

SMSRL User Guide

Start evaluation

The tool is self-guided. It is a Microsoft Excel Macro. The user simply needs to open the spreadsheet in Microsoft Excel. Click the “Start Evaluation” button. (If there is a previous ongoing evaluation saved in the file, an alert will be shown asking if the user wants to continue the previous evaluation. See “Save and Continue” section for more detail).

Form the main dialog, the user can select an evaluation mode. The user can select “Complete Evaluation” mode to perform an evaluation across all [Factory Design and Improvement \(FDI\) activities](#), or can choose the “Scope Selection” mode, which only evaluate activities pertaining to frequently-performed factory analysis project. After selecting an evaluation mode, click the “Start Evaluation” button at the bottom right of the dialog, and all the necessary questionnaire sheets are generated. If the user needs to start all over, click “Reset” button at the bottom left, all the questionnaire sheets and existing answers will be deleted, and new ones created.

Answering the Questionnaire

Any cell that is filled with grey color in the “Evaluation” and “Within-Activity” sheets are not required to have any input. Thus, it will be automatically reverted to the original value if the user mistakenly inputs anything to these cells. The cells under some columns (Activity Management, Software System, Output Data Format) require user to select a value among the preset values, and since the “Output Data Format” is dependent to the value of the “Software System”, the preset values of “Output Data Format” are variable and user is required to update the answer to “Output Data Format” if the value of “Software System” is changed.

The “Designated Personnel”, “KPI 1”, and “KPI Relationship” columns should be filled with texts to reflect current state of the factory operations. Specifically, the “Designated Personnel” column should be filled in with person name or names if there is/are one/ones responsible to the activity; otherwise, leave the cell blank. The “KPI 1” column should be filled with the name of the KPI monitored for that activity. If no KPI is monitored, leave the cell blank. In the “KPI Relationship” column, fill in the relationship between the KPI monitored at a particular control level and the KPI monitored at the higher-control level (which is automatically filled in the “KPI 2” column) if exists, otherwise, leave blank. It is considered a better practice if KPIs monitored at related control levels are also related.

After completing the “Evaluation” sheet, user can press cell with “Next Step” in the upper right of the questionnaire, it will take the user to the “Within-Activity” sheet that is generated in accordance with the selected activities.

The purpose of the “Within-Activity” sheet is to capture the information connectivity between different ISA-88 control-levels within each of activities. The levels (e.g. Area) under each activity number (e.g. A25) are the ‘from-level’ (which provide the information) and the levels right to the activity number are ‘to-level’. In the sheet, user put “1” if there

is any information transferred between 'from-level' and 'to-level'. Otherwise, put "0" or can leave it blank.

Once the sheets are completed, user can have the final result of the SMSRL by pressing the cell "Calculate Result" at the upper right of the sheet. This will show the SMSRL indices at the bottom of the sheet.

Save and Continue the Evaluation Later

If the user needs to save the current evaluation sheets and continue it later, user can simply save the file as it is done in normal excel files. When the user opens the saved evaluation file (more specifically, if there is an "Evaluation" sheet generated in the file), the user will be prompted to answer if he/she wants to continue the previous evaluation or start a new evaluation. If the user selects "Yes", the "Evaluation" sheet will be displayed, and user can continue the previous work. If the user selects "No", all the existing sheets and data will be removed, and user can start a new evaluation.