

Summary:

The Daily Schedule tab provides the ability to create daily schedules by assigning work orders to specific employees. Work orders that were scheduled in the Weekly Schedules Tab will appear or work orders can be assigned directly through this tab.

Features of the Daily Schedule are to assign specific work orders to an employee(s) and offers the same functionality as the Weekly Schedule Tab.

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/dailyschedule>

Revision Log

Revisions	Date	Reason/Update	Updated By:
Rev 12	October 6, 2023	Move Multiple WO's	C. Banham
Rev 11	July 22, 2022	Annual Review	C. Banham
Rev 10	June 18, 2020	Added 'Hide Unavailable Employees'	C. Banham
Rev 9	May 26, 2020	Added Drag & Drop details	C. Banham
Rev 8	February 14, 2020	Added Adjusting Backlog & Schedule Views	C. Banham
Rev 7	August 8, 2019	Copy Work Orders to Clipboard	C. Banham
Rev 6	June 7, 2019	Added Delay Code & Revision Log	C. Banham

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Daily 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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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 More ▼ Christine Banham ▼

Daily Schedule for Monday, Jun 20, 2022
Chip Line Mech - Supervisor Tim Fisher

Team: Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	Comment	Alert	Sched Comp
▼ R. Humbert														
900005614243	PMH1	RELE	3	310-0306	010	310-0306 Chip Belt ...	NULL	None	1	MW	4			W
900005344597	PMH1	RELE	3	471	010	Rebuild Tmp Foot O...	NULL	None	1	MW	3			W
900005343381	PMH1	RELE	4	471	010	Tha Required For Tr...	NULL	None	1	MW	4			W
900005611935	PMH1	RELE	3	471-0169	010	Inspect Packing Sle...	HST...	None	1	MW	1			W
▼ T. Lau														
900005657661	PMH1	RELE	3	471	010	Safety Mirror Fallen ...	NULL	None	1	MW	2	In Bin 43		W
900005712127	PMH1	RELE	2	471	010	Create Plate To Isol...	NULL	None	1	MW	2			W
900005779577	PMH1	RELE	4	471	010	To Cover Clean Up ...	NULL	None	1	MW	2			W
900005893307	PMH1	RELE	4	471	010	Capital Afe: Refiner ...	NULL	None	1	MW	4			W

Backlog for Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	Comment	Alert	Sched Comp
▼ undefined														
900004911534	PMH1	RELE	1	471-0416	020	Change #34 popit v...	NULL	None	1	PF	2			
900004911534	PMH1	RELE	1	471-0416	030	Reweld safety shield	NULL	None	1	WL	1	Must be done on...		
900005343520	PMH1	RELE	3	471-0488	010	Bleach Recirc Valve...	HST...	None	1	PF	2			

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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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.

Daily Schedule for Monday, Jun 20, 2022
Chip Line Mech Supervisor Tim Fisher

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	Comment	Alert	Sched Comp
900005614243	PMH1	RELE	3	310-0306	010	310-0306 Chip Belt ...	NULL	None	1	MW	4			W
900005657661	PMH1	RELE	3	471	010	Safety Mirror Fallen ...	NULL	None	1	MW	2	In Bin 43		W
900005344597	PMH1	RELE	3	471	010	Rebuild Tmp Foot O...	NULL	None	1	MW	3			W
900005712127	PMH1	RELE	2	471	010	Create Plate To Isol...	NULL	None	1	MW	2			W
900005779577	PMH1	RELE	4	471	010	To Cover Clean Up ...	NULL	None	1	MW	2			W

Backlog for Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	Comment	Alert	Sched Comp
900004911534	PMH1	RELE	1	471-0416	020	Change #34 popit v...	NULL	None	1	PF	2			---
900004911534	PMH1	RELE	1	471-0416	030	Reweld safety shield	NULL	None	1	WL	1	Must be done on...		---
900005343520	PMH1	RELE	3	471-0488	010	Bleach Recirc Valve...	HST...	None	1	PF	2			---
900005343522	PMH1	RFI F	3	471-0488	010	Caustic Feed Line D	HST	None	1	PF	2	no parts please		---

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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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 shows the Sockeye software interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. On the left, a calendar for June 2022 shows Monday, June 20, 2022, selected. The main area displays the 'Daily Schedule for Monday, Jun 20, 2022' for the 'Chip Line Mech' team, supervised by Tim Fisher. A search bar with the text 'pla' is highlighted with a red circle and a blue '1'. Below the search bar, a table of work orders is shown. A red arrow points to the 'Team' dropdown menu, which is labeled with a blue '2'. Another red arrow points to the search bar, labeled with a blue '3'. Below the work orders table, the 'Backlog for Chip Line Mech' section is visible. A search bar with the text 'Plat' is highlighted with a red circle and a blue '4'. A red arrow points to the 'Search the backlog' button, labeled with a blue '4'.

Daily Schedule for Monday, Jun 20, 2022
Chip Line Mech - Supervisor Tim Fisher

Search:

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	C...	Alert	Sched Comp
900005712127	PMH1	RELE	2	471	010	Create Plate To Isolate Tmp Chip Silos	NULL	None	1	MW	2			W
900005893307	PMH1	RELE	4	471	010	Capital Afe Refiner Plate Gap Controls	NULL	None	1	MW	4			W

Backlog for Chip Line Mech

Search:

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	C...	Alert	Sched Comp
900005346382	PMH1	RELE	3	475-0103	010	Reseat Torque Limiter Spring Plate #1 Sa	NULL	None	1	MW	1			W
900005597184	PMH2	RELE	4	475-0011	010	Inspect Refiner Plates For Wear And	NULL	None	1	MW	3			W
900005597185	PMH2	RELE	4	475-0007	010	Inspect Refiner Plates For Wear And	NULL	None	1	MW	4			W
900005597332	PMH1	RELE	3	471-0270	030	Strip And Dress Rejects Plate Package	NULL	None	1	MW	1			W
900005965986	PMH1	RELE	3	471-0270	030	Strip And Dress Rejects Plate Package	NULL	None	1	MW	1			W

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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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.

Daily Schedule for Monday, Jun 20, 2022
Chip Line Mech - Supervisor Tim Fisher

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	C...	Alert	Sched Comp
900005614243	PMH1	RELE	3	310-0306	010	310-0306 Chip Belt 6 Backside Chip Guide	NULL	None	1	MW	4			
900005657661	PMH1	RELE	3	471	010	Safety Mirror Fallen From Wall	NULL	None	1	MW	2			
900005344597	PMH1	RELE	3	471	010	Rebuild Tmp Foot Operated Enerpac Pump	NULL	None	1	MW	3			
900005712127	PMH1	RELE	2	471	010	Create Plate To Isolate Tmp Chip Silos	NULL	None	1	MW	2			
900005779577	PMH1	RELE	4	471	010	To Cover Clean Up & Organization Of Tmp	NULL	None	1	MW	2			

Backlog for Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	C...	Alert	Sched Comp
B009337	BRK	RELE	1	310	010	Replace faulty switch	None		1	ME	1.5			
B009365	BRK	RELE	1	310	010	Switch out worn CAT2	None		1	ME	0.5			
B009657	BRK	RELE	1	310	010	Repair P60 chain	None		1	ME	2			
900005789948	PMH2	CRTD	2	310-0307	010	Semi-Annual Inspection Of Tmp Chip Belts	NULL	None	1	MW	0.3			
B009559	BRK	RELE	1	421-0065...	010	Belt torn	None		1	ME	1			
900005971791	PMH1	CRTD	4	465-0002	010	Fabricate And Install New Piping	NULL	None	1	PF	0.3			
900005971924	PMH2	CRTD	2	471	010	471DI001 Mw Mech Pm Ground Floor	NULL	None	1	MW	8			
900005971925	PMH2	CRTD	3	471	010	471DI002 Mw Mech Pm Operating Floor, ...	NULL	None	1	MW	4			
900005971926	PMH2	CRTD	2	471	010	471CI007 Mw Mech Pm Refiner Floor	NULL	None	1	MW	0.15			
900005597188	PMH2	RELE	4	471-0066	010	Inspect Preheater Pst Screw And Throat	HS-T...	None	1	MW	4			
900005346332	PMH1	RELE	2	471-0195	010	Replace Seal Assembly On #1 Primary S...	NULL	None	1	MW	4			
900005970761	PMH1	RELE	2	471-0253	010	Connect Oil Cooler To Rejects Press The	NULL	None	1	MW	1			
900005345840	PMH1	RELE	3	471-0254	010	Set Up Hyd Pump On Test Bench	NULL	None	1	WL	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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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

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Jun 2022

Daily Schedule for Monday, 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	C...	Alert	Sched Comp
900005614243	PMH1	RELE	3	310-0306	010	310-0306 Chip Belt 6 Backside Chip Guide	NULL	None	1	MW	4			
900005657661	PMH1	RELE	3	471	010	Safety Mirror Fallen From Wall	NULL	None	1	MW	2	I...		
900005344597	PMH1	RELE	3	471	010	Rebuild Tmp Foot Operated Enerpac Pump	NULL	None	1	MW	3			
900005712127	PMH1	RELE	2	471	010	Create Plate To Isolate Tmp Chip Silos	NULL	None	1	MW	2			
900005779577	PMH1	RELE	4	471	010	To Cover Clean Up & Organization Of Tmp	NULL	None	1	MW	2			

Backlog for Chip Line Mech + Schedule Details Search Refresh ✕

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	C...	Alert	Sched Comp
B009337	BRK	RELE	1	310	010	Replace faulty switch		None	1	ME	1.5			
B009365	BRK	RELE	1	310	010	Switch out wornCAT2		None	1	ME	0.5	P...		
B009657	BRK	RELE	1	310	010	Repair P60 chain		None	1	ME	2			
900005789948	PMH2	CRTD	2	310-0307	010	Semi-Annual Inspection Of Tmp Chip Belts	NULL	None	1	MW	0.3			
B009559	BRK	RELE	1	421-0065-...	010	Belt torn		None	1	ME	1			
900005971791	PMH1	CRTD	4	465-0002	010	Fabricate And Install New Piping	NULL	None	1	PF	0.3			
900005971924	PMH2	CRTD	2	471	010	471DI001 Mw Mech Pm Ground Floor	NULL	None	1	MW	8			
900005971925	PMH2	CRTD	3	471	010	471DI002 Mw Mech Pm Operating Floor, ...	NULL	None	1	MW	4			

Team: Chip Line Mech
Crafts: All
Priority: All
WO Stat: All
Employees: All
Revision: All
WO Type: All
Group By: None
Split Pane: Backlog (checked), Weekly KPis, None

Employee Utilization

Located at the top right hand of the screen offers a view of the available hours for each employee. The ledger uses colors to identify the resource utilization:

- Red identifying over Resources Available
- Green indicating within 85 to 100% Resource Availability
- Grey showing there are Resources Available to schedule additional work.
- Yellow indicates the employee is not available for scheduling

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

Jun 2022

Daily Schedule for Thursday, Jun 23, 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	Alert	Sched Comp
900005346460	PMH1	RELE	3	310-0306	010	Monitor ...	HS-T...	None	1	WL	4			
900005343567	PMH1	RELE	3	471-0169	010	Monitor ...	HS-T...	None	1	MW	1			
900005947557	PMH2	RELE	2	623-3832	010	Replace...	HTM...	None	1	MW	1			
900005343650	PMH1	RELE	3	471	010	Refiner ...	HS-T...	None	1	PF	3			
900005343918	PMH2	RELE	3	471-0157	010	Change ...	HS-T...	None	1	MW	8			

Backlog for Chip Line Mech + Schedule Details Search Refresh x

WO #	WO Type	Status	Priority	Loc #	Op #	Operatio...	Revisi...	Delay	Est Men	Craft	Hrs	Comm...	Alert	Sched Comp
B009337	BRK	RELE	1	310	010	Replace...		None	1	ME	1.5			
B009365	BRK	RELE	1	310	010	Switch o...		None	1	ME	0.5	Parts N...		
B009657	BRK	RELE	1	310	010	Repair P...		None	1	ME	2			
900005789948	PMH2	CRTD	2	310-0307	010	Semi-An...	NULL	None	1	MW	0.3			

Employee Utilization Summary (Top Right):

Sched. Hrs	Avail. Hrs	Utilization	Employee
12	9	14	C. Carriere
6	9	7	R. Humbert
14	9	7	C. Morrissey
7	7	7	Contractor J. J.
10.2	7	12	A. Mannion
56.25	58		Fanning 1

Employee Details

Video Link: [Employee Details](#)

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. Hover the mouse over a resource.
5. Click on the resource when a line appears under the name.
6. An Employee Details dialogue box will appear.
7. View details. Refer to the '**Setup > Employees**' user guide for details on making these changes.
8. Click **OK**.

The screenshot shows the Sockeye software interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. Below the ribbon, the 'Daily Schedule for Thursday, Jun 23, 2022' is displayed. On the left, a calendar for June 2022 shows the 23rd as the selected day. In the center, a list of resources is shown, with 'C. Carriere' highlighted. An 'Employee Details' dialog box is open, displaying information for 'C. Carriere', including Name, Code, Home Team, Crafts, Default Availability, and Notes. The 'OK' button is visible at the bottom of the dialog box. Numbered callouts 1 through 7 indicate the steps for accessing employee details.

Update Resource Availability

Video Link: [Update Resource Availability](#)

Adding changes to the availability schedule can take place throughout the week to track updates such as vacation, overtime, leave, sick and among many other examples.

1. Click on the **Available Hours** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Available Hours for week of**.
3. Click on the calendar **Week** that the Available Hours are being updated.
4. Update **Resource** information such as **Vacation (VA)**, **Sick (S)**, **Training (TR)**, **Approved Over Time Hours (OT)**, etc.
5. Click on the **cell** at the intersection of the **date** and the **employee** details to be updated.
 - a. Type in either the absence code, or the new number of hours available.
 - b. Hit Tab, Enter, or Click the mouse away from the cell.

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

Available Hours for week of Jun 20, 2022
Chip Line Mech Supervisor Tim Fisher

Reassign Add Note

Employees	Mon Jun 20	Tue Jun 21	Wed Jun 22	Thu Jun 23	Fri Jun 24	Sat Jun 25	Sun Jun 26
MW employees							
R. Humbert	D12	D12	N12	N12			
C. Carriere			Sick	9	N12	N12	
T. Lau	7	7	7	VA	VA		
Contractor J. Niemann				7OT	7OT		
PF employees							
C. Morrissey	to MPR	to MPR	D12	D12	N12	N12	
Contractor G. Watson							
WL employees							
A. Mannion	TR	TR	Safety	7	7		
Contractor employees							
Finning 1			12	12			
Finning 2							
SMS 1							

9. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
10. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
11. Select the **Day** in the calendar.
12. The resource hour or away details will appear in the employee ledger.

Over Schedule Resources

Video Link: [Over Scheduling Resources](#)

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

Updating or Adjusting the Daily Schedule

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

Assigning a Different Employee to a Task

Video Link: [Assign to a different resource](#)

Sockeye users can change or reassign the task to a different technician.

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. **Click and hold down** the mouse on the **designated hours** under the assigned resource.
5. **Drag** the cell and **drop** in the desired new assigned employee column.

The screenshot shows the Sockeye software interface. At the top, there is a blue ribbon with tabs: Available Hours, Weekly Schedules, **Daily Schedules**, Find Task, Setup, and More. The **Daily Schedules** tab is selected. Below the ribbon, there is a calendar for June 2022. To the right of the calendar, there is a section for 'Daily Schedule for Wednesday, Jun 22, 2022'. This section includes a dropdown for 'Team' (currently set to 'Chip Line Mech') and a dropdown for 'Supervisor' (currently set to 'Tim Fisher'). Below these dropdowns, there is a table of work orders (WO #, WO Type, Status, Priority, Loc #, Op #, Operati..., Revisi..., Delay, Est Men, Craft, Hrs, Com...). To the right of the work order table, there is a grid for assigning resources. The grid has columns for resources: R. Humbert, C. Morrissey, A. Morrissey, and F. Morrissey. The grid has rows for days of the week: MW, PF, WL, Cont, and Totals. A red circle highlights a cell in the grid, and a red arrow points to the 'Daily Schedules' tab.

Updating Hours Assigned to a Task

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

Task or work orders hours may need to be updated based on the resource assigned. This can be quickly adjusted by adding and or removing hours.

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. Select the cell that is to be changed and update the applicable hours.

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

Jun 2022

Daily Schedule for Wednesday, Jun 22, 2022
Chip Line Mech - Supervisor Tim Fisher

+ Add by # - Remove Details More Search

WO #	WO Type	Status	Priority	Loc #	Op #	Operati...	Revisi...	Delay	Est Men	Craft	Hrs	Com...	Alert	Sched Comp
900005343491	PMH2	RELE	3	471-0062	010	Chang...	HST...	None	1	MW	8			
B009087	BRK	RELE	1	310	010	Replac...		None	1	ME	2	Must...		
900005343950	PMH1	RELE	3	471-1512	010	Replac...	HS-T...	None	1	WL	4			
900005671264	PMH1	RELE	3	465	010	Repair...	NULL	None	1	PF	3			
900005675570	PMH1	RELE	3	465-0501	010	Install...	NULL	None	1	PF	4	Can't		
900005346413	PMH1	RELE	4	471-0079	010	Modify...	HS-T...	None	1	MW	2			
900005946041	PMH1	RELE	4	471-0089	010	Strip A...	NULL	None	1	MW	2			
900005611934	PMH1	RELE	2	471-0111	010	Inspect...	HS-T...	None	1	MW	2			
900005842832	PMH1	RELE	2	471-0117	010	Belzon...	HS-T...	None	1	MW	2			
900005699000	PMH1	RELE	4	471-0120	010	Rebuil...	NULL	None	1	MW	8			

Sched. Hrs: 9, 10, 7, 9, 11
Avail. Hrs: N12 Sick 7, D12 Safe 12, 43

Resources: R. Humbert, T. Lau, C. Morrissey, A. Thompson, Finning 1

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 daily schedule section.

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. **Hover** the mouse under the '**Priority**' field or the second 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 Sockeye software interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. Below the ribbon, the 'Daily Schedule for Thursday, Jun 23, 2022' is displayed for 'Chip Line Mech' under Supervisor Tim Fisher. A calendar on the left shows the date selection. The main table lists work orders with columns for WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi..., Delay, Est Men, Craft, Hrs, Comment, and Alert. A red box highlights the 'Priority' column and a specific work order row (900005343361). A red arrow points to the 'Priority' column header, and another red arrow points to the work order row. The right-hand panel shows a summary of the schedule with columns for Sched. Hrs, Avail. Hrs, and various resource assignments.

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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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 displays the Sockeye software interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. On the left, a sidebar contains various filters like Team, Crafts, Priority, etc. The main area shows a 'Daily Schedule for Wednesday, Jun 23, 2021' for 'B Crew'. A calendar on the left shows the date selection. A file explorer window is open, showing the 'Pictures' folder with several files. The file 'Sockeye Data Dump V2.7 July 20, 2022.xlsx' is selected. The 'Open' button is highlighted. Below the file explorer, 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 Alert. The 'Backlog' tab is selected, and the 'Refresh' button is highlighted.

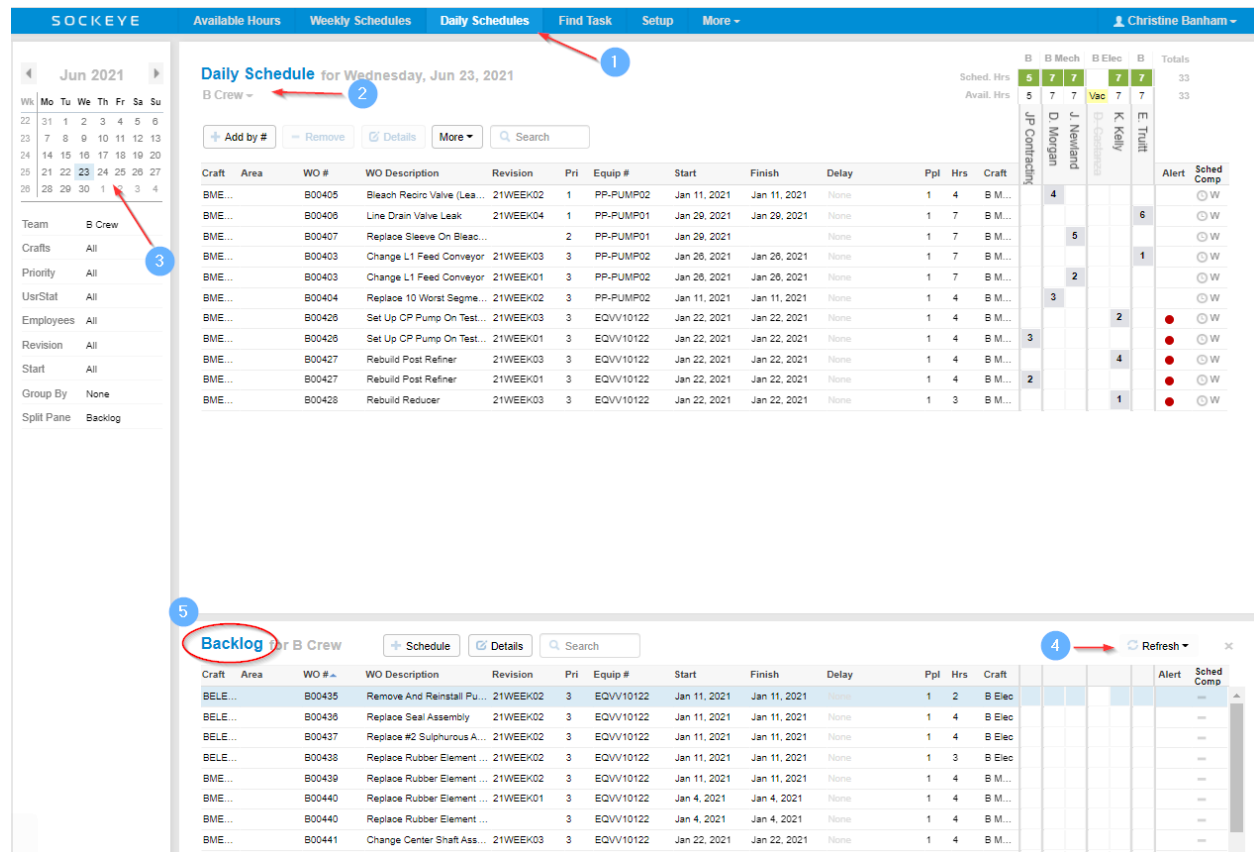
Read Integration from CMMS

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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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.



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

Daily Schedule for Wednesday, Jun 23, 2021
B Crew -

Jun 2021
Mo Tu We Th Fr Sa Su
22 31 1 2 3 4 5 6
23 7 8 9 10 11 12 13
24 14 15 16 17 18 19 20
25 21 22 23 24 25 26 27
26 28 29 30 1 2 3 4

Team: B Crew
Crafts: All
Priority: All
UserStat: All
Employees: All
Revision: All
Start: All
Group By: None
Split Pane: Backlog

Craft	Area	WO #	WO Description	Revision	Pri	Equip #	Start	Finish	Delay	Ppl	Hrs	Craft	Alert	Sched Comp
BME...		B00405	Bleach Recirc Valve (Lea...	21WEEK02	1	PP-PUMP02	Jan 11, 2021	Jan 11, 2021	None	1	4	B M...		W
BME...		B00406	Line Drain Valve Leak	21WEEK04	1	PP-PUMP01	Jan 29, 2021	Jan 29, 2021	None	1	7	B M...		W
BME...		B00407	Replace Sleeve On Bleac...		2	PP-PUMP01	Jan 29, 2021		None	1	7	B M...		W
BME...		B00403	Change L1 Feed Conveyor	21WEEK03	3	PP-PUMP02	Jan 26, 2021	Jan 26, 2021	None	1	7	B M...		W
BME...		B00403	Change L1 Feed Conveyor	21WEEK01	3	PP-PUMP02	Jan 26, 2021	Jan 26, 2021	None	1	7	B M...		W
BME...		B00404	Replace 10 Worst Segme...	21WEEK02	3	PP-PUMP02	Jan 11, 2021	Jan 11, 2021	None	1	4	B M...		W
BME...		B00426	Set Up CP Pump On Test...	21WEEK03	3	EQVV10122	Jan 22, 2021	Jan 22, 2021	None	1	4	B M...		W
BME...		B00426	Set Up CP Pump On Test...	21WEEK01	3	EQVV10122	Jan 22, 2021	Jan 22, 2021	None	1	4	B M...		W
BME...		B00427	Rebuild Post Refiner	21WEEK03	3	EQVV10122	Jan 22, 2021	Jan 22, 2021	None	1	4	B M...		W
BME...		B00427	Rebuild Post Refiner	21WEEK01	3	EQVV10122	Jan 22, 2021	Jan 22, 2021	None	1	4	B M...		W
BME...		B00428	Rebuild Reducer	21WEEK03	3	EQVV10122	Jan 22, 2021	Jan 22, 2021	None	1	3	B M...		W

Backlog for B Crew

Craft	Area	WO #	WO Description	Revision	Pri	Equip #	Start	Finish	Delay	Ppl	Hrs	Craft	Alert	Sched Comp
BELE...		B00435	Remove And Reinstall Pu...	21WEEK02	3	EQVV10122	Jan 11, 2021	Jan 11, 2021	None	1	2	B Elec		
BELE...		B00436	Replace Seal Assembly	21WEEK02	3	EQVV10122	Jan 11, 2021	Jan 11, 2021	None	1	4	B Elec		
BELE...		B00437	Replace #2 Sulphurous A...	21WEEK02	3	EQVV10122	Jan 11, 2021	Jan 11, 2021	None	1	4	B Elec		
BELE...		B00438	Replace Rubber Element ...	21WEEK02	3	EQVV10122	Jan 11, 2021	Jan 11, 2021	None	1	3	B Elec		
BME...		B00439	Replace Rubber Element ...	21WEEK02	3	EQVV10122	Jan 11, 2021	Jan 11, 2021	None	1	4	B M...		
BME...		B00440	Replace Rubber Element ...	21WEEK01	3	EQVV10122	Jan 4, 2021	Jan 4, 2021	None	1	4	B M...		
BME...		B00440	Replace Rubber Element ...		3	EQVV10122	Jan 4, 2021	Jan 4, 2021	None	1	4	B M...		
BME...		B00441	Change Center Shaft Ass...	21WEEK03	3	EQVV10122	Jan 22, 2021	Jan 22, 2021	None	1	4	B M...		

Scheduling Work Orders

Assign Bulk Work to the Schedule

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

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

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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 shows the SOCKEYE software interface. At the top, the 'Daily Schedules' tab is selected in the ribbon. Below the ribbon, the 'Daily Schedule for Thursday, Jun 17, 2021' is displayed. On the left, a calendar shows the date '17' selected. Below the calendar, the 'Team' dropdown is set to 'B Crew'. In the main area, the 'Backlog' section is visible, showing a list of work orders. A red arrow points to the 'Backlog' label (5), and another points to a work order in the list (4). A third arrow points to the '+ Schedule' button (5). The work order list includes columns for Craft, Area, WO #, WO Description, Revision, Pri, Equip #, Start, Finish, Delay, Ppl, Hrs, Craft, and Alert. The work order B00301 is highlighted in blue.

Craft	Area	WO #	WO Description	Revision	Pri	Equip #	Start	Finish	Delay	Ppl	Hrs	Craft	Alert	Sched Comp
BME...		B00301	Replace failed B14 bearing	1	1	INJUMP	Jan 22, 2021	Jan 22, 2021	None	1	1	B M...		
BME...		B00302	Replace faulty switch	1	1	M-3000-N051	Jan 22, 2021	Jan 28, 2021	None	1	1	B M...		
BME...		B00303	Switch out worn CAT20	21WEEK03	2	DAD-TOOL1	Jan 23, 2021	Jan 28, 2021	None	1	1	B M...		
BME...		B00304	Repair torn belt	21WEEK02	2	PP-PUMP02	Jan 11, 2021	Jan 11, 2021	None	1	1	B M...		
BME...		B00304	Repair torn belt	21WEEK02	2	PP-PUMP02	Jan 11, 2021	Jan 11, 2021	None	1	1	B M...		
BME...		B00304	Repair torn belt	21WEEK02	2	PP-PUMP01	Jan 11, 2021	Jan 11, 2021	None	1	1	B M...		
BME...		B00305	Annual P15 inspection	21WEEK03	2	PP-PUMP01	Jan 25, 2021	Jan 25, 2021	None	1	1	B M...		
BME...		B00305	Annual P15 inspection	21WEEK03	2	PP-PUMP01	Jan 25, 2021	Jan 25, 2021	None	1	1	B M...		
BME...		B00306	Annual P14 inspection	21WEEK03	3	E-3000-101	Jan 22, 2021	Jan 28, 2021	None	1	4	B M...		
BME...		B00307	Annual P19 inspection	21WEEK03	3	EQVV10122	Jan 22, 2021	Jan 28, 2021	None	1	4	B M...		
BELE...		B00308	Annual P19am inspection	21WEEK03	3	EQVV10122	Jan 25, 2021	Jan 25, 2021	None	1	2	B Elec		
BME...		B00400	Install Remote Grease Bl...	21WEEK03	3	INJUMP	Jan 28, 2021	Jan 28, 2021	None	1	4	B M...		

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 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 + Add by #.

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. Click on the **+ Add by #** button located in the **Daily Schedule** section of the screen.
5. This will generate a new entry box and a pop-up box **Type the WO # and press Enter**.
6. Click in **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.
7. Click on the **Enter** key on the keyboard.

The screenshot displays the Sockeye software interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. On the left, a calendar for June 2021 shows the 17th as the selected day. The main area is titled 'Daily Schedule for Thursday, Jun 17, 2021'. Below this, there's a team selection dropdown set to 'B Crew'. A '+ Add by #' button is highlighted. A pop-up box prompts the user to 'Type the WO # and press Enter'. Below this, a table lists work orders with columns for Craft, Area, WO #, WO Description, Revision, Pri, Equip #, Start, Finish, Delay, Ppl, Hrs, Craft, and Alert. A 'Backlog for B Crew' section is also visible at the bottom.

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** is included in the CMMS and 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.

Add Work Order(s) from a Different Team

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

In some cases, a work order may need to be included that does not meet the 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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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.
10. Add work order to the schedule.

The screenshot shows the Sockeye software interface. At the top is a blue ribbon with tabs: Available Hours, Weekly Schedules, **Daily Schedules**, Find Task, Setup, and More. A user profile for Christine Banham is in the top right. On the left is a calendar for June 2022. The main area is titled 'Daily Schedule for Tuesday, Jun 21, 2022' with a dropdown for 'Chip Line Mech' and 'Supervisor Tim Fisher'. Below this is a table of work orders with columns: WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi..., Delay, Est Men, Craft, Hrs, Comment, and Alert. A 'Backlog settings' dialog box is open, showing a dropdown for 'Area Shutdown' and a list of teams: Area Shutdown (checked), Chip Line Mech, Fiberline Mech, Kraft Inst, Major Projects, Paper E/I TMP, Paper Mech TMP, and WFP SM. A 'Save' button is at the bottom of the dialog. Red arrows and numbers 1-8 indicate the steps for adding work orders from a different team.

Remove a Work Order

Video Link: [Remove a task](#)

Throughout the week schedules will need to be updated and adjusted. Work orders may need to be removed from the schedule for several reasons.

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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 Sockeye software interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. On the left, a calendar for June 2022 is visible. The main area shows a table of work orders with columns: WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi..., Delay, Est Men, Craft, Hrs, Comment, Alert, and Sched Comp. A work order is highlighted in blue. Below this table is the 'Backlog for Chip Line Mech' section, which also contains a table of work orders. A red circle highlights a 'W' in the 'Sched Comp' column of a work order in the backlog, indicating it has been committed.


Task Details

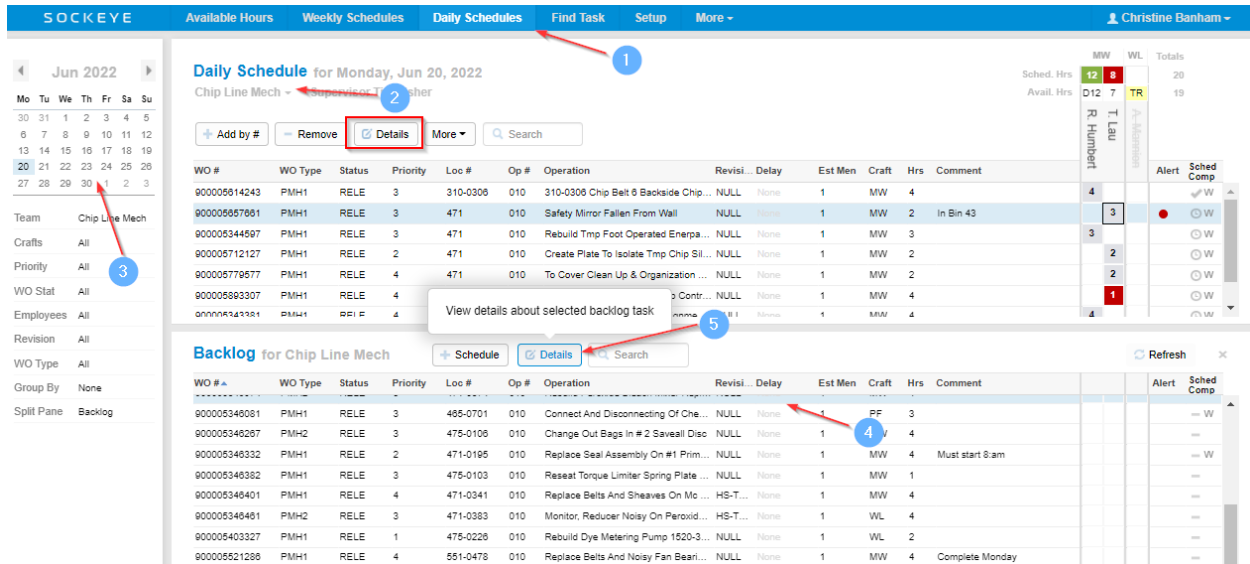
Viewing Task Details

Video Link: [Task Details](#)

Provides further details about that specific work order. These details are updated within the backlog refresh pane and fields can be updated through setup > schedule field menu. The scheduling tab focuses on the current details of the day, hours, craft, and tradesperson assigned to the work within Sockeye.

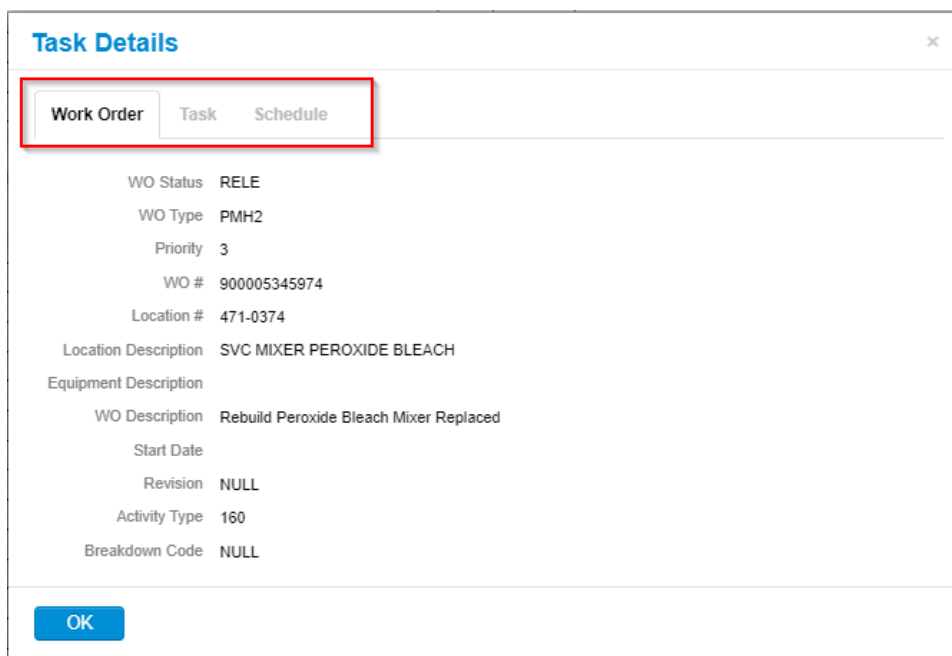
1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.

2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. **Click on a task** in the Backlog or the Schedule section.
5. **Click on the**  **button** in either section (Weekly Schedule or Backlog).



The screenshot shows the Sockeye software interface. At the top, there's a navigation bar with tabs: Sockeye, Available Hours, Weekly Schedules, Daily Schedules, Find Task, Setup, and More. The 'Daily Schedules' tab is active. Below the navigation bar, there's a header for 'Daily Schedule for Monday, Jun 20, 2022'. On the left, there's a calendar for June 2022. In the center, there's a table of tasks. A red arrow points to the 'Details' button in the task table header. Another red arrow points to the 'Details' button in the 'Backlog for Chip Line Mech' section. A third red arrow points to the 'Details' button in the 'Task Details' box. A fourth red arrow points to the 'Details' button in the 'Task Details' box. A fifth red arrow points to the 'Details' button in the 'Task Details' box.

6. 'View Details about Selected Task' box will appear.
7. A 'Task Details' box will appear and includes Work Order, Task and Schedule Tab details. In some cases, there may be additional tabs. This is broken down by the fields being pulled into Sockeye.



The screenshot shows the 'Task Details' dialog box. At the top, there's a tab bar with three tabs: 'Work Order', 'Task', and 'Schedule'. The 'Work Order' tab is selected. Below the tab bar, there's a form with the following fields:

- WO Status: RELE
- WO Type: PMH2
- Priority: 3
- WO #: 90005345974
- Location #: 471-0374
- Location Description: SVC MIXER PEROXIDE BLEACH
- Equipment Description: Rebuild Peroxide Bleach Mixer Replaced
- Start Date: (empty)
- Revision: NULL
- Activity Type: 160
- Breakdown Code: NULL

At the bottom of the dialog box, there's an 'OK' button.

More

Moving Scheduled Tasks to a Different Day

Video Link: [Move Tasks](#)

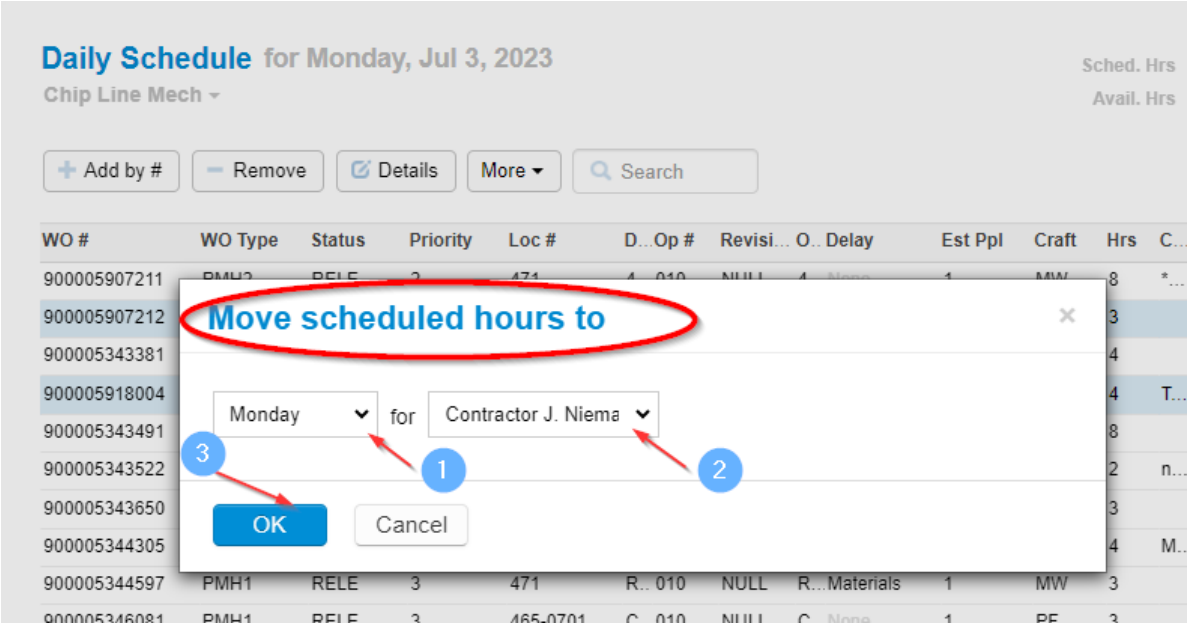
Allows Sockeye users to move a single or multiple tasks to a different day within the Weekly Schedule.

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. **Select** one or more **task(s)** to move, these tasks should be highlighted in blue.
5. Click on the **More** button at the top of the Daily Schedules section.
6. Select **"Move Scheduled Hours."**

The screenshot shows the Sockeye software interface. At the top is a blue ribbon with tabs: Available Hours, Weekly Schedules, **Daily Schedules**, Find Task, Setup, and More. Below the ribbon, the 'Daily Schedule for Monday, Jul 3, 2023' is displayed for the 'Chip Line Mech' team. On the left, a calendar for July 2023 shows the 3rd as selected. The main area contains a list of work orders (WO #, WO Type, Status, Priority, etc.). A 'More' button is visible above the list. A dialog box titled 'Move schedule hours to another day' is open, showing options to 'Copy work order #s to clipboard' or 'Copy selected work order #s to clipboard'. On the right, a summary table shows scheduled and available hours for various employees.

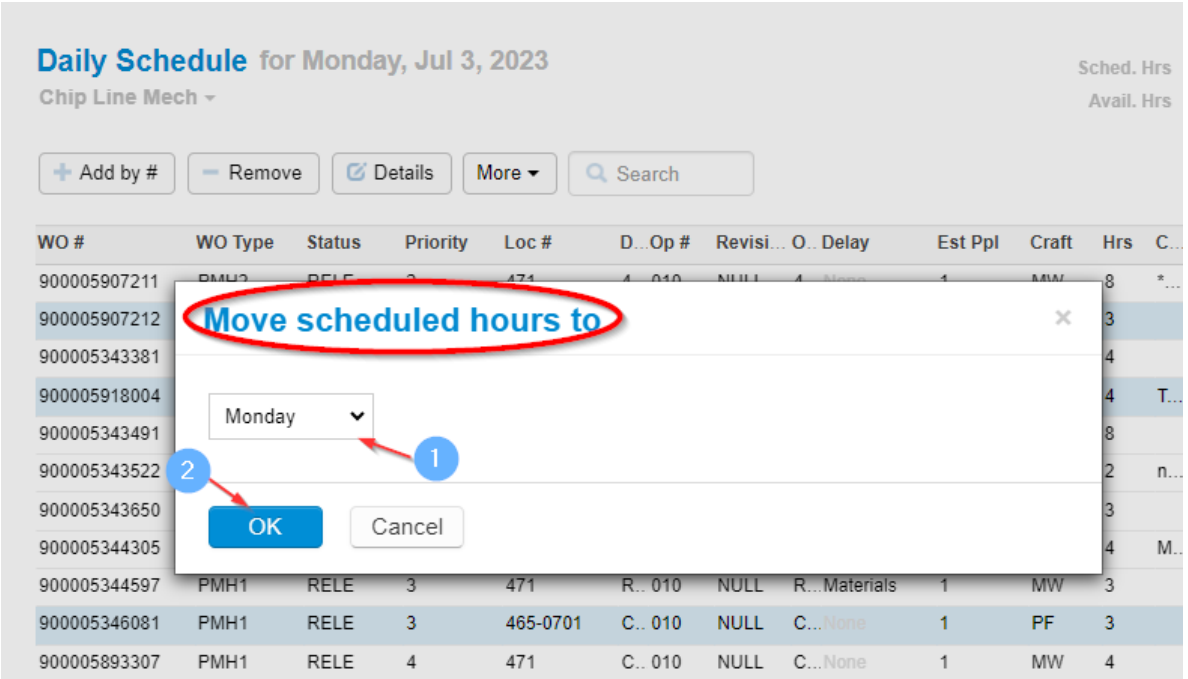
Sched. Hrs	MW	PF	MW	PF	WL	Totals
12	12	7	11	7	7	65
Avail. Hrs	N12	D12	7	D12	7	64

7. **'Move scheduled hours to'** dialogue box will appear.
 - a. If all selected tasks are scheduled for the same employee, the dialogue box will show:
 - i. Day of the week – Select the new **day**.
 - ii. Employee - Select the **individual** assigned to the task.
 - iii. Click **OK**.



- b. If selected tasks are scheduled to more than one trades person, the dialogue box will show:
- i. Day of the week – Select the new **day**.
 - ii. Click **OK**.

When the hours are moved, the scheduled employee will remain the same for each moved task.



Copy Work Order #s to Clipboard

Video Link: [All Work Order Numbers to Clipboard](#)

Allows Sockeye users to copy all work orders to a different document or program. Some users use this feature to copy work orders to a CMMS to print job tickets.

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

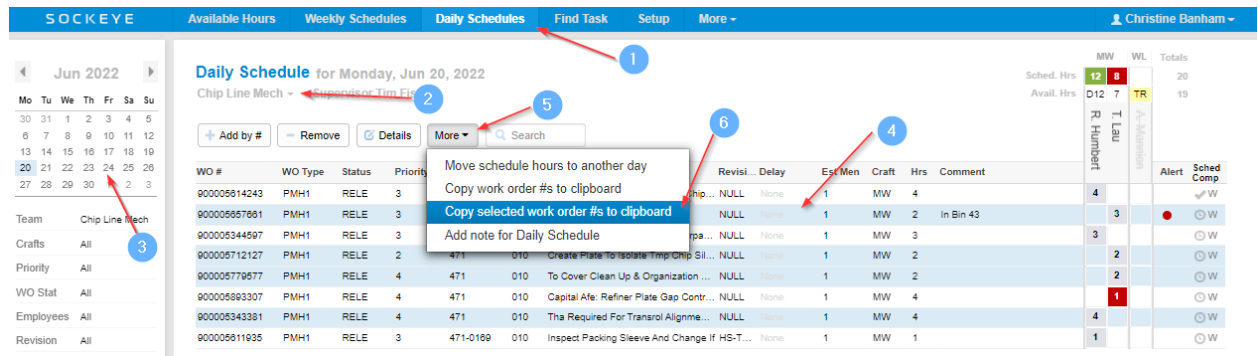
6. Open the text file or document the work orders are to be transferred or pasted into
7. Depending on your document select the appropriate paste functionality

Copy Selected Work Order #s to clipboard

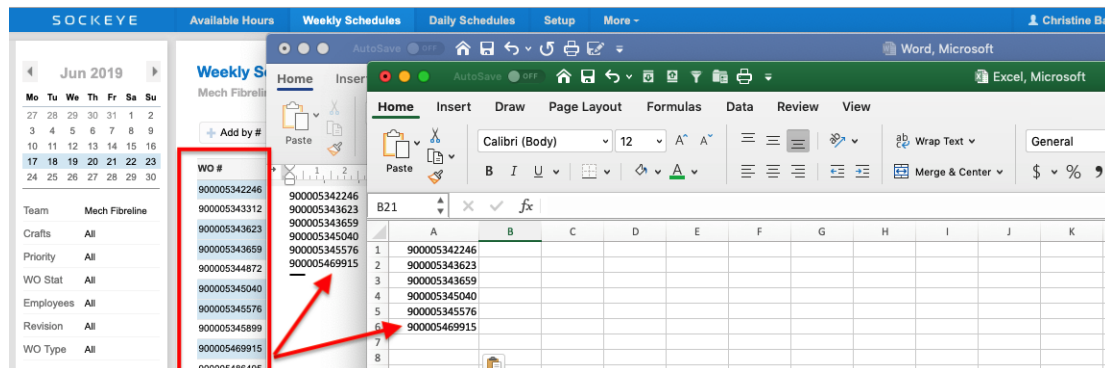
Video Link: [Selected Work Order Numbers to Clipboard](#)

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.

2. Select the **Team** by clicking on the ▼ under **Daily Schedule** for .
3. Select the **Day** in the calendar.
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 Daily 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.





Schedule Compliance

Identify Task is Complete

Video Link: [Identify Task is Complete](#)

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.




The following defines the Sched Comp field:

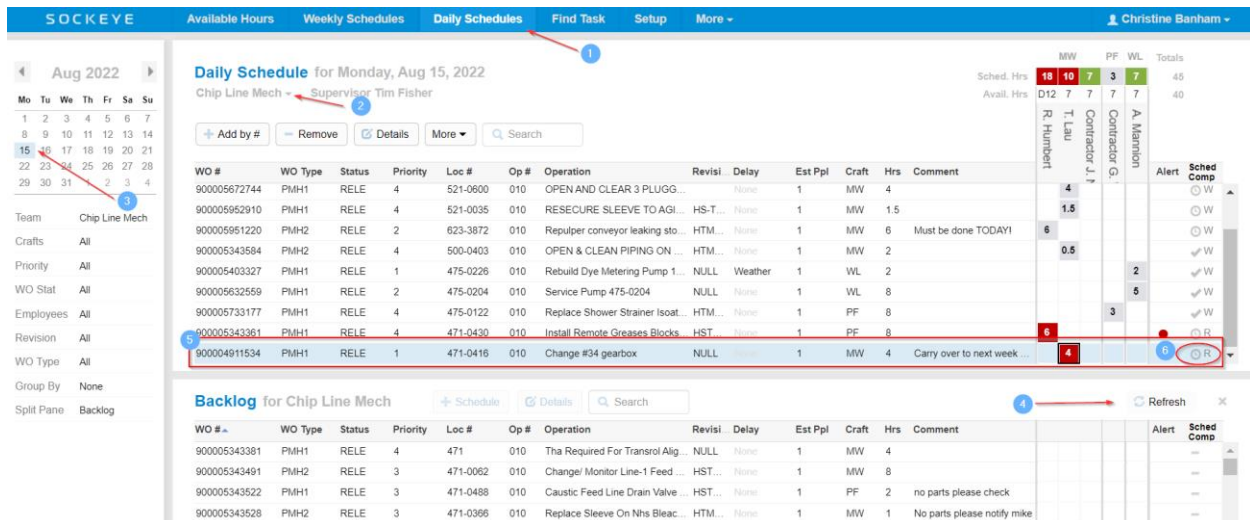
-  W = Weekly Committed Schedule
-  R = Reactive Work

Add Schedule Breakers

Video Link: [Add Schedule Breakers](#)

For many varied 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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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  column.



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

Daily Schedule for Monday, Aug 15, 2022
Chip Line Mech - Supervisor Tim Fisher

Aug 2022
Mo Tu We Th Fr Sa Su
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 31 1 2 3 4

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	Loc #	Op #	Operation	Revisi	Delay	Est Ppl	Craft	Hrs	Comment	Alert	Sched Comp
900005672744	PMH1	RELE	4	521-0600	010	OPEN AND CLEAR 3 PLUGG...	None		1	MW	4			
900005952910	PMH1	RELE	4	521-0035	010	RESECURE SLEEVE TO AGI...	HS-T...	None	1	MW	1.5			
900005951220	PMH2	RELE	2	623-3872	010	Repulper conveyor leaking sto...	HTM...	None	1	MW	6	Must be done TODAY!		
900005343584	PMH2	RELE	4	500-0403	010	OPEN & CLEAN PIPING ON ...	HTM...	None	1	MW	2			
900005403327	PMH1	RELE	1	475-0226	010	Rebuild Dye Metering Pump 1...	NULL	Weather	1	WL	2			
900005632559	PMH1	RELE	2	475-0204	010	Service Pump 475-0204	NULL	None	1	WL	8			
900005733177	PMH1	RELE	4	475-0122	010	Replace Shower Strainer Isoat...	HTM...	None	1	PF	8			
900005343361	PMH1	RELE	4	471-0430	010	Install Remote Greases Blocks	HST...	None	1	PF	8			
900004911534	PMH1	RELE	1	471-0416	010	Change #34 gearbox	NULL	None	1	MW	4	Carry over to next week ...		

Backlog for Chip Line Mech

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi	Delay	Est Ppl	Craft	Hrs	Comment	Alert	Sched Comp
900005343381	PMH1	RELE	4	471	010	Tha Required For Transrol Alig...	NULL	None	1	MW	4			
900005343491	PMH2	RELE	3	471-0062	010	Change/ Monitor Line-1 Feed ...	HST...	None	1	MW	8			
900005343522	PMH1	RELE	3	471-0488	010	Caustic Feed Line Drain Valve ...	HST...	None	1	PF	2	no parts please check		
900005343528	PMH2	RELE	3	471-0366	010	Replace Sleeve On Nhs Bleac...	HTM...	None	1	MW	1	No parts please notify mike		

Identify Removed Work Order(s)

Video Link: [Remove Scheduled Work](#)

Schedule breakers happen for many varied 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 **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
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.

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.

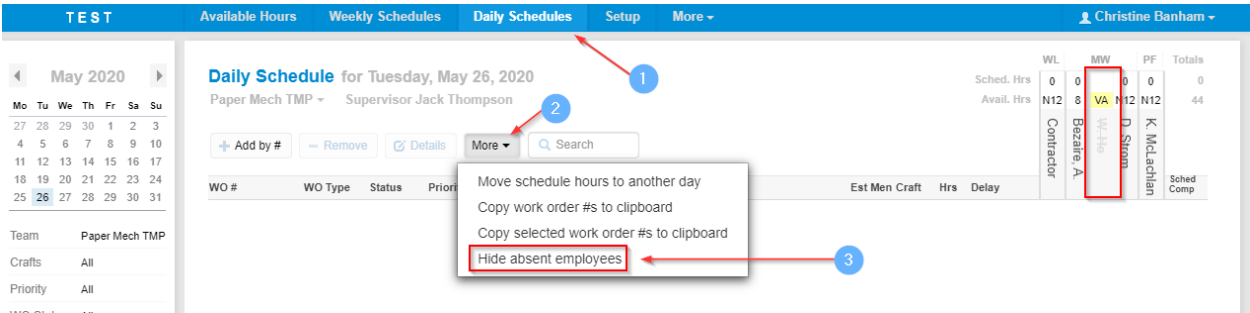
Hourly Scheduling

Link: [Hourly Scheduling](#)

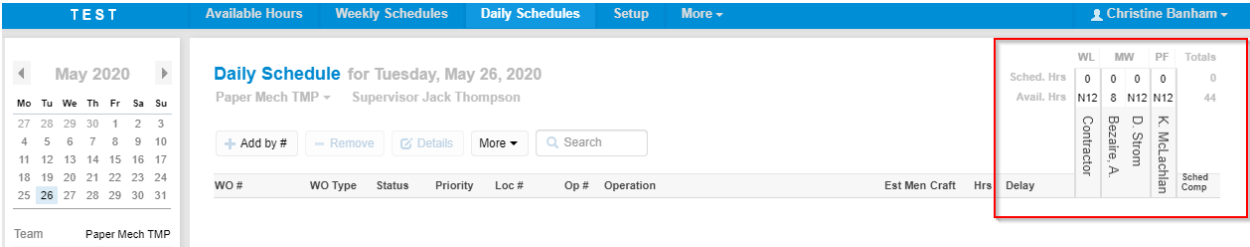
Automatically scheduling work order’s start time based on resource work periods.

Hide Unavailable Hours

- 1. Click on **Daily Schedules** in blue ribbon
The right-hand side ledger currently indicates all employee resources
- 2. Click on **More**
- 3. Select **Hide absent employees**



Once the ‘Hide absent employees’ has been selected those highlighted in yellow with a line through the name will disappear.



Show Unavailable Hours

- 1. Click on **More**
- 2. Select **Show absent employees**

TEST

Available HoursWeekly SchedulesDaily SchedulesSetupMore

Christine Banham

May 2020

Mo	Tu	We	Th	Fr	Sa	Su
27	28	29	30	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	31

TeamPaper Mech TMP

CraftsAll

PriorityAll

Daily Schedule for Tuesday, May 26, 2020

Paper Mech TMPSupervisor Jack Thompson

+ Add by #

- Remove

Details

More

Search

Move schedule hours to another day

Copy work order #s to clipboard

Copy selected work order #s to clipboard

Show absent employees

WO #	WO Type	Status	Priority	Est	Men	Craft	Hrs	Delay
------	---------	--------	----------	-----	-----	-------	-----	-------

WL	MW	PF	Totals	
Sched. Hrs	0	0	0	0
Avail. Hrs	N12	8	N12	N12
	Contractor	Bezaire, A	D Strom	K McLachlan
				Sched Comp

All employees will be visible in the right-hand column

TEST

Available HoursWeekly SchedulesDaily SchedulesSetupMore

Christine Banham

May 2020

Mo	Tu	We	Th	Fr	Sa	Su
27	28	29	30	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	31

TeamPaper Mech TMP

Daily Schedule for Tuesday, May 26, 2020

Paper Mech TMPSupervisor Jack Thompson

+ Add by #

- Remove

Details

More

Search

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Est	Men	Craft	Hrs	Delay
------	---------	--------	----------	-------	------	-----------	-----	-----	-------	-----	-------

WL	MW	PF	Totals	
Sched. Hrs	0	0	0	0
Avail. Hrs	N12	8	VA	N12
	Contractor	Bezaire, A	D Strom	K McLachlan
				Sched Comp

Note for Daily Schedule

Link: [Note for Daily Schedule](#)

Allows users to include an overall comment for that specific day. This feature can be used when many tasks have been removed or reassigned from the schedule.

Add Note for Daily Schedule

6. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
7. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
8. Select the **Day** in the calendar.
9. Click **More** under the Daily schedule portion of the screen.
10. Select 'Add note for Daily Schedule.'
11. Add Note dialogue box will appear
12. Enter **note details**.
13. Click **Save**.

The screenshot shows the Sockeye software interface. At the top is a blue ribbon with tabs: Available Hours, Weekly Schedules, **Daily Schedules**, Find Task, Setup, and More. The 'Daily Schedules' tab is active, showing a 'Daily Schedule for Monday, Aug 15, 2022' for 'Chip Line Mech' under Supervisor Tim Fisher. On the left is a calendar for August 2022. In the center is a table of work orders (WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi..., Delay, Est Ppl, Craft, Hrs, Comment). A 'More' dropdown menu is open, showing options: 'Move schedule hours to another day', 'Copy work order #s to clipboard', 'Copy selected work order #s to clipboard', and 'Add note for Daily Schedule'. The 'Add Note' option is selected, opening a dialog box with a text area for the note and 'Save', 'Cancel', and 'Delete' buttons. Red numbered callouts (1-10) indicate the sequence of actions.

14. A message indicator will appear beside the team and supervisor.
15. Hover the mouse over the note all note details will appear.

The screenshot shows the Sockeye software interface. At the top is a blue ribbon with tabs: Available Hours, Weekly Schedules, **Daily Schedules**, Find Task, Setup, and More. The 'Daily Schedules' tab is active, showing a 'Daily Schedule for Monday, Aug 15, 2022' for 'Chip Line Mech' under Supervisor Tim Fisher. On the left is a calendar for August 2022. In the center is a table of work orders (WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi..., Delay, Est Ppl, Craft, Hrs, Comment). A message indicator 'Fire alarm in main building' is visible next to the team and supervisor. A tooltip is displayed over the message indicator, showing the details of the note: 'Fire alarm in main building went off today at approximately 1:00pm. All work scheduled after that had to be removed from the schedule.' Red numbered callouts (9-10) indicate the sequence of actions.

Edit Note for Daily Schedule

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. Click **More** ▼ under the Daily schedule portion of the screen.
5. Select 'Edit note for Daily Schedule' or click on the **note** link.
6. **Edit Note** dialogue box will appear.
7. Enter **note details**.
8. Click **Save**.

The screenshot shows the Sockeye software interface. At the top is a blue ribbon with tabs: **SOCKEYE**, **Available Hours**, **Weekly Schedules**, **Daily Schedules** (selected), **Find Task**, **Setup**, and **More**. On the right of the ribbon is the user name **Christine Banham**.

On the left, there is a calendar for **Aug 2022**. The date **15** is selected. Below the calendar is a list of filters: **Team** (Chip Line Mech), **Crafts** (All), **Priority** (All), **WO Stat** (All), **Employees** (All), **Revision** (All), **WO Type** (All), **Group By** (None), and **Split Pane** (Backlog).

The main area displays the **Daily Schedule for Monday, Aug 15, 2022**. It shows a table with columns: **WO #**, **WO Type**, **Status**, **Priority**, **Revisi...**, **Delay**, **Est Ppl**, **Craft**, **Hrs**, and **Comment**. A **More** dropdown menu is open, showing options: **Move schedule hours to another day**, **Copy work order #s to clipboard**, **Copy selected work order #s to clipboard**, and **Edit note for Daily Schedule** (selected).

The **Edit Note** dialog box is open, showing the user **Christine Banham** and the date **Aug 15, 2022**. The note text is: **Fire alarm in main building went off today at approximately 1:30pm. All work scheduled after will be removed from the schedule.** The dialog box has **Save**, **Cancel**, and **Delete** buttons.

At the bottom, there is a **Backlog for Chip Line Mech** section with **Schedule**, **Details**, and **Search** buttons, and a **Refresh** button.

Delete Note for Daily Schedule

1. Click on the **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Daily Schedule for**.
3. Select the **Day** in the calendar.
4. Click **More** ▼ under the Daily schedule portion of the screen.
5. Select 'Edit note for Daily Schedule' or click on the **note** link.
6. **Edit Note** dialogue box will appear.
7. Click **Delete**.

The screenshot displays the Sockeye software interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. On the left, a calendar for August 2022 shows the 15th selected. The main area shows the 'Daily Schedule for Monday, Aug 15, 2022' for the 'Chip Line Mech' team, supervised by Tim Fisher. A list of work orders (WO #, WO Type, Status, Priority) is shown. A context menu is open over the 'Edit Note' link, with options: 'Move schedule hours to another day', 'Copy work order #s to clipboard', 'Copy selected work order #s to clipboard', and 'Edit note for Daily Schedule'. The 'Edit Note' dialogue box is open, showing a note about a fire alarm in the main building. The 'Delete' button is highlighted with a red arrow and a circled number 7.