SOCKEYE

Sockeye Configuration Guide

VERSION 7.0

Sockeye Technologies Inc.
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Sockeye Configuration Contents

Revision Log

Revision	Date	Reason/Update	Updated By:
Rev7.0	2022-05-25	Add video links to all sections	C. Banham
Rev6.2	2022-04-14	Employees, Backlog Criteria & Teams Updated	C. Banham
Rev6.1	2022-01-27	‘Users’ Permissions updated	C. Banham
Rev6.0	2022-01-20	Availability Pattern ‘Repeating’ Feature	C. Banham

Summary:

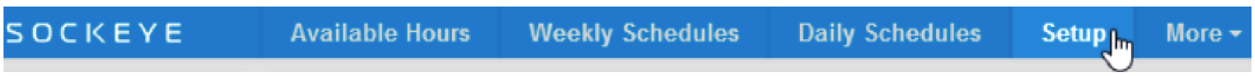
The Setup tab are the core details of Sockeye's setup for your scheduling purposes. If a tab is not available, it may be due to the setup. Ask your Sockeye representative for details.

Tools / Resources:

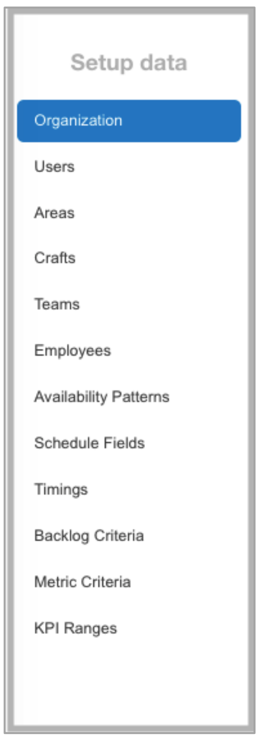
- The Administrator role has access to the setup menu.
- Access to additional 'Features' to be added upon request; setup fee may apply.
- Videos and User Guides: https://www.getsockeye.com/support/setup

Setup Tab:

- Click on Setup tab located on the navigation bar within the blue ribbon.



Organization:

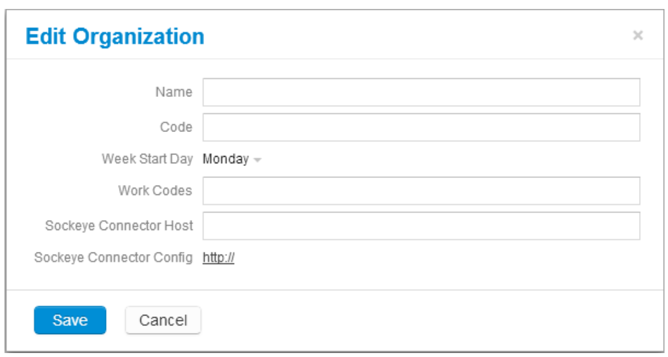


The organization section is the setup details of the business organization.

Edit organization:

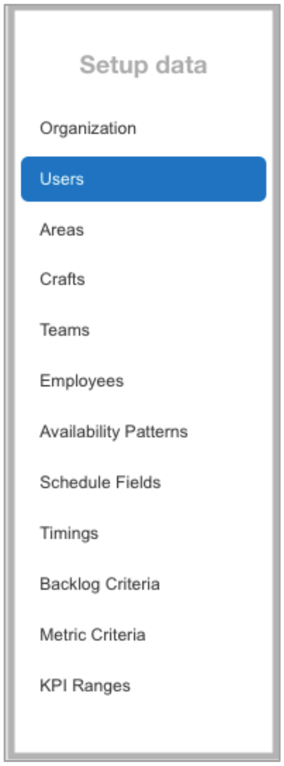
Video Link: Edit Org.

Click on the Organization section and click the organization name or code. The Edit Organization dialog should appear:



Name: Organization's name.
Code: Code must match the organization code in the CMMS.
Week Start Day: Day of the week that the organization recognizes as the start of the work week.
Work Codes: The code(s) used in external employee scheduling systems that signify hours that are available for scheduling.
Complete Status: Identify work orders completed from the CMMS.
Extended Auto-confirm: Specific to the Account to allow certain number of days after the calendar week to complete statuses.
Time Zone: Mandatory non changeable field identifying time zone.
Sockeye Connector Host: Connection to allow communication with external systems (WorkSight, JDE, etc.)

Users:



A user account with identified role and permissions.

	User Role Access			
	Setup	Commit Weekly Schedule	Un-commit Weekly Schedule	Everything Else
Admin.	★	★	★	★
Planner		★		★
Scheduler				★
Operations				★
Manager				★

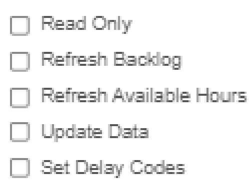
Add new user:

Video Link: [Create a new user]()

Click on

button. The Add User dialog should appear:

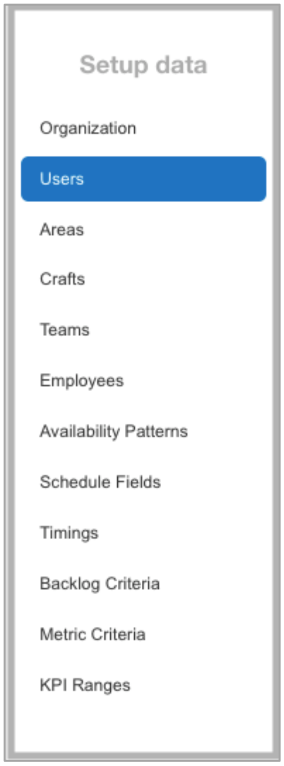
*** Name:** User's full name.
*** Email:** User's email address. This will be the username at log in.
*** Password:** User's password. To be used at log in.
Role: Role will determine the information the user will be able to see and edit. If no role is selected, the user will default to Administrator. Role access defined in the table on the left.
Areas: Select specific areas that user can default and access. If a user has access to more than one Sockeye Account this field must remain blank.
*** Permissions:** Choose one or multiple of the following permissions that are applicable.



- Read Only – User can see information; however, cannot make any changes.
- Refresh Backlog – Able to refresh Weekly and Daily Schedule Backlogs
- Refresh Available Hours – Able to refresh hours under the Available Hours Refresh button
- Update Data – Make changes or additions to schedules, hours, complete work orders, etc.
- Set Delay Codes – Allows any Role to select a delay code ad the Weekly Schedule level.

Note: Fields with a * indicates a mandatory field.

Users Cont'd:



Edit or delete user:

Click on the user that changes are applicable to. The Edit User dialog should appear:

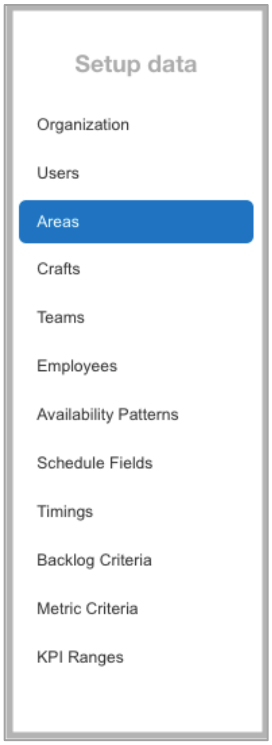
Edit a user: All fields in the Edit User dialog are editable. Make the desired changes and click 'Save.'

Video Link: ***Editing a Sockeye User***

Delete a user: Click on the 'Delete' button in the bottom right corner.

Video Link: ***Deleting a Sockeye User***

Areas:



In the Areas section, an administrator can create or update a second level of reporting. The setup can be by departmental, functional, geography and or a business unit. This is not a mandatory section and can be left blank if not required.

Add area:

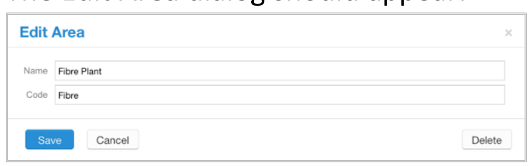
Video Link: [Add Area]()

Click on the   button. The Add User dialog should appear:

Name: Area's name to be displayed
Code: Used for integration with external systems. The code must match the organization code in the external source.

Edit or delete areas:

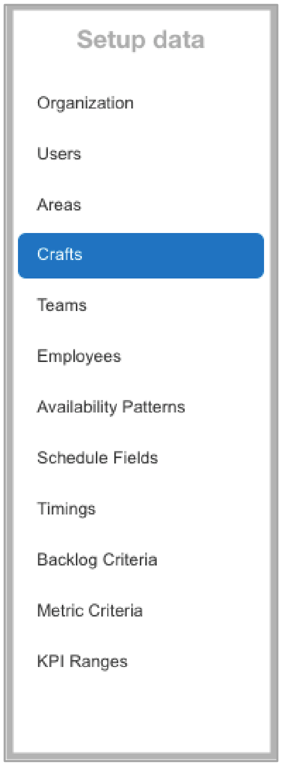
Click on the row of the area that you would like to amend. The Edit Area dialog should appear:



Edit: All fields in the Edit User dialog are editable. Make the desired changes and click 'Save.'
Video Link: [Edit Areas]()

Delete: Click on the 'Delete' button in the bottom right corner.
Video Link: [Delete Areas]()

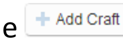
Crafts:



The crafts section identifies a job or activity that requires a special skill to schedule.

Add new Craft:

Video Link: New Craft

Open the Craft section and click on the 

button. The Add Craft dialog should appear:

Name: This is how the craft name will appear throughout Sockeye.
Code: The Craft's code. This is used for integration with external systems. The craft code in Sockeye must exactly match the craft code in the external source.

Edit craft:

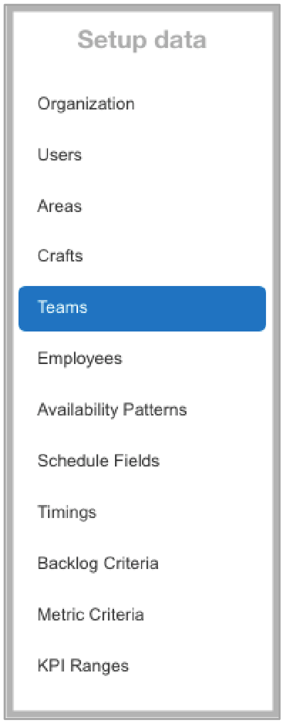
Click on the row of the craft that you would like to update. The Edit Craft dialog should appear:

To edit a craft: All fields in the Edit Craft dialog are editable. Make the desired changes and click 'Save.'
Video Link: Edit Craft

Delete craft:

To delete a craft: Reach out to your Sockeye Rep or Sockeye's help desk.

Teams:



Teams allow flexibility on the number of schedules to build each week and the level of detail required. This can be broken up by crafts, shifts, and or groupings.

*Note: By utilizing the '**Active**' feature instead of the delete button, history of that team will remain intact and can be generated quickly in the future.*

Add new team:

Video Link: [New Team]

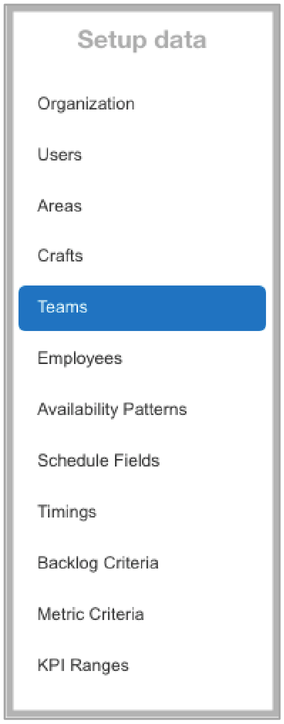
Click on the + Add Team button. The Add Team dialog should appear:

Name: The team's name will be identified in Sockeye.
Code: Used for integration with external systems. The team code in Sockeye must match the team code in the external source.
Area: Multiple groups setup the team can be assigned to a specific group *(optional field*).
Supervisor: Sockeye user who is the supervisor for the team.
Planner: Sockeye user who is the planner for the team.
Note: Supervisor and Planner are optional fields. Specifying a supervisor and/or planner will bring that user directly to their team.
Backlogs: Select a backlog criteria that has already been generated. Can be left blank and a new backlog criteria can be generated for this team.
Active: Select yes to see and build a schedule for this team. By selecting no this will hide the team from all scheduling tabs.

Video Link: Activate a Team

Video Link: Inactivate a Team

Teams Cont'd:



*Note: By utilizing the '**Active**' feature instead of the delete button, history of that team will remain intact and can be generated quickly in the future.*

Edit a team:

Video Link: [Edit a Team]

Click on the 

and double click on the team that you would like to amend. The Edit Team dialog should appear:

All fields in the Edit Team dialog are editable. Make the desired changes and click 'Save.'

Name: The team's name will be identified in Sockeye.
Code: Used for integration with external systems. The team code in Sockeye must match the code in the external source.
Area: Multiple groups setup the team can be assigned to a specific group *(optional field*).
Supervisor: Sockeye user who is the supervisor for the team.
Planner: Sockeye user who is the planner for the team.
Note: Supervisor and Planner are optional fields. Specifying a supervisor and/or planner will bring that user directly to their team.
Backlogs: Select a backlog criteria that has already been generated. Can be left blank and a new backlog criteria can be generated for this team.
Active: Select yes to see and build a schedule for this team. By selecting no this will hide the team from all scheduling tabs.

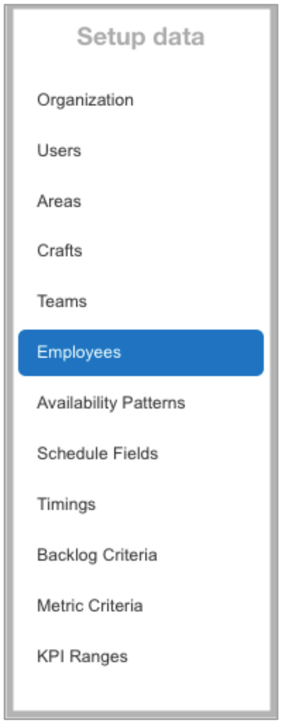
Video Link: [Activate a Team]
Video Link: [Inactivate a Team]

Delete a team:

Video Link: [Delete a Team]

To delete a team: Click on Active and select 'NO.' Click 'Save' or click on 'Delete.'

Employees:



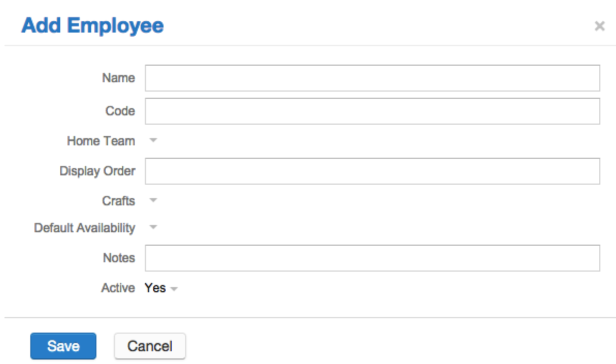
A skilled worker that specializes in a particular trade.
The employee section can be filtered by team, or a user can search for specific identifying information.

Note: Sockeye will automatically assign work orders to employees based on the classified craft and available hours

Add new employee:

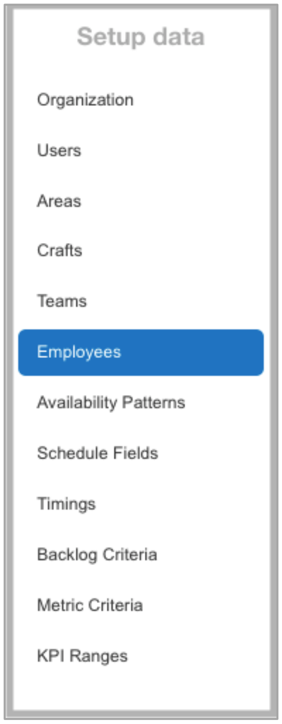
Video Link: [Adding New Employee]()

Click on the + Add Employee button. The Add Employee dialog should appear:



Name: The employee's full name.
Code: The employee's code. This is used for integration with external systems. The employee code in Sockeye must exactly match the employee code in the external source.
Home Team: The employee's home team. This is used for tracking when employees are temporarily assigned to different teams.
Display Order: The numerical value that represents which order the employee will be displayed in the daily schedule. If an employee is no longer with the team, it will be updated to reflect 'INACTIVE'
Crafts: The employee's craft(s).
Default Availability: The scheduled shift pattern that the employee is currently working (field is not mandatory).
Active: Select Yes if the employee is available to work.
Notes: Any specific details about the employee (i.e., pager number, apprentice label, etc.). The note will show in the employee details that are accessible throughout Sockeye by clicking on the employee's name.

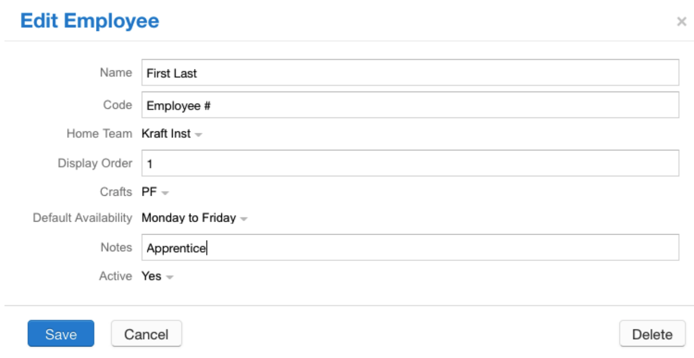
Employees Cont'd:



*Note: By utilizing the '**Active**' feature instead of the delete button your history of that employee will remain intact and can be updated quickly in the future.*

Edit or delete an employee:

Click on the row of the employee that you would like to update. The Edit Employee dialog should appear:



To edit an employee: All fields in the Edit Employee dialog are editable. Make the desired changes and click 'Save.'

Video Link: Editing an Employee

To delete an employee: select 'No' under **Active** or Click on the 'Delete' button in the bottom right corner.

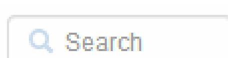
Video Link: Deleting an Employee

Video Link: Activate or Inactivate an Employee

Filtering by team:

The user can filter the employees displayed by team by clicking on the 'Teams' drop-down menu at the top of the page and choosing the desired team. All the employees from that team will then be displayed.

Searching for employees:

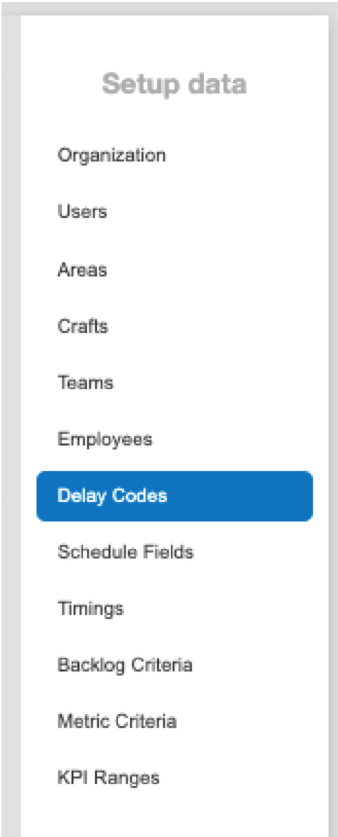


Search for employees by typing specific identifying information into the search bar at the top of the page. To clear the search results, press the 'Esc' key or clear the search bar and press 'Enter.'

Specific identifying information could be a name, code, craft, team, or note. The search will return all results that contain the search criteria.

Video Link: Searching or Filtering

Delay Codes:



https://www.getsockeye.com/support/feature/delaycode

Contact a Sockeye Sales Rep if this might help!
Setup fees will be quoted.

Add new delay code:

Video Link: [Adding a Delay Code]()

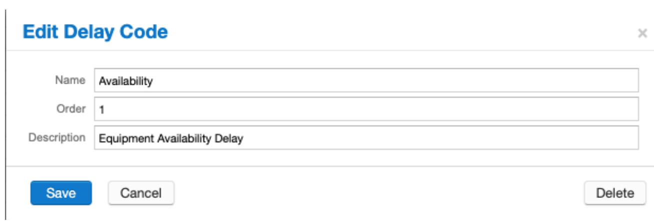
Click on .

The Add Delay Code dialog will appear:

Name: Delay Name.
Order: Identifies the order of the delay code.
Description: Details of the Delay Name if applicable.

Edit or delete delay code:

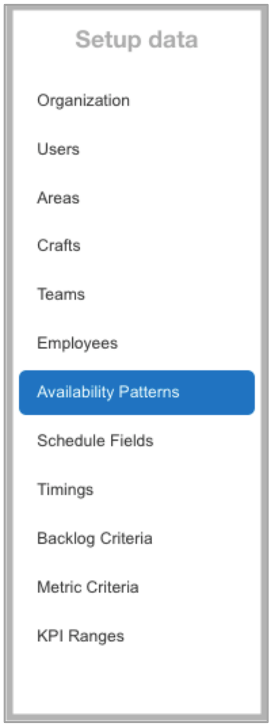
Click on the delay code that you would like to update.
Edit Delay Code will appear:



To edit a delay code: All fields in the availability pattern dialog are editable. Make the desired changes and click 'Save.'
Video Link: [Editing Delay Codes]()

To delete a delay code: Click on 'Delete.'
Video Link: [Deleting a Delay Code]()

Availability Patterns:

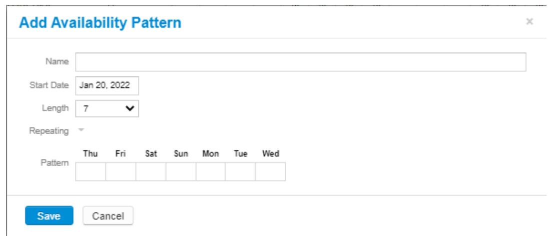


Availability Patterns are employees shift schedules and will auto populate under the Available Resources tab to eliminate data entry.

Add new schedule:

***Video Link**: [Adding Availability Pattern]*

Click on the [+ Add Availability Pattern] button. The Add Availability Pattern dialog should appear:



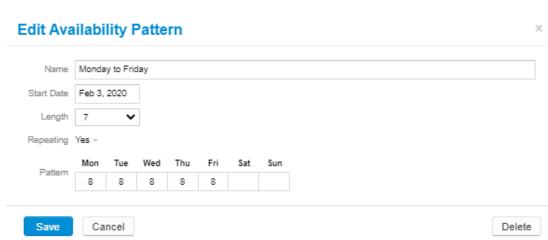
Name: Shift or schedule name.
Start Date: The date of the start of shift or schedule.
Length: Number of days the shift pattern is. This includes days off.
Repeating: Allows patterns to be ongoing or stop at a specific time.

- **YES** - pattern will continue indefinitely.
- **NO** - the pattern will not repeat, a different "pattern" will need to be added.

Available Hours Pattern: Hours and shift pattern details.

Edit or delete schedule:

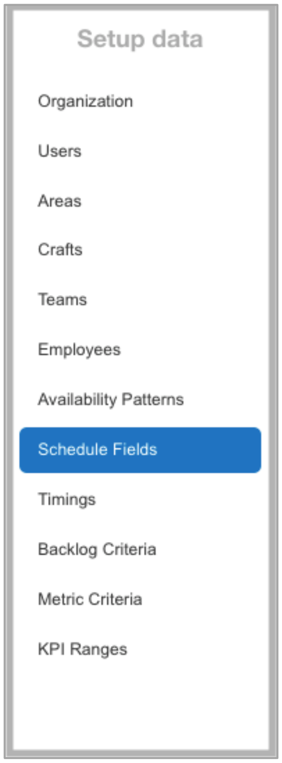
Click on the availability pattern that you would like to amend. The Edit Availability Pattern dialog should appear:



Edit a pattern: All fields in the availability pattern dialog are editable. Make the desired changes and click 'Save.'
***Video Link:** [Editing Availability Patterns]*

Delete a pattern: Click on 'Delete.' ***NOTE:** Ensure all employees do not have this pattern attached prior to deleting.*
***Video Link:** [Deleting Availability Pattern]*

Schedule Fields:



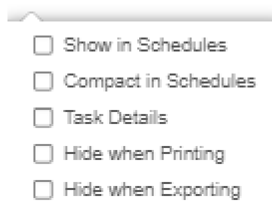
In the schedule fields section, an administrator can specify which schedule fields are to be displayed in the schedules and/or the task details.

Edit schedule field information:

***Video Link:* [Edit Schedule Fields]**

Click on the row of the field that you would like to amend. The Edit Schedule Field dialog should appear:

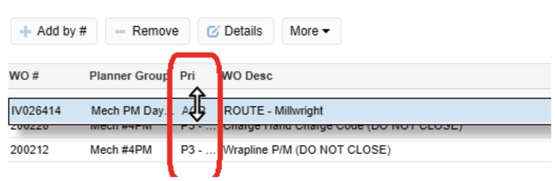
Field: Schedule fields that can be displayed in the schedules and work order details.
Display in: The user can define where the specified field should be displayed.



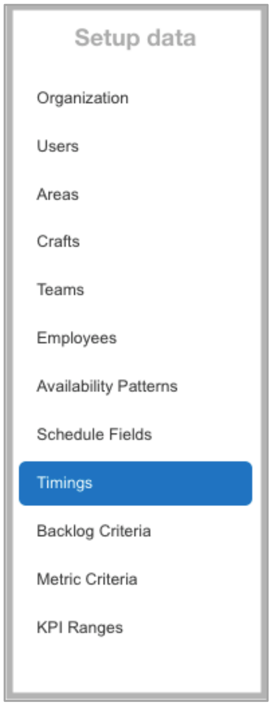
Show in Schedules: Field will show in the weekly and daily schedule section in both the schedule and backlog areas.
Compact in Schedules: Allows field in the weekly and daily tabs to be squeezed together for screen space.
Task Details: Field will show in the task details dialog box.
Hide when Printing: Field will **not** be visible when printing.
Hide when Exporting: Field will **not** be visible when exporting to excel.

Sockeye extra feature:

Programmed field(s) that may help depending on your setup:
Priority: Hover over the field in the weekly or daily schedule and click on the work order this will allow you to drag-drop rows in the schedule to reorder tasks.



Timings:



https://www.getsockeye.com/support/feature/timings

The timings setup is to assist in the identification of work to be timed at a specific period during the week.

W = Weekend

P = Production

C = Cleanup/Night

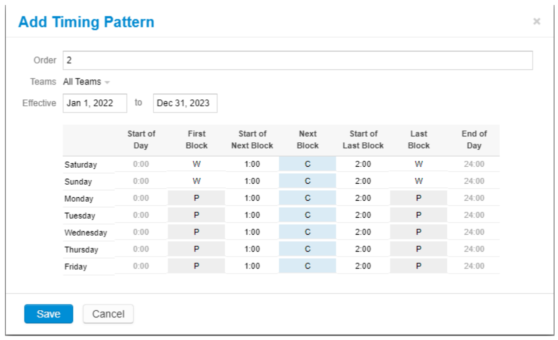
Timings are currently view only. Changes or updates can be made by your Sockeye Rep.

Add timing patterns:

Video Link: [Add Timing Pattern]()

Click on the 

button. The Add Availability Pattern dialog should appear:



Order: The number of assigned patterns generated.

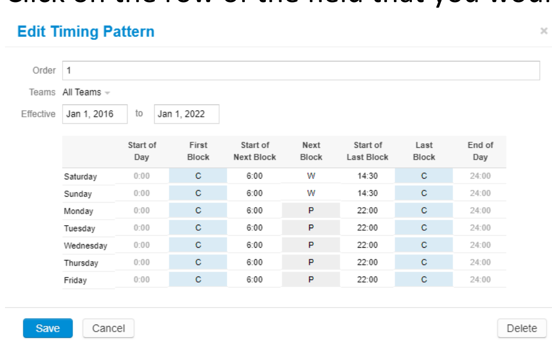
Teams: Viewed by a specific team or if patterns are the same for multiple teams it can be displayed for a specific team.

Effective: Date range the pattern should be applied to.

Timing Patterns: Hours for Start and End time of Main Blocks show for the longest duration pattern. This is view only.

View timing patterns:

Click on the row of the field that you would like to view.



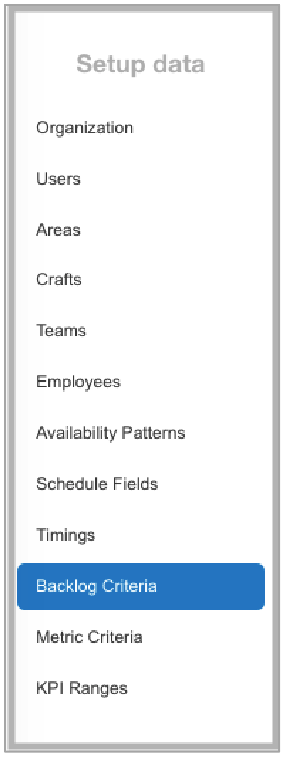
To edit criteria: Order, Teams and Effective field are editable. Make the desired changes and click ‘Save.’

Video Link: [Edit Timing Pattern]()

To delete criteria: Click on the ‘Delete’ button in the bottom right corner.

Video Link: [Delete Timing Pattern]()

Backlog Criteria:



The Backlog Criteria that are specified defines how teams relate to work orders.

The criteria determine which work orders are displayed in the backlog section when scheduling certain teams.

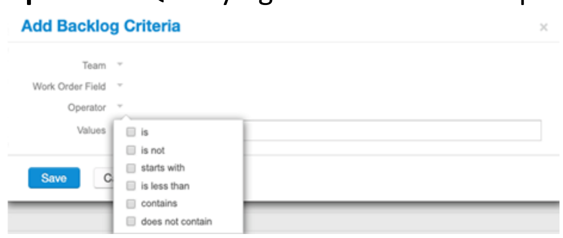
Data may vary for each team depending on the criteria that has been specified.

Add new criteria:

***Video Link:* [Adding Backlog Criteria]()**

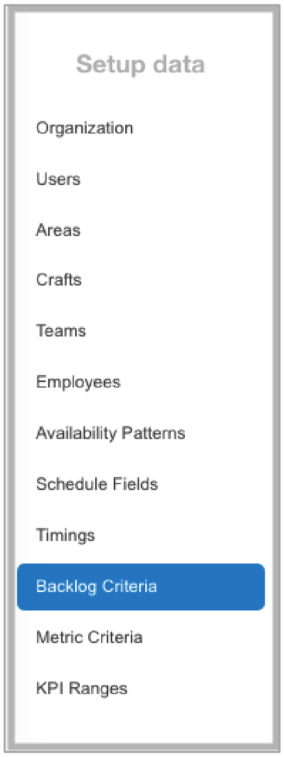
Click on the + Add Criteria button. The Add Backlog Criteria dialog should appear:

Team: The team whose criteria you are defining.
Work Order Field: The work order field that holds specific values that can be used to filter for accessibility by the selected team.
Operator: Qualifying condition for the specified values.



Operator	Definition	Example for Status Field	Returns all record where the status field is…
Is	Pulls data that equals or matches data indicated in the value(s) field.	'Ready to Schedule'	set to Ready to Schedule.
Is not	Filters out value(s) that do not match data provided, null values or blank fields.	'Waiting on Materials''	set to a status other than waiting on materials
Starts with	Returns records for all value(s) that start with indicated for that field.	'RSCH'	starting with RSCH, such as RSCH APR
Is less than	Searches for value(s) of less than the specified value.	4	less than 4

Backlog Criteria Cont'd:



Programmed Filters:

Programmed field(s) that may help:

Scheduled is TRUE – Removes work orders from other teams.

Scheduled in Past is FALSE – Excludes work orders scheduled in the past

Scheduled in Future is TRUE – Excludes work orders scheduled in the Future.

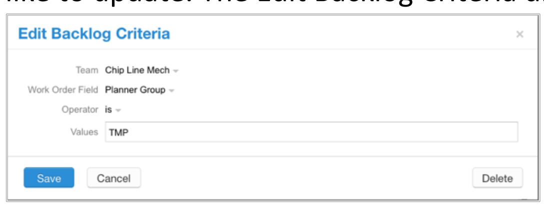
Video Link: ***Programmed Filters***

Operator	Definition	Example for Status Field	Returns all record where the status field is…
Ends with	Returns records for all value(s) that ends with indicated for that field	'APR'	Ends with APR, such as RSCH APR, CREAT APR
Contains	Contains the specified string	Schedule	schedule
Does not contain	Removes values that do not contain the data provided.	Schedule	not included

Values: The values associated with the work order field that should be available to the selected team when scheduling.

Edit or delete criteria:

Click on the row of the criteria under the team that you would like to update. The Edit Backlog Criteria dialog should appear:



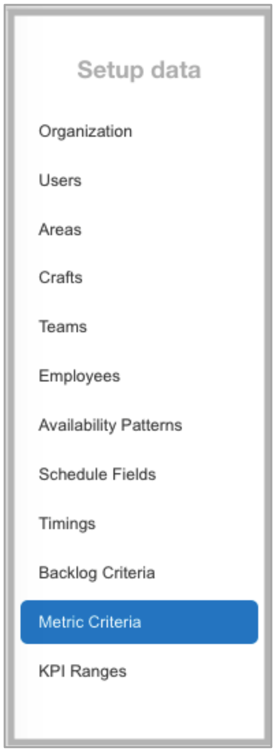
To edit criteria: All fields in the Edit Backlog Criteria dialog are editable. Make the desired changes and click 'Save.'

Video Link: ***Edit Backlog Criteria***

To delete criteria: Click on the 'Delete' button in the bottom right corner.

Video Link: ***Delete Backlog Criteria***

Metric Criteria:



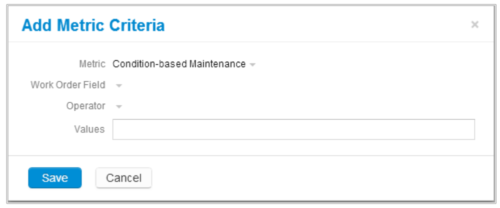
Metric Criteria identifies specific fields to categorize work orders for the purpose of identifying and calculating KPIs.

Add new criteria:

Video Link: ***[Adding Criteria]***

Click on the

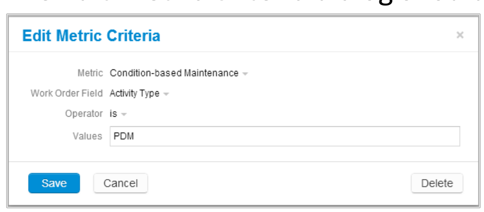
button. The Add Metric Criteria dialog should appear:



Metric: KPI defining criteria for.
Work Order Field: The work order field that holds specific values that can be used to identify which tasks are the selected KPI tasks.
Operator: The qualifying condition for the specified values.
Values: The values associated with the work order field that will identify the selected KPI.

Edit or delete criteria:

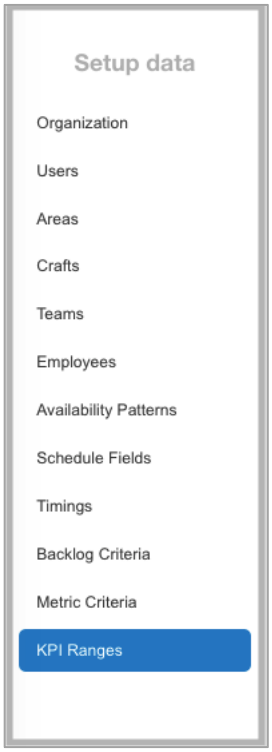
Click on the row of the criteria that you would like to update. The Edit Metric Criteria dialog should appear:



To edit criteria: All fields in the Edit Metric Criteria dialog are editable. Make the desired changes and click 'Save.'
Video Link: ***[Editing Criteria]***

To delete criteria: Click on the 'Delete' button in the bottom right corner
Video Link: ***[Delete Criteria]***

KPI Ranges:

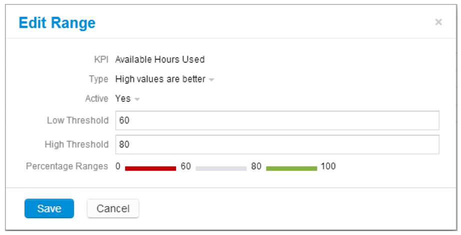


KPI information will already be set up in Sockeye with industry standard target ranges.

Edit KPI Ranges:

Video Link: ***[Editing Ranges]***

Click on the row of the KPI that you would like to update. The Edit Range dialog should appear:



KPI: The tracked Key Performance Indicators.
Active: Yes or No determines whether the selected KPI will show on the KPI Summary tab, the Weekly KPIs pane and the print/export report.

Video Link: ***[Activate or Inactivate a KPI]***

Type: Defines which ends of the range are shown with a green (good), grey (neutral), red (bad) or no indicator.
Low Threshold: Set the low percentage threshold.
High Threshold: Set the high percentage threshold.
Percentage Ranges: Displays, in graphic form, the breakdown of low and high threshold and the neutral area in between. When scheduled performance reaches or exceeds the specified thresholds, the corresponding color will be displayed.
Description: Allows details or point of reference if your business calls this KPI something different.