Actuate Performance Management for Utilities

It’s not just about keeping the lights on - it’s about building tomorrow’s sustainable utility.
How is your utility performing, why, and what should you do about it? See how BIRT Performance Scorecard will become an indispensable tool for your utility.

BIRT Performance Scorecard provides power generation, transmission and distribution, oil and gas, and water and wastewater utilities with the information needed at all levels to make proactive decisions that meet the challenges of today’s competitive marketplace.

Every day, new challenges are presenting themselves to the constantly changing utility industry. Restructuring, acquisitions, increased competition and escalating material costs have all placed new demands on utilities to more effectively streamline operations. In addition, utilities have the added pressure of needing to increase productivity, customer satisfaction and shareholder value. All this, while continuing to maintain optimal asset performance and meet environmental regulatory requirements.

These challenges place demands not only on the executives who need to deliver on shareholder value, but also on the plant, operations and middle line managers tasked with administering these activities.

BIRT Performance Scorecard, the leading Performance Management solution from Actuate, provides energy and other utility companies with the insight needed to make informed decisions and respond proactively to issues - before they turn into problems. Whether you are in power generation, transmission and distribution, or oil and gas, Performance Scorecard’s proven functionality will give your utility company the resources it needs to meet the challenges of today’s competitive marketplace.
Achieve Results

Take Performance Management to the Next Level

Improve Efficiency  Manage Proactively to Results
By having immediate access to your critical information, you are better able to manage your organization in an efficient manner, thereby reducing costs and improving visibility and alignment.

Enhance Productivity  Deploy Resources More Effectively
When you implement a Performance Management initiative, you are providing your employees with the enabling technology they need to work smarter. When you free them up from the burden of endless ad-hoc report creation, for example, you save them precious time that can be used for other, more important activities.

Manage Assets more Strategically  Understand the Relationship Between Assets and Organizational Performance
When you manage the performance of your assets, you are helping to ensure that your organization is running as efficiently as possible. Asset Management, however, is just one element of Performance Management. By providing performance information for all areas of your utility, the BIRT Performance Scorecard lets you see the “big picture” of true organizational performance, and how assets are affecting it.

Transform Data into Action  Maximize IT Investment
By transforming the data in your current enterprise information systems into actionable Performance Management information, you not only begin to see a clearer picture of the true health of your organization, but you also maximize the investment of your current IT infrastructure.
A Day in the Life

How BIRT Performance Scorecard Can Help Your Utilities Organization Achieve Optimal Performance

Instant Visibility into Areas that Need your Attention

**Executive Vice President: “Why are my costs increasing?”**

Executives, Senior Managers and Board Members need an easy to use means to gain insight into the performance of critical measures across divisions, plants and facilities – as well as by functional areas, such as Finance and Human Resources. In this example, the Executive Vice President of a Power Utility sees a performance alert in his Briefing Book indicating that Asset Costs are on the rise, and in turn Return on Assets is declining. He uses the Book to facilitate performance-related workflow by launching an investigation into the problem’s root-cause, and asking his team for an action plan to resolve the issue. Using the Briefing Book, he enhances communication with his team, prepares himself with performance insight for the next board meeting, and facilitates problem-solving through advanced visualization and drill down capabilities.

Manage by Exception

**Generation Manager: “I want to ensure my capital resources are performing optimally.”**

Through use of the View, an intuitive hierarchical structure, the Generation Manager can quickly and proactively identify underperforming operational resources, such as an inefficient multi-stage filtration unit, that are impacting the overall performance of the plant. Because preventative maintenance is less expensive than corrective maintenance, he actively uses the View interface to “manage by exception”, and spot assets that are underperforming over time. Additionally through the View interface, the Generation Manager is one click away from all related E-mail Links, Document Links, and Measure Dashboards to assist him with further analysis and team collaboration to troubleshoot issues before they become larger problems.

Stay on Top of Critical Success Factors

**Plant Manager: “Are my critical success factors on track for my review meeting next week?”**

Regardless of the Performance Management framework employed, key employees such as Plant Managers can leverage their personalized, dynamic Performance Maps to view information from a number of perspectives including: Strategy Maps, Cause-and-Effect Diagrams, Process Maps, Geographical Performance Maps, as well as any ad-hoc relational diagram. Using Maps, Managers have the option to view information for a select set of measures or can compare performance for the organization, across multiple assets, plants, departments, locations or facilities. In this case, the Plant Manager has created a highly customized Map that allows him to easily track his plant’s KPIs, and their relation to those of the organization as a whole, on an ongoing basis.
A Day in the Life

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Perform Root Cause Analysis

Director of Operations: “I need more insight into my plant’s efficiency and environmental impact”

BIRT Performance Scorecard’s advanced root cause analysis functionality allows users to drill through to the operational details behind a measure, such as emissions by plant. BIRT Performance Scorecard supports root cause analysis and allows users to build custom web and or spreadsheet reports for decision-makers across the organization that combine performance management data, including colors and commentary, with information from other operational systems. In this instance, the Director of Operations drills from an Environmental Impact measure in BIRT Performance Scorecard down into the plant’s MRO Strategic Asset Management system to prepare a detailed report on the environmental impact of aging assets, in order to make the case for more capital investment in his plant.

Launch and Manage Performance Improvement Initiatives

Project Manager: “How can I easily track my Asset Management Initiatives?”

BIRT Performance Scorecard provides color-coded, performance-based status into all initiatives, linked to overall strategy and communicated organization-wide. Project managers can assess the performance of a measure in BIRT Performance Scorecard as well as the status of performance improvement initiatives. BIRT Performance Scorecard can break even the most complex activities such as asset upgrade programs into component parts, with the easy-to-use visualization capabilities that are the hallmark of the Actuate Solutions.
From Top to Bottom

Take Complete Control of Your Organization

See Clearly

Allocate capital more effectively by allowing executives to evaluate the different aspects of your organization
The scarcity of capital resources means that they must be allocated properly in order to ensure success. Because the BIRT Performance Scorecard provides true insights into organizational performance, where to allocate this capital becomes an easier question, as you can clearly see which areas need more support.

Focus Employees

Focus employees in areas that will make a true difference to the organization
The old adage “what doesn’t get measured doesn’t get done” couldn’t be more true in today’s over-burdened utility organizations. By assigning ownership to specific measures, and the tools to track the projects that fall under those measures, BIRT Performance Scorecard focuses employees on tasks that are relevant to the overall strategy of the organization, while at the same time providing accountability.

Communicate Consistently

Drive consistent communication to stakeholders, shareholders, board members and employees
When you communicate information in a single, unified voice, you guarantee everyone is working from the same set of assumptions. By providing consistent performance information in a central location, the BIRT Performance Scorecard lets you communicate a single version of the truth to employees, customers, partners and other stakeholders.

Visualize It

Provide buy-in with other areas of the organization into a cohesive strategic plan
Many Utilities find it truly difficult to communicate strategy throughout the organization. With the use of the BIRT Performance Scorecard, you can graphically illustrate both overall strategy and the activities that support it. If improving Customer Satisfaction is part of your strategy, for example, BIRT Performance Scorecard allows you to visualize its relationship to overall goals, such as revenue, and keeps you focused on how this objective impacts daily activities throughout the organization.
The Actuate Performancesoft Suite for Utilities

Leverage Success

More utilities choose BIRT Performance Scorecard than any other Performance Management solution because Actuate truly understands the needs of the industry. Below is just a partial list of some of the utilities that have improved their organizations' performance using Actuate Solutions.

**XCEL Energy**
As a leading combination electricity and natural gas energy company, Xcel Energy offers a comprehensive portfolio of energy related products and services to 3.3 million electricity customers and 1.8 million natural gas customers.

BIRT Performance Scorecard has been embraced enthusiastically among Xcel Energy’s executive leadership. Various levels of management are catching the vision of the tool’s full capability and we are convinced that it will be contagious!

*Gregory Sanchez, Key Performance Analyst*

**NSTAR**
As Massachusetts’ largest investor-owned electric and gas utility, NSTAR has been transmitting and delivering electricity and natural gas for more than 100 years.

BIRT Performance Scorecard is the ideal Performance Management solution to fit within NSTAR’s performance-driven culture. Its easy to use, intuitive interface allows us to quickly see how we are performing against key performance indicators and how performance in one area impacts that of another area. And because Actuate’s features and functionality are driven by customer feedback, we can be confident that the tool will continue to meet the real-world Performance Management challenges that NSTAR faces, allowing us to plan, with confidence, future improvements in our financial, customer and operational business areas.

*Susan McSherry, Director Corporate Performance Management*

**Omaha Public Power District**
Located in Omaha, Nebraska, Omaha Public Power District is a fully integrated electric utility serving 300,000 customers in a 5,000 square mile, 13 county region.

BIRT Performance Scorecard as the tool to monitor the company’s key performance indicators, measure them against strategic objectives and align day-to-day activities with the business strategies.

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Actuate - the people behind BIRT
Actuate founded and continues to co-lead the Eclipse BIRT open source project. BIRT is the premier development environment for Rich Information Applications that present data in compelling and interactive ways via the web on any device. Actuate and its people are dedicated to making BIRT the best environment for our customers to develop Web 2.0 applications that drive revenue through higher customer satisfaction/loyalty and improve operational performance. The people of Actuate continually participate in and provide resources for the vibrant open source community that has emerged around BIRT. Anybody can participate in the BIRT movement by visiting www.birt-exchange.com.
Actuate offers value-add BIRT products and services that speed the development process and bring additional functionality, interactivity and enterprise scalability to BIRT-based Rich Information Applications. Actuate has over 4,400 customers globally in a diverse range of business areas including financial services and the public sector. Founded in 1993, Actuate is headquartered in San Mateo, California, with offices worldwide. Actuate is listed on NASDAQ under the symbol ACTU. For more information, visit the company's web site at www.actuate.com.