

**Summary:**

The 'Find Task' feature assists in searching for work orders and or specific tasks that may have been scheduled historically or in the future. Provides details of the current scheduled week and team the work had been scheduled for and allows scheduling changes to that task.

**Tools / Resources:**

- Added feature are available. Reach out to a Sockeye sales representative to learn how to add this feature to your Sockeye account.
  - o Email: [sockeyeadmin@getsockeye.com](mailto:sockeyeadmin@getsockeye.com)
  - o Website: [www.getsockeye.com](http://www.getsockeye.com)
  - o Phone: 1-833-303-3073
  - o Or speak with your Sockeye representative.

**Table of Contents**

<b>Sockeye Find Tasks:</b> .....	<b>2</b>
<b>Find Task</b> .....	<b>2</b>
<b>Make Scheduled Changes</b> .....	<b>2</b>
<b>Revision Log</b> .....	<b>4</b>

## Sockeye Find Tasks:

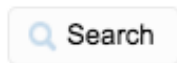
The 'Find Task' tab is available in the blue ribbon.



## Find Task

Work order number search:

1. Click on **Find Task** in the blue ribbon
2. Click in the search box  and enter a work order number
  - a. This search will pull any partial matches displayed, partial work order numbers can be inputted



3. Press enter or click **Search** to find tasks which match that code
  - a. A list of work orders will appear that match the search criteria

**Note:** In some cases, the operation or task number may be of importance as more than one task for that work order number may have been added to the schedule

- The far right of the screen indicates the **Scheduled Week** and the **Team** the work order was scheduled for

Status	Type	Equip D...	WO #	Op #	WO Description	Sched Start	Est Ppl	Est Hrs	Assigne...	Act Hrs	Comments	Craft	Mo	Tu	We	Th	Fr	Sa	Su	Scheduled Week	Team
WSCH	PM02		403804793	0010	MMPM- MTHLY ...	Mar 25, 2019	1	80				C_MEC...	5	5	5	5				Apr 1, 2019	UG GY Mainto...
WSCH	PM02		403804793	0010	MMPM- MTHLY ...	Mar 25, 2019	1	80				C_MEC...	6	6	6	6				Apr 8, 2019	UG GY Mainto...
WSCH	PM02		403804793	0010	MMPM- MTHLY ...	Mar 25, 2019	1	80				C_MEC...	6	6	6					Apr 15, 2019	UG GY Mainto...
WSCH	PM02		403804793	0010	MMPM- MTHLY ...	Mar 25, 2019	1	80				C_MEC...	6	6	6	6				Apr 22, 2019	UG GY Mainto...

End of matching tasks.

## Make Scheduled Changes

The schedule tab of the task details is available to make changes or updates to hours, week, day, and or employee assignment for that specific task.

1. Select that specific work order and double click or click on **Details** to open the Task Details



### Task Details

Work Order Task **Schedule**

2. Click on the Schedule tab



- a. Changing the Week: Click either arrow between the 'Week of Mon Day, Year'. This will move the week date in the past or future. Select the applicable week and enter or adjust the hours on the calendar below.
- b. Change the Assigned To: Click on the current name selected a drop-down box will appear with all team members identified for that team. Select the applicable team member.
- c. Add an Employee: Click on Add Employee. A drop-down box will appear with a list of employees for all TEAMS. Select the applicable team member.
- d. Change, Edit or Add Hours: Select the cell in the week that the hours are to be updated. Make applicable changes by deleting hours, inputting hours or over writing hours currently displayed.

3. Click **OK** once all updates are in place.

### Task Details

×

Work Order Task **Schedule**

				Week of Jan 7, 2019						
Team	Craft	Assigned To		Mo	Tu	We	Th	Fr	Sa	Su
Building Operator	BUILDING OPERA..	Mr. Brown		7	7	7	7	7		
		<u>Add Employee</u>								

OK

### *Revision Log*

Revisions	Date	Reason/Update	Updated By:
Rev1	July 9, 2019	Generated Document	Christine Banham