

Summary:

Provides workload balancing for individual trades personal at an hourly level. Sockeye automatically derives each work order’s start time from scheduled employee’s work periods and scheduled hours. Users can still manually override times if required.

Tools / Resources:

- Optional features are available, reach out to [Sockeye Support](#) to learn how to add this feature to your Sockeye account.
- Sockeye Support: support@getsockeye.com
- User Guide and videos can be found at the following link: <https://www.getsockeye.com/support/feature/hourly>

Revision Log:

Revisions	Date	Reason/Update	Updated By:
Rev3	April 12, 2023	Alert added & Annual Review	C. Banham
Rev2	May 18, 2022	Added Video Links	C. Banham
Rev1	June 24, 2021	Document Generated	C. Banham


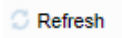
Table of Contents

Available Hours:	2
Update Available Hours	2
Weekly and Daily Schedule	3
Automatically assigning time and day	3
Automatically updating hours.....	4
Manually assigning a specific time and day	4
Alerts	5
Different Start Time	5
Times Overlap	6
Setup Availability Patterns.....	8
Add Patterns	8
Edit or delete patterns.....	9

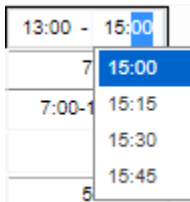
Available Hours:

Update Available Hours

Video Link: [Update Available Hours](#)

1. Click  in the blue ribbon.
2. Select the applicable **Week**.
3. Select **Team**.
4. Click  on the far-right side of the screen.
 - This will auto-populate times and hours that have been assigned to the employee.
5. Update **Times** fields for any given day and employee. **Note: Time is 24-Hour Clock.**
 - 5.1. Double click on a specific time for a drop-down box to appear.
 - 5.2. Select the hours.
 - 5.3. Hit the enter key.

Note: When clicking on the enter key the Hours field will automatically adjust to reflect the updated times.



6. Update **Hours** field for any given day and employee.
 - 6.1. Click on the applicable field.
 - 6.2. Update field to reflect vacation, different hours, training, etc.

Note: Numbers in this field will be included in the total craft hours and employee availability.

Employees		Mon Aug 9	Tue Aug 10	Wed Aug 11	Thu Aug 12	Fri Aug 13
MECH1 employees						
Tech 1	Times	7:00-12:00	7:00-12:00	7:00-12:00	7:00-12:00	
		13:00-17:00	13:00-17:00	13:00-15:30	13:00-17:00	
	Hours	Vacation	Vacation	7.5	8	
Tech 2	Times	7:00-12:00		7:00-12:00	7:00-12:00	
		13:00-14:30			13:00-17:00	
	Hours	6.5		5	9	
Tech 3	Times	7:00-12:00	7:00-12:00	7:00-12:00	7:00-12:00	7:00-12:00

Weekly and Daily Schedule

Automatically assigning time and day

Video Link: [Automatically Assign to the Hour](#)

1. Select **Weekly Schedules** or **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Click on the **Week** or **Day** that is applicable.
3. Select **Team**.
4. Add **work order(s)** to the schedule from the backlog section of the screen.
5. Sockeye will automatically derive each work order's start time from scheduled employee's work periods and scheduled hours.

Status	Type	Revision	Sched Code	Loc Code	Phi	Tech ID	WO #	WO Description	Op #	Target Start	Assign	Target Finish	Est Pyl	Craft	Hrs	Unused	In Schedule	Job Order	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Start Time
WNSCH	PM01	ME1	1DDP-0130-0910...	3	A004P02	408819085	TEST NOTIFICA...	0010	Jan 29, 2021	Andrz.	Jan 29, 2021	1	MECH1	2				1									7:00
WNSCH	PM01	ME1	1DDP-0130-0910...	4	A004P02	408819186	Sockeye Test	0010	Feb 3, 2021	Grzqz.	Feb 3, 2021	2	MECH1	2				2									7:00
SCHD	PM01		1DDP			407728822	Sockeye 4	0008	Jun 18, 2021	Andrz.	Jun 23, 2021	1	MECH1	4				3									9:00
SCHD	PM01		1DDP			407728801	test	0010	May 4, 2021	Grzqz.	May 10, 2021	2	MECH1	2				4									7:00
SCHD	PM01		1DDP			407728805	test 1	0010	May 10, 2021	Grzqz.	May 12, 2021	1	MECH1	1				5									9:00
SCHD	PM01		1DDP			407728830	test 2	0010	May 10, 2021	Grzqz.	May 12, 2021	1	MECH1	1				6									10:00
SCHD	PM01		1DDP			407728801	test	0020	May 4, 2021	Andrz.	May 10, 2021	2	MECH1	4				8									13:30

Automatically updating hours

Video Link: [Automatically Assign to the Hour](#)

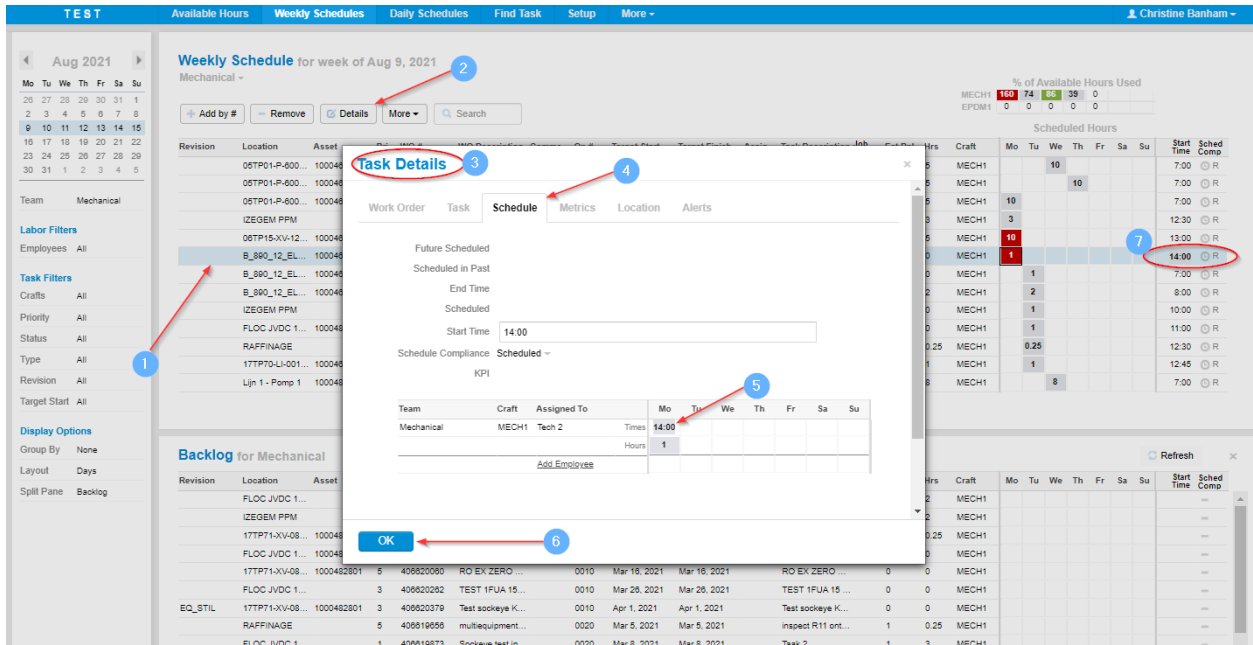
1. Select **Weekly Schedules** or **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Click on the **Week** or **Day** that is applicable.
3. Select **Team**.
4. Under **PRIORITY** or **JOB ORDER** field hover the mouse over either field the pointer should change to an up and down pointing arrow.
5. Click and hold the mouse on the work order **drag** and **drop** the work order up or down within the schedule.
6. The **Start Time** field will **automatically** adjust based on the priority.

The screenshot displays the 'Weekly Schedules' interface for the week of Mar 22, 2021. The main table lists work orders with columns for Status, Type, Revision, Sched Code, Loc Code, Tech ID, WO #, WO Description, Op #, Target Start, Assign., Target Finish, Est Ppl, Craft, Hrs, Unused, In Schedule, Job Order, and Alert. A 'Scheduled Hours' grid is visible on the right, showing hours from 7:00 to 13:30. Red annotations highlight the 'Weekly Schedules' tab (1), the 'Team' filter (2), the 'Week of Mar 22, 2021' selection (3), the 'Job Order' column (4), a work order being dragged (5), and the 'Start Time' column (6).

Manually assigning a specific time and day

Video Link: [Manually Assign to the Hour](#)

1. Select the **work order** located under the **Weekly** or **Daily** schedule portion of the screen.
2. Double click on the work order or select **Details**.
3. A **Task Details** dialogue will appear.
4. Select the **Schedule** tab.
5. Click on the **day** and input the **time** work order is to be assigned.
6. Click **OK**.
7. The hours will turn **grey** in the '**Start Time**' column.



Alerts

User Guides and Video's: <https://www.getsockeye.com/support/feature/alerts>

Displays a red circle under the Alert field when craft, hours, date and or resources do not match within the Weekly and Daily Schedule sections. The "Alert" feature is to help identify tasks or work order that may need to be reviewed.

Different Start Time

Video Link: [Different Start Time Alert](#)

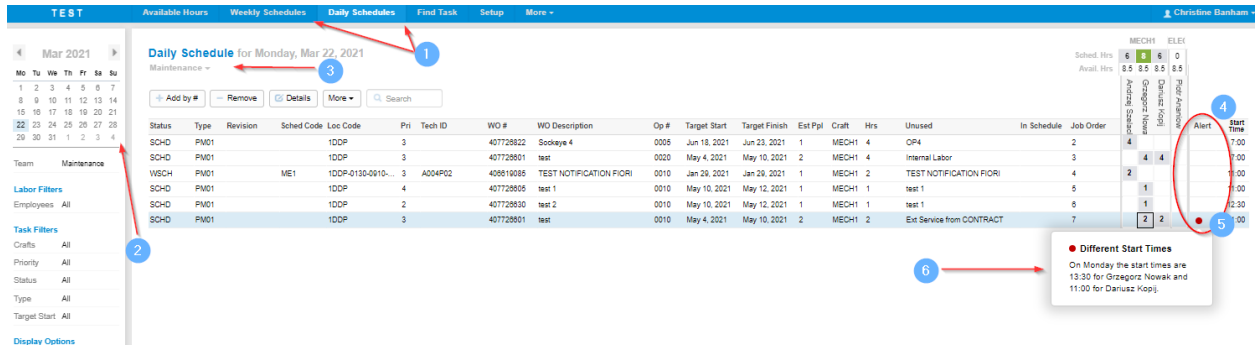
The Different Start Time alert focuses when scheduling hourly. It identifies that the start time is different from one assigned technician to another.

Example: Task requires two persons at 7:00 am; however, only one technician is available at 7am the second technician was assigned at 9:00 am.

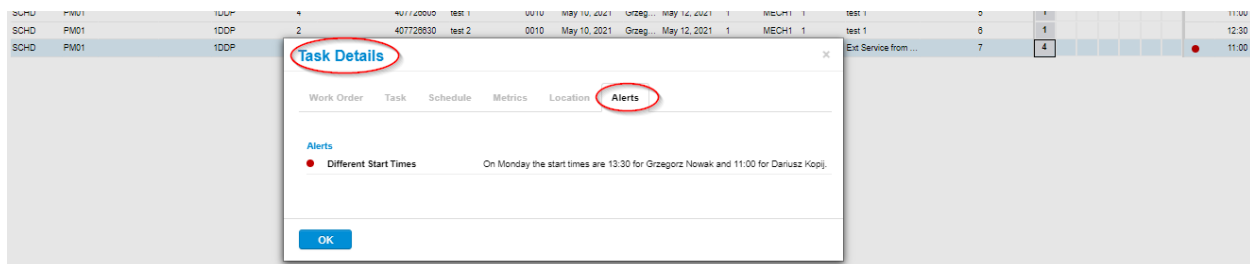
Status	Type	Sched Code	Lo...	As...	Pri	Tech ID	WO #	Op #	As...	Est Ppl	Est Hrs	Craft	Job Order	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Start Time	
WSCH	PM02	M2	PL...	PL...	3	104.PLNTPLMB	407091906	0010	Ja...	5	30	MECH1	1	30								●	7:00

● Different Start Times
 On Monday the start times are 9:00 for Jay and 7:00 for Len.

1. Select **Weekly Schedules** or **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Click on the **Week** or **Day** that is applicable.
3. Select **Team**.
4. **Alert** column located on the far right of the screen if enabled. To enable this field, follow the user guide for [Setup / Schedule Fields](#).
5. Click on the **RED dot** under the **Alert** column.
6. **'Different Start Times'** indicates that the Start Time for one or more trades people are different based on the priority or job order and scheduled employee's work periods and scheduled hours.



Note: Details of the Alert(s) can also be found when double clicking on the work order and clicking on **SCHEDULE** or **ALERTS** under the **Task Details** dialog box appears.



Times Overlap

Video Link: [Time Overlap Alert](#)

The 'Times Overlap' alert can be utilized when scheduling hourly and users are manually set the same start time in Sockeye. The alert appears when the same person is assigned to two different work orders at the same or overlapping times.

Example: two tasks are assigned to Moise between 8:00 am to 9:00 am on November 18th.

Daily Schedule for Friday, Nov 18, 2022
Mechanical -

Sched. Hrs 1.25 Totals 1.25
Avail. Hrs 8 8

Koffi Moise

Status	Type	Revision	Location	Pri	WO #	WO Description	Op #	Target Start	Task Description	Est Ppl	Hrs	Craft	Alert	Start Time	Sched Comp
WSCH	PM02	CALL-OUT	BROYEUR À BILLES N°3	3	409888550	Appoint de billes	0010	Oct 21, 2022	CONSIGNATION LOTO	1	0.25	MTEC2	0.25	8:00	R
WSCH	PM02	LINE-ST	NAVETTE DE RACK MA...	3	409888554	Nettoyage capteurs nave...	0010	Oct 19, 2022	Nettoyage navettes	1	1.25	MTEC2	1	8:00	R

Times Overlap

On Friday Koffi Moise is scheduled 8:00 to 9:00 on this task and 8:00 to 8:15 on 409888550-0010.

1. Select **Weekly Schedules** or **Daily Schedules** tab in the blue ribbon at the top of the screen.
2. Click on the **Week** or **Day** that is applicable.
3. Select **Team**.
4. **Alert** column located on the far right of the screen if enabled. To enable this field, follow the user guide for [Setup / Schedule Fields](#).
5. Click on the **RED dot** under the **Alert** column.
6. **'Times Overlap'** indicates that the Start Times for two or more tasks overlap.

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

Mar 2023

Weekly Schedule for week of Mar 13, 2023

Mechanical -

% of Available Hours Used

	Mo	Tu	We	Th	Fr	Sa	Su
Sous-Traitant Méc	8	0	0	0	0	0	0
Sous-Traitant Méc	1	0	0	0	0	0	0
Mécanicien Niveau	0	0	0	0	0	0	0

Status	Type	Revision	Location	Pri	WO #	WO Desc.	Op #	Target Start	Assi...	Task Des...	Est Ppl	Hrs	Craft	Scheduled Hours							Alert	Start Time	Sched Comp			
														Mo	Tu	We	Th	Fr	Sa	Su						
WSCH	PM02	DEP-ST	ECHAN...	3	409888759	Contrôl b...	0010	Oct 20, 2022	Koffi...	CONSIG...	1	0.25	MTEC3	0.25											8:00	R
WSCH	PM02	CALL-OUT	BROYE...	3	409888760	Appoint ...	0010	Oct 21, 2022	Zam...	CONSIG...	1	0.25	MTEC2	0.25	0.25										8:00	R
WSCH	PM02	CALL-OUT	BROYE...	3	409888769	Appoint ...	0010	Oct 7, 2022	Zam...	CONSIG...	1	0.25	MTEC2	0.25											8:00	R
WSCH	PM02	CALL-OUT	BROYE...	3	409888770	Appoint ...	0010	Oct 7, 2022	Zam...	CONSIG...	1	0.25	MTEC2	0.25											8:15	R
WSCH	PM02	DEP-ST	LAB-PR...	3	409888772	Entretien...	0010	Oct 10, 2022	Zam...	LABPRE...	1	0.5	MTEC2	0.5											8:00	R
SCHD	PM02	CALL-OUT	BROYE...	3	409888550	Appoint ...	0010	Mar 20, 2023	Koffi...	CONSIG...	1	0.25	MTI												9:00	R
SCHD	PM02	NONE	FILTRE ...	3	409888556	Control s...	0010	Mar 18, 2023	Gale...	Contrôler...	1	0.25	MTI												8:00	R
SCHD	PM02	NONE	CONCA...	3	409888555	Entretien...	0010	Mar 13, 2023	Koffi...	CONSIG...	1	0.25	MTI												8:15	R
SCHD	PM02	NONE	SOUDE...	5	409888574	Entretien...	0010	Mar 20, 2023	Assi...	CONSIG...	1	0.25	MTI												8:00	R
WSCH	PM02	NONE	CONCA...	3	409888558	Entretien...	0010	Oct 13, 2022	Boi...	CONSIG...	1	0.25	MTI												8:00	R
SCHD	PM02	CALL-OUT	BROYE...	3	409888549	Appoint ...	0010	Mar 16, 2023	Zam...	CONSIG...	1	0.25	MTEC2	0.25											9:00	R
WSCH	PM01	DEP-ST	PONT B...	4	409894172	test for f...	0010	Dec 20, 2022	Koffi...	test for f...	2	1	MTEC2	2											8:00	R

Times Overlap

On Monday Zambie Aubin is scheduled 8:00 to 8:30 on this task and 8:00 to 8:15 on 409888769-0010.

Note: Details of the Alert(s) can also be found when double clicking on the work order and clicking on **SCHEDULE** or **ALERTS** under the Task Details dialog box appears.

Task Details

Work Order Task **Schedule** Location

Alerts

- Times Overlap

On Monday Zamble Aubin is scheduled 8:00 to 8:30 on this task and 8:00 to 8:15 on 409888769-0010.

Scheduled Hours

Team	Craft	Assigned To		Mo	Tu	We	Th	Fr	Sa	Su
Mechanical	Sous-...	Zamble Aubin	Times	8:00						
			Hours	0.5						

[Add Employee](#)

OK

Setup Availability Patterns

Add Patterns

Video Link: [Add Availability Pattern](#)

1. Click on **Setup** tab in the blue ribbon at the top of your screen.
2. Select **Availability Patterns** located in the menu on the left-hand side of the screen.
3. Click on the **+ Add Availability Pattern** button. The Add Availability Pattern dialog should appear:

Setup Availability Patterns

+ Add Availability Pattern

Name	Start Date	Length	Hours
Monday to Friday	Jan 4, 2021	7	8.5 8.5 8.5 8.5 8.5
Shift A	Apr 19, 2021	21	8 8
Weekend engineers	Jan 9, 2021	7	8.5 8.5

Add Availability Pattern

Name:

Start Date:

Length:

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
7:00 - 12:00	7:00 - 12:00	7:00 - 12:00	7:00 - 12:00	7:00 - 12:00	-	-	-
13:00 - 17:00	13:00 - 17:00	13:00 - 17:00	13:00 - 17:00	13:00 - 17:00	-	-	-
Hours	9	9	9	9			

4. **Name:** The shift or schedule name.
5. **Start Date:** The date of the start of the shift or schedule.
6. **Length:** Number of days the shift pattern is. This includes days off.
7. **Times:** Hours and shift pattern details allow for one break.
8. **Hours:** Total hours available to schedule for the day.
9. Click .

Edit or delete patterns

1. Click on the availability pattern that you would like to update. The Edit Availability Pattern dialog should appear:
2. **Edit a pattern:** All fields in the availability pattern dialog are editable.
3. Make the desired changes and click .
4. **Delete a pattern:** Click on .

TEST Available Hours Weekly Schedules Daily Schedules Find Task Setup More -

Setup data

Organization

Users

Areas

Crafts

Teams

Employees

Availability Patterns

Delay Codes

Schedule Fields

Backlog Criteria

Metric Criteria

KPI Ranges

Interfaces

Setup Availability Patterns

+ Add Availability Pattern

Name	Start Date	Length	Hours								
Monday to Friday	Jan 4, 2021	7	8.5	8.5	8.5	8.5	8.5				
Shift A	Apr 19, 2021	21	8	8	8	8		8	8	8	8
Weekend engineers	Jan 9, 2021	7	8.5	8.5							
Monday to Thursday	Mar 1, 2021	7	9	9	9	9					

Edit Availability Pattern ×

Name:

Start Date:

Length:

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Times	7:00 - 12:00	7:00 - 12:00	7:00 - 12:00	7:00 - 12:00	-	-	-
	13:00 - 17:00	13:00 - 17:00	13:00 - 17:00	13:00 - 17:00	-	-	-
Hours	9	9	9	9			