Performance Metrics

VelocityEHS®

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Contents

Metric Setup

- Click 'Admin' from the navigation bar and select 'Metrics List'. Here you will find a list of all the metrics that have already been created. Metrics must be created in the application prior to a user adding data to them.
    - If you need to make a change, update an existing metric, or add a new target, click on the metric name and make the required change(s).

- If you would like to create a new metric, select 'Add New' from the top left of the page. You will be prompted to select the type of metric that you would like to create.

Input Metric

Metrics to be collected throughout the organization. Also used for metrics calculated by conversion factors. Example: 'Grid Electricity Usage'

Creating an Input Metric

- ✓ Define the metric definition information.
  - Add as many details as possible. Select all measurement types that apply.
  - Choose the default input and output unit for the metric. Note the default will recommend the suggested unit however there is an opportunity to enter metrics using other units within the measurement type or report a different unit within the measurement type. For example, you can default to CAD dollars, enter a metrics using USD and report out AUD.
  - Outline any data collection guidelines that you would like to convey to those who will be responsible for collecting the data.
  - Add a plausibility review. Any metrics which fall outside the threshold will be flagged upon entry.
  - Save the information that you have just entered by clicking on the 'save' button in the top right corner.
- ✓ Create an input metric by selecting the 'Input Locations' from the index on the left-hand side.
  - Click on 'Add Input Location Assignment'
  - Choose the location which will be required to enter this metric.
  - Select the data entry frequency, location level and starting period.
  - Save and exit. Add any additional locations which are required to enter data on this metric.

- Click on 'Targets' from the index on the left-hand side.
    - Choose the location for your target
    - Select the time period and value for your target. Note every year you can add the new years target instead of editing it so you can have a log of historical targets.
    - Save and exit. Add any additional locations which are required to have targets for this input metric.
- If any Conversion Factors apply to this input metric, click on 'Conversion Factors' from the index on the left-hand side.
    - Select the location of the conversion factor.
    - Keep in mind, you must have first entered the conversion metric into the application. Reference the "Conversion Metric" section below.
    - Select the location and identify the conversion metric your input metric will convert to. Enter the conversion information.
    - Save and exit.
- Once you have completed entering all the new input metric information, click on the hamburger menu,  and select 'Save and Exit'.

Try this:

- ☐ Create a new input metric
- ☐ Add two input locations
- ☐ Add a target for one of the input locations that you set

Formula Metric

Calculation that relates two or more input metrics. Example: 'Total Electricity Produced', where the metric sums several specific input metrics.

Creating a Formula Metric

- To create a formula metric, you must ensure all metrics used have previously been created, this can include: input, formula or conversation metrics. Once the metrics have been created, enter the formula metric definition information.
    - Add as many details as possible.
    - Choose the input(s) which will be part of the formula and the value. Use the 'add another' button to add additional metrics to your formula.
    - Enter the formula which will be used. Create a mathematical formula with the letter(s) representing your selected metric(s), any numbers, and these mathematical operations: +, -, /, *. Group sections with parentheses.
    - Select the output unit.
    - Enter your formula in the tester at the bottom of your screen to ensure that it works correctly.
    - Save the information that you have just entered by clicking on the 'save' button in the top right corner.
- Click on 'Targets' from the index on the left-hand side.
    - Choose the location for your target.
    - Select the time and value for your target.
    - Save and exit. Add any additional locations which are required to have targets for this metric.
- Once you have completed entering all the formula metric information, click on the hamburger menu, choose 'Save and Exit'.

Try this:

- ☐ Create a formula metric
- ☐ Select at least 3 inputs
- ☐ Create a formula and test it to ensure that it is working.

Conversion Metric

Use this type of metric to define the relation between input metrics when the relation varies over time or by location. Example: If 'Grid Electricity' usage is input, I can have a conversion metric to 'Carbon Dioxide' or to 'Methane'.

Creating a Conversion Metric

- Enter the metric definition information.
    - Add as many details as possible. Select all measurement types that apply.
    - Choose the output unit for the metric.
    - Save the information that you have just entered by clicking on the 'Save' button in the top right corner.
- Click on 'Targets' from the index on the left-hand side.
    - Choose the location for your target.
    - Select the time and value for your target.
    - Select 'Save and Exit'. Add any additional locations which are required to have targets for this metric.
- If any conversion factors apply to a conversion metric, click on 'Conversion Factors' from the index on the left-hand side.
    - Select the location of the conversion factor.
    - Keep in mind, you must have first entered the conversion metric into the application.
    - Select the location and identify the conversion metric your conversion metric will convert to.
    - Enter the conversion information.
    - Select 'Save and Exit'.
- Once you have completed entering all the conversion metric information, click on the action menu,  choose 'Save and Exit'.

Try this:

- ☐ Create a conversion metric
- ☐ Add a target for one of the conversion locations

Knowledge Check:

1. True or False: You can create a formula metric prior to creating the input metric.
2. True or False: A formula metric will still work if the formula was entered incorrectly.
3. Describe what the plausibility review is meant for _____

   _____
4. True or False: A metric tag sources the same list as location tags.
5. True or False: multiple targets can be created for a single metric.
6. Describe the steps that need to happen to create a conversion factor:
   i. _____
   ii. _____
7. True or False: The formula in a formula metric is not case sensitive.

Entering Data

- Once the input metrics have been created in the application, users are then able to enter data for them. To enter metric data, select 'Add New' from the Navigation Bar. Click on 'Enter Data' beneath 'Metrics'. Here are some pointers for you to consider:
  - Users who are entering data will be able to see the locations which they have permissions for.
  - To filter the entries, select the location which you would like to enter the data for, the dates for the entry, the metric, and/or any metric tags.
  - A list of your filter options will appear. Click on 'Value' to enter the metric value and 'Data Source' to identify where this information was retrieved from.

- Beside each metric which you are entering data for, you will see these icons  . Click on the disc to save your entry. Select the arrow to undo your last entry and click on the double arrows to open a detailed entry form.
- Within the detailed entry form, you can enter any notes which you would like to include with the metric, add attachments, and see the data history for this metric.

Try this:

- ☐ Filter the metrics by location, time, and metric name.
- ☐ Add metric data for two of the metrics you created.
- ☐ Undo one of the entries.
- ☐ Open one of the detailed entry forms, add notes and an attachment.

Knowledge Check:

1. True or False: You can enter metrics for all locations in your location tree
2. True or False: I can enter a metric using a different unit of measurement then suggested
3. Outline two benefits of the Detailed Entry Form:
   i. _____
   ii. _____
4. True or False: You must click the disc icon to save after each entry.
5. True or False: I can enter data for a formula metric.
6. Describe how you can view already entered data for a location over a specific time period.

   _____

   _____

Importing Metrics Data

✓ Import metrics data by clicking 'Add New', under "Metrics" click on "Import Metrics Data" and "New Import" on the blue bar. Here are some pointers for you to consider:

- Select the appropriate template and click “Preview”
- Enter the metric details into the template csv. file. Note all columns are required.
- Save the csv file template to your desktop.
- Select the updated template file from your desktop by clicking on the “File Selection” option on the “Import Metric Data” page.
- Import Data for review.
- Data errors are highlighted and can be updated before uploading file into the VelocityEHS solution.

Try this:

- ☐ Import metrics data
- ☐ Update metric data errors and confirm import

Knowledge Check:

1. True or False: I cannot import more than one metric in a single import file.
2. What does the confirmation status mean?

   _____

   _____
3. True or False: I can update data errors in the VelocityEHS solution?
4. True or False: I can edit an imported metric on the enter data page.
5. True or False: I can delete the metric data import once closed.

Tips and Tricks

- ✓ If you need to report your calculated metric on a monthly basis, you need to ensure that the contributing metrics are collected monthly
- ✓ Metrics that contribute to a calculated metric that you report out on should be required.

- Location levels – if the denominator of your formula metric is collected at the region, and the numerator is collected at the department, it makes sense to report the metric at the region (higher level).
- If you collect the denominator metric at various levels, there may be some locations where the calculation makes sense and some places that it won't.