

Summary:

The Weekly Schedule tab gives the ability to generate a weekly schedule at a craft level, view pending work orders and designate certain days of the week for their completion. In this tab, the user can also see the number of Available Hrs. Used to track daily productivity.

Tools / Resources:

- Up-to-date **Import** Excel Spreadsheet of all Work Orders from a CMMS matching the field template provided or an integration to CMMS
- Email Support: support@getsockeye.com
- User Guides and Video's: <https://www.getsockeye.com/support/weeklyschedules>

Revision Log

Revisions	Date	Reason/Update	Updated By:
Rev 11.1	May 12, 2023	Added 'Closed Weekly Schedule'	C. Banham
Rev 11	July 19, 2022	Added Filter Details and video links	C. Banham
Rev10	May 2, 2022	Timing Pattern Feature Added	C. Banham
Rev9	May 26, 2020	Added Drag & Drop	C. Banham
Rev8	February 14, 2020	Added Adjusting Backlog & Schedule Views	C. Banham

Table of Contents:

<i>Weekly Schedule Overview</i>	4
Filters	4
Group By	4
Split Pane	5
Adjust Backlog Section by Dragging and Dropping	6
Viewable Fields	6
Search Fields	7
Sort field Numerically or Alphabetically	8
Backlog	9
<i>Import Work Orders</i>	9
Excel Import	10
Read Integration from CMMS	11
<i>Scheduling Work Orders</i>	12
Assign Bulk Work to the Schedule	12
Assign to a Specific Day	13
Assign by Work Order Number	14
Work Automatically added to the Weekly Schedule	14
<i>Updating or Adjusting the Weekly Schedule</i>	15
Adjust the Assigned Day	15
Updating or Reassign Hours	15
Drag and Drop Work Orders within the Schedule	16
Add Work Order(s) from a Different Team	17
Removing Work from the Schedule	18
<i>Task Details</i>	19
Viewing Task Details	19
Schedule Task Details	21
<i>More</i>	22
Move Schedules	22
Copy Schedules	23

Copy Work Order #s to clipboard	24
Copy Selected Work Order #s to clipboard	26
Commit or Uncommit Weekly Schedule	27
Close Weekly Schedule (Optional KPI Feature)	27
<i>Crew Utilization</i>	27
% Of Available Hours Used	27
Individual Craft Utilization	29
Over Schedule Resources.....	30
<i>Schedule Compliance</i>	30
Commit Weekly Schedule	31
Uncommit Weekly Schedule	32
Manually Complete a Work Order	33
Complete a Work Order Through CMMS	34
Add Schedule Breakers	35
Identify Removed Work Order(s)	36
Review Metrics During the Week.....	37
Group By Schedule Compliance	39
<i>Features</i>	40
Alerts.....	40
Updating a Delay Code	40
Hourly Scheduling	41
Maintenance Plan Assignment.....	41
Assigning Work to Timing Patterns	41
Close Weekly Schedule	42

Weekly Schedule Overview

Filters

Focuses on specific field details within the data being pulled in from the CMMS. Filters can be adjusted and or added depending on the current setup and details being pulled into Sockeye.

Group By

Video Link: [Group by Filter](#)

Allows work orders in both sections to group by a specific field.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Click on **Group By** **None** in the filter pane.
 - a. A drop-down box will appear with a list of fields.
5. Select the criteria required to sort the work orders by.
 - a. The drop-down box will disappear.
6. All work orders will be grouped by the field selection.

SOCKEYE Available Hours **Weekly Schedules** Daily Schedules Find Task Setup

Jun 2022

Mo Tu We Th Fr Sa Su
30 31 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 1 2 3

Team Chip Line Mech
Crafts All
Priority All
WO Stat All
Employees All
Revision All
WO Type All
Group By Day

Weekly Schedule for week of Jun 20, 2022
Chip Line Mech Supervisor Tim Fisher

+ Add by # - Remove Details More Search

WO #	WO Type	Status	Priority	Loc #	Op #	O. Revisi...	Delay	Est
▼ Monday								
900005343381	PMH1	RELE	4	471	010	T...NULL	None	1
900005614243	PMH1	RELE	3	310-0306	010	3...NULL	None	1
900005657661	PMH1	RELE	3	471	010	S... NULL	None	1
900005344597	PMH1	RELE	3	471	010	R... NULL	None	1
900005712127	PMH1	RELE	2	471	010	C... NULL	None	1
900005779577	PMH1	RELE	4	471	010	T... NULL	None	1
900005611935	PMH1	RELE	3	471-0169	010	I... HS-T...	None	1
▼ Monday and Tuesday								
900005893307	PMH1	RELE	4	471	010	C... NULL	None	1
▼ Tuesday								

Backlog for Chip Line Mech + Schedule Details Search

WO #	WO Type	Status	Priority	Loc #	Op #	O. Revisi...	Delay	Est
900004911534	PMH1	RELE	1	471-0416	020	C... NULL	None	1
900004911534	PMH1	RELE	1	471-0416	030	R... NULL	None	1
900005343520	PMH1	RELE	3	471-0488	010	B... HST...	None	1
900005343522	PMH1	RELE	3	471-0488	010	C... HST...	None	1
900005343528	PMH2	RELE	3	471-0366	010	R... HTM...	None	1
900005343584	PMH2	RELE	4	500-0403	010	O... HTM...	None	1

Split Pane

Video Link: [Split Pane Filter](#)

Provides different views in the bottom section of the Weekly and Daily Schedules section.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Click on **Split Pane** in the filter pane.
 - a. A drop-down box will appear with a list of fields.
 - i. Backlog – Pulls all work orders identified as ready to schedule for that team.
 - ii. Weekly KPIs – Available to view only under the Weekly Schedule Tab. Offers a view of each of the Sockeye KPI's turned on and the status for the week.
 - iii. None – Removes the separation and shows a full Weekly or Daily Schedule.
5. Select the criteria required to sort the work orders by.
 - a. The drop-down box will disappear.
6. The bottom portion will update based on the selection from the Split Pane.

SOCKEYE Available Hours **Weekly Schedules** Daily Schedules Find Task Setup

Jun 2022

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Team: Chip Line Mech

Crafts: All

Priority: All

WO Stat: All

Employees: All

Revision: All

WO Type: All

Group By: None

Split Pane: Weekly KPIs

Weekly KPIs: Weekly KPIs, Backlog, None

Weekly Schedule for week of Jun 20, 2022
Chip Line Mech Supervisor Tim Fisher

+ Add by # - Remove Details More Search

WO #	WO Type	Status	Priority	Loc #	Op #	O. Revisi...	Delay	Est Me
900004911534	PMH1	RELE	1	471-0416	010	C.. NULL	None	1
900005343361	PMH1	RELE	4	471-0430	010	I... HST...	None	1
900005343381	PMH1	RELE	4	471	010	T... NULL	None	1
900005343491	PMH2	RELE	3	471-0062	010	C.. HST...	None	1
900005346460	PMH1	RELE	3	310-0306	010	M.. HS-T...	None	1
900005614243	PMH1	RELE	3	310-0306	010	3.. NULL	None	1
900005821314	PMH1	RELE	4	310-0307	010	C... HST...	None	1
B009067	BRK	RELE	1	310	010	R..	None	1
900005343567	PMH1	RELE	3	471-0169	010	M.. HS-T...	None	1
900005902416	PMH1	RELE	4	471-0356...	010	R.. NULL	None	1
900005947557	PMH2	RELE	2	623-3832	010	R.. HTM...	None	1
900005343650	PMH1	RELE	3	471	010	R.. HS-T...	None	1

Weekly KPIs for Chip Line Mech


6% Schedule Complia... Schedule Compliance (Hours) Sche

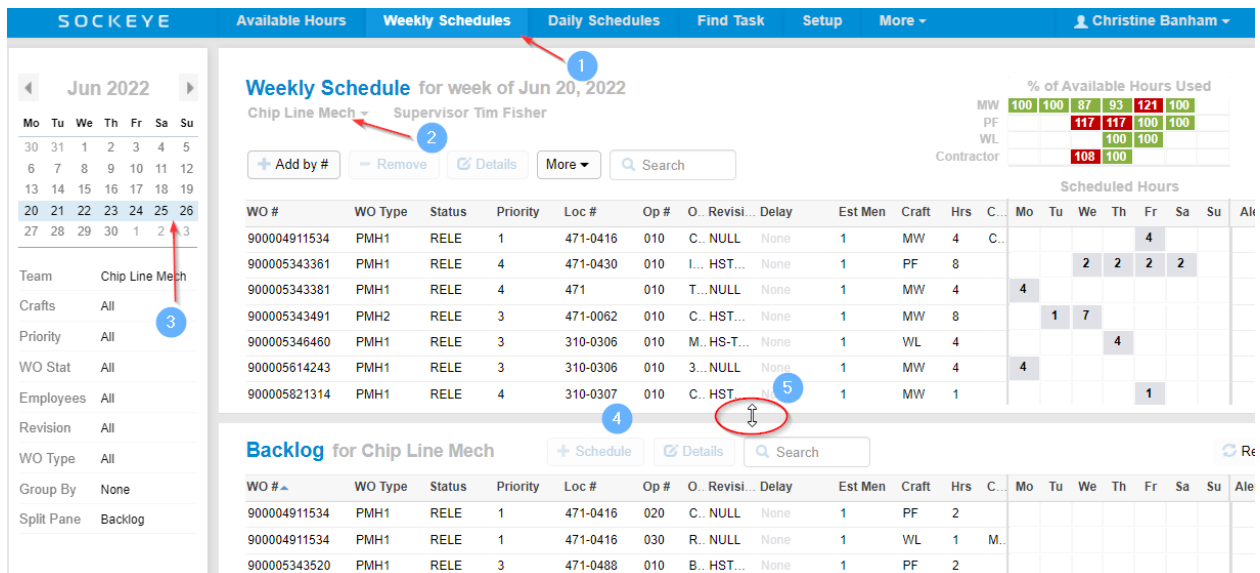
40

Adjust Backlog Section by Dragging and Dropping

Video Link: [Adjust Backlog Section](#)

The Backlog section of Sockeye under the Weekly and Daily Schedules tabs can be adjusted to allow more visibility on the screen.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Hover the mouse on the grey line separating the schedule and the backlog.
5. The mouse will change to show an arrow pointing up and down .
6. Press and hold down the left mouse button
7. Move the grey line up or down on the screen.
8. Release the mouse button when the grey line is in a better placement.



SOCKEYE Available Hours **Weekly Schedules** Daily Schedules Find Task Setup More Christine Banham

Weekly Schedule for week of Jun 20, 2022
Chip Line Mech - Supervisor Tim Fisher

Team: Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	O. Revisi...	Delay	Est Men	Craft	Hrs	C...	Mo	Tu	We	Th	Fr	Sa	Su	Al
900004911534	PMH1	RELE	1	471-0416	010	C.. NULL	None	1	MW	4	C..						4		
900005343361	PMH1	RELE	4	471-0430	010	I... HST...	None	1	PF	8			2	2	2	2			
900005343381	PMH1	RELE	4	471	010	T... NULL	None	1	MW	4		4							
900005343491	PMH2	RELE	3	471-0062	010	C.. HST...	None	1	MW	8			1	7					
900005346460	PMH1	RELE	3	310-0306	010	M.. HS-T...	None	1	WL	4					4				
900005614243	PMH1	RELE	3	310-0306	010	3... NULL	None	1	MW	4		4							
900005821314	PMH1	RELE	4	310-0307	010	C.. HST...	None	1	MW	1						1			

Backlog for Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	O. Revisi...	Delay	Est Men	Craft	Hrs	C...	Mo	Tu	We	Th	Fr	Sa	Su	Al
900004911534	PMH1	RELE	1	471-0416	020	C.. NULL	None	1	PF	2									
900004911534	PMH1	RELE	1	471-0416	030	R.. NULL	None	1	WL	1	M..								
900005343520	PMH1	RELE	3	471-0488	010	B.. HST...	None	1	PF	2									

Viewable Fields

Video Link: [Schedule Fields](#)

To change any of the work order columns this can be configured in the setup menu. Refer to the 'Setup > Schedule Fields' user guide for details on making these changes.

Search Fields

Video Link: [Search](#)

Search fields are available for both the scheduling and backlog section. Any keyword from the visible fields can be searched.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **▼** under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Click in the **search** field.
5. Enter a **specific** detail.
6. Click the **enter** key.
7. A **list of work orders** will appear based on the search criteria.

The screenshot displays the 'SOCKEYE' software interface. At the top, a blue ribbon contains navigation tabs: 'Available Hours', 'Weekly Schedules' (highlighted with a red circle and arrow labeled '1'), 'Daily Schedules', 'Find Task', 'Setup', and 'More'. Below the ribbon, the 'Weekly Schedule for week of Jun 20, 2022' section is shown for 'Chip Line Mech' and 'Supervisor Tim Fisher'. A search bar contains the text 'Bea' (circled in red). Below this is a table of work orders:

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay
B009067	BRK	RELE	1	310	010	Replace failed B14 bearing		None
900005902416	PMH1	RELE	4	471-0356-...	010	Replace Rotating Assembly -Bearin...	NULL	None

On the left, a calendar for June 2022 shows the week of the 20th to 26th selected (circled in red). Below the calendar, a 'Team' dropdown menu is open, showing 'Chip Line Mech' selected (circled in red and labeled '3').

Below the weekly schedule, the 'Backlog for Chip Line Mech' section is visible. A search bar contains the text 'bear' (circled in red and labeled '4'). A tooltip above it says 'Search the backlog'. Below this is another table of work orders:

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay
900005521286	PMH1	RELE	4	551-0478	010	Replace Belts And Noisy Fan Bearings	NULL	None

Sort field Numerically or Alphabetically

Video Link: [Sort fields numerically or alphabetically](#)

The Backlog and Setup sections of Sockeye can sort fields or columns in numerical or alphabetical orders based on the data within that field.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▾ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Select and click the **backlog field** to put in order.
5. A blue triangle ▲ will appear.
 - a. If the triangle is pointing upwards ▲ the order is A to Z or lowest to highest.
 - b. The triangle pointing downwards ▼ puts the order Z to A or highest to lowest.

SOCKEYE Available Hours **Weekly Schedules** Daily Schedules Find Task Setup More ▾

◀ Jun 2022 ▶

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Team Chip Line Mech

Crafts All

Priority All

WO Stat All

Employees All

Revision All

WO Type All

Group By None

Split Pane Backlog

Weekly Schedule for week of Jun 20, 2022
Chip Line Mech ▾ Supervisor Tim Fisher

+ Add by # - Remove Details More ▾ Search

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est M
900004911534	PMH1	RELE	1	471-0416	010	Change #34 gearbox	NULL	None	1
900005343361	PMH1	RELE	4	471-0430	010	Install Remote Greases Blocks For ...	HST...	None	1
900005343381	PMH1	RELE	4	471	010	Tha Required For Transrol Alignmen...	NULL	None	1
900005343491	PMH2	RELE	3	471-0062	010	Change/ Monitor Line-1 Feed Conve...	HST...	None	1
900005346460	PMH1	RELE	3	310-0306	010	Monitor Elec Motor No.6 Tmp Chip ...	HS-T...	None	1
900005614243	PMH1	RELE	3	310-0306	010	310-0306 Chip Belt 6 Backside Chip...	NULL	None	1
900005821314	PMH1	RELE	4	310-0307	010	Clean Build Up Off Self Alignment R...	HST...	None	1

Backlog for Chip Line Mech Schedule Details Search

WO #	WO Type	Status	Priority	Loc # ▲	Op #	Operation	Revisi...	Delay	Est M
B009337	BRK	RELE	1	310	010	Replace faulty switch		None	1
B009365	BRK	RELE	1	310	010	Switch out wornCAT2		None	1
B009657	BRK	RELE	1	310	010	Repair P60 chain		None	1
900005789948	PMH2	CRTD	2	310-0307	010	Semi-Annual Inspection Of Tmp Chi...	NULL	None	1

Backlog

Video Link: [Backlog](#)

The Backlog is located at the bottom of the Weekly and Daily Schedule tabs. This is the section of work that has been identified as ready to schedule and can be filtered differently for each team.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. **Backlog** section can be **hidden** at any time by clicking the ✕ on the top right corner of the section or by changing the split pane option on the left-hand filters.
5. **Unhide Backlog**, select **Backlog** from the split pane option on the left side of the screen under the filters

The screenshot shows the Sockeye software interface. At the top, the 'Weekly Schedules' tab is selected in the blue ribbon. The main area displays a calendar for June 2022 and a table of work orders for the week of June 20, 2022. The work orders table includes columns for WO #, WO Type, Status, Priority, Loc #, Op #, Ope..., Revisi..., Delay, Est Men, Craft, Hrs, C..., and a grid for Scheduled Hours. Below the main table, there is a section for 'Backlog for Chip Line Mech' with a search bar and a refresh button. The left sidebar contains various filters, and the bottom right corner has a close button (✕) for the Backlog section.

Import Work Orders

Updating the Backlog Criteria can happen by a excel import or a read integration. Reach out to your Sockeye Rep if you are not certain of the type of import that has been setup.

Excel Import

VIDEO LINK: [Excel Import](#)

Allows a list of all backlog work orders within the CMMS to be uploaded by an excel spreadsheet the work orders will filter to the applicable teams based on the backlog criteria set for that specific team. When updating Sockeye with a spreadsheet it is important that the fields match.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Click **Refresh** on the lower right-hand side of the **Backlog** section.
5. A file explorer dialogue box will appear.
6. Select the excel spreadsheet that has been exported. ****Note: the document must be .xls or .xlsx and all data details need to be in one tab.*
7. Click on **Open**.
8. Work orders will load into Sockeye with the details of the most recent import.



The screenshot shows the Sockeye software interface. At the top, the 'Weekly Schedules' tab is selected in the blue ribbon. Below the ribbon, the 'Weekly Schedule for week of Jun 7, 2021' is displayed. A file explorer dialog box is open, showing the 'This PC > Desktop' location. The file '20220603, Backlog.xlsx' is selected. The 'Open' button is highlighted. Below the dialog, the 'Backlog' table is visible, showing a list of work orders with columns for Craft, Area, WO #, WO Description, Revision, Pri, Equip #, Start, Finish, Delay, Ppl, Hrs, Craft, and a calendar grid for the week of Jun 7, 2021. A 'Refresh' button is located at the bottom right of the backlog section.

Craft	Area	WO #	WO Description	Revision	Pri	Equip #	Start	Finish	Delay	Ppl	Hrs	Craft	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
MEC...		A00301	Replace failed B...	1		INJPUMP	Jan 22, 2021	Jan 22, 2021	None	1	1	Mech										
MEC...		A00302	Replace faulty s...	1		M-3000-N051	Jan 22, 2021	Jan 28, 2021	None	1	1	Mech										
MEC...		A00303	Switch out worn ...	2		DAD-TOOL1	Jan 23, 2021	Jan 26, 2021	None	1	1	Mech										

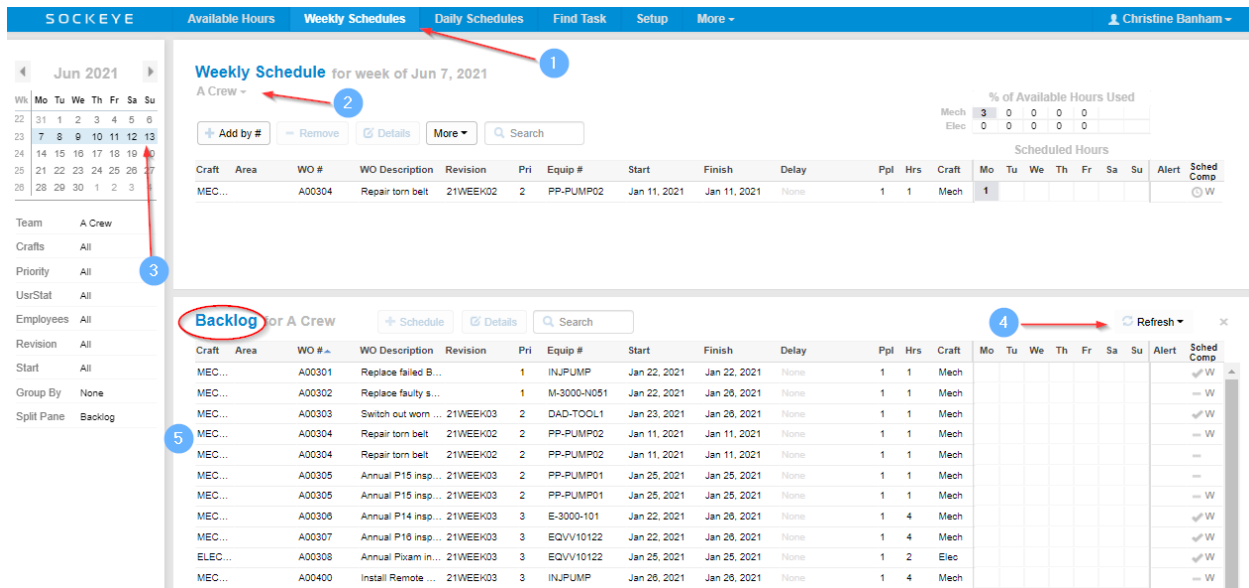
Read Integration from CMMS

Video Link: [Import Work Orders from CMMS](#)

Pulls all workorders identified within the CMMS automatically and populates the identified work orders to the assigned teams based on the backlog criteria setup.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the  under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Click  on the lower right-hand side of the **Backlog** section.
5. Work orders will load into Sockeye with the most recent CMMS details.

*****Note:** This needs to be setup in advance, please work with your Subject Matter Expert and Sockeye Rep to move forward with this option.



The screenshot shows the Sockeye interface with the following elements:

- Navigation Bar:** SOCKEYE, Available Hours, **Weekly Schedules** (highlighted with callout 1), Daily Schedules, Find Task, Setup, More.
- Header:** Weekly Schedule for week of Jun 7, 2021 (highlighted with callout 1).
- Team Selection:** A Crew (highlighted with callout 2).
- Calendar:** A calendar for June 2021 with the week of June 7-13 highlighted (callout 3).
- Buttons:** Add by #, Remove, Details, More, Search.
- Table 1 (Weekly Schedule):**

Craft	Area	WO #	WO Description	Revision	Pri	Equip #	Start	Finish	Delay	Ppl	Hrs	Craft	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp.	
MEC...		A00304	Repair torn belt	21WEEK02	2	PP-PUMP02	Jan 11, 2021	Jan 11, 2021	None	1	1	Mech	1									W
- Buttons:** Backlog (highlighted with callout 5), Schedule, Details, Search.
- Refresh:** Refresh button (highlighted with callout 4).
- Table 2 (Backlog):**

Craft	Area	WO #	WO Description	Revision	Pri	Equip #	Start	Finish	Delay	Ppl	Hrs	Craft	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp.	
MEC...		A00301	Replace failed B...		1	INJ.PUMP	Jan 22, 2021	Jan 22, 2021	None	1	1	Mech										W
MEC...		A00302	Replace faulty s...		1	M-3000-N051	Jan 22, 2021	Jan 28, 2021	None	1	1	Mech										W
MEC...		A00303	Switch out worn ...	21WEEK03	2	DAD-TOOL1	Jan 23, 2021	Jan 28, 2021	None	1	1	Mech										W
MEC...		A00304	Repair torn belt	21WEEK02	2	PP-PUMP02	Jan 11, 2021	Jan 11, 2021	None	1	1	Mech										W
MEC...		A00304	Repair torn belt	21WEEK02	2	PP-PUMP02	Jan 11, 2021	Jan 11, 2021	None	1	1	Mech										W
MEC...		A00305	Annual P15 insp...	21WEEK03	2	PP-PUMP01	Jan 25, 2021	Jan 25, 2021	None	1	1	Mech										W
MEC...		A00305	Annual P15 insp...	21WEEK03	2	PP-PUMP01	Jan 25, 2021	Jan 25, 2021	None	1	1	Mech										W
MEC...		A00306	Annual P14 insp...	21WEEK03	3	E-3000-101	Jan 22, 2021	Jan 28, 2021	None	1	4	Mech										W
MEC...		A00307	Annual P18 insp...	21WEEK03	3	EQV/10122	Jan 22, 2021	Jan 28, 2021	None	1	4	Mech										W
ELEC...		A00308	Annual Pixam in...	21WEEK03	3	EQV/10122	Jan 25, 2021	Jan 25, 2021	None	1	2	Elec										W
MEC...		A00400	Install Remote ...	21WEEK03	3	INJ.PUMP	Jan 28, 2021	Jan 28, 2021	None	1	4	Mech										W

Scheduling Work Orders

Assign Bulk Work to the Schedule

Video Link: [Adding multiple work order to the schedule](#)

Allows users to selecting a large group of work orders to add to the Weekly Schedule. This will automatically assign to the first available resource based on the availability of craft, estimated hours, and estimated people.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Under the **Backlog** section select the **work orders to add** to the schedule. Highlight the work order from the backlog by clicking on the work order and highlighting in blue.
5. Click on the **+ Schedule** button. This will move the selected work orders above to the Weekly Schedule section when resources are available.

The screenshot displays the 'Weekly Schedules' interface. At the top, the 'Weekly Schedules' tab is selected. The main area shows a weekly schedule for 'A Crew' for the week of June 21, 2021. A calendar on the left indicates the selected week. Below the calendar, the 'Backlog' section is visible, containing a table of work orders. A red circle highlights the 'Backlog' button, and a red arrow points to the '+ Schedule' button. Another red arrow points to a work order in the backlog table. A fourth red arrow points to a cell in the 'Scheduled Hours' grid. The 'Scheduled Hours' grid shows a grid of days (Mo-Su) and hours (Ppl, Hrs) for various crafts (Mech, Elec).

SHORTCUT:

Multiple work orders can be selected and scheduled at one time by holding down the Ctrl key while clicking on multiple selections OR by clicking on one work order at the top of the list, hold down the Shift key, and click on a work order further down the list (this will select all entries in between)

Assign to a Specific Day

Video Link: [Assign to a specific day](#)

By select a single work order to add to the weekly schedule for a specific day the work order will be added to the Weekly Schedule under the selected day and automatically assign the resource based on the availability of craft, estimated hours, and estimated people.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of** .
3. Click on the calendar **Week** for the specified period.
4. Under the **Backlog** section select the **work orders to add** to the schedule.
5. **Click** on the desired **day** of the week the work order is to be scheduled. In this example, we clicked on Friday. The work order will move to the Weekly Schedule for that specific day.

The screenshot displays the 'SOCKEYE' software interface. At the top, the 'Weekly Schedules' tab is selected in the blue ribbon. The main area shows a 'Weekly Schedule for week of Jun 21, 2021' for 'A Crew'. A calendar on the left shows the week of June 21-27, 2021, with the 27th highlighted. Below the calendar, a 'Backlog of A Crew' section lists several work orders. The 'Backlog' section is circled in red. A red arrow points to the 'Fr' (Friday) column in the work order table, indicating the step of assigning the work order to that day.

Craft	Area	WO #	WO Description	Revision	Pri	Equip #	Start	Finish	Delay	Ppl	Hrs	Craft	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
MEC...		A00301	Replace failed B...	1	1	INJPUMP	Jan 22, 2021	Jan 22, 2021	None	1	1	Mech										
MEC...		A00302	Replace faulty s...	1	1	M-3000-N051	Jan 22, 2021	Jan 28, 2021	None	1	1	Mech					1					
MEC...		A00303	Switch out worn ...	21WEEK03	2	DAD-TOOL1	Jan 23, 2021	Jan 28, 2021	None	1	1	Mech										
MEC...		A00304	Repair torn belt	21WEEK02	2	PP-PUMPO2	Jan 11, 2021	Jan 11, 2021	None	1	1	Mech										
MEC...		A00304	Repair torn belt	21WEEK02	2	PP-PUMPO2	Jan 11, 2021	Jan 11, 2021	None	1	1	Mech										
MEC...		A00304	Repair torn belt	21WEEK02	2	PP-PUMPO2	Jan 11, 2021	Jan 11, 2021	None	1	1	Mech										
MEC...		A00305	Annual P15 insp...	21WEEK03	2	PP-PUMPO1	Jan 25, 2021	Jan 25, 2021	None	1	1	Mech										

Assign by Work Order Number

Video Link: [Assign by work order number](#)

If the user knows a partial or full work order number, it can be inputted through the search functionality or by:

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▾ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Click on the **+ Add by #** button located in the **Weekly Schedule** section of the screen.
5. This will generate a new entry box at the bottom of the **Weekly Schedule** section
Type the WO # and press Enter.
6. Click on **Work Order # box** and **enter the work order**. A drop-down box will automatically give suggestions based on what is typed and can be selected if applicable.

The screenshot shows the Sockeye software interface. At the top, the navigation bar includes 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The 'Weekly Schedules' tab is active. Below the navigation bar, there is a calendar for June 2021. To the right of the calendar, there is a section for 'Weekly Schedule for week of Jun 21, 2021' for 'A Crew'. This section includes a '+ Add by #' button, a search box, and a table of work orders. A red arrow points to the '+ Add by #' button (1), another to the team dropdown (2), and a third to the calendar (3). A fourth arrow points to the search box (4), and a fifth to the search input field (5) which contains the text 'Type the WO # and press Enter'. A sixth arrow points to the work order table (6). The table has columns for Craft, Area, WO #, WO Description, Revision, Pri, Equip #, Start, Finish, Delay, Ppl, Hrs, Craft, Mo, Tu, We, Th, Fr, Sa, Su, Alert, and Sched Comp. A 'Refresh' button is located at the bottom right of the interface.

Work Automatically added to the Weekly Schedule

Video Link: [Automatically Scheduling](#)

Work orders can automatically be added to the Weekly Schedule when clicking on the Refresh button if it matches specified fields. Typically, these fields are:

- **Date** field matches the current week in Sockeye
- **Personnel Code** has been populated in CMMS and is available to schedule in Sockeye
- **Craft** matches both the personal number and is available in Sockeye

*****Note:** This needs to be setup in advance, please work with your Subject Matter Expert and Sockeye Rep to move forward with this option.

Updating or Adjusting the Weekly Schedule

*****Note:** Any work order hours highlighted in **RED** under the week indicate there are **NO** resources available to complete the work.

Adjust the Assigned Day

Video Link: [Adjusting the Assigned Day](#)

Work orders may be required to be shifted to a different day for a variety of reasons. And can be quickly updated by drag and dropping to the right or left within the week.

1. **Press** and hold down the mouse button on the **scheduled hours** under the assigned day and **drag** it to a preferred day. Release the mouse button on the new assigned day.

Weekly Schedule for week of Apr 22, 2013
New Team

+ Add by # - Remove Details More ▾

MW % of Available Hrs Used 6 0 17 0

WO #	Priority	WO Desc	Step	People	Craft	Hrs	Dur	Mo	Tu	We	Th	Fr	Sa	Su
1550621	2	check bull...	1	2	MWT	3	1.5			3				
1389941	2	g)PM-SER...	1	1	GAR	8	8			8				
1387078	2	g)PM-SER...	1	1	GAR	8	8						8	

Updating or Reassign Hours

Video Link: [Adjusting the Assigned Hours](#)

Work order hours may need to be assigned throughout the week or adjusted based on other scheduling details. This can be quickly adjusted by adding and or removing hours for any day throughout the week.

1. Select the cell that is to be changed and update the applicable hours.

Available Hours **Weekly Schedules** Daily Schedules Find Task Setup More ▾ Christine Banham ▾

Weekly Schedule for week of Jun 21, 2021
A Crew ▾

+ Add by # - Remove Details More ▾ Search

Mech % of Available Hours Used 11 3 3 3 3 0 0
Elec 0 0 0 0 0 0 0


Craft	Area	WO #	WO D...	Revision	Pri	Equip #	Start	Finish	Delay	Ppl	Hrs	Craft	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
MEC...		A00401	Trans...	21WEEK03	3	M-3000-N051	Jan 26, 2021	Jan 26, 2021	None	1	2	Mech	2									R
MEC...		A00306	Annu...	21WEEK03	3	E-3000-101	Jan 22, 2021	Jan 26, 2021	None	1	4	Mech	1	1	1	1	1	1	1			R
MEC...		A00301	Repla...		1	INJPUMP	Jan 22, 2021	Jan 22, 2021	None	1	1	Mech										R

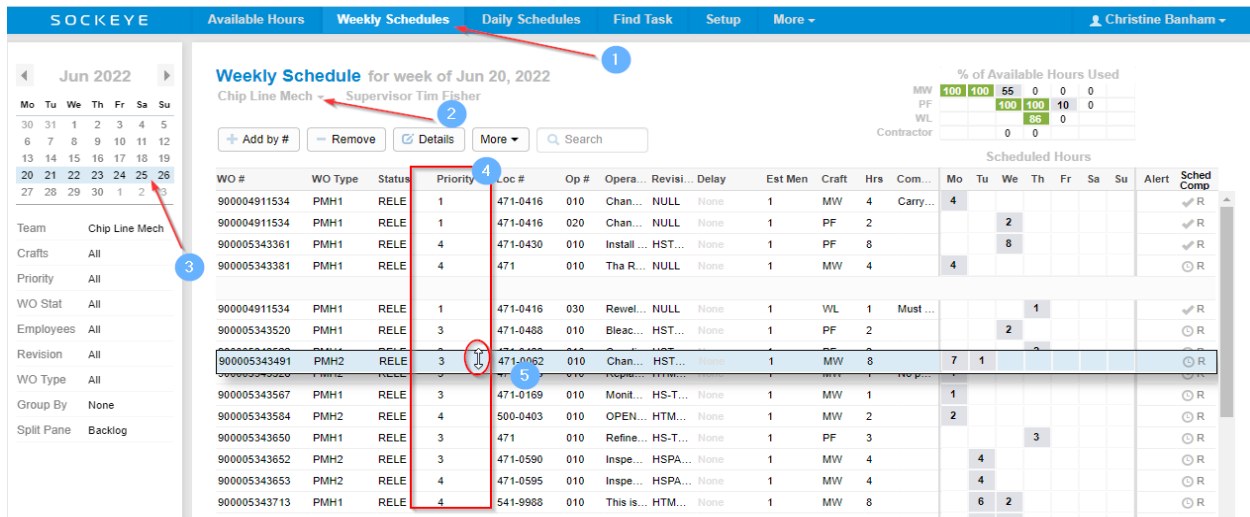
Hours
4 hours required.
7 hours scheduled.

Drag and Drop Work Orders within the Schedule

Video Link: [Drag and Drop](#)

Change the prioritization of the work order within a schedule by selecting the work order and moving up or down within the list of work orders in the weekly schedule section.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. **Hover** the mouse under the 'Priority' field or the 2nd column on the left (if the 'Priority' field is not available). The mouse will change to an arrow  in that column
5. Press and hold down the mouse button on the **work order** to move. The line will highlight in blue.
6. Drag work order up or down within your schedule and drop (Release the mouse button) where applicable.



The screenshot shows the 'Weekly Schedules' interface for the week of Jun 20, 2022. The main table lists work orders with columns for WO #, WO Type, Status, Priority, Loc #, Op #, and Scheduled Hours. A red box highlights the 'Priority' column, and a blue box highlights a work order row (WO # 90005343491). A mouse cursor is shown over the priority field of the highlighted row. The interface also includes a navigation bar, a calendar, and a sidebar with filters.

WO #	WO Type	Status	Priority	Loc #	Op #	Opera...	Revisi...	Delay	Est Men	Craft	Hrs	Com...	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp
900004911534	PMH1	RELE	1	471-0416	010	Chan...	NULL	None	1	MW	4	Carry...	4								✓ R
900004911534	PMH1	RELE	1	471-0416	020	Chan...	NULL	None	1	PF	2			2							✓ R
900005343361	PMH1	RELE	4	471-0430	010	Install...	HST...	None	1	PF	8			8							✓ R
900005343381	PMH1	RELE	4	471	010	Tha R...	NULL	None	1	MW	4		4								○ R
900004911534	PMH1	RELE	1	471-0416	030	Revel...	NULL	None	1	WL	1	Must...				1					✓ R
900005343520	PMH1	RELE	3	471-0488	010	Bleac...	HST...	None	1	PF	2				2						○ R
900005343491	PMH2	RELE	3	471-0052	010	Chan...	HST...	None	1	MW	8		7	1							○ R
900005343567	PMH1	RELE	3	471-0169	010	Mont...	HS-T...	None	1	MW	1		1								○ R
900005343584	PMH2	RELE	4	500-0403	010	OPEN...	HTM...	None	1	MW	2		2								○ R
900005343650	PMH1	RELE	3	471	010	Refine...	HS-T...	None	1	PF	3					3					○ R
900005343652	PMH2	RELE	3	471-0590	010	Inspe...	HSPA...	None	1	MW	4			4							○ R
900005343653	PMH2	RELE	4	471-0595	010	Inspe...	HSPA...	None	1	MW	4			4							○ R
900005343713	PMH1	RELE	4	541-9968	010	This is...	HTM...	None	1	MW	8		6	2							○ R

Add Work Order(s) from a Different Team

Video Link: [Backlog work from a different team](#)

During the scheduling process a work order may need to be included that does not meet the current Backlog Criteria for that team. By clicking on the backlog team an option will generate to select a different team to be viewed. The same steps to add the work to the schedule will apply.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Go to the **Backlog** section. Click on the **TEAM** currently displayed.
5. A **BACKLOG SETTINGS** dialogue box will appear in the middle of the screen.
6. Click on the ▼ .
7. Select the applicable **Team**.
8. Click on **Save**.
9. The **BACKLOG** work orders will update with the new team details based on the backlog criteria set.

The screenshot displays the 'Weekly Schedules' interface for the week of Jun 20, 2022. The interface includes a navigation bar with tabs like 'Available Hours', 'Weekly Schedules', and 'Daily Schedules'. A calendar on the left shows the selected week. The main area features a 'Weekly Schedule' for 'Chip Line Mech' with a table of work orders. A 'Backlog settings' dialog box is open, showing options to select a different team for backlog work orders. The 'Area Shutdown' option is checked, and the 'Save' button is highlighted. Red arrows and numbers 1-8 point to the specific UI elements mentioned in the instructions.

WO #	WO Type	Status	Priority	Loc #	Op #	Opera...	Revisi...	Delay	Est Men	Craft	Hrs	Com...	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp
900005343361	PMH1	RELE	4	4/1-0430	010	Install...	HS-T...	None	1	PF	8										
900005343381	PMH1	RELE	4	471	010	Tha R...	NULL	None	1	MW	4		4								
900004911534	PMH1	RELE	1	471-0416	030	Revel...	NULL	None	1	WL	1	Must...									
900005343953	PMH2	RELE	3	471-0595	010	Inspe...	HSPA...	None	1	MW	4			4							
900005343713	PMH1	RELE	4	471-0988	010	This is...	HTM...	None	1	MW	8			6	2						
900005343918	PMH2	RELE	1	471-0157	010	Chan...	HS-T...	None	1	MW	8			4	4						
900005343950	PMH1	RELE	1	471-1512	010	Repla...	HS-T...	None	1	WL	4						4				
900005344305	PMH1	RELE	1	471-0100	010	Repla...	HST...	None	1	PF	4	Must...							4		
900005343491	PMH2	RELE	3	471-0062	010	Chan...	HST...	None	1	MW	8			7	1						
900005344351	PMH2	RELE	4	471-0352	010	Chan...	HST...	None	1	MW	2										

Removing Work from the Schedule

Video Link: [Remove Work](#)

As schedules are being built and adjusted work orders may need to be removed from the schedule for various reasons.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. **Click** on the **work order** to un-assign. The line will highlight in blue.
5. **Click** the **Remove** button located at the top of the weekly schedule section.
6. This will move the work order back down into the **Backlog** section.
 - a. ****Note:** If the schedule has been committed a 'W' under the Sched Comp column will identify the work order that were removed from the schedule after it was committed.

The screenshot displays the software interface with the following components and annotations:

- 1:** Points to the **Weekly Schedules** tab in the top navigation bar.
- 2:** Points to the **Weekly Schedule for week of Jun 20, 2022** dropdown menu.
- 3:** Points to the calendar for **Jun 2022**.
- 4:** Points to a work order row in the **Weekly Schedule** table, which is highlighted in blue.
- 5:** Points to the **Remove** button located above the work order table.
- 6:** Points to the **Remove** button in the **Backlog** table for a work order that has been removed.


The **Weekly Schedule** table includes columns for WO #, WO Type, Status, Priority, Loc #, Op #, and various operational details. The **Backlog** table lists work orders that are not currently scheduled.

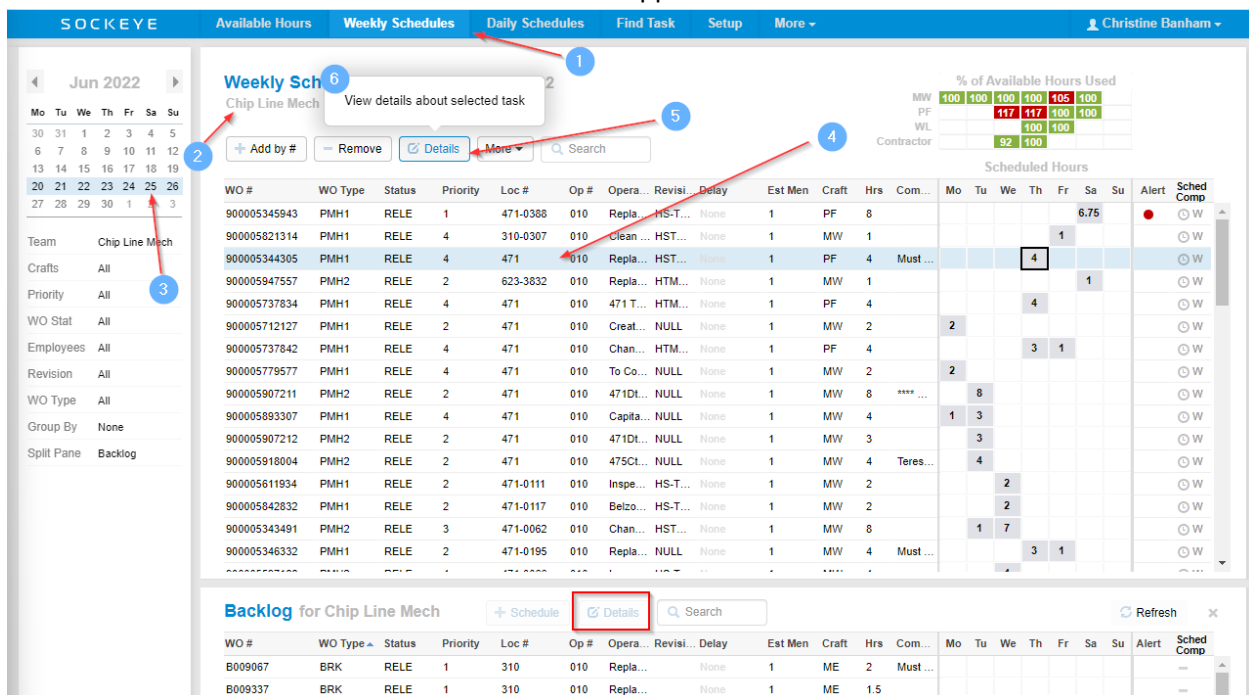
Task Details

Viewing Task Details

Video Link: [Task Details](#)

Provides further details about that specific work order. These details are updated within the backlog refresh and the scheduling tab focuses on the current details of the day, hours, craft and tradesperson assigned to the work within Sockeye.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. **Click on a task** in the Backlog or the Schedule section.
5. **Click on the**  **button** in either section (Weekly Schedule or Backlog).
6. **'View Details about Selected Task'** box will appear.



The screenshot displays the Sockeye software interface. At the top, a blue ribbon contains navigation tabs: SOCKEYE, Available Hours, Weekly Schedules, Daily Schedules, Find Task, Setup, and More. A user profile for Christine Banham is visible in the top right. On the left, a sidebar shows a calendar for June 2022 and a filter menu for Team (Chip Line Mech), Crafts, Priority, WO Stat, Employees, Revision, WO Type, Group By, and Split Pane. The main area is divided into two sections: 'Weekly Schedules' and 'Backlog for Chip Line Mech'. The 'Backlog' section contains a table of work orders with columns for WO #, WO Type, Status, Priority, Loc #, Op #, Opera..., Revisi..., Delay, Est Men, Craft, Hrs, Com..., and a grid for Scheduled Hours (Mo-Su). A 'View details about selected task' dialog box is open over a task in the Backlog, with a 'Details' button highlighted. A 'Refresh' button is also visible in the Backlog section.

WO #	WO Type	Status	Priority	Loc #	Op #	Opera...	Revisi...	Delay	Est Men	Craft	Hrs	Com...	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp
900005345943	PMH1	RELE	1	471-0388	010	Repla...	HS-T...	None	1	PF	8										
900005821314	PMH1	RELE	4	310-0307	010	Clean...	HST...	None	1	MW	1										
900005344305	PMH1	RELE	4	471	010	Repla...	HST...	None	1	PF	4	Must...									
900005947557	PMH2	RELE	2	623-3832	010	Repla...	HTM...	None	1	MW	1										
900005737834	PMH1	RELE	4	471	010	471 T...	HTM...	None	1	PF	4										
900005712127	PMH1	RELE	2	471	010	Creat...	NULL	None	1	MW	2		2								
900005737842	PMH1	RELE	4	471	010	Chan...	HTM...	None	1	PF	4										
900005779577	PMH1	RELE	4	471	010	To Co...	NULL	None	1	MW	2		2								
900005907211	PMH2	RELE	2	471	010	471DT...	NULL	None	1	MW	8	****...		8							
900005893307	PMH1	RELE	4	471	010	Capita...	NULL	None	1	MW	4		1	3							
900005907212	PMH2	RELE	2	471	010	471DT...	NULL	None	1	MW	3			3							
900005918004	PMH2	RELE	2	471	010	475Cl...	NULL	None	1	MW	4	Teres...		4							
900005611934	PMH1	RELE	2	471-0111	010	Inspe...	HS-T...	None	1	MW	2			2							
900005842832	PMH1	RELE	2	471-0117	010	Belzo...	HS-T...	None	1	MW	2			2							
900005343491	PMH2	RELE	3	471-0062	010	Chan...	HST...	None	1	MW	8		1	7							
900005346332	PMH1	RELE	2	471-0195	010	Repla...	NULL	None	1	MW	4	Must...									

Task Details page will open and includes Work Order, Task and Schedule Tab. In some cases, there may be additional tabs. This is broken down by the fields being pulled into Sockeye.

The screenshot displays the Sockeye software interface. At the top, there is a navigation bar with tabs for 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The main area shows a 'Weekly Schedule' for the week of Jun 20, 2022, for 'Chip Line Mech' under supervisor 'Tim Fisher'. A 'Task Details' modal window is open, showing the following information:

- Task Details Modal:**
 - Work Order: 9000057
 - Task: 9000057
 - Schedule: 9000057
 - Task Status: RELE
 - Op #: 010
 - Craft: PF
 - Operation: Replace Existing Piping And Static Mixer
 - Estimated People: 1
 - Estimated Duration: 4
 - Planned Code: (empty)
 - Business Unit: (empty)
 - Delay Code: (empty)
 - Comment: Must on Friday
 - Planner Group: TMP
 - Work Center: MECH
 - Estimated Hours: 4

The background shows a weekly schedule grid for June 2022, with a table of available hours and a list of work orders (WO #) on the left. The grid shows scheduled hours for various days, with some cells containing numbers like 4, 3, 1, 2, 7, 3, 1.

Schedule Task Details

Video Link: [Task Details Schedule](#)

The scheduling tab focuses on the current details of the day, hours, craft, and tradesperson assigned to the work within Sockeye. Overriding scheduling details such as resource or adjusting time to an individual can take place in this tab.

1. Select Schedule tab
2. Schedule Compliance click on the ▾ a drop-down will appear. Select Completed, Scheduled, or Unscheduled if applicable.
3. Alerts identify the differences between what was planned vs. scheduled.
4. Scheduled Hours are the details currently scheduled; however, can be adjusted or changed.
 - Allows hours to be updated by clicking on the specific weekday cell.
 - Drag and drop hours to a different day.
 - Add a specific employee for the assigned work
5. Click OK

The screenshot displays the Sockeye software interface. At the top, the navigation bar includes 'SOCKEYE', 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The user is identified as 'Christine Banham'. The main area shows a 'Weekly Schedule' for the week of Jun 20, 2022, for 'Chip Line Mech' under Supervisor 'Tim Fisher'. A 'Task Details' dialog box is open, with the 'Schedule' tab selected. The dialog contains the following elements:

- Work Order / Task / Schedule** tabs, with 'Schedule' selected (1).
- Schedule Compliance** dropdown menu set to 'Scheduled' (2).
- Alerts** section with a red dot icon (3).
- Hours** section showing '1 hour required. 2 hours scheduled.'
- Scheduled Hours** table (4):

Team	Craft	Assigned To	Mo	Tu	We	Th	Fr	Sa	Su
Chip Line Mech	MW	R. Humbert				1			
Chip Line Mech	MW	C. Carriere						1	
- Add Employee** dropdown menu (5) listing: T. Lau, C. Morrissey, Contractor J. Niemann, Contractor G. Watson, A. Mannion, Finning 1, Finning 2, SMS 1.
- OK** button at the bottom left of the dialog.

The background interface shows a calendar for June 2022 on the left and a grid of available hours used for various trades (MW, PF, WL) on the right. The grid shows values for each day of the week, with some cells highlighted in red or green.

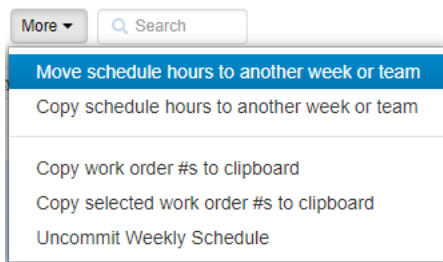
More

Move Schedules

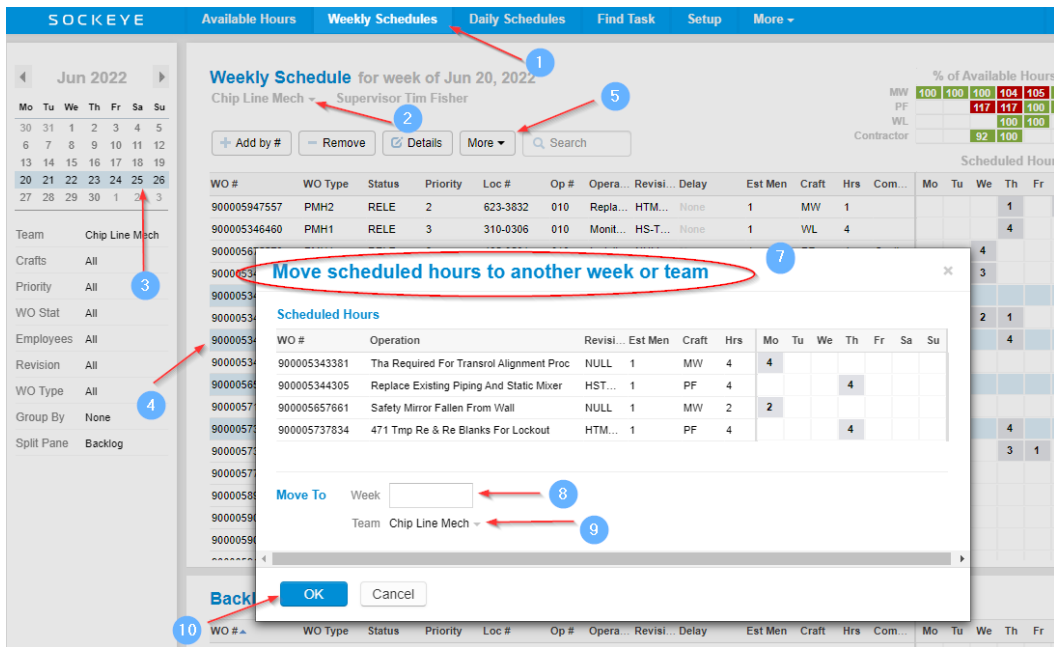
Link: [Move Schedules](#)

Allows schedulers to quickly move work orders tasks to a different week, team, or both. By moving schedules this will remove the work orders from the current weekly schedule and update them to the new identified week.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Select the **work orders** to be moved. These will highlight in blue. If there is more than one hold the shift key to select multiple work orders.
5. Click on **More** ▼.
6. Select **'Move schedule hours to another week or team'**.



7. A **'Move scheduled hours to another week or team'** dialogue box will generate.
8. Select the new **week date**.
9. Select a new **team** if applicable.
10. Click **OK**.
11. All work orders selected have been moved to the new assigned date and team.

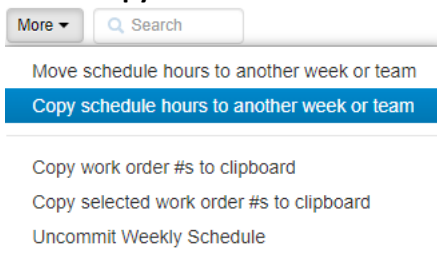


Copy Schedules

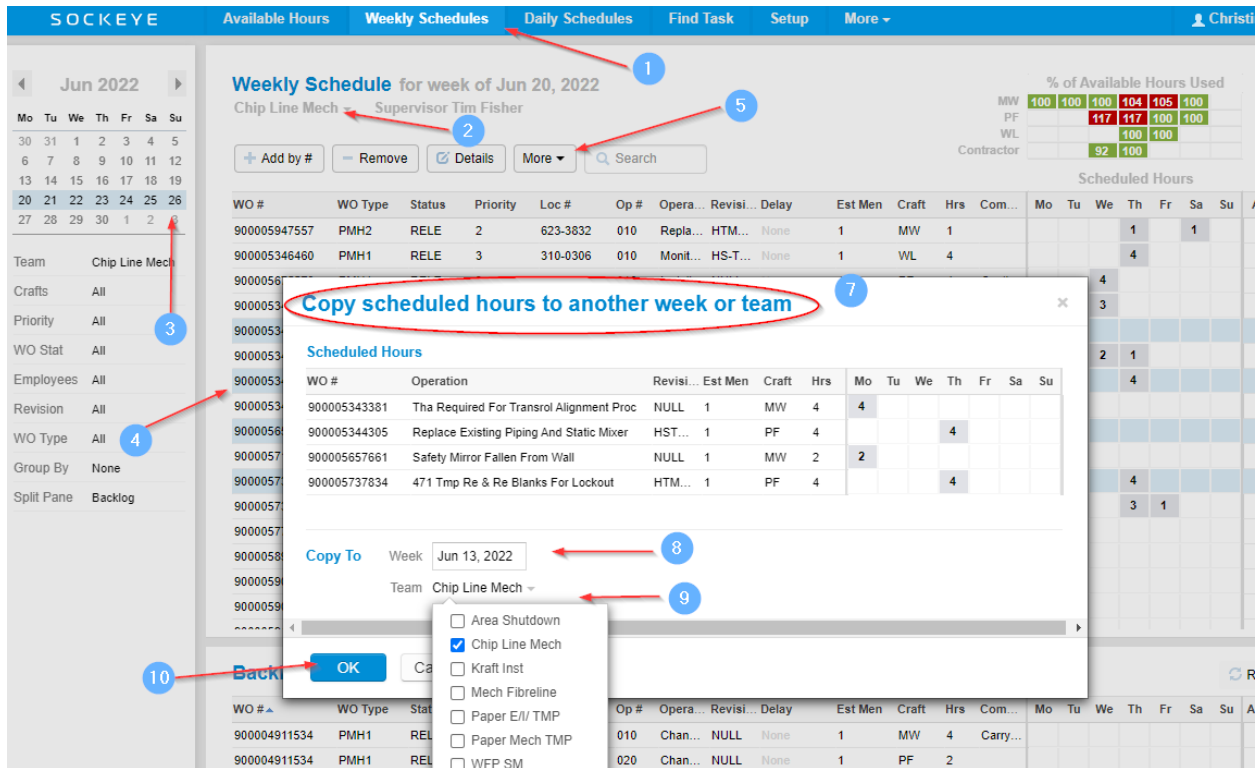
Link: [Copy Schedules](#)

Allows schedulers to quickly move work orders tasks to a different week, team, or both. Copying schedules will add these details to the selected week and team. All current scheduled details will remain in the schedule.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Select the **work orders** to be moved. These will highlight in blue. If there is more than one hold the shift key to select multiple work orders.
5. Click on **More** ▼
6. Select '**Copy schedule hours to another week or team**'.



7. A '**Copy scheduled hours to another week or team**' dialogue box will generate.
8. Select the new **week date**.
9. Select a new **team** if applicable.
10. Click **OK**.
11. All work orders selected have been moved to the new assigned date and team.



Copy Work Order #s to clipboard

Video Link: [Copy work order numbers to clipboard](#)

Provides an opportunity to copy work order numbers to mass upload in a CMMS or other program. This feature is typically used when picking or printing job tickets.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Click **More ▼** under the Weekly schedule portion of the screen
5. Select **Copy Work Order #s to clipboard**

SOCKEYE Available Hours Weekly Schedules Daily Schedules Find Task Setup More ▾

Weekly Schedule for week of Jun 20, 2022
Chip Line Mech - Supervisor Tim Fisher

Team: Chip Line Mech
Crafts: All
Priority: All
WO Stat: All
Employees: All
Revision: All
WO Type: All
Group By: None
Split Pane: Backlog

WO #	WO Type	Status	Priority	471	010	Retine...	HS-T...	None	1	Craft	Hrs	Com...	Mo	Tu	We	Th	F
900005947557	PMH2	RELE	2							MW	1						1
900005346460	PMH1	RELE	3							WL	4						4
900005675570	PMH1	RELE	3							PF	4	Can't...					4
900005346081	PMH1	RELE	3							PF	3						3
900005343381	PMH1	RELE	4							MW	4		4				
900005343650	PMH1	RELE	3							PF	3					2	1
900005344305	PMH1	RELE	4	471	010	Repla...	HST...	None	1	PF	4	Must ...					4
900005344597	PMH1	RELE	3	471	010	Rebuil...	NULL	None	1	MW	3		3				
900005657661	PMH1	RELE	3	471	010	Safety...	NULL	None	1	MW	2	In Bi...	2				
900005712127	PMH1	RELE	2	471	010	Creat...	NULL	None	1	MW	2		2				
900005737834	PMH1	RELE	4	471	010	471 T...	HTM...	None	1	PF	4						4
900005737842	PMH1	RELE	4	471	010	Chan...	HTM...	None	1	PF	4						3 1
900005779577	PMH1	RELE	4	471	010	To Co...	NULL	None	1	MW	2		2				
900005893307	PMH1	RELE	4	471	010	Capita...	NULL	None	1	MW	4		1	3			
900005907211	PMH2	RELE	2	471	010	471DL...	NULL	None	1	MW	8	**** ...					8
900005907212	PMH2	RELE	2	471	010	471DL...	NULL	None	1	MW	3						3

6. Open a text file or document the work orders are to be transferred or pasted into
7. Depending on your document select the appropriate paste functionality
 - a. Microsoft Word and Microsoft Excel was used in the example below by clicking on the paste button.

SOCKEYE Available Hours Weekly Schedules Daily Schedules Setup More ▾

Weekly Schedules for week of Jun 2019
Mech Fibreline

Team: Mech Fibreline
Crafts: All
Priority: All
WO Stat: All
Employees: All
Revision: All

WO #

900005342246
900005343312
900005343623
900005343659
900005344872

Home Insert Draw Page Layout Formulas Data Review View

Calibri (Body) 12

A1 900005342246

Copy Selected Work Order #s to clipboard

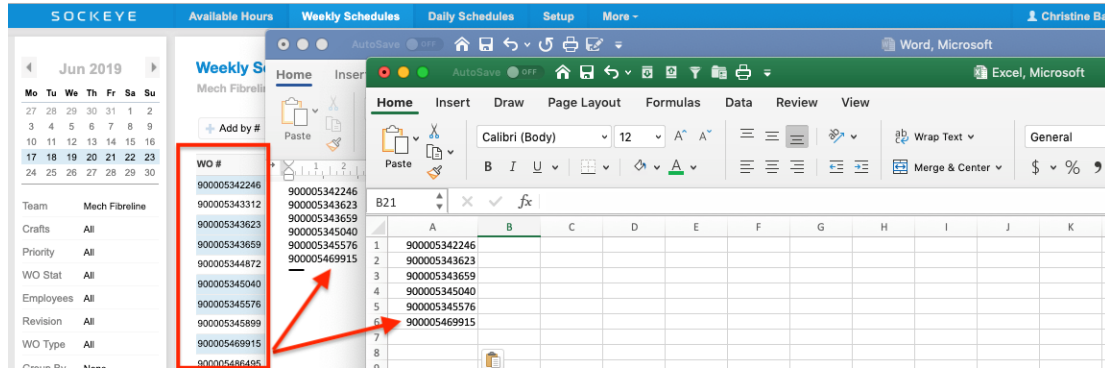
Video Link: [Copy selected work order numbers to clipboard](#)

Allows specific work order numbers to be pulled out of Sockeye and uploaded in a CMMS or other program. This feature is typically used when picking or printing job tickets at a daily level.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **▼** under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Select one or multiple work orders by holding the ALT key and clicking on the work orders to copy. Once the work orders have been selected, they should highlight blue.
5. Click **More ▼** under the Weekly schedule portion of the screen.
6. Select **Copy Selected Work Order #s to clipboard**

The screenshot shows the Sockeye software interface. At the top is a blue navigation bar with the following tabs: SOCKEYE, Available Hours, Weekly Schedules, Daily Schedules, Find Task, Setup, and More. Below the navigation bar, there is a left sidebar with a calendar for June 2022 and various filter options like Team, Crafts, Priority, etc. The main content area displays a 'Weekly Schedule for week of Jun 20, 2022' for 'Chip Line Mech' under supervisor 'Tim Fisher'. A table of work orders is shown with columns for WO #, WO Type, Status, Priority, and various task details. A 'More' dropdown menu is open over the table, showing options like 'Copy selected work order #s to clipboard'. Red arrows and numbers 1-6 point to specific UI elements corresponding to the numbered steps in the list above.

7. Open the text file or document work orders are to be copied.
8. Depending on your document select the appropriate paste functionality.
 - a. Microsoft Word and Microsoft Excel was used in the example below by clicking on the paste button.



Commit or Uncommit Weekly Schedule

Video Link: [Schedule Compliance](#)

Refer to the [Schedule Compliance](#) section for details on how to commit or uncommit a weekly schedule.

Close Weekly Schedule (Optional KPI Feature)

Website Link: [Close Weekly Schedule](#)

Handles actual hours and completion statuses for KPI calculations, an additional weekly snapshot can be added to store each team's "closed" schedule. A user can close a team's schedule by selecting "Close Weekly Schedule" from the More dropdown on the Weekly Schedule tab.

Crew Utilization


% Of Available Hours Used

Video Link: [Crew % of Available Hours Used](#)

Located top right of the screen offers a view of the percentage available hours used, broken down by craft. The ledger uses colors to identify the recourse utilization:

- Red identifying OVER Resources Availability
- Green indicating within 85 to 100% Resource Availability
- Grey showing there are Resources Available to schedule additional work.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▾ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. **Click** on the [% of Available Hours Used](#) header located at the top right hand of the Weekly Schedule.
5. An **Hours Summary** dialogue box will appear.

6. The following details are provided for each **craft** and **total** for that specified team:
 - Scheduled Hours
 - Available Hours
 - Percentage Used
 - Unscheduled Hours
7. # of Scheduled Tasks and # of Backlog Tasks for the Team can be found at the bottom of the Hours Summary details.
8. Click  to exit the dialogue box.

The screenshot displays the 'Weekly Schedule' interface for the week of Jun 20, 2022, for Supervisor Tim Fisher. A 'Hours Summary' dialog box is open for the 'Chip Line Mech' team. The dialog shows the following data:

Craft	Sched. Hrs	Avail. Hrs	% Used	Unscheduled Hrs
PF	14	14	100	0
WL	7	7	100	0
Contractor	11	12	92	1
Total	19	19	100	0

At the bottom of the dialog, the following task counts are shown:

- # of Scheduled Tasks: 64
- # of Backlog Tasks: 52

An 'OK' button is located at the bottom left of the dialog box.

Individual Craft Utilization

Video Link: [Craft Utilization](#)

Located top right of the screen offers a view of the percentage available hours used, broken down by a specific day and craft. The ledger uses colors to identify the recourse utilization:

- Red identifying OVER Resources Availability
- Green indicating within 85 to 100% Resource Availability
- Grey showing there are Resources Available to schedule additional work.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of** .
3. Click on the calendar **Week** for the specified period.
4. **Click** on a specific day's craft number or % of Available Hours Used within the grid
5. A box will appear with the **craft's current utilization** for that specific day.
6. To remove the pop up click on a **white** space within the Weekly Schedules tab.

Weekly Schedule for week of Jun 20, 2022
Chip Line Mech - Supervisor Tim Fisher

Available Hours: Weekly Schedules | Daily Schedules | Find Task | Setup | More

Team: Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	Opera...	Revisi...	Delay	Est Men	Craft	Hrs	Com...	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp		
900005947557	PMH2	RELE	2	623-3832	010	Repla...	HTM...	None	1	MW	1					1		1			●	W	
900005346460	PMH1	RELE	3	310-0306	010	Monit...	HS-T...	None	1	WL	4					4						○	W
900005675570	PMH1	RELE	3	465-0501	010	Install...	NULL	None	1	PF	4	Can't...			4							○	W
900005346081	PMH1	RELE	3	465-0701	010	Conn...	NULL	None	1	PF	3				3							○	W
900005343381	PMH1	RELE	4	471	010	Tha R...	NULL	None	1	MW	4		4									○	W
900005343650	PMH1	RELE	3	471	010	Refine...	HS-T...	None	1	PF	3				2	1						○	W

MW utilization on Thursday

29 hours scheduled
28 hours available
= 104% utilization

Available Hours Used

104	105	100
117	100	100
100	100	
100		

Scheduled Hours

Over Schedule Resources

Video Link: [Over Scheduling Resources](#)

Within the weekly schedule work order(s) or task(s) may highlight in RED within the schedule portion. This identifies that there are no resources available to complete the work and it may need to be investigated further.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Work orders or Tasks identifying resources are not available.
 - a. Refer to [Updating or Adjusting the Weekly Schedule](#) section to adjust work orders.

Schedule Compliance

Sockeye offers SMRP (Society for Maintenance & Reliability Professionals) scheduling metrics. And are triggered when an individual selects the 'commit weekly schedule'.


The following define the Sched Comp field available within the Weekly Schedule Tab:

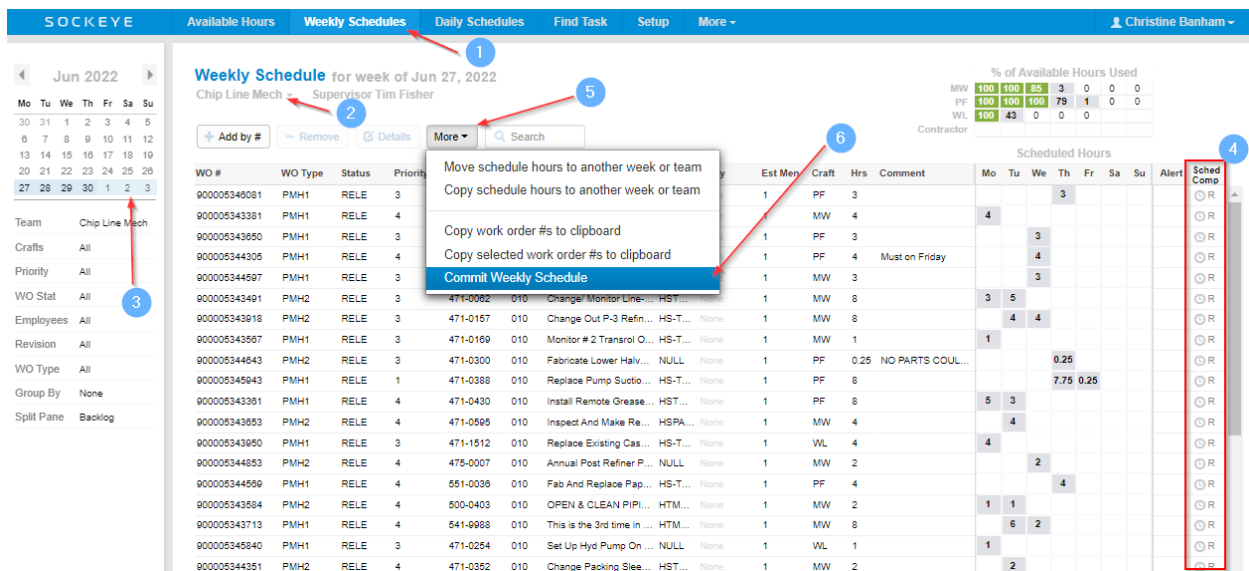
- R = Ready to Schedule
- W = Weekly Committed Schedule
- R = Reactive Work

Commit Weekly Schedule

Video Link: [Commit Schedule](#)


By committing the weekly schedule Sockeye will take a snapshot of the current approved schedule. As the week progresses and changes take place the teams KPI's will update.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. The Sched Comp column will show an  R = Ready to Schedule.
5. **Click** on the **More** ▼ at the top of the weekly schedule.
6. Select **Commit Weekly Schedule**.



The screenshot shows the Sockeye software interface. At the top, the 'Weekly Schedules' tab is selected in the blue ribbon. Below the ribbon, there's a navigation bar with 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The main area displays a 'Weekly Schedule for week of Jun 27, 2022' for 'Chip Line Mech' supervised by 'Tim Fisher'. A calendar on the left shows the week of June 27-30, 2022, with the 27th-30th selected. A table of work orders is shown with columns for WO #, WO Type, Status, Priority, Est Men, Craft, Hrs, Comment, and Scheduled Hours (Mo-Su). A 'Sched Comp' column on the right shows 'R' (Ready to Schedule) for each row. A 'More' dropdown menu is open over the table, with options: 'Move schedule hours to another week or team', 'Copy schedule hours to another week or team', 'Copy work order #s to clipboard', 'Copy selected work order #s to clipboard', and 'Commit Weekly Schedule' (highlighted in blue). Red arrows and numbers 1-6 point to these elements: 1. Weekly Schedules tab, 2. Team dropdown, 3. Calendar week selection, 4. Sched Comp column, 5. More dropdown, 6. Commit Weekly Schedule option.

7. Schedule Complete will turn to a W = Weekly Committed Schedule.

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp
900005346480	PMH1	RELE	3	310-0306	010	Monitor Elec Motor No...	HS-T...	None	1	WL	4				4					

***NOTE: After committing the weekly schedule, it cannot be undone. Only an administrator has access to reverse those changes to the weekly schedule.

Uncommit Weekly Schedule

Video Link: [Uncommit Schedule](#)

By uncommitting the weekly schedule Sockeye stops tracking any changes to the schedule and all work currently scheduled is then identified as 'R = Ready to Schedule' within the Sched Comp column. Sockeye users with an administrative role can uncommit a scheduled.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. The Sched Comp column currently shows **W** = Weekly Committed Schedule.
5. Click on the **More** at the top of the weekly schedule.
6. Select **Uncommit Weekly Schedule**

WO #	WO Type	Status	Priority	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp
900005348480	PMH1	RELE	3	1	WL	4					4					W
900005614243	PMH1	RELE	3	1	MW	4	4									W
900005821314	PMH1	RELE	4	1	MW	1						1				W
900005902416	PMH1	RELE	4	1	MW	4							3.5			W
900005947557	PMH2	RELE	2	1	MW	1				1		1				W
900005671264	PMH1	RELE	3	495	010	Repairs/Pipes To ...	NULL				3					W
900005675570	PMH1	RELE	3	485-0501	010	Install Spectacle ...	NULL				4					W
900005349081	PMH1	RELE	3	485-0701	010	Connect And Disc...	NULL				3					W
900005343351	PMH1	RELE	4	471	010	Tha Required For ...	NULL							4		W
900005343650	PMH1	RELE	3	471	010	Refiner Lube Pan...	HS-T...				2	1				W
900005344305	PMH1	RELE	4	471	010	Replace Existing ...	HST...					4				W
900005344597	PMH1	RELE	3	471	010	Rebuild Tmp Foot...	NULL							3		W
900005657661	PMH1	RELE	3	471	010	Safety Mirror Falle...	NULL				2					W
900005712127	PMH1	RELE	2	471	010	Create Plate To is...	NULL				2					W
900005737834	PMH1	RELE	4	471	010	471 Tmp Re & Re...	HTM...					4				W
900005343491	PMH2	RELE	3	471-0062	010	Change/ Monitor ...	HST...			1	7					W
B009067	BRK	RELE	1	310	010	Replace failed B1...	None			1						R
900005348446	PMH1	RELE	4	471-0071	010	Monitor, Reducer, ...	HS-T...					0.25				W

7. Work orders will change to an **R = Ready to Schedule**.

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
B009067	BRK	RELE	1	310	010	Replace failed B1...	None	1	ME	2	Must be done ...			2							R

Manually Complete a Work Order

Video Link: [Manually Complete Work](#)

By indicating that a work order has been completed can provide a visual assistance to where you currently are within the schedule along with generating the Weekly KPI's accordingly. Manual completions can override an automatic import.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Refer to the **Sched Comp** column located on the far right of the Weekly Schedule.
5. Click on the ⌚ button beside the **W** (Weekly Committed Schedule) or **R** (Reactive Work) of the work order that has been completed.
6. A ✓ will appear indicating completion.

Weekly Schedule for week of Jun 20, 2022
Chip Line Mech - Supervisor Tim Fisher

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp			
900005340450	PMH1	RELE	3	310-0306	010	Monitor Elec Moto...	HS-T... None	1	WL	4					4					⌚	✓ W		
900005821314	PMH1	RELE	4	310-0307	010	Clean Build Up Of...	HST... None	1	MW	1						1					⌚	✓ W	
900005821314	BRK	RELE	1	310	010	Replace failed B1...	None	1	ME	2	Must be done ...			2								⌚	✓ R
900005902416	PMH1	RELE	4	471-0355...	010	Replace Rotating ...	NULL None	1	MW	4								3				⌚	✓ W
900005947557	PMH2	RELE	2	623-3832	010	Replace missing ...	HTM... None	1	MW	1					1							⌚	✓ W
900005871264	PMH1	RELE	3	465	010	Repairs/Fixes To ...	NULL None	1	PF	3								3				⌚	✓ W
900005975570	PMH1	RELE	3	465-0501	010	Install Spectacle ...	NULL None	1	PF	4	Can't do do par...							4				⌚	✓ W
900005340081	PMH1	RELE	3	465-0701	010	Connect And Disc...	NULL None	1	PF	3								3				⌚	✓ W
900005343381	PMH1	RELE	4	471	010	Tha Required For...	NULL None	1	MW	4								4				⌚	✓ W
900005343650	PMH1	RELE	3	471	010	Refiner Lube Pan...	HS-T... None	1	PF	3								2	1			⌚	✓ W
900005344305	PMH1	RELE	4	471	010	Replace Existing ...	HST... None	1	PF	4	Must on Friday							4				⌚	✓ W

Complete a Work Order Through CMMS

Video Link: [Automatically Complete Work](#)

Automatically updating the schedule compliance column based on work orders that have been completed by an import through the CMMS. Typically, these are identified by a status change within the work order of the CMMS that identifies completion. This indicates the status of the schedule and adjusts the KPI's.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Click **Refresh** on the lower right-hand side of the **Backlog** section.
5. Work order statuses will update with any changes or updates in both the backlog and weekly schedule section.
6. Any work orders that have a status of complete will automatically initiate a **✓** in the Sched Comp column.

*****Note:** Sockeye will only update these work orders for that specific week. Any work orders completed a month later will not update within Sockeye for that selected week.




The screenshot displays the Sockeye software interface. At the top, the 'Weekly Schedules' tab is selected in the blue ribbon. Below the ribbon, the 'Weekly Schedule for week of Dec 14, 2021' is shown for the 'Electrical Planner' team, supervised by Scott Davison. A calendar on the left shows the selected week. The main table lists work orders with columns for WO #, Work Descr., Pri., Status, Start Date, Type, Asset ID, Rep Code, Hold, Work Ref, Delay, Assi., Est Heads, Est Hrs, Craft, and Sched Comp. A red box highlights the 'Status' and 'Sched Comp' columns. The 'Sched Comp' column shows checkmarks for completed work orders. Below the weekly schedule, the 'Backlog for Electrical Planner' section is visible, with a 'Refresh' button highlighted by a red arrow and the number 4.

WO #	Work Descr...	Pri.	Status	Start Date	Type	Asset ID	Rep Code	Hold	Work Ref	Delay	Assi.	Est Heads	Est Hrs	Craft	Tu	We	Th	Fr	Sa	Su	Mo	Sched Comp
W089433	Set up low f...	4	I	7, 2021	OP	PM0133	PEP		001	None	Tang...	1	0	?								
W089786	Ongoing S...	4	I	Dec 1, 2021	P2	2002-30-00	PEP		003	None	No1...	1	250	Elec Tech	10							
W090222	new isolato...	4	I	Sep 28, 2021	PM	2002-30-80-08	PEP		002	None	Paul...	1	4	Elec Tech			4					
W092561	Inspection...	3	I	Sep 25, 2021	P1	2002-10-00	PEP			None	Tang...	1	0	?	1							
W092176	Inspection...	3	I	Sep 18, 2021	P1	2002-10-00	PEP			None	Tang...	1	0	?	1							
W105075	South 4 Ma...	4	F	May 5, 2022	P1	PO0010	PEP	S1	001	None	No1...	1	10	Elec Tech	5							✓
W104391	Replace ae...	2	F	May 1, 2022	P2	2002-30-80-02	PEP	S1	001	None	Tang...	1	6	Instr Tech		6						✓
W102018	Replace mi...	2	F	Mar 17, 2022	P2	2002-30-80-02	PEP	S1	001	None	Tang...	1	4	Instr Tech				4				✓
W104807	Create UG...	2	F	May 3, 2022	P2	2002-10-52	PEP	S1	003	None	Tang...	1	6	Instr Tech						6		✓
W104758	Photograph...	2	F	May 8, 2022	P2	2002-30-00-80	PEP	S1	003	None	No1...	1	22	Elec Tech	5							✓
W108176	T6 not pum...	1	I	Jul 9, 2022	P2	WE0006	PEP	S1	002	None	Tang...	1	0	?	1							
W108172	Investigate...	1	I	Jul 9, 2022	P2	MC0002	PEP		001	None	Paul...	1	0	?	1							
W107192	attach elu...	1	I	Jun 20, 2022	P2	BL0008	PEP	S1	001	None	Paul...	1	2	Elec Tech					2			
W107086	H2O2 trans...	1	I	Jun 17, 2022	P2	TA0031	PEP	S1	002	None	Paul...	1	4	Elec Tech					4			
W105126	Pole 144 h...	2	I	May 7, 2022	S3	2002-80-70-11	PEP	S1	004	None	Tang...	1	0	?			1					
W103622	EDR motor...	2	I	Apr 11, 2022	P2	PM8040	PEP	S1	001	None	Tang...	1	0	?			1					
W103904	4W-THER...	2	I	May 2, 2022	P1	2002-50-30-02	PEP	S1		None	Paul...	1	0	?			1					
W101630	11kV pole...	2	I	Feb 25, 2022	P2	WT9001-DRT...	PEP	S1	001	None	Paul...	1	0	?			1					
W099050	Grey Street...	2	I	Jan 31, 2022	I1	2002-10-52	PEP	S3	006	None	Paul...	1	0	?			1					

Add Schedule Breakers

Video Link: [Add Schedule Breakers](#)

For many different reasons break-ins happen; these can be added to the schedule and be tracked based on the R = Reactive Work identified in the Sched Comp column.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the  under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4.  Backlog if it has not yet been completed.
5. Add the **Break-in work order** to the schedule
6. Any work that is added to the schedule after being committed will be identified as an  **R = Reactive Work** in the **Sched Comp** column.

Weekly Schedule for week of Jun 20, 2022
Chip Line Mech - Supervisor Tim Fisher

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp		
900005344643	PMH2	RELE	3	471-0300	010	Fabricate Lower H...	NULL	None	1	PF	0.25	NO PARTS CO...				0.25							
900005345943	PMH1	RELE	1	471-0388	010	Replace Pump Su...	HS-T...	None	1	PF	8												
900005343391	PMH1	RELE	4	471-0430	010	Install Remote Gr...	HST...	None	1	PF	8			2	2	2	2						
900005867922	PMH1	RELE	3	471-0467	010	Increase Tubing D...	HS-T...	None	1	PF	8					3.75							
900005346336	PMH1	RELE	4	471-0468	010	Replace Rubber E...	HTM...	None	1	WL	4				4								
900005346335	PMH1	RELE	4	471-0481	010	Replace Rubber E...	HTM...	None	1	WL	4			1	3								
900005821261	PMH1	RELE	4	471-0490	010	Install A 3/4" Tee ...	HTM...	None	1	PF	4							4					
900005817468	PMH1	RELE	4	471-0577	010	Install A 3/4" Drain...	HST...	None	1	PF	4	End of shift only						2					
900005343853	PMH2	RELE	4	471-0595	010	Inspect And Make...	HSPA...	None	1	MW	4							4					
900005343950	PMH1	RELE	3	471-1512	010	Replace Existing ...	HS-T...	None	1	WL	4			4									
900005614183	PMH1	RELE	4	471-8705	010	Rack Room Integr...	NULL	None	1	MW	2							2					
90000582906	PMH1	RELE	4	471-8982	010	Clear White Water...	HST...	None	1	PF	4							4					
900005881009	PMH1	RELE	3	475	010	Sewer Grating Br...	NULL	None	1	WL	2			2									
900005344853	PMH2	RELE	4	475-0007	010	Annual Post Refin...	NULL	None	1	MW	2							2					
900005346477	PMH2	RELE	4	475-0007	010	Install Spare Refin...	HS-T...	None	1	MW	4							4					
900005897185	PMH2	RELE	4	475-0007	010	Inspect Refiner Pl...	NULL	None	1	MW	4							2.5	1.5				
900005897184	PMH2	RELE	4	475-0011	010	Inspect Refiner Pl...	NULL	None	1	MW	3				1			2					
900005344590	PMH1	RELE	4	561-0036	010	Fab And Replace...	HS-T...	None	1	PF	4							4					
900004911534	PMH1	RELE	1	471-0416	010	Change #34 gear...	NULL	None	1	MW	4	Carry over to n...							4				

Backlog for Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
900004911534	PMH1	RELE	1	471-0416	020	Change #34 popit ...	NULL	None	1	PF	2											
900004911534	PMH1	RELE	1	471-0416	030	Reweld safety shield	NULL	None	1	WL	1	Must be done ...										
900005343520	PMH1	RELE	3	471-0488	010	Bleach Recirc Val...	HST...	None	1	PF	2											
900005343522	PMH1	RELE	3	471-0488	010	Caustic Feed Line...	HST...	None	1	PF	2	no parts pleas...										
900005343528	PMH2	RELE	3	471-0386	010	Replace Sleeve O...	HTM...	None	1	MW	1	No parts pleas...										
900005343594	PMH2	RELE	4	500-0403	010	OPEN & CLEAN ...	HTM...	None	1	MW	2											

Identify Removed Work Order(s)

Video Link: [Remove Scheduled Work](#)

Schedule breakers happen for many different reasons. When removing work from a committed schedule the work order or task can still be referenced under the schedule compliance column by the 'W = Weekly Committed Schedule' within the backlog section of the screen.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Select the **work order(s)** to be removed.
5. Click on **Remove** within the Weekly Schedule portion of the screen.
6. Work orders will be removed from the schedule and visible within the Backlog section.
7. Those work orders moved to the backlog section can be identified with a **W = Weekly Committed Schedule** under the **Sched Comp** column.

The screenshot displays the 'Weekly Schedules' interface. At the top, the navigation bar includes 'SOCKEYE', 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The user 'Christine Banham' is logged in. The main content area shows a 'Weekly Schedule for week of Jun 20, 2022' for 'Chip Line Mech'. A calendar on the left shows the selected week. The work order table includes columns for WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi... Delay, Est Men, Craft, Hrs, Comment, and a grid for Scheduled Hours (Mo-Su). A 'Remove' button is highlighted with a red circle and arrow. Below the schedule is a 'Backlog for Chip Line Mech' section with a table of work orders. A red circle and arrow highlight a 'W' in the 'Sched Comp' column of the backlog table.

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
900005344843	PMH2	RELE	3	471-0300	010	Fabricate Lower H...	NULL	None	1	0.25	NO PARTS CO...					0.25				●	W
900005345943	PMH1	RELE	1	471-0388	010	Replace Pump Su...	HS-T...	None	1	8							6.75			●	W
900005343361	PMH1	RELE	4	471-0430	010	Install Remote Gr...	HST...	None	1	8		2	2	2	2					●	W
900005697922	PMH1	RELE	3	471-0467	010	Increase Tubing D...	HS-T...	None	1	8						3.75				●	W
900005348336	PMH1	RELE	4	471-0468	010	Replace Rubber E...	HTM...	None	1	4			4							●	W
900005348335	PMH1	RELE	4	471-0481	010	Replace Rubber E...	HTM...	None	1	4		1	3							●	W
900005621261	PMH1	RELE	4	471-0490	010	Install A 3/4" Tee ...	HTM...	None	1	4							4			●	W
900005617468	PMH1	RELE	4	471-0577	010	Install A 3/4" Drain...	HST...	None	1	4						2				●	W
900005343653	PMH2	RELE	4	471-0595	010	Inspect And Make...	HSPA...	None	1	4						4				●	W
900005343950	PMH1	RELE	3	471-1512	010	Replace Existing ...	HS-T...	None	1	4			4							●	W
900005614183	PMH1	RELE	4	471-8705	010	Rack Room Integr...	NULL	None	1	2						2				●	W
900005629006	PMH1	RELE	4	471-9992	010	Clear White Water...	HST...	None	1	4						4				●	W
900005681009	PMH1	RELE	3	475	010	Sewer Grating Br...	NULL	None	1	2			2							●	W
900005344853	PMH2	RELE	4	475-0007	010	Annual Post Refin...	NULL	None	1	2						2				●	W
900005348477	PMH2	RELE	4	475-0007	010	Install Spare Refin...	HS-T...	None	1	4						4				●	W
900005697185	PMH2	RELE	4	475-0007	010	Inspect Refiner Pl...	NULL	None	1	4						2.5	1.5			●	W
900005697184	PMH2	RELE	4	475-0011	010	Inspect Refiner Pl...	NULL	None	1	3			1			2				●	W
900005344569	PMH1	RELE	4	551-0036	010	Fab And Replace ...	HS-T...	None	1	4				4						●	W
900004911534	PMH1	RELE	1	471-0416	010	Change #34 gear...	NULL	None	1	4						4				●	R

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
900005621260	PMH1	RELE	4	501-0478	010	Heplace Belts And...	NULL	None	1	4											W
900005559659	PMH1	RELE	4	475-0166	010	Replace Drive Belts	HTM...	None	1	8											W
900005697188	PMH2	RELE	4	471-0066	010	Inspect Preheater ...	HS-T...	None	1	4											W
900005697332	PMH1	RELE	3	471-0270	030	Strip And Dress R...	NULL	None	1	1											W
900005697334	PMH1	RELE	3	471-0266	010	Overhaul Gear Op...	NULL	None	1	1											W
900005603264	PMH2	RELE	4	499-9088	010	REPLACE LEAKI...	NULL	None	1	6											W
900005632559	PMH1	RELE	2	475-0204	010	Service Pump 475 ...	NULL	None	1	8											W
900005671265	PMH1	RELE	3	471-0535	010	Oba Tank Dischar...	NULL	None	1	4											W
900005672744	PMH1	RELE	4	521-0800	010	OPEN AND CLEA...	NULL	None	1	4											W
900005678296	PMH1	RELE	4	471-1501	010	Replace Steam I...	NULL	None	1	4											W

Review Metrics During the Week

Video Link: [Review Current Metrics](#)

Allows a visual throughout the week to identify where the team is at for weekly KPI's.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Click on **Split Pane** in the filter pane.
 - a. A drop-down box will appear with a list of fields.
5. Select **Weekly KPIs**.
 - a. The drop-down box will disappear.
6. The bottom portion will update with the Weekly KPIs for that specific team.
7. Click on any **KPI** visible.
 - a. The selected KPI will appear with a circle and bar graph showing the status for the week.
8. **Hover** the mouse over the formula of the KPI.
9. A **line** will become visible **click** on it.
10. All work orders that are identified to the KPI will highlight in blue within the Weekly Schedule section. *****Note:** *KPI's that do not reflect a work order such as 'Available Hours' will not have a link available.*

SOCKEYE Available Hours Weekly Schedules Daily Schedules Find Task Setup More - Christine Banham -

Jun 2022

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Team: Chip Line Mech

Crafts: All

Priority: All

WO Stat: All

Employees: All

Revision: All

WO Type: All

By: None

Split Pane: Weekly KPIs

Weekly Schedule for week of Jun 20, 2022

Chip Line Mech - Supervisor Tim Fisher

+ Add by #
- Remove
Details
More
Search

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp
900005340460	PMH1	RELE	3	310-0306	010	Monitor Elec Moto...	HS-T... None	1	WL	4					4					W
900005914243	PMH1	RELE	3	310-0306	010	310-0306 Chip Be...	NULL None	1	MW	4		4								W
900005821314	PMH1	RELE	4	310-0307	010	Clean Build Up Of...	HST... None	1	MW	1						1				W
9000007	BRK	RELE	1	310	010	Replace failed B1...	None	1	ME	2	Must be done ...			2						R
900005902416	PMH1	RELE	4	471-0356...	010	Replace Rotating ...	NULL None	1	MW	4							3.5			W
900005947557	PMH2	RELE	2	623-3832	010	Replace missing ...	HTM... None	1	MW	1					1		1			W
900005971264	PMH1	RELE	3	465	010	Repairs/Fixes To ...	NULL None	1	PF	3				3						W
900005975570	PMH1	RELE	3	465-0501	010	Install Spectacle ...	NULL None	1	PF	4	Can't do do par...			4						W
900005340081	PMH1	RELE	3	465-0701	010	Connect And Disc...	NULL None	1	PF	3				3						W
90000543381	PMH1	RELE	4	471	010	Tha Required For ...	NULL None	1	MW	4		4								W
900005343650	PMH1	RELE	3	471	010	Refiner Lube Pan...	HS-T... None	1	PF	3				2	1					W
900005344305	PMH1	RELE	4	471	010	Replace Existing ...	HST... None	1	PF	4	Must on Friday					4				W
900005344597	PMH1	RELE	3	471	010	Rebuild Tmp Foot...	NULL None	1	MW	3			3							W
900005657661	PMH1	RELE	3	471	010	Safety Mirror Fall...	NULL None	1	MW	2	In Bin 43		2							W
900005712127	PMH1	RELE	2	471	010	Create Plate To Is...	NULL None	1	MW	2		2								W
900005737834	PMH1	RELE	4	471	010	471 Tmp Re & Re...	HTM... None	1	PF	4					4					W
900005343491	PMH2	RELE	3	471-0062	010	Change/Monitor ...	HST... None	1	MW	6			1	7						W
900005340446	PMH1	RELE	4	471-0071	010	Monitor, Reducer...	HS-T... None	1	WL	0.25						0.25				W
900005737841	PMH1	RELE	4	471-0077	010	Clear Refiner Dilut...	HTM... None	1	PF	0.25							0.25			W
900005340413	PMH1	RELE	4	471-0079	010	Modify P-1 Refine...	HS-T... None	1	MW	2					2					W

% of Available Hours Used

MW	100	100	87%	100	100	100
PF			117%	117	100	100
WL				100	100	
Contractor			108	100		

Weekly KPIs for Chip Line Mech

- 6% Schedule Compliance (...)
- 6% Schedule Compliance (...)
- 100% Available Hours Used
- 1% Reactive Work (Hours)
- 25% Preventive Maintenance
- 49% Corrective Maintenance
- 49% Condition-Based Mainte...
- 100% Planned Work
- 0% Unplanned Work
- 27% Proactive Work
- 2% Standing Work Orders

Schedule Compliance (Hours)

12.5 hrs for complete tasks from committed schedule

+ 214.0 hrs available to schedule

Schedule Compliance (Hours) by Day

■ hrs for complete tasks from committed schedule

■ hrs available to schedule

Group By Schedule Compliance



Video Link: [Group Sched Comp](#)

Tips & Tricks: Quickly highlights the work that was identify as reactive work throughout the week.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Click on **Group By** **None** in the filter pane.
 - a. A drop-down box will appear with a list of fields.
5. Select **Sched. Comp.**
 - a. The drop-down box will disappear.
6. All work orders will be grouped by Weekly committed work on schedule and Reactive work on the schedule.

Weekly Schedule for week of Jun 6, 2022
Chip Line Mech Supervisor Tim Fisher

											% of Available Hours Used										
											MW	42	0	0	0	0	0	0			
											PF	32	0	0	0	0	0	0			
											WL	71	0	0	0	0	0	0			
											Contractor										
											Scheduled Hours										
WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
▼ Weekly committed work on schedule																					
900004911534	PMH1	RELE	1	471-0416	010	Change #34 gear...	NULL None	1	MW	4	Carry over to n...	4									W
900004911534	PMH1	RELE	1	471-0416	020	Change #34 popit ...	NULL None	1	PF	2		2									W
900004911534	PMH1	RELE	1	471-0416	030	Reweld safety shield	NULL None	1	WL	1	Must be done ...	1									W
900005343361	PMH1	RELE	4	471-0430	010	Install Remote Gr...	HST... None	1	PF	8		8									W
900005343381	PMH1	RELE	4	471	010	The Required For ...	NULL None	1	MW	4		4									W
900005343491	PMH2	RELE	3	471-0082	010	Change/ Monitor ...	HST... None	1	MW	8		8									W
900005343520	PMH1	RELE	3	471-0488	010	Bleach Recirc Val...	HST... None	1	PF	2		2									W
900005343522	PMH1	RELE	3	471-0488	010	Caustic Feed Line...	HST... None	1	PF	2	no parts pleas...	2									W
900005343528	PMH2	RELE	3	471-0369	010	Replace Sleeve O...	HTM... None	1	MW	1	No parts pleas...	1									W
900005343567	PMH1	RELE	3	471-0199	010	Monitor # 2 Transr...	HS-T... None	1	MW	1		1									W
900005343564	PMH2	RELE	4	500-0403	010	OPEN & CLEAN ...	HTM... None	1	MW	2		2									W
900005343950	PMH1	RELE	3	471	010	Refiner Lube Pan...	HS-T... None	1	PF	3		3									W
900005343952	PMH2	RELE	3	471-0590	010	Inspect And Make ...	HSPA... None	1	MW	4		4									W
▼ Reactive work on schedule																					
900005343953	PMH2	RELE	4	471-0595	010	Inspect And Make ...	HSPA... None	1	MW	4		4									R
900005343713	PMH1	RELE	4	541-9988	010	This is the 3rd tim...	HTM... None	1	MW	8		7	1								R
900005343918	PMH2	RELE	3	471-0157	010	Change Out P-3 ...	HS-T... None	1	MW	8		3	5								R
900005343960	PMH1	RELE	3	471-1512	010	Replace Existing ...	HS-T... None	1	WL	4		4									R

Backlog for Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
▼ Unscheduled work																					
900005344643	PMH2	RELE	3	471-0300	010	Fabricate Lower H...	NULL None	1	PF	0.25	NO PARTS CO...										--
900005344853	PMH2	RELE	4	475-0007	010	Annual Post Refin...	NULL None	1	MW	2											--

Features

Alerts

Link: [Alerts](#)

The 'Alert' feature is an indicator only to help identify which tasks or work orders may need attention. In many cases these alerts will generate because the user has made some specific changes in Sockeye for that task by manually changing hours, dates, number of people, etc. to complete the job.

Updating a Delay Code

Link: [Delay Code Details](#)

Note: This needs to be setup in advance, please work with your Subject Matter Expert and or Sockeye Rep to move forward with this solution.

1. Click on **Weekly Schedules** or **Daily Schedules** tab in the blue ribbon at the top of your screen.
2. Click on the **Week or Day** that is being updated.
3. Find the **Delay** column on the schedule portion of the screen (Usually the top one).
4. Click on 'None' or the Delay code already assigned to that work order.

5. A dropdown box will appear with a list of reasons.
6. Select the reason for the delay.
7. The dropdown box will disappear, and the updated delay code will appear.

Delay	People	Hrs	Trade
Instruction	1	1	ENG-MNT
Clearance	8	1500	ENG-MNT
None	1	72.5	ENG-MNT
Materials	1	1	ENG-MNT
None			ENG-MNT
Clearance			ENG-MNT
Instruction			ENG-MNT
Materials			ENG-MNT
Operator			ENG-MNT
Other			ELEC
Tools			INST
Weather			MECH
None	1	16	MECH
None	1	8	ELEC

Hourly Scheduling

Link: [Hourly Scheduling](#)

Automatically scheduling work order's start time based on resource work periods.

Maintenance Plan Assignment



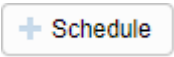
Link: [Auto Assign a Maintenance Plan](#)

Allows resource assignment to multiple or single Maintenance Plans.

Assigning Work to Timing Patterns

Link: [Timing Patterns](#)

When configuring the timing pattern, it also includes the field from your CMMS that identifies these timings to auto populate specific patters, craft, and resources.

1. Click on the  tab in the blue ribbon at the top of your screen.
2. Click the applicable schedule **week**.
3. Select the **Team**.
4. Click on the  button under the backlog section to bring in all new work orders.
5. Select the work orders to be added to the Weekly Schedule.
6. Click on the  located in the Backlog section of the screen.
7. The Timing Field will be utilized to distribute hours withing those 3 timing patterns.
 - a. The top right-hand side of the screen in the WEEKLY Schedule portion the **Unscheduled Hours** are showing the details that were populated from the Available Hours and identify the 3 timing patterns along with the work orders that have been assigned.

Note: *Hours can be dragged and dropped to other timing patterns; by clicking on the work order hours and dropping to a different cell.*

Weekly Schedule for week of Mar 28, 2020
Automation - Supervisor John Mobley

Timing INST1: W 27, W 28, C 8, C 10, C 10, C 8, C 8, C 8, P 20.5, P 27, P 23, P 29.5, Total 238

Status	Pln Grp	Timing	WO #	WO Description	Est Ppl	Basic Start	Scheduled Hours							Mo	Tu	We	Th	Fr	Alert	Sched Comp
							Sa	Su	Sa	Su	Mo	Tu	We							
WSCH	ET1	PROD	405556010	GRP B TIME CLOCK ...	1	Mar 31, 2020							1.5							
WSCH	ET1	PROD	405556011	GRP A TIME CLOCK ...	1	Mar 30, 2020							1.5							
WSCH	ET1	PROD	405556012	GRP C TIME CLOCK ...	1	Apr 1, 2020							1.5							
WSCH	ET1	PROD	405556013	GRP D TIME CLOCK ...	1	Apr 2, 2020							1.5							
WSCH	ET1	PROD	405595320	PLANT SYSTEM CO...	1	Mar 30, 2020							6							
SCHD	ET1	WEEKEND	405595393	GRADERS SYSTEM ...	1	Mar 28, 2020	1													
WSCH	ET1	PROD	405595397	HOCW PH GRAB SA...	1	Mar 31, 2020							0.5							
WSCH	ET1	PROD	405596230	INSPECT SECURITY ...	6	Mar 30, 2020											3			
WSCH	ET1	PROD	405596231	INSPECT SECURITY ...	6	Mar 31, 2020								3						
WSCH	ET1	PROD	405596232	INSPECT SECURITY ...	5	Apr 2, 2020											2.5			
WSCH	ET1	PROD	405596234	INSPECT SECURITY ...	6	Apr 1, 2020								3						

Backlog for Automation

Status	Pln Grp	Timing	WO #	WO Description	Est Ppl	Basic Start	Sa	Su	Sa	Su	Mo	Tu	We	Th	Fr	Mo	Tu	We	Th	Fr	Alert	Sched Comp
WSCH	ET1	PROD	405596235	CHECK AND CLEAN ...	1	Mar 29, 2020																
WSCH	ET1	PROD	405596236	CHECK AND CLEAN ...	1	Mar 30, 2020																
WSCH	ET1	PROD	405596237	CHECK AND CLEAN ...	2	Mar 31, 2020																
WSCH	ET1	PROD	405596238	CHECK AND CLEAN ...	2	Apr 1, 2020																

Close Weekly Schedule

Website Link: [Close Weekly Schedule](#)

Handles actual hours and completion statuses for KPI calculations, an additional weekly snapshot can be added to store each team's "closed" schedule. A user can close a team's schedule by selecting "Close Weekly Schedule" from the More dropdown on the Weekly Schedule tab.