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

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Weekly Schedule Overview

Filters

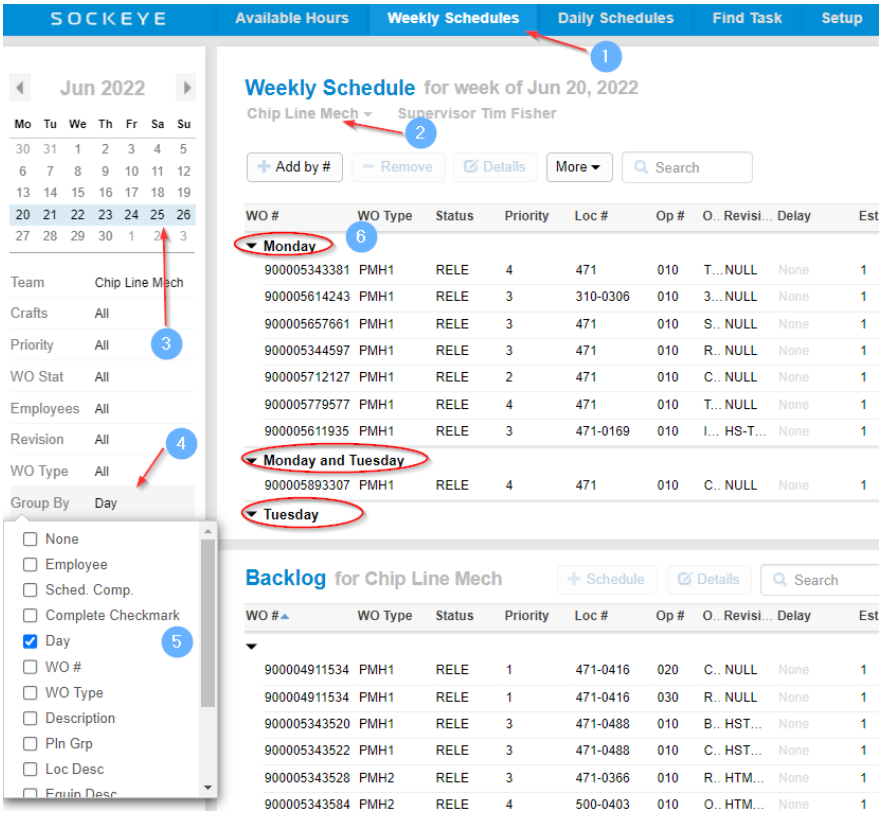
Focuses on specific field details within the data being pulled in from the CMMS. Filters can be adjusted and or added depending on the current setup and details being pulled into Sockeye.

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.

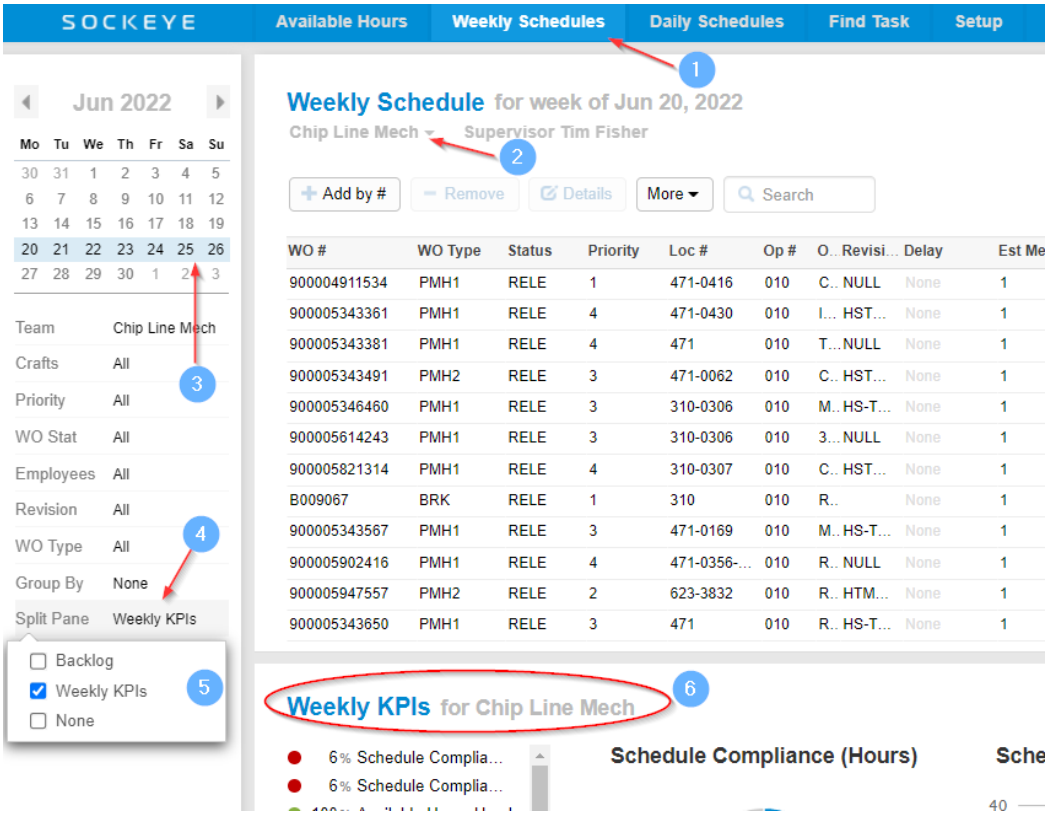


Split Pane

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.

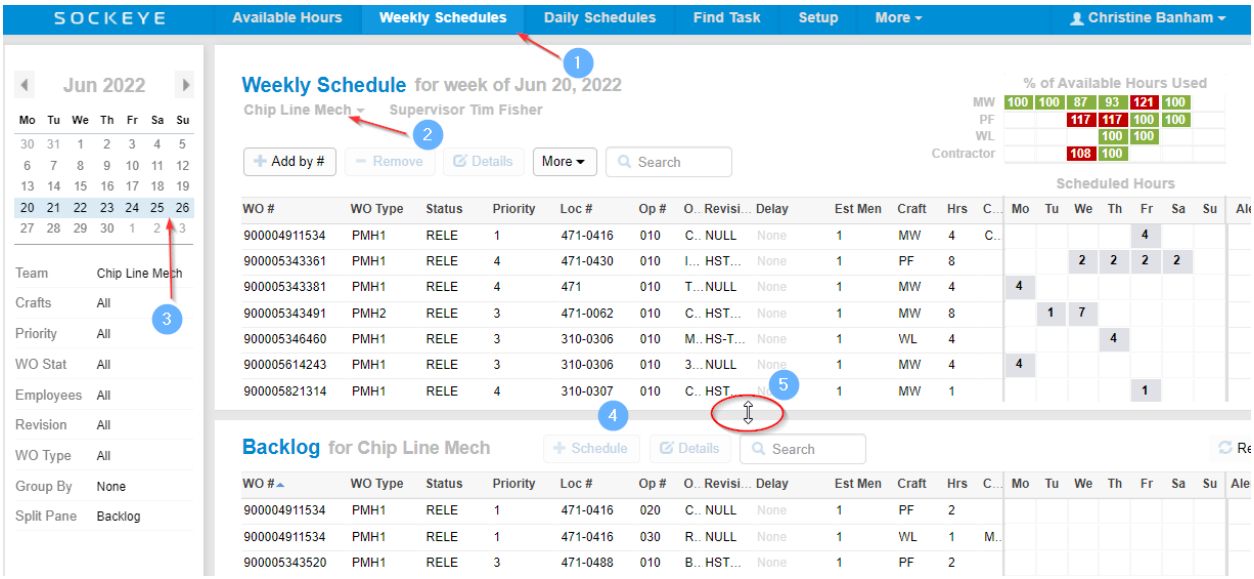


Adjust Backlog Section by Dragging and Dropping

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 ▾ under **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.



Viewable Fields

Video Link: [Schedule Fields]

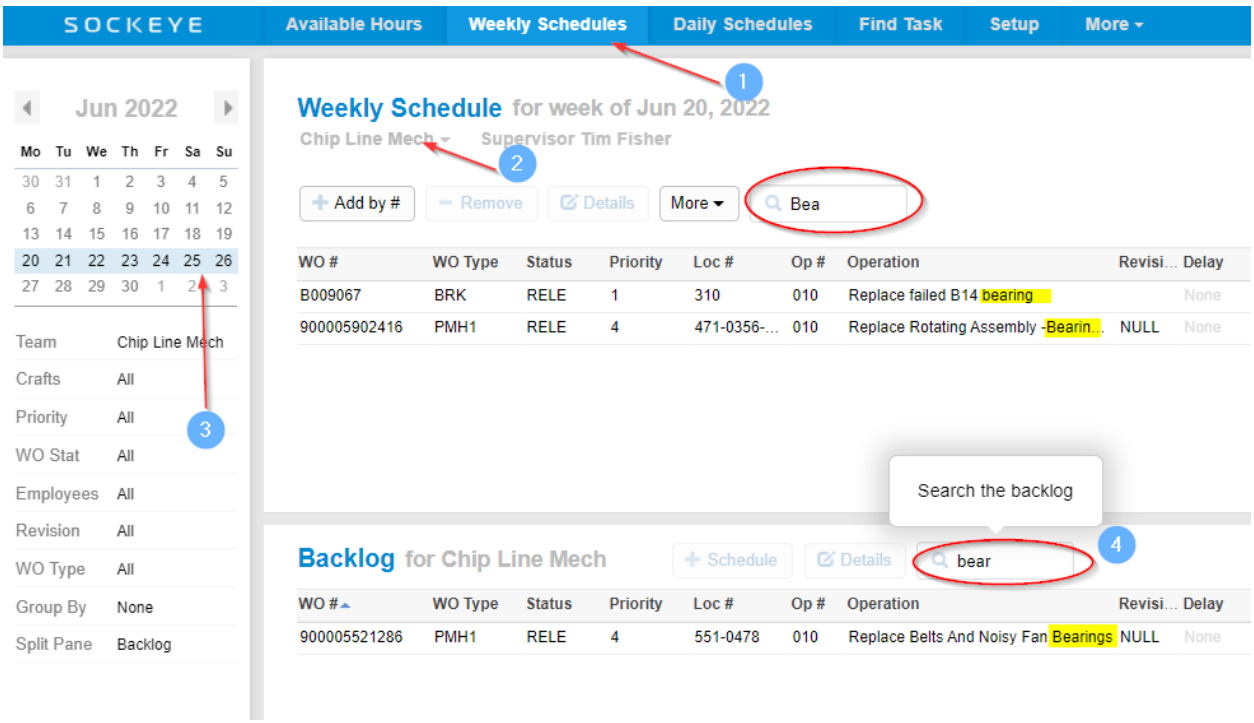
To change any of the work order columns this can be configured in the setup menu. Refer to the '**Setup > Schedule Fields**' user guide for details on making these changes.

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.

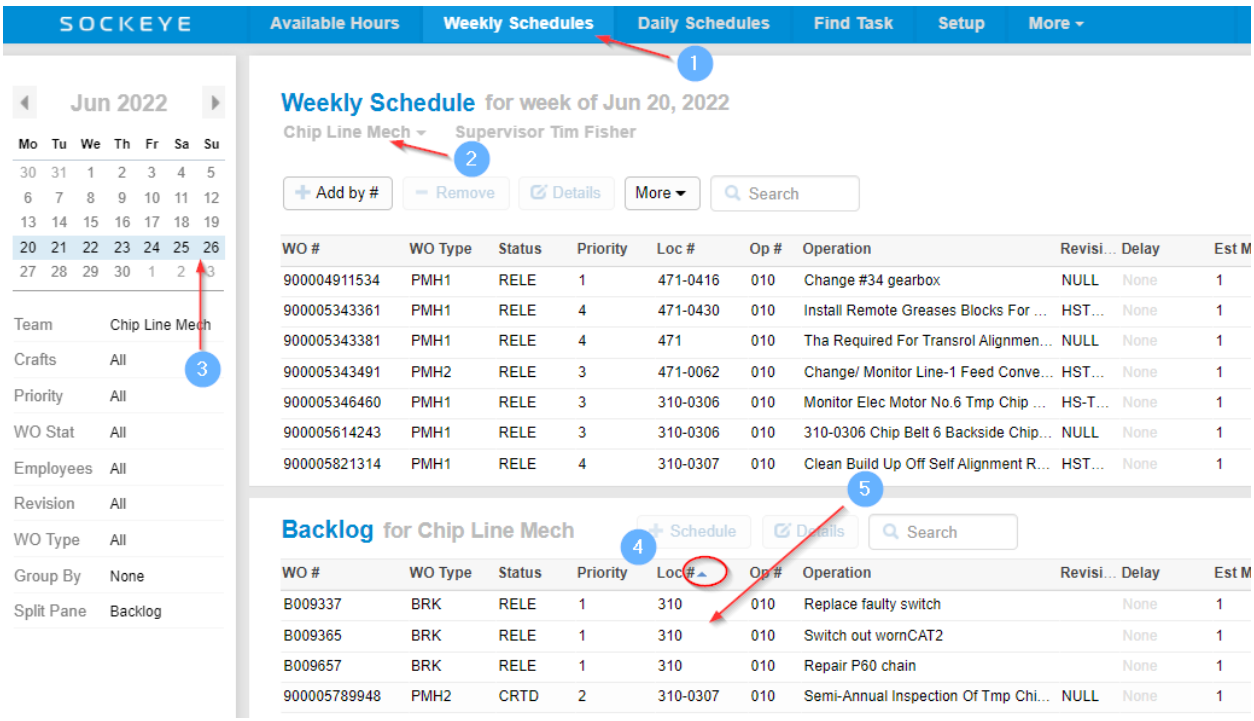


Sort field Numerically or Alphabetically

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.

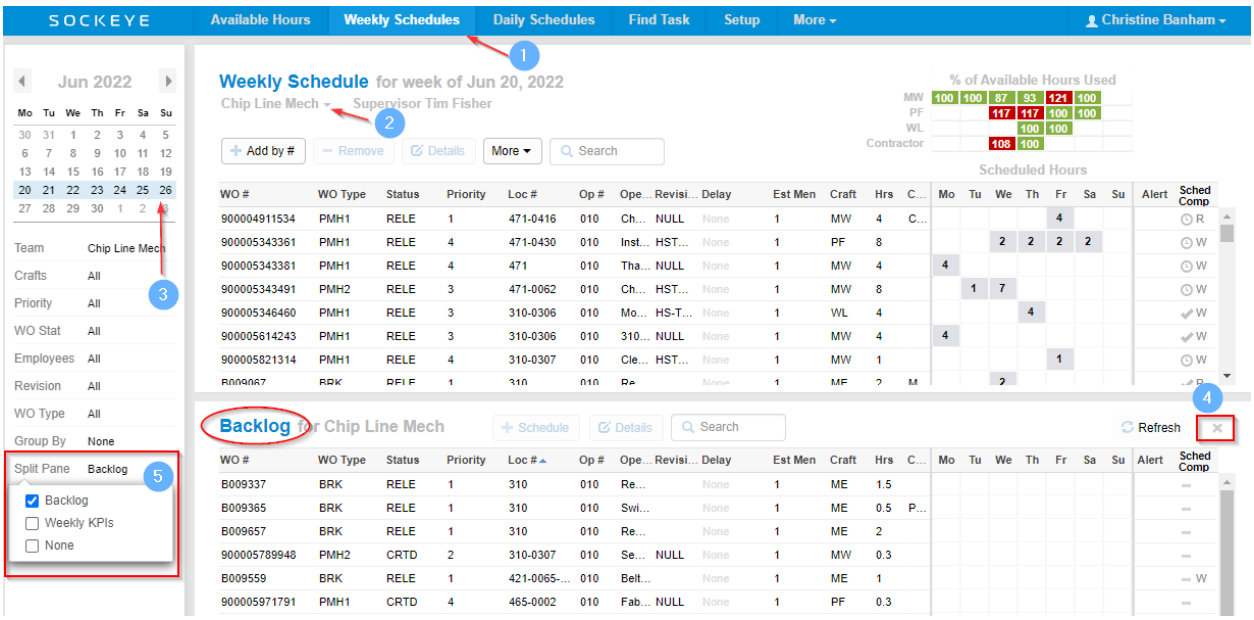


Backlog

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



Import Work Orders

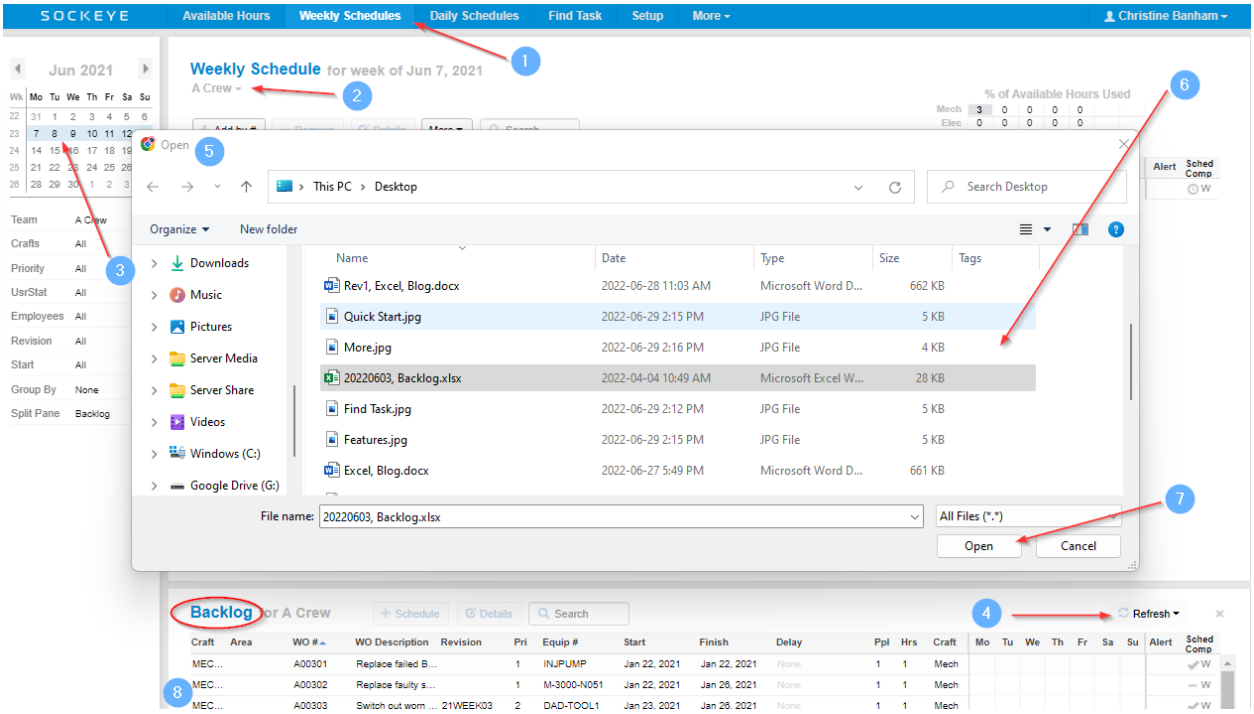
Updating the Backlog Criteria can happen by a excel import or a read integration. Reach out to your Sockeye Rep if you are not certain of the type of import that has been setup.

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.



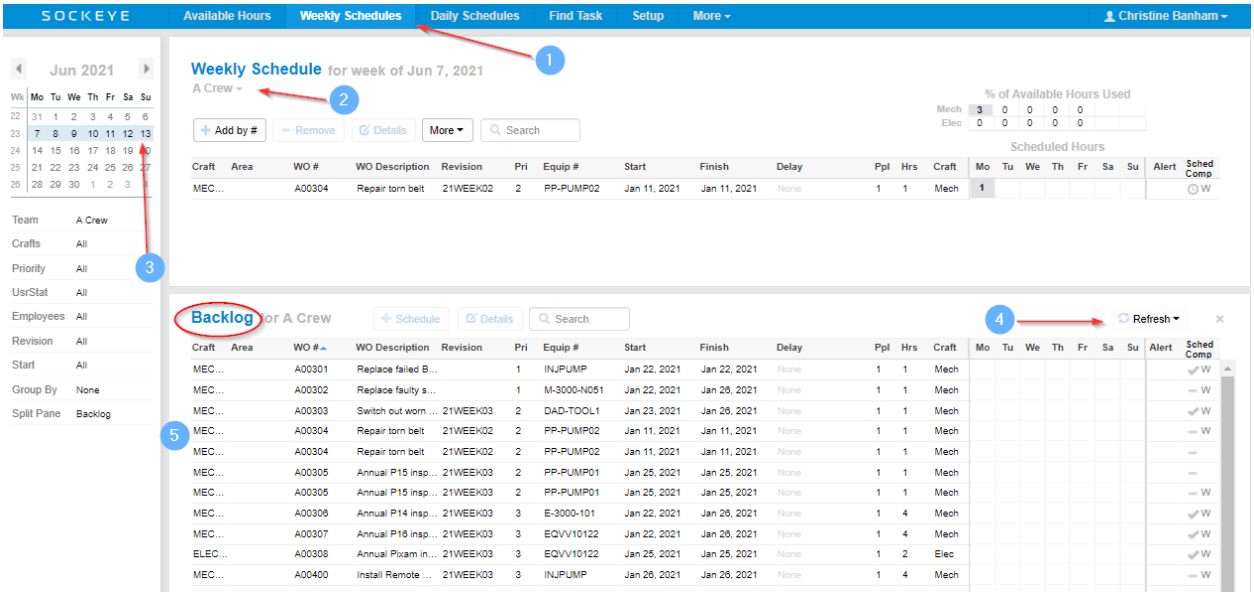
Read Integration from CMMS

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 Refresh 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.*



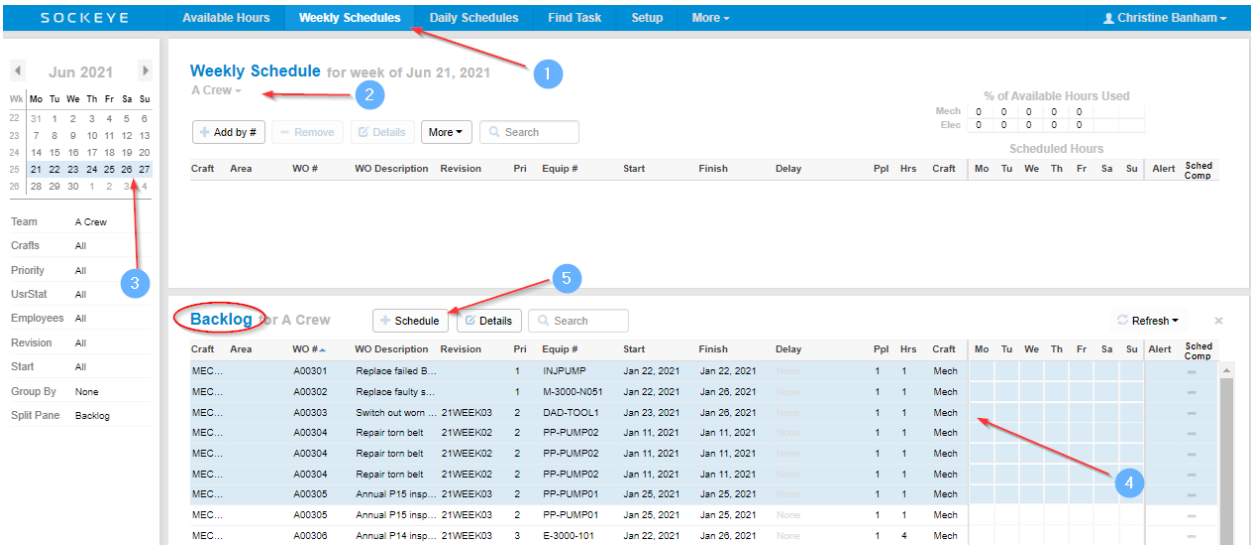
Scheduling Work Orders

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 ▾ 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. 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.



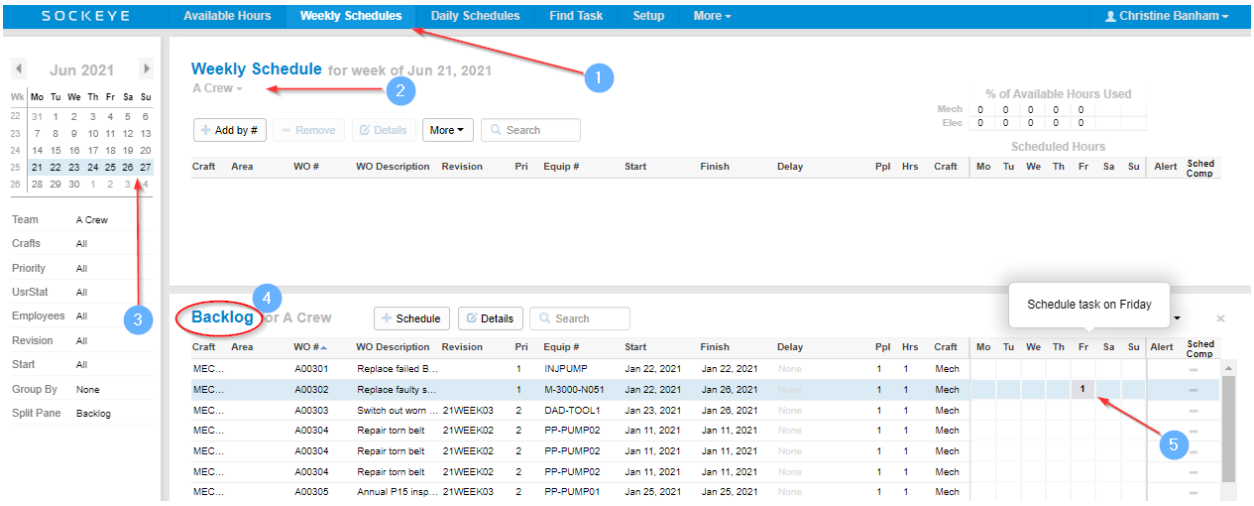
SHORTCUT:
Multiple work orders can be selected and scheduled at one time by holding down the Ctrl key while clicking on multiple selections OR by clicking on one work order at the top of the list, hold down the Shift key, and click on a work order further down the list (this will select all entries in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

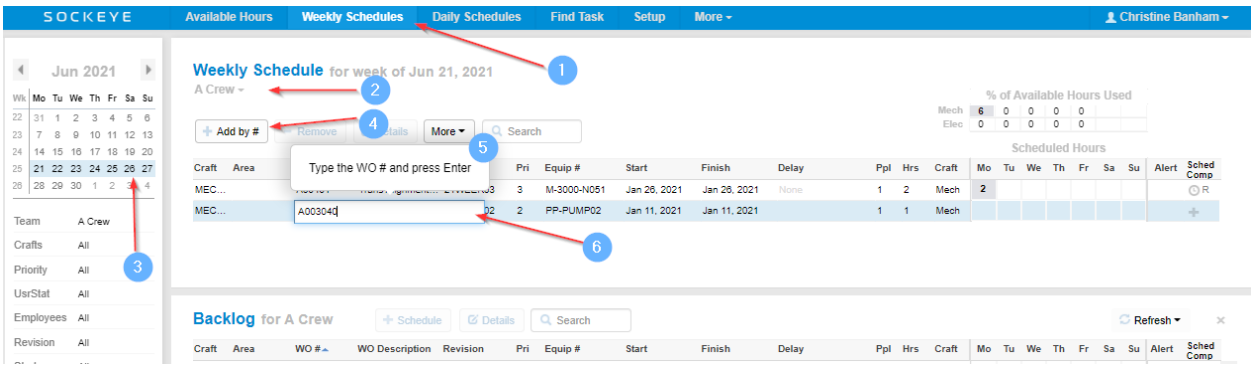


Assign by Work Order Number

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.



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

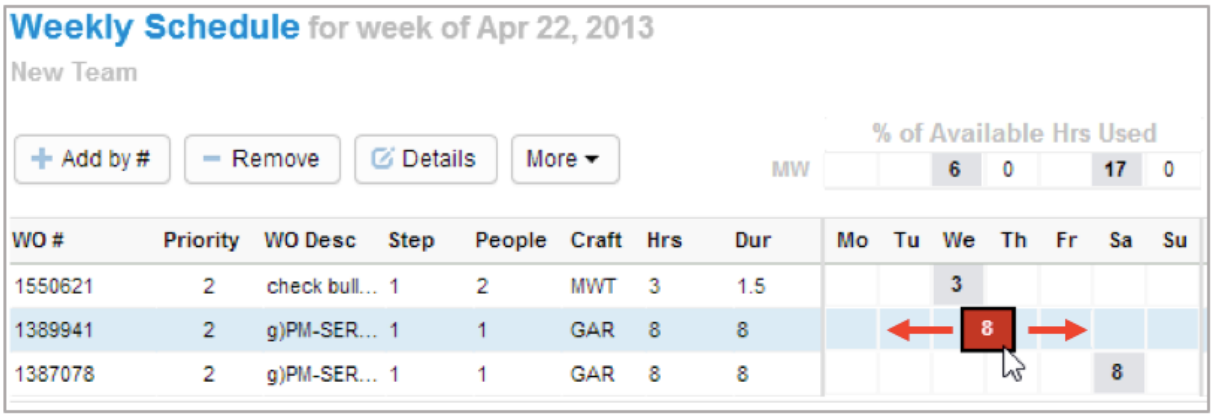
***Note:** *Any work order hours highlighted in RED under the week indicate there are **NO** resources available to complete the work.*

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.

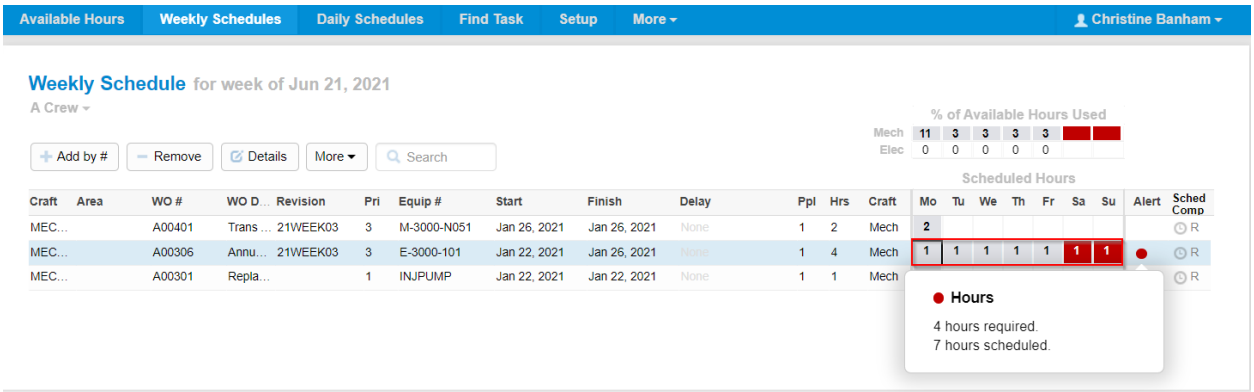


Updating or Reassign Hours

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.

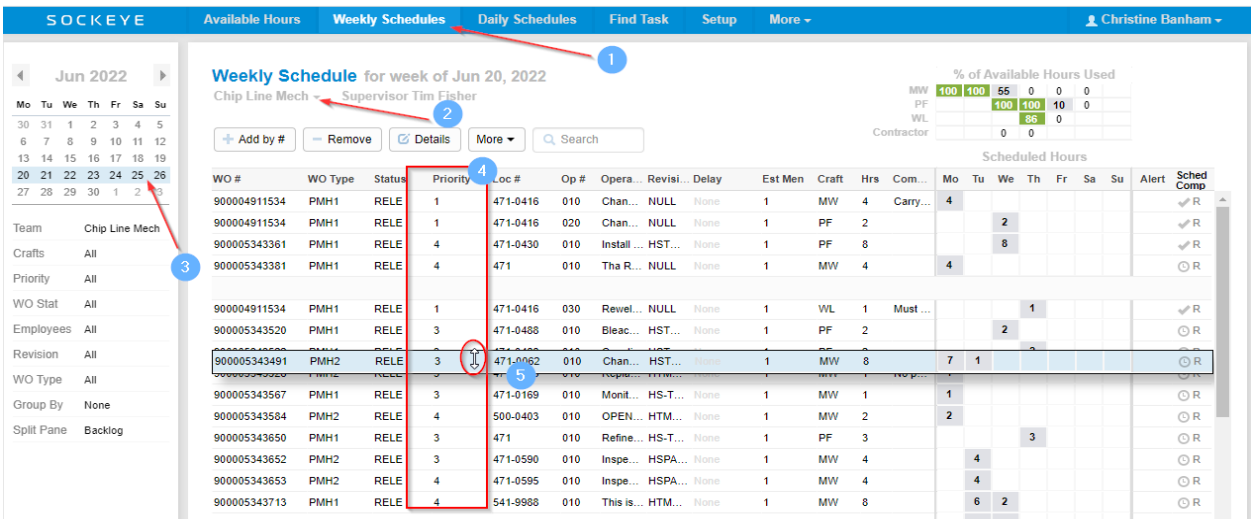


Drag and Drop Work Orders within the Schedule

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 ▾ under **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.

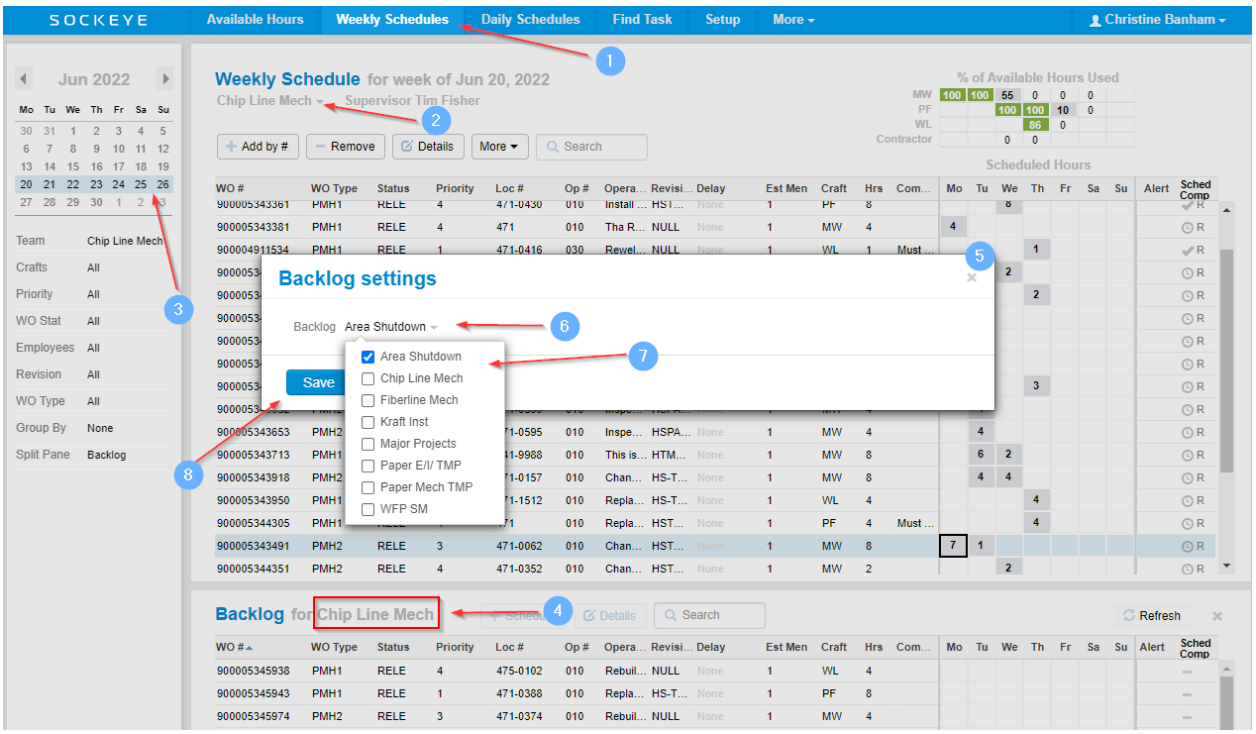


Add Work Order(s) from a Different Team

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.

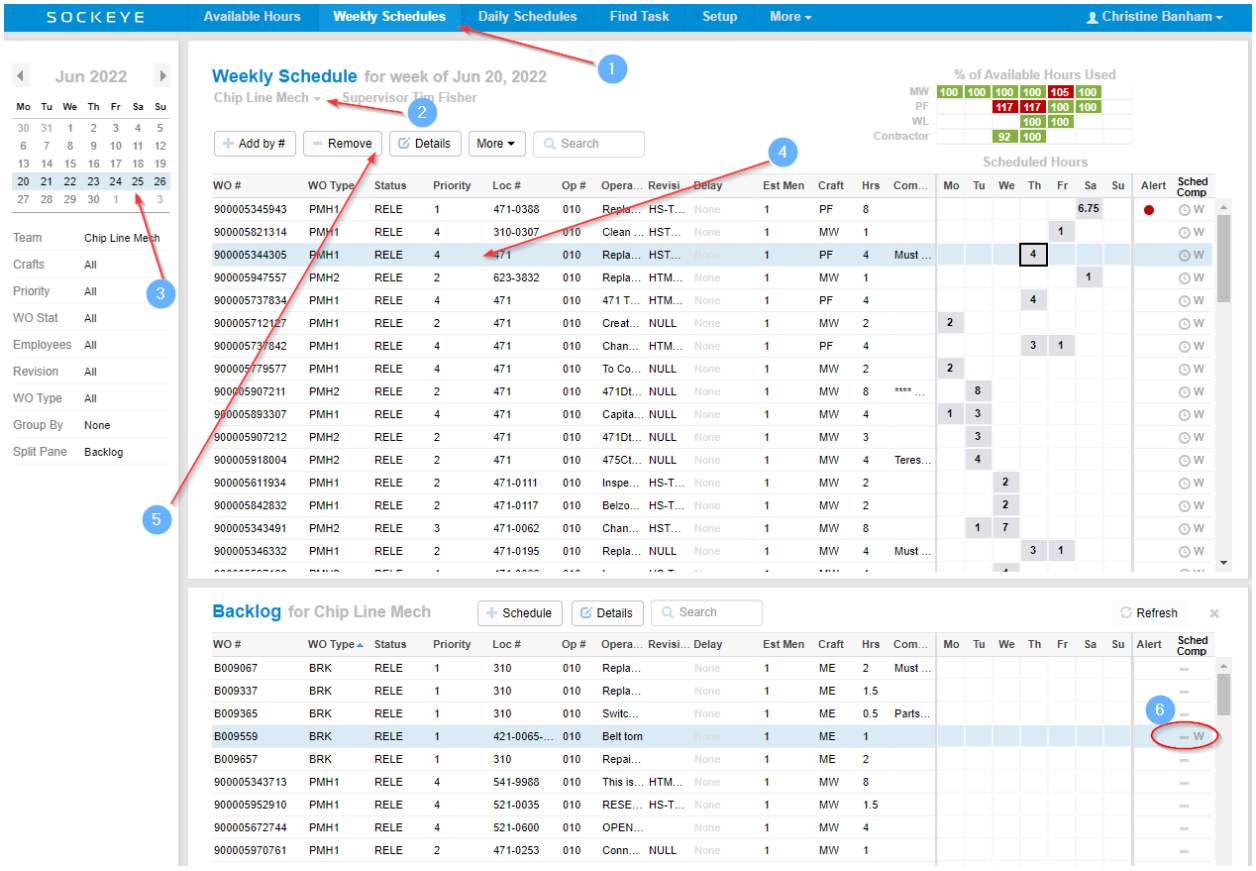


Removing Work from the Schedule

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 ▾ under **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.*



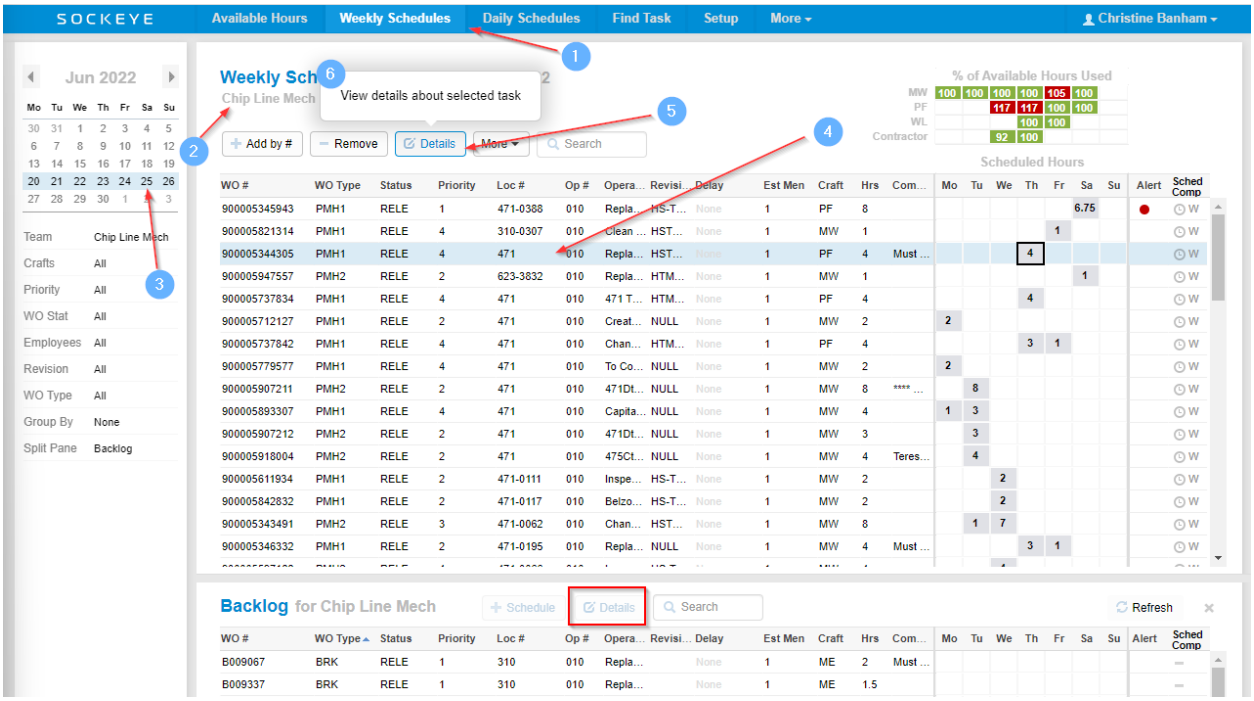
Task Details

Viewing Task Details

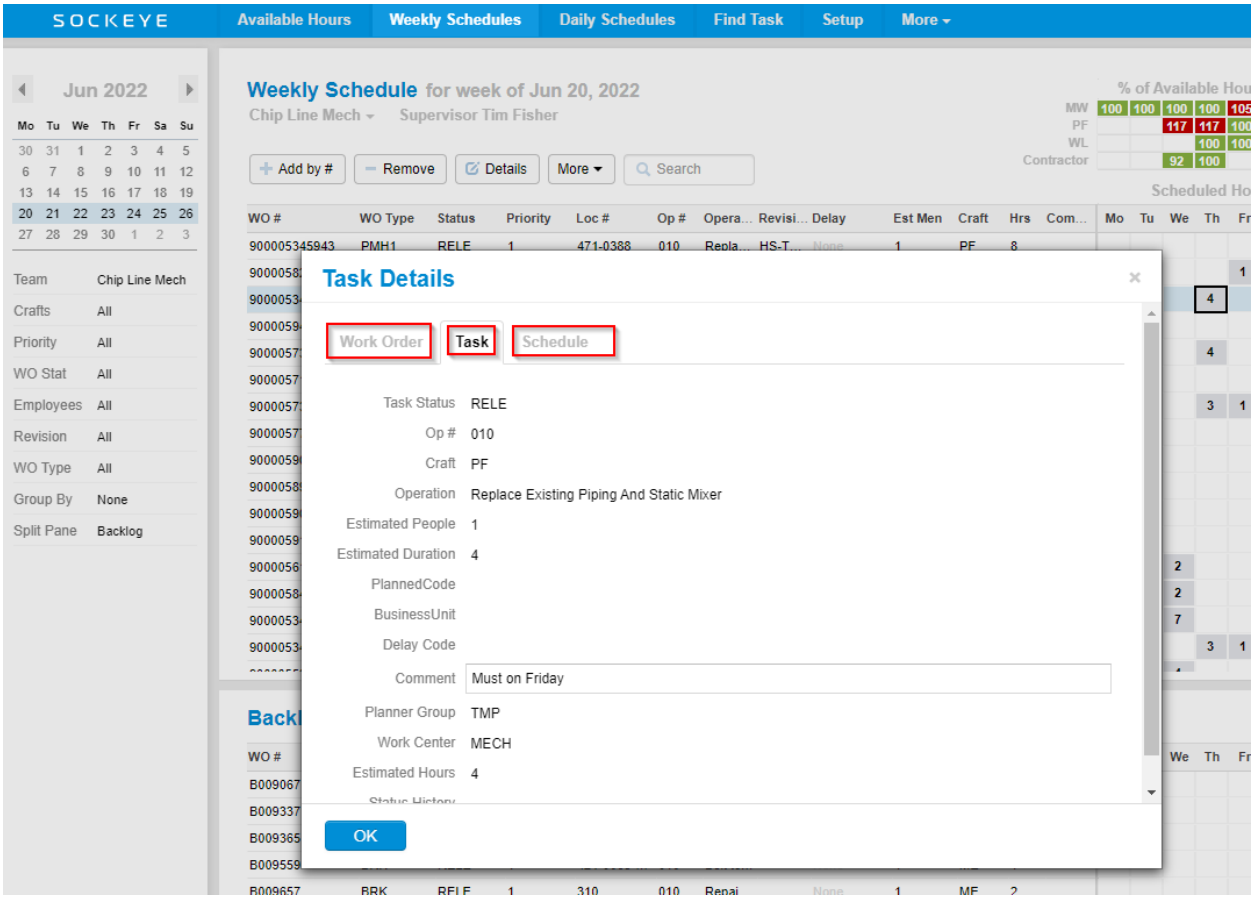
Video Link: [Task Details]

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 Details button in either section (Weekly Schedule or Backlog).
6. **'View Details about Selected Task'** box will appear.



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.

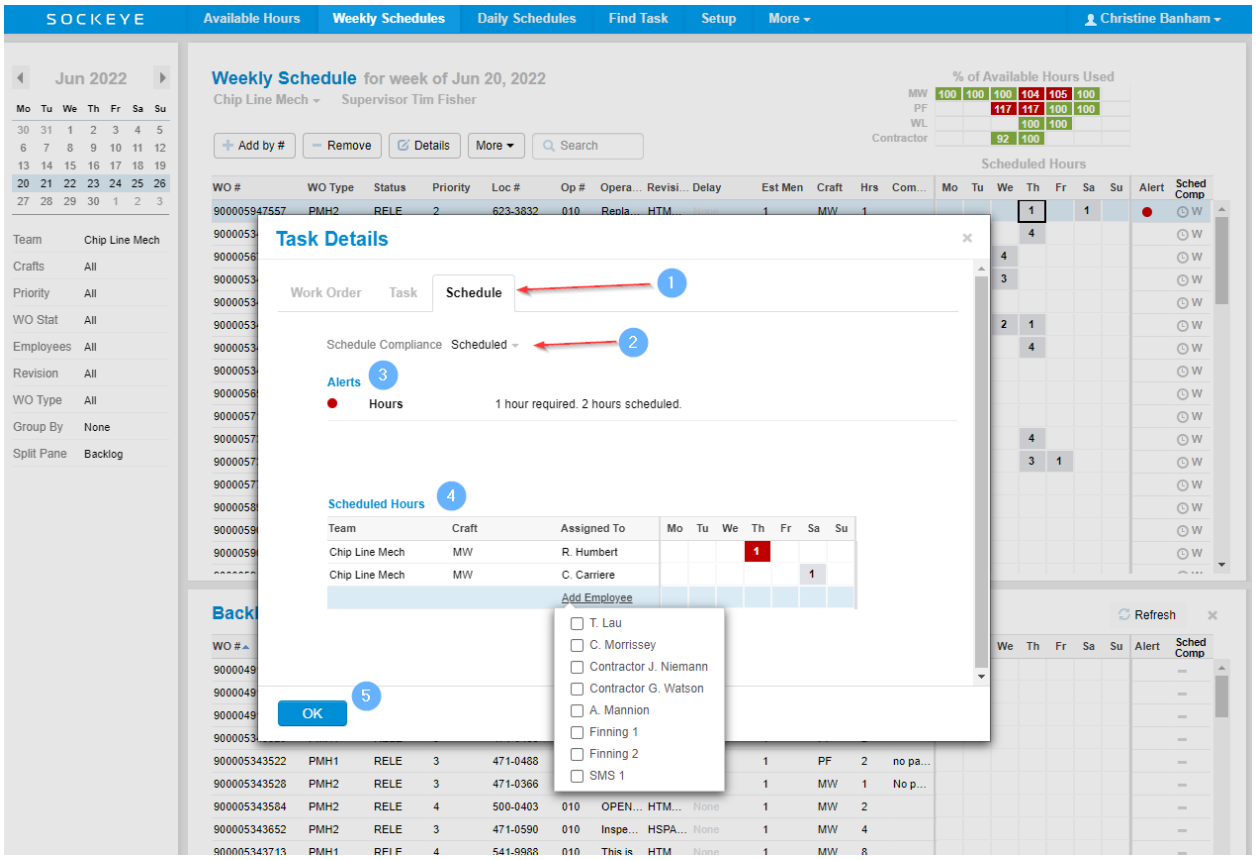


Schedule Task Details

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



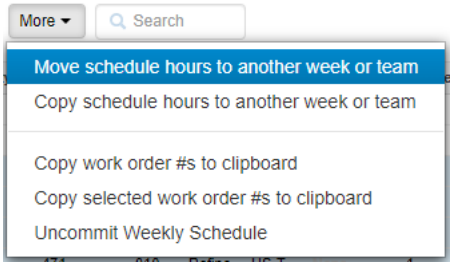
More

Move Schedules

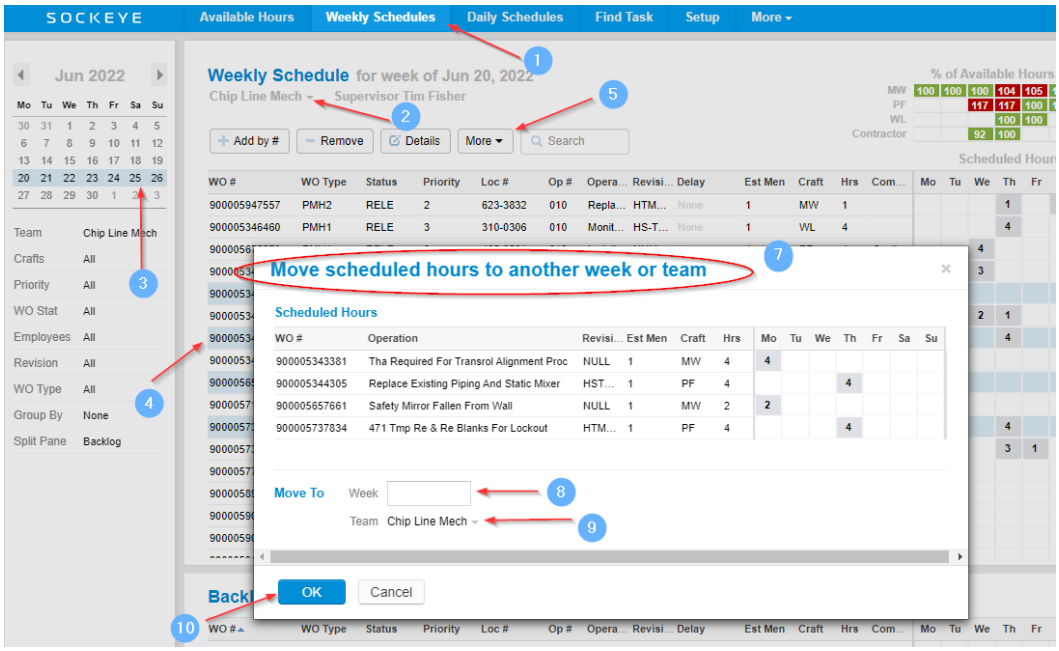
Link: **Move Schedules**

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.

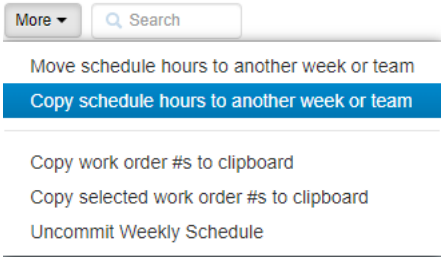


Copy Schedules

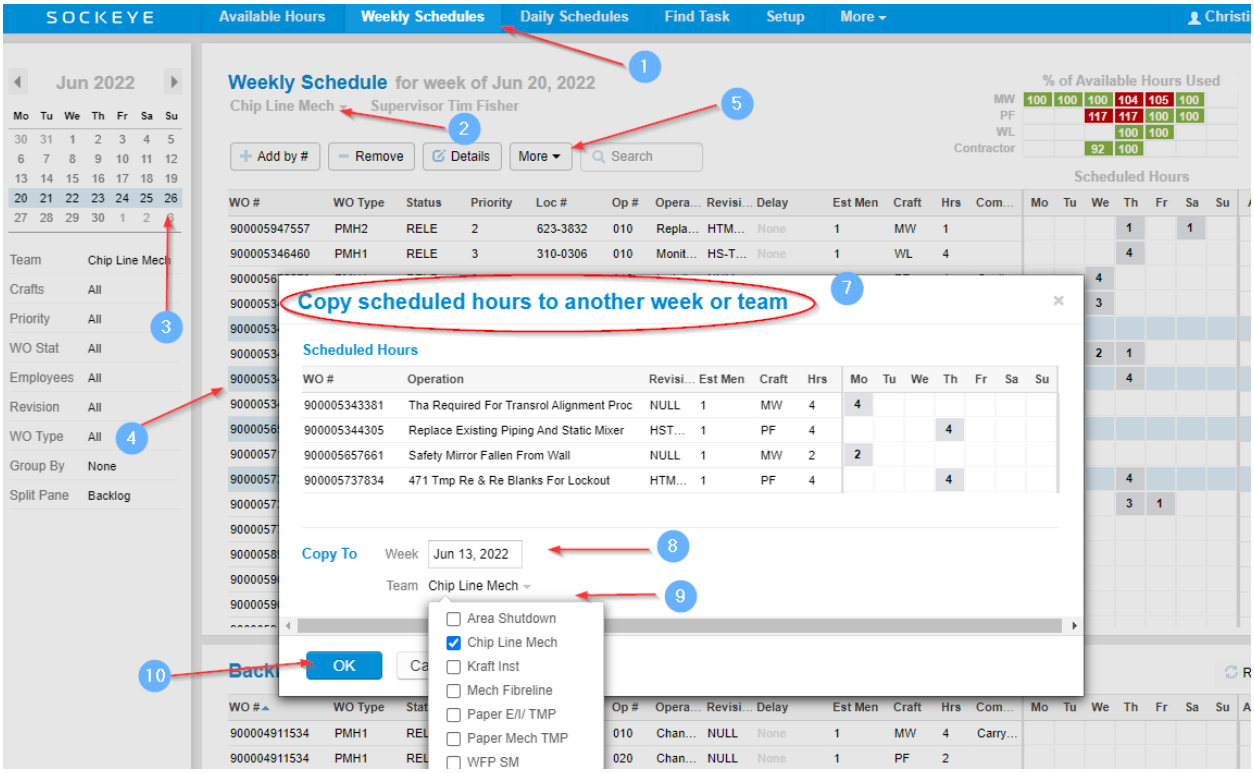
Link: [Copy Schedules]

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.

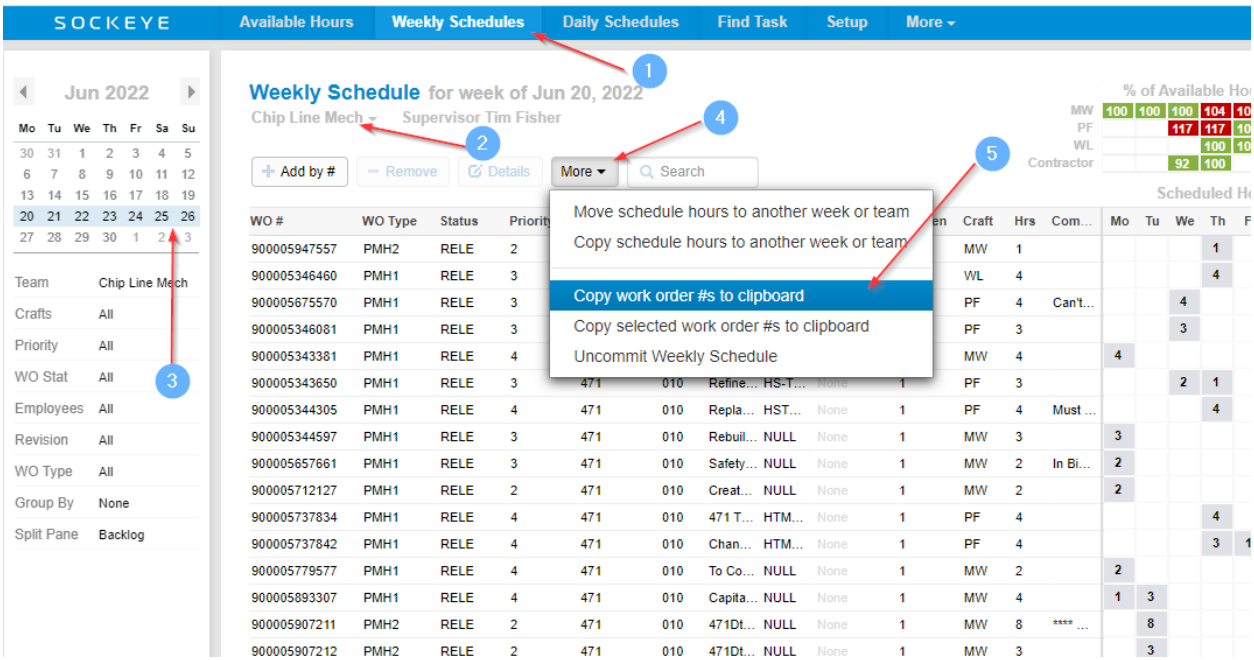


Copy Work Order #s to clipboard

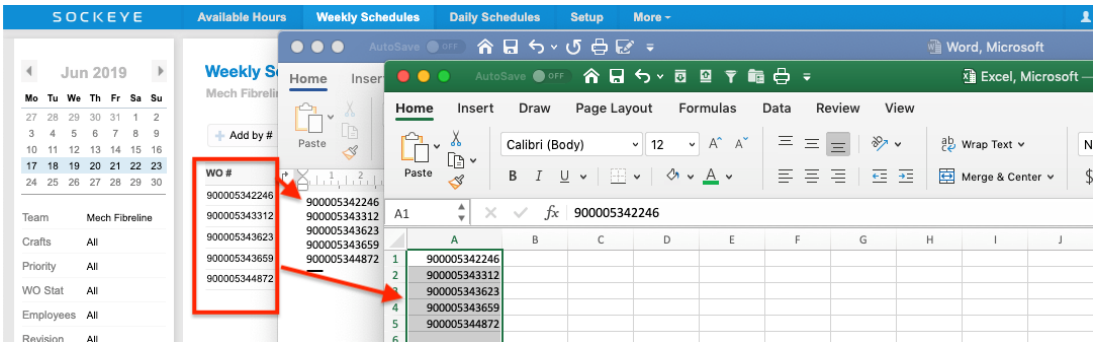
Video Link: [Copy work order numbers to clipboard]

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



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.

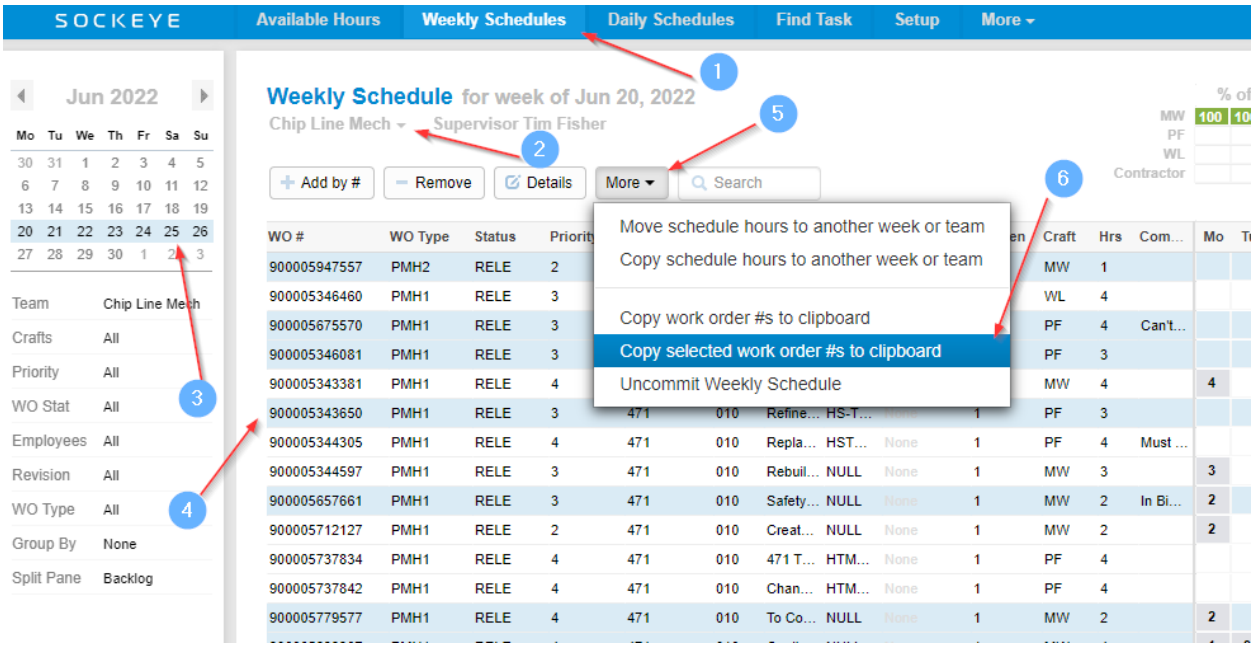


Copy Selected Work Order #s to clipboard

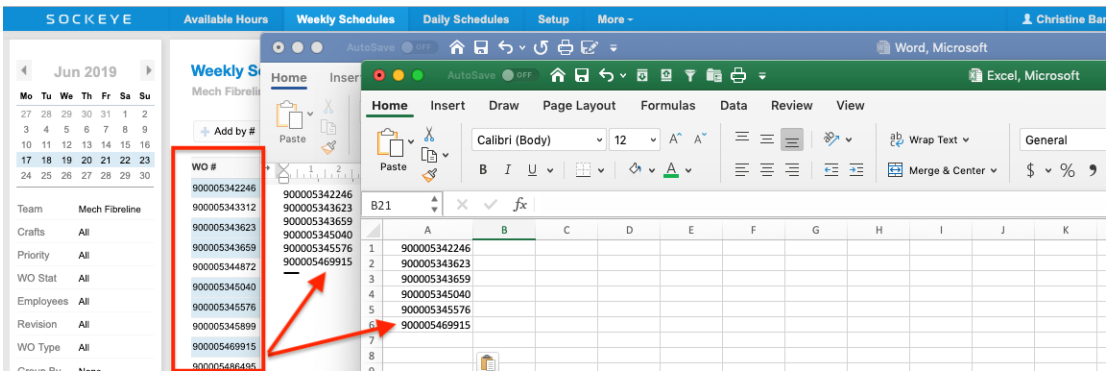
Video Link: [Copy selected work order numbers to clipboard]

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 .



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

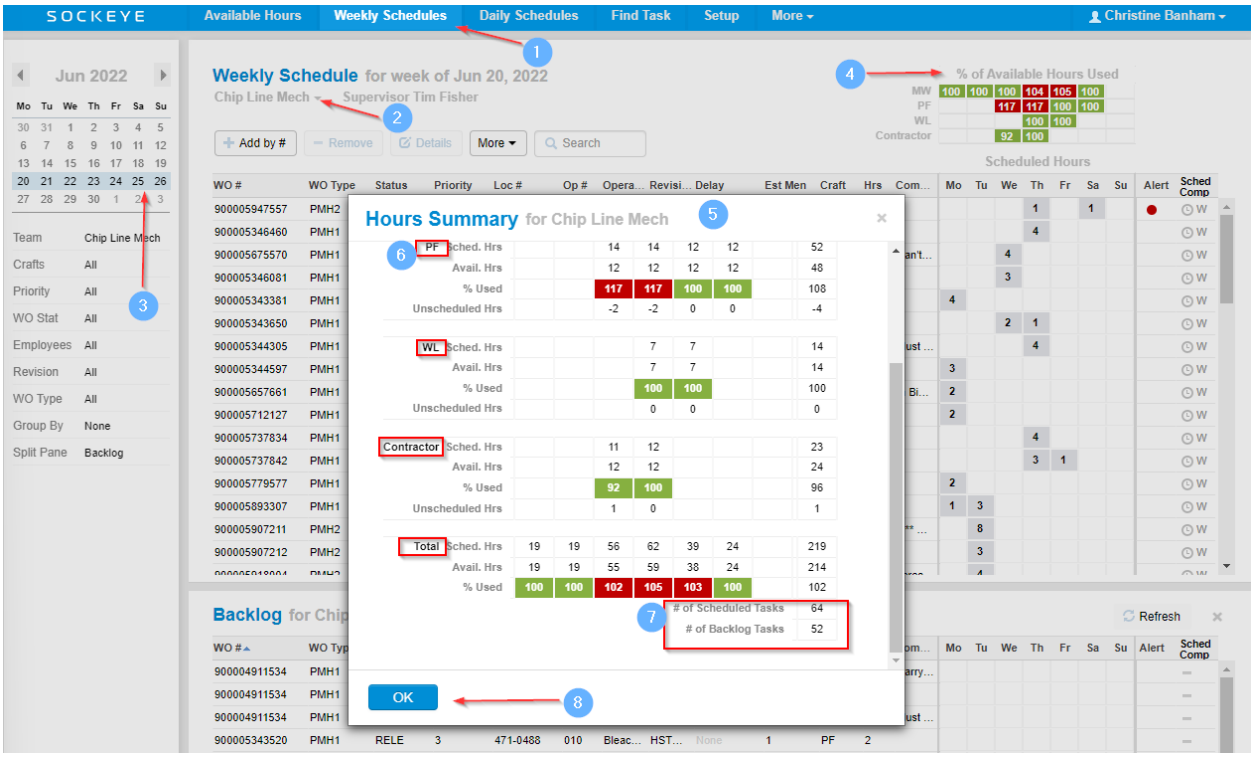
Video Link: **Crew % of Available Hours Used**

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 OK to exit the dialogue box.



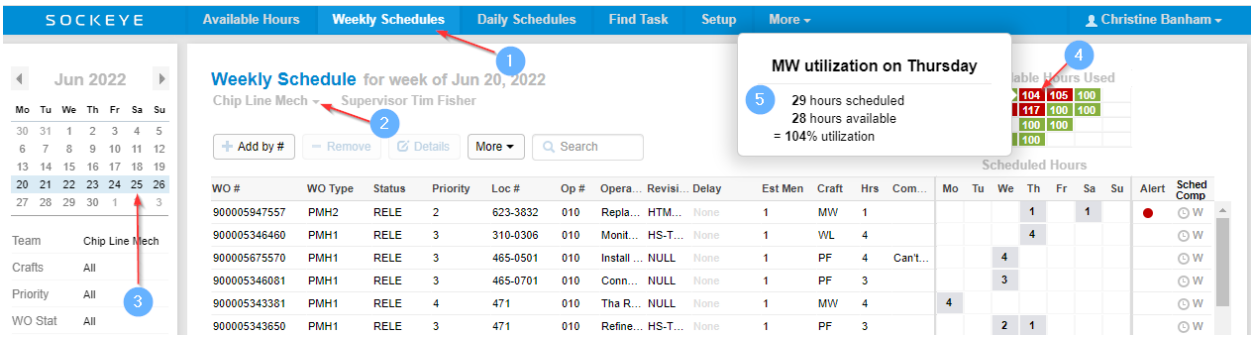
Individual Craft Utilization

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.

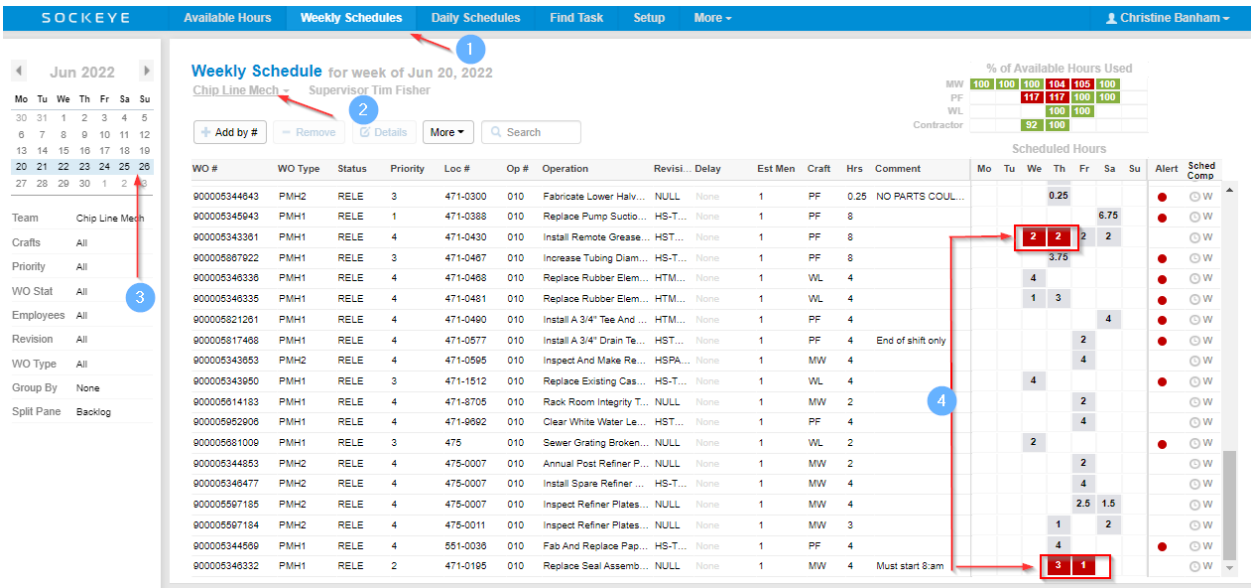


Over Schedule Resources

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:

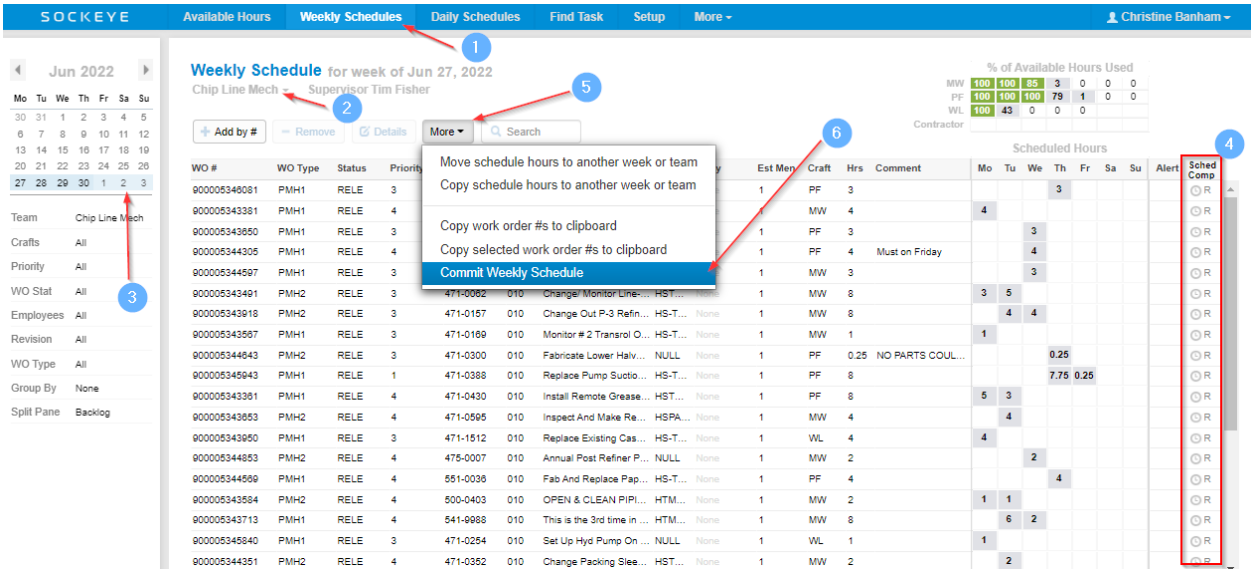
- R = Ready to Schedule
- W = Weekly Committed Schedule
- R = Reactive Work

Commit Weekly Schedule

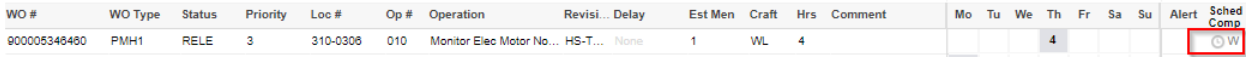
Video Link: Commit Schedule

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.**



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



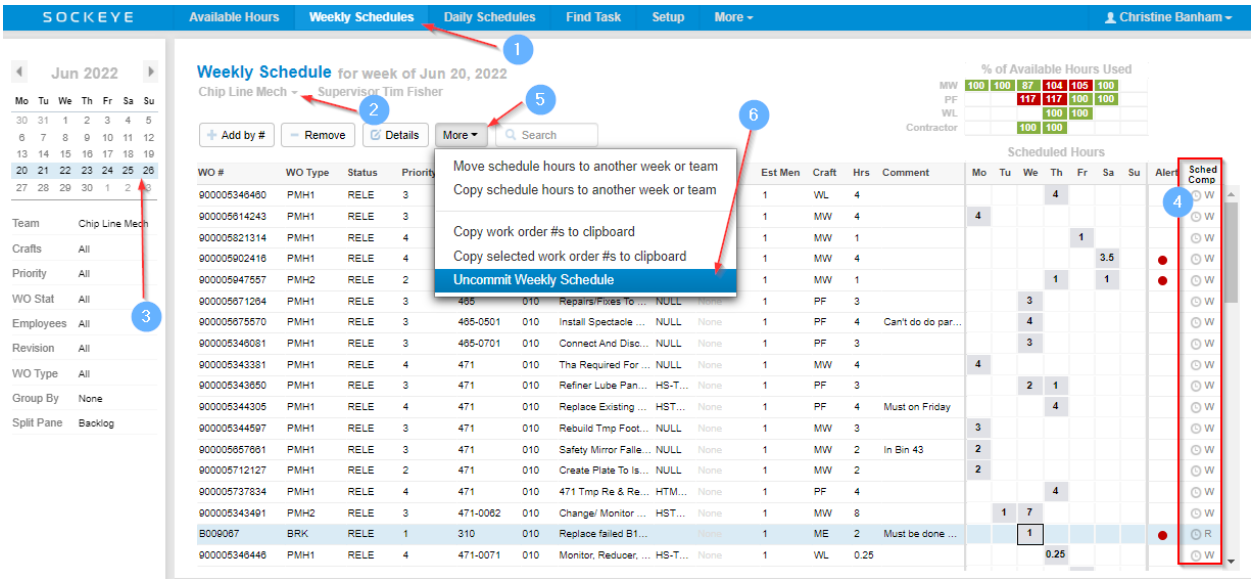
********NOTE**: After committing the weekly schedule, it cannot be undone. Only an administrator has access to reverse those changes to the weekly schedule.*

Uncommit Weekly Schedule

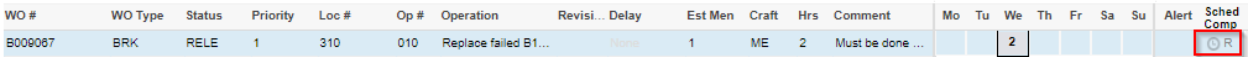
Video Link: Uncommit Schedule

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 ▾ under **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**



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

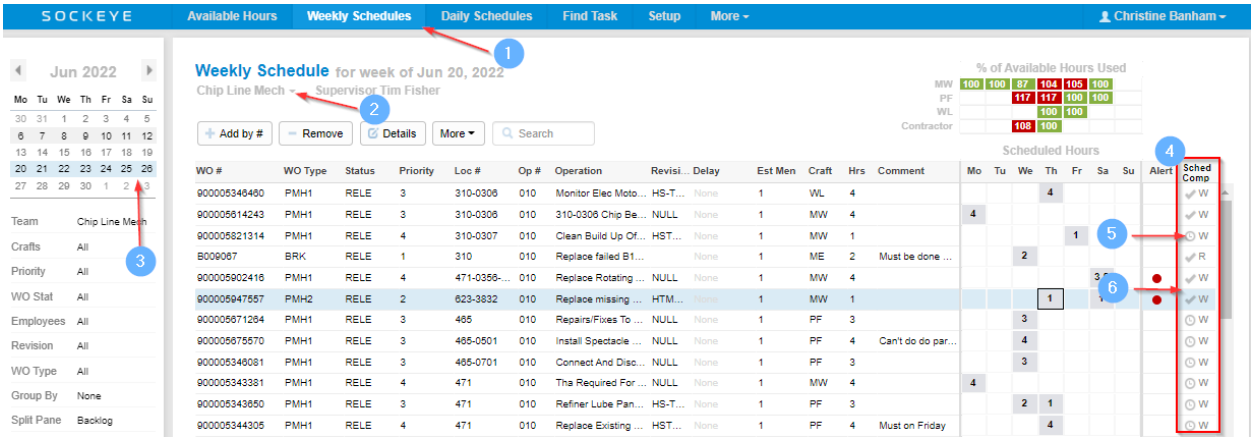


Manually Complete a Work Order

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.



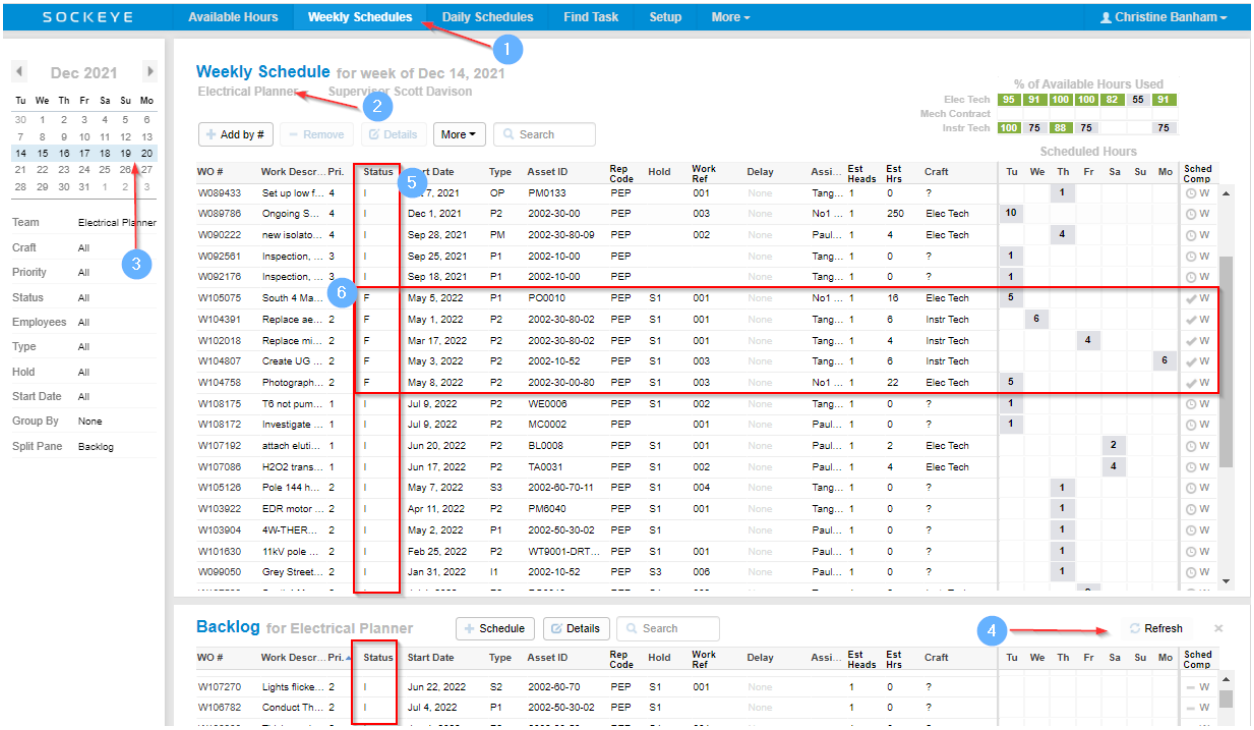
Complete a Work Order Through CMMS

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 ▾ 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. 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.*

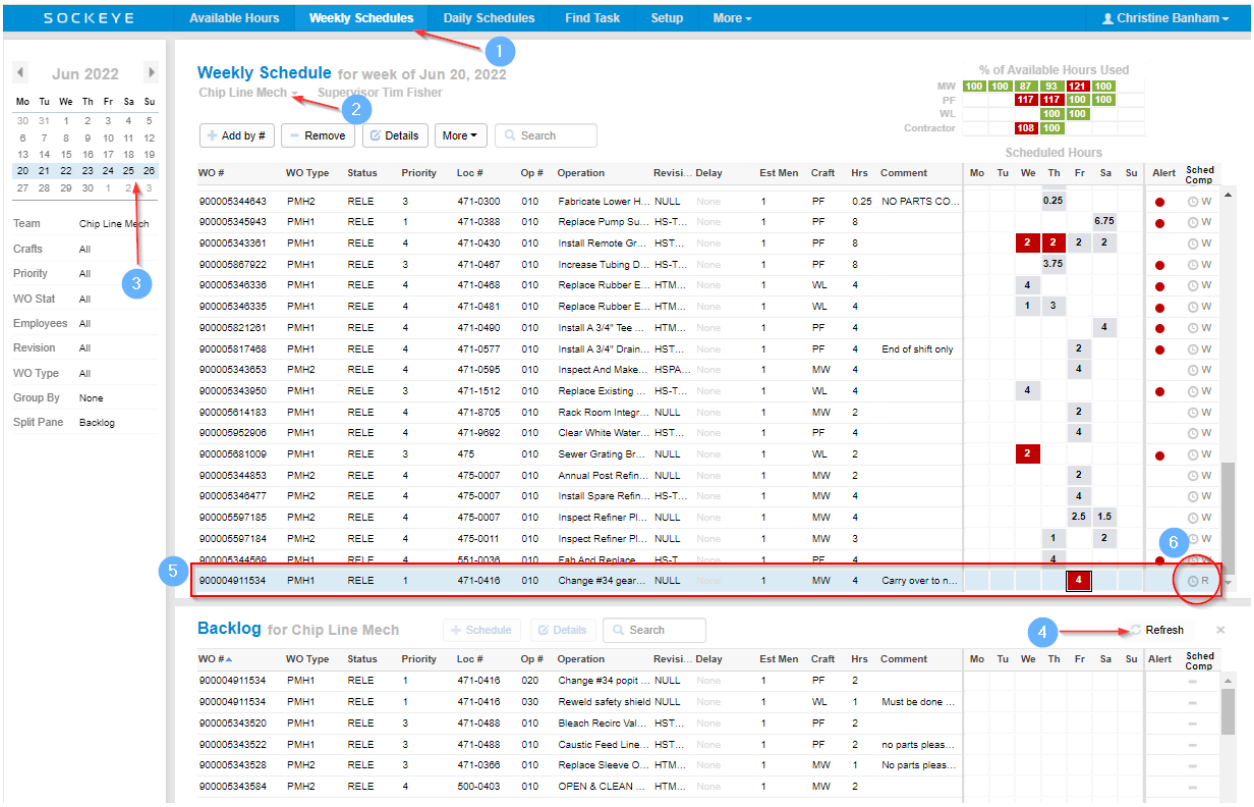


Add Schedule Breakers

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. **Refresh** 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 **R = Reactive Work** in the **Sched Comp** column.

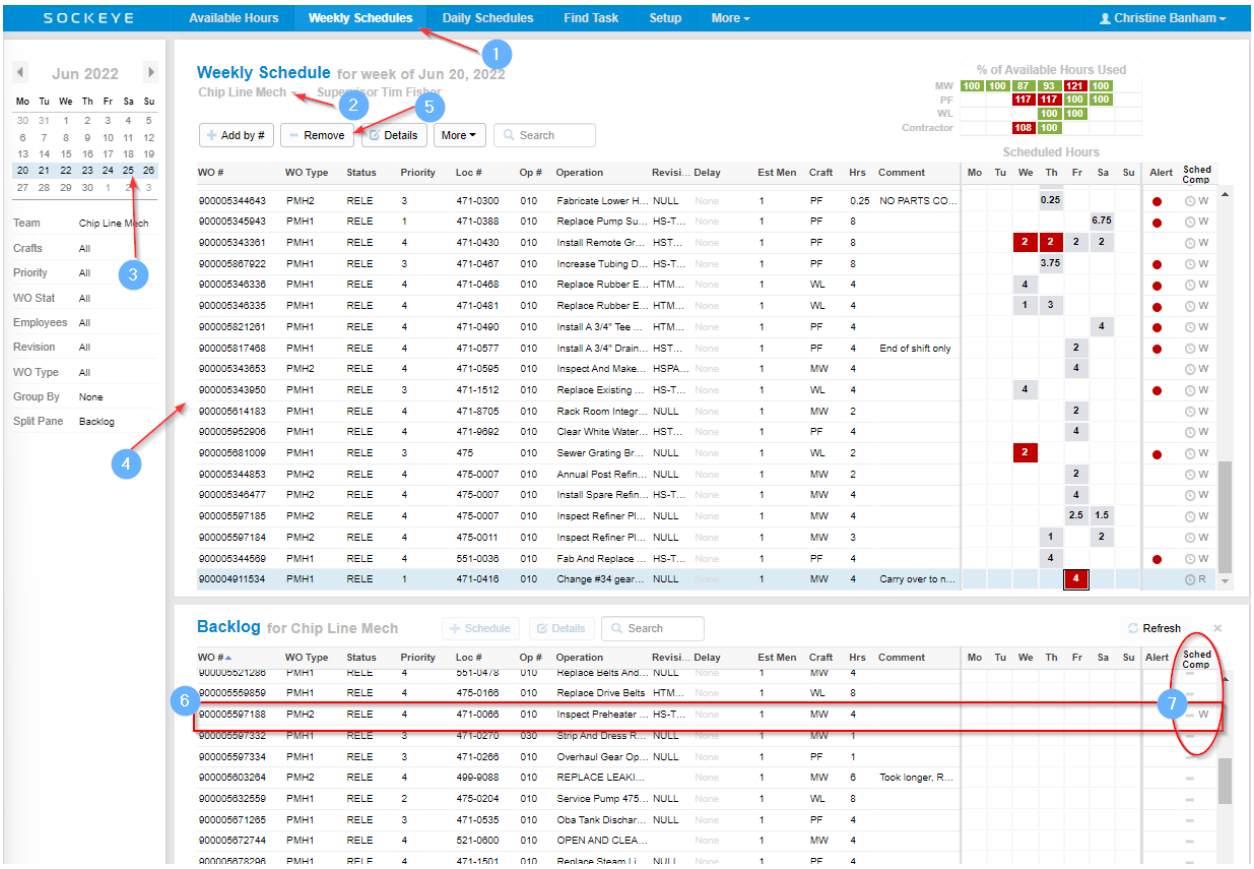


Identify Removed Work Order(s)

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.

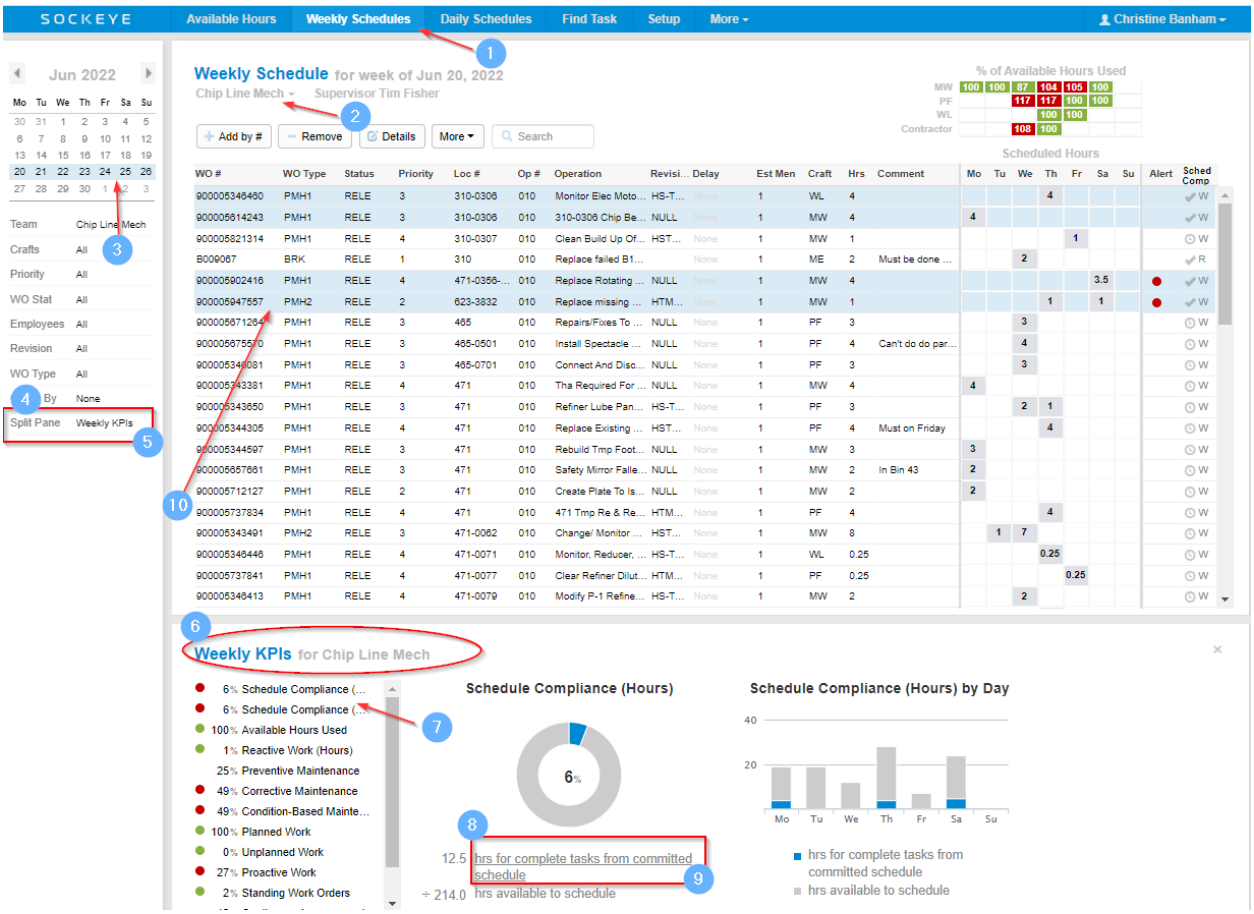


Review Metrics During the Week

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.*

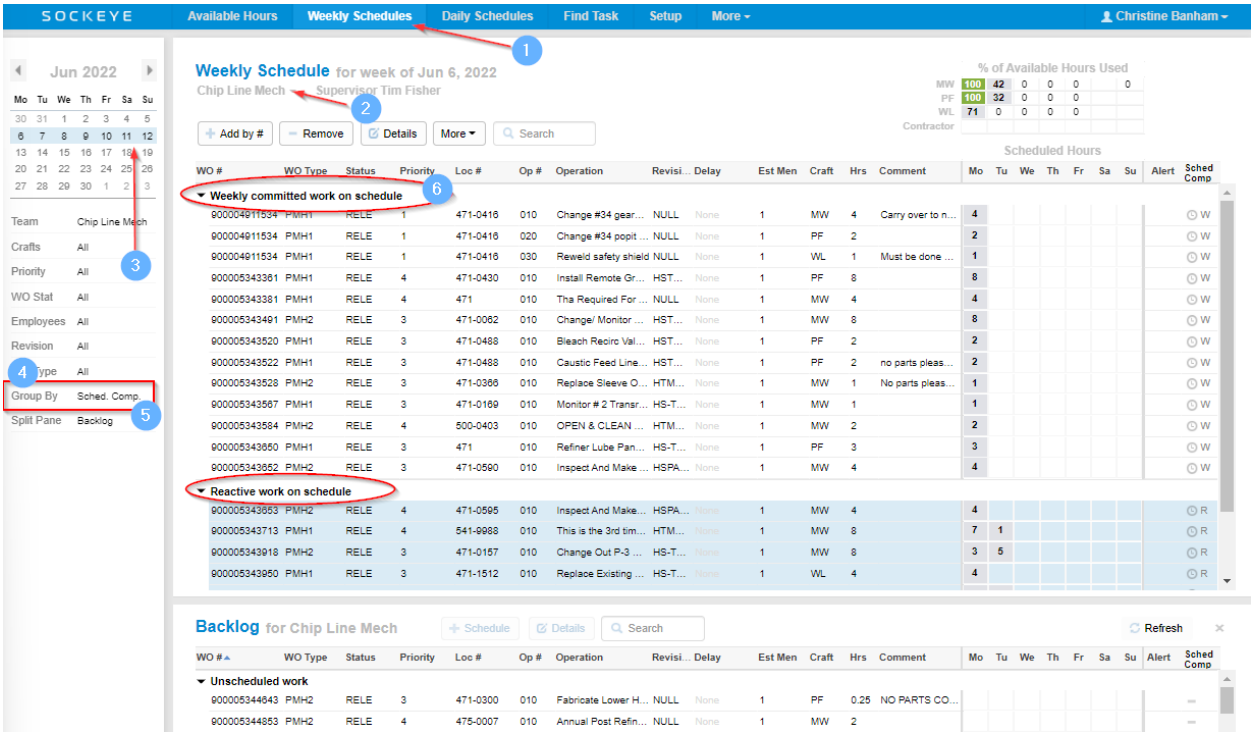

SOCKEYE
Available Hours
Weekly Schedules
Daily Schedules
Find Task
Setup
More
Christine Banham
Jun 2022
Weekly Schedule for week of Jun 20, 2022
Chip Line Mech
Supervisor Tim Fisher
% of Available Hours Used
Add by #
Remove
Details
More
Search
Scheduled Hours
Team Chip Line Mech
Crafts All
Priority All
WO Stat All
Employees All
Revision All
WO Type All
By None
Split Pane Weekly KPIs
Weekly 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)
6%
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.



Features

Alerts

Link: [Alerts]

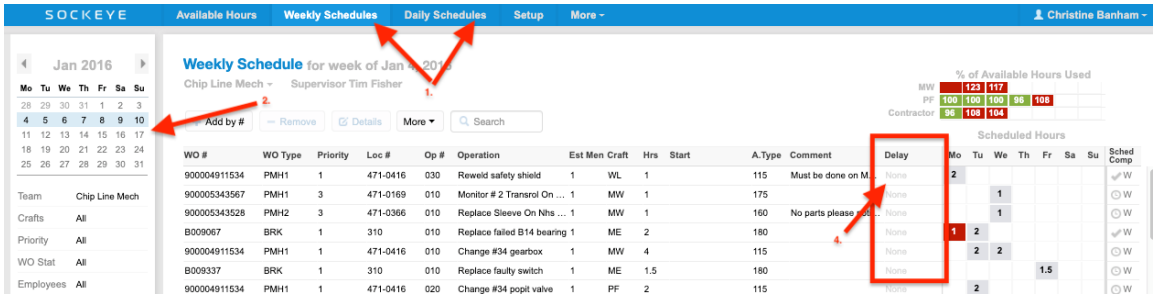
The 'Alert' feature is an indicator only to help identify which tasks or work orders may need attention. In many cases these alerts will generate because the user has made some specific changes in Sockeye for that task by manually changing hours, dates, number of people, etc. to complete the job.

Updating a Delay Code

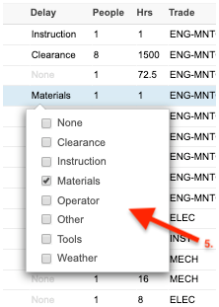
Link: [Delay Code Details]

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.



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.

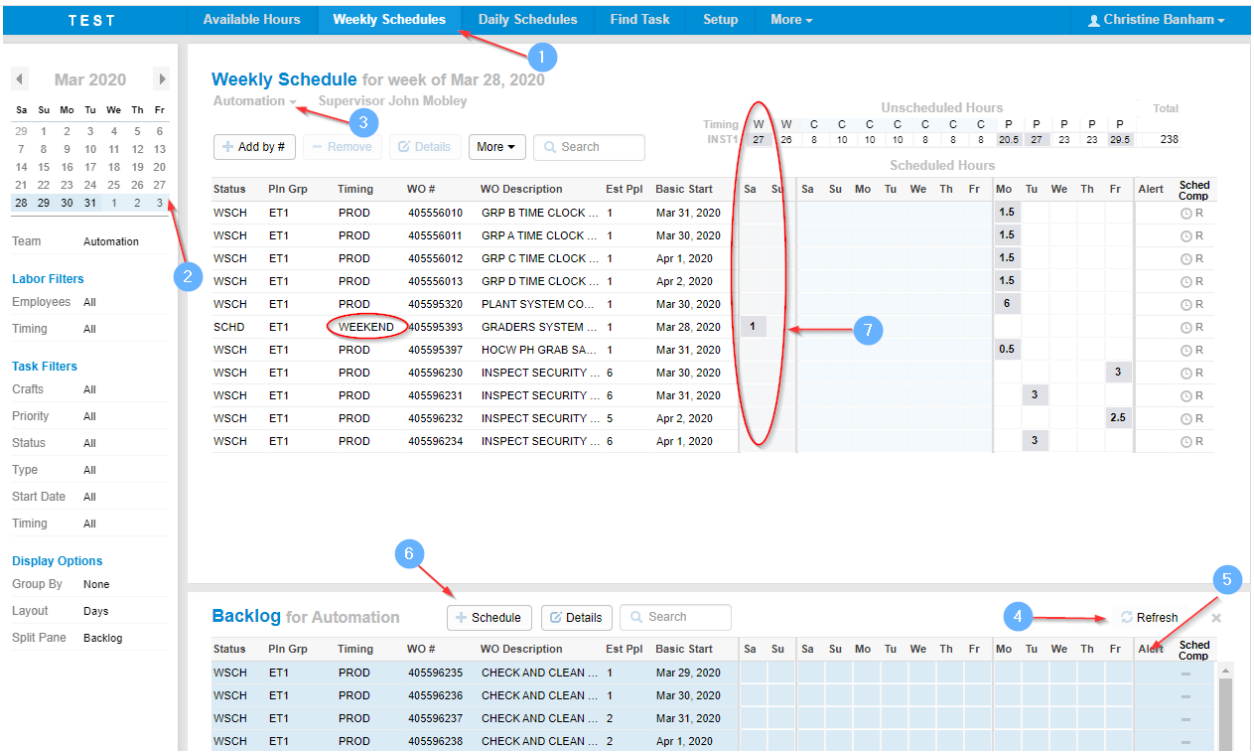
Assigning Work to Timing Patterns

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 Weekly Schedules 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 Refresh 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 + Schedule 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.*



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.