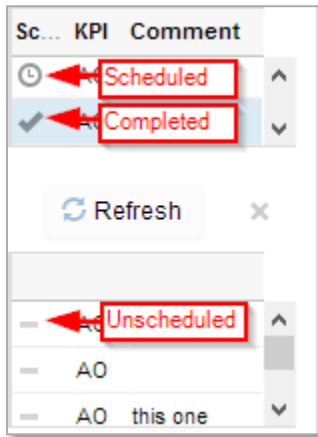
Percentage Ranges: Displays, in graphic form, the breakdown of low and high threshold and the neutral area in between. When scheduled performance reaches or exceeds the specified thresholds, the corresponding color will be displayed.

KPI Qualification

In order for KPIs to be calculated properly, a certain process must be followed:

1. The work orders coming from your CMMS must be configured correctly when they come through to Sockeye. They must have matching criteria to what is set up in the Metric Criteria options in the setup menu to ensure that they qualify for certain KPIs.
2. After building the schedule (by moving work orders from the backlog to the schedule), the user must commit to the weekly schedule. This takes a snapshot of the schedule and uses that as a guideline for tracking schedule compliance.
 - a. After the schedule is committed to, the schedule compliance column will change from 'R' for reactive to 'W' for weekly
 - b. If a work order is added after the schedule has been committed, it will be marked as 'R' for reactive

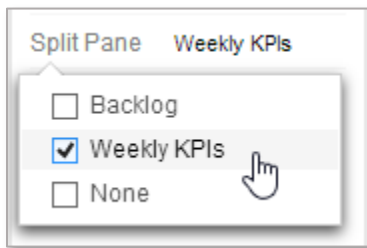
3. After the task has been completed, a user will mark that work order as 'complete' in Sockeye.
 - a. By clicking in the Schedule compliance column, the use can change the status from scheduled to complete



Viewing KPI Reports

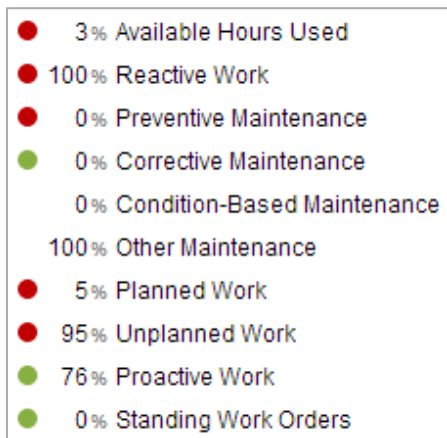
Split Pane View

From the weekly schedule, a user is able to view the Weekly KPIs in the bottom pane of the schedule. In the filter pane, click on the drop down menu for 'Split Pane' and select 'Weekly KPIs'



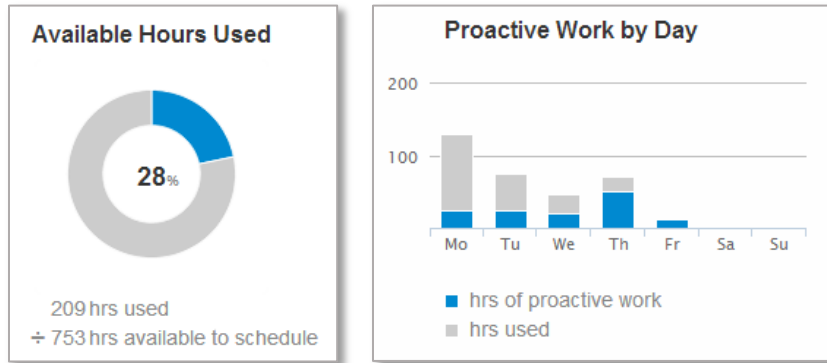
The bottom pane where the Backlog usually appears should now display a variety of graphs showing the Weekly KPIs for the selected team.

Summary of KPIs for the week

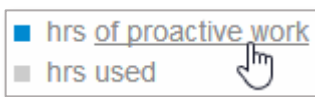


The green/red indicates whether the KPI percentage is within the target range or not.

When the user clicks on a KPI in the 'Summary of KPIs for the Week' list, the donut chart and bar graph will reflect the selected KPI.



By clicking on the component name in the donut chart calculation or the legend of the bar graph, all of the qualifying work orders for that particular component will become highlighted in the schedule.



Full Pane View

A KPI report can also be viewed by selecting 'KPIs' from the 'More' menu in the navigation bar.

This will show a list of all KPIs. Click on the + button beside any KPI to show a breakdown of its components:

The screenshot shows a table of KPIs for Team 1. Each KPI has a plus sign, a colored dot (red for compliance, green for work types), and a percentage. The 'Schedule Compliance (Hours)' KPI is expanded to show 'Hours for complete tasks from committed schedule' (0) and 'Hours available to schedule' (753).

KPIs for week of Jul 15, 2013		
Team 1		
- Schedule Compliance (Hours)	●	0%
Hours for complete tasks from committed schedule: 0		
Hours available to schedule: 753		
+ Schedule Compliance (Orders)	●	0%
+ Available Hours Used	●	0%
+ Reactive Work	●	0%
+ Preventive Maintenance	●	0%
+ Corrective Maintenance	●	0%
+ Condition-Based Maintenance		0%
+ Other Maintenance		0%
+ Planned Work	●	0%
+ Unplanned Work	●	0%
+ Proactive Work	●	0%
+ Standing Work Orders	●	0%
+ Continuous-Improvement		0%

Tracking Schedule Compliance

Here are step-by-step instructions for tracking the “Schedule Compliance (Orders)” KPI in Sockeye.

1. When you finish building a weekly schedule for an upcoming week, select “Commit Weekly Schedule” from the More button. This saves a snapshot of the currently scheduled tasks and hours for that week. This snapshot is used as a basis for the Schedule Compliance calculation.

Weekly Schedule for week of Aug 4, 2014
P & R Mech - Supervisor Jim Hughes

Buttons: + Add by #, - Remove, Details, More

WO #	Status	Loc #	Prior	Op #	Operation	Craft	Hrs	Comm
900005911534	RELE	471-0416	1		Inspect / Recertify Disc Thickener Cr...	MW	8	
900004911534	RELE	471-0416	1	0010	22F gearbox/popit rplc	MW	4	
900005951220	RELE	623-3872	2		ROALIGN ANNUAL INSPECTION ...	MW	6	
900005712127	RELE	471	2		Create Plate To Isolate Tmp Chip Silos	MW	2	
900005907211	RELE	471	2	471Dt003	Mw Mech Pm Mezzanine ...	MW	8	
900005907212	RELE	471	2	471Dt004	Mw Mech Pm Roof Fans ...	MW	3	
900005918004	RELE	471	2	475Ct001	Mw Mech Pm Ground Flo...	MW	4	
900005611934	RELE	471-0111	2		Inspect Preheater Discharge Convey...	MW	2	

2. After you commit a weekly schedule, Sockeye marks all the tasks on that weekly schedule z with a “W” in the Sched Comp column. These tasks count towards next week’s Schedule Compliance. You can add tasks to the schedule after it has been committed, but those tasks will show an “R” in the Sched Comp column, and will count as “Reactive” work (also known as “break-in” work). Reactive work doesn’t count towards Schedule Compliance. It is also OK to remove tasks that were originally part of the weekly schedule – often this is done to make room for break-in work. However, this doesn’t affect the original snapshot of the weekly schedule, so Schedule Compliance is always based on the committed version of the weekly schedule.

% of Available Hours Used

MW	100	100	100	91	100		
WL	84	88	88	88	100		
PF	100	88	100	100	94		

Scheduled Hours

n	Op #	Operation	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Sched Comp
		Inspect / Recertify Disc Thickener Cr...	MW	8		8							W
	0010	Change #34 gearbox	MW	4		4							W
		Repulper conveyor leaking s...	MW	6			6						W
		Create Plate To Isolate Tmp Chip Silos	MW	2		2							W
	471Dt003	Mw Mech Pm Mezzanine ...	MW	8			8						W
	471Dt004	Mw Mech Pm Roof Fans ...	MW	3				3					W

3. At the end of next week, mark which tasks were actually performed by clicking the clock icon in the Sched Comp column. This changes those task's icons to checkmarks as shown below. Tasks that have a checkmark and were part of the committed weekly schedule count towards the Schedule Compliance calculation.

Weekly Schedule for week of Aug 4, 2014
 P & R Mech - Supervisor Jim Hughes

		% of Available Hours Used								
MW	WL	PF	Mo	Tu	We	Th	Fr	Sa	Su	
100	100	100	91	100						
84	88	88	88	100						
100	88	100	100	94						

WO #	Status	Loc #	Priority	Description	Operation	Craft	Hrs	Scheduled Hours							Sched Comp		
								Mo	Tu	We	Th	Fr	Sa	Su			
900005911534	RELE	471-0416	1	Inspect / Recertify Disc Thickener Cr...	Inspect / Recertify Disc Thic...	MW	8	8									✓ W
900004911534	RELE	471-0416	1	22F gearbox/popit rplc	Change #34 gearbox	MW	4	4									✓ W
900005951220	RELE	623-3872	2	ROTALIGN ANNUAL INSPECTION ...	Repulper conveyor leaking s...	MW	6		6								⌚ W
900005712127	RELE	471	2	Create Plate To Isolate Tmp Chip Silos	Create Plate To Isolate Tmp ...	MW	2	2									⌚ W

4. When you select "Weekly KPIs" for the Split Pane option at the left, the bottom pane of the Weekly Schedule shows KPIs instead of the backlog. You can select which specific KPI to view in the list at the left. In the screenshot below, the selected KPI is "Schedule Compliance (Orders)". The formula for the selected KPI is showed below the donut graph of the KPI's current value. In the example below, there were 47 tasks on the committed weekly schedule, and 37 of those tasks were marked with a checkmark by clicking on the task's clock icon, so the KPI's value is 86% (37 ÷ 43).

