



## Recent Developments\*

### RIO (Risk Identification & Opportunities) Module – Batch Import of Asset / Issue / Risk Data

The SOS application now offers a standard flat file data export/import capability for automatically loading data into both sections of the RIO Module. This includes Issue (i.e. Asset Health Issue) and Risk (“Need”) demographic and scoring information from another system, such as your Asset Register or Risk Management System. This feature can be used to modify existing OR create new Assets/Issues/Risks, and is automatically and immediately responsive to any configuration changes. This allows, for example, batch upload of new or updated asset registry and risk scoring data for any and all data collected in RIO.



### Cross Browser Compatibility

The SOS application is now compatible with IE (Internet Explorer), Chrome, and Edge browsers. In addition, it is functionally compatible with Firefox, although not visually optimized in all cases. Client updates delivered starting in 2018 will be compatible with these browsers.\*



### User Generated Word Format Reporting

Users can now generate “business case” type reports in Word document format, including demographic and cost data in various presentations. A default format (such as that required for a particular submission process) can be saved by an administrator, so that a user simply has to select investments and run the report, making the SOS a “one stop shop” for data and reporting for many clients. Users may also change the included fields and various settings to generate other Word reports for their own purposes.



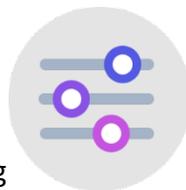
### Automatic Creation of Executive Summary Optimization Report in PowerPoint

From the IO (Investment Optimizer) Module, users may now automatically generate PowerPoint reports with key optimization tabular and graphical outputs. This report is intended as an “executive summary” to easily communicate results. Users may select which outputs are to be included in the report, and the report template includes explanatory comments on interpreting the data.



### Reliability Scoring – Expanded Options

The Reliability scoring pages (i.e. standard SAIFI/SAIDI and Reliability pages which utilize historical OMS data) now include additional question, calculation, and formatting options. This provides existing users greater flexibility in their approaches to reliability scoring going forward, as well as additional options for designing the approach for new users of this scoring format.



### Hard Delete

For clients with a large amount of test data or old projects they don't wish to keep archived, a “Hard Delete” feature has now been implemented, such that an administrator can completely remove these records from the database.



## Client Process Spotlights

### 1. Integration with Asset Economic Replacement Tool

In 2017 UMS Group performed a new SOS implementation at a US utility across electric Distribution and Transmission. The company already had in place an Asset Economic Replacement tool to determine the optimal replacement timing of individual assets based on economic and health data, as well as a “roll-up” mechanism to combine individual asset work into projects/programs. However, they were lacking a structured way to further evaluate these projects and programs across company strategy and analyze them to determine their optimal budget plans within various constraints. The SOS was implemented to utilize relevant data, including some demographic, financial and reliability data already available, ensuring an integrated process and consistent use of information across the two applications.

### 2. Use of Word Report to Streamline Processes

During the last budget cycle, one company used the SOS Word Report feature to eliminate duplicate data entry users were doing to create a “business case” document for each project as part of a separate process. These business case documents are required by the regulator and all data was already included within SOS, so they were able to set the default format of the Word Report to closely mimic their existing documentation. Now, users simply have to generate the reports out of SOS. There is no longer a need to copy and paste the data into separate reports, saving a great deal of time while still meeting requirements. Any new data fields added to SOS in the future will also be available to be added to the Word Report, as it is automatically responsive to configuration changes. An added bonus is that users can set their own configurations to create other types of Word reports.

### 3. Utility-Wide Optimization

In previous newsletters, we highlighted an SOS user that decided to pursue its goal of optimizing across the utility after their first budget cycle using the SOS. UMS Group was engaged to further analyze the first cycle data, make recommendations, and implement changes to achieve consistent and fair scoring across all the business units. The process involved several iterations of deep scoring analysis, results analysis, and adjustment, as well as adding new scoring measures to account for project types / factors that weren’t getting as much credit as deserved.

After the first cycle of optimizing across business units, the company saw a great improvement, but also decided there was still room for further improvement, particularly in the area of balancing risk of deferral across business units. In addition, they wanted to add a new business unit into the process. UMS Group was engaged to support this with further analysis, recommendations and adjustments. Ultimately, the company felt they achieved a “>90% objectivity” level across business units. This past cycle was the company’s first “solo” run, and the SOS allowed them to successfully compare all investment types, even within a highly constrained budget.

## Client Corner

If we haven’t yet discussed update timing for 2018, and you have a specific timeframe in mind, please contact us so that we can discuss scheduling.

*(Applicable to latest version only.)*



Visit our YouTube Channel for brief SOS overview and practical problem solving videos:  
<https://www.youtube.com/channel/UCWpUPSdRswgSkE4iyx2nH6Q>

Don’t forget to visit or request to join the **SOS Linked In Group**:

[http://www.linkedin.com/groups?gid=3108029&trk=hb\\_side\\_g](http://www.linkedin.com/groups?gid=3108029&trk=hb_side_g)

Feel free to post questions, ideas, and thoughts for help or discussion amongst the SOS peer user group.

