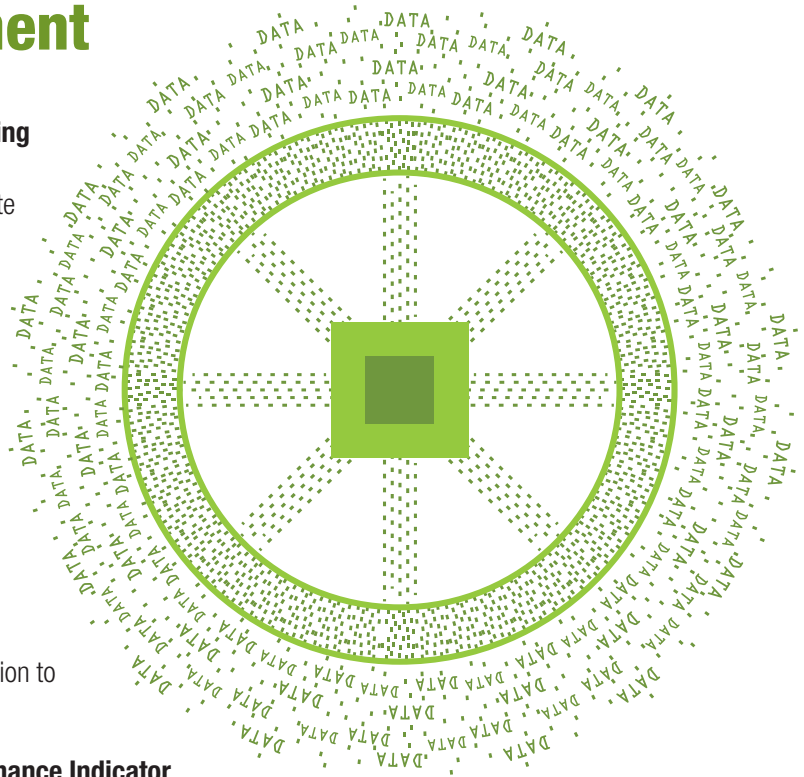




# Performance Management

Operational Sustainability, LLC® (OS) offers a **robust reporting and metrics module, Performance Management (PM)**, as part of **OESuite™**. PM empowers companies to aggregate their reporting information and publish it effortlessly to dashboards. Add ranges for data entries to prohibit invalid data entry. All OESuite modules integrate with PM, so all mission-critical metrics each user needs are available on one dashboard, creating a single source of shared truth across an organization. Robust security features allow administrators to define user roles and to set privileges at the facility level. Filters and dynamic ranges can be specified by date to control when individual metrics are published. Data management tools enable users to add reporting on entities, assets, and/or components to their dashboard. Users can subscribe to reports, documents, equipment information, incident data, and other key information to receive them automatically as they are generated.



Functionality within the module includes both a **Key Performance Indicator (KPI)** function and an **Integrity Operating Windows (IOW)** function.

### KPI:

Users have the ability to utilize interchangeable metrics – to customize a dashboard for themselves or for other individuals, departments, facilities, or organizations. Users can drag and resize dashboard items to highlight individual metrics, and can choose to receive email notifications if a metric’s set limits are exceeded.

Through the dashboard interface, users can review trends and drill down to individual data points such as an incident or MOC recommendation to see detailed information, and then export the item to common document formats.

### IOW:

Data can be aggregated from multiple sources for each individual asset, component, or entity. Users can manually enter data, import it from external sources or integrate from data historians and equipment health monitoring systems to capture temperatures, pressures and other key parameters. An administrator can determine the frequency of data collection. Readings are aggregated by time and date stamp, and system users can view data trends immediately.

Users can add related key parameter tags to equipment and specify automated email alerts based on limit types such as operational, environmental, reliability, or safety. In the event of a consequence of deviation, users can log a corrective action – including the ability to go to emergency shutdown if warranted – and send operations personnel a procedure tied to applicable limits. Action items and incident investigations can also be automatically triggered and sent to responsible parties, along with damage mechanisms.

## **Performance Management (PM) has numerous core functions:**

- Data function
  - Numerical data entry/collection
  - Data entry management: format specific to user
  - Integration with data historian or external database
  - Links to **Operator Rounds Module** as data collection source
  - IOW: associate a limit type, limit values, and damage mechanisms to particular pieces of equipment or components
  - Date verification and rejection
  - Data locking to prevent changes to the data going forward
  - Data can trigger task or incident investigation or email alert
- KPI
  - Customizable dashboard based on user needs
  - Email notifications triggered by exceeding limits on a metric
  - Ability to create limits
  - Export to common document formats such as Adobe PDF, Word, and Excel
- Both ad hoc and standardized reporting available

**For more information email us at [info@os-orm.com](mailto:info@os-orm.com) or call (713) 355-2900.**