

Summary:

Allows a Sockeye user to include an overall comment for the day and is primarily used if many changes or tasks have been removed from the schedule for a given day.

Tools / Resources:

- Added feature are available within a Sockeye package.
- Feature is specific to the 'Daily Schedules' tab.
- Reach out to our sales representative to learn how to add this feature to your Sockeye account.
 - o Email: support@getsockeye.com
 - o User Guides and Video's: <https://www.getsockeye.com/support>

Revision Log:

Revisions	Date	Reason/Update	Updated By:
Rev1	August 30, 2022	Generated Document	C. Banham

Contents

Add Note for Daily Schedule	2
Edit Note for Daily Schedule	3
Delete Note for Daily Schedule	4
Note included in Print or Export to Excel	5

Add Note for Daily Schedule

Video Link: [Add 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 **'Add note for Daily Schedule'**.
6. **Add Note** dialogue box will appear
7. Enter **note details**.
8. Click **Save**.

The screenshot shows the Sockeye software interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. Below the ribbon, there's a navigation bar with 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The main area displays a calendar for August 2022 on the left, with the 15th selected. The central part shows the 'Daily Schedule for Monday, Aug 15, 2022' for 'Chip Line Mech' under supervisor 'Tim Fisher'. A table lists work orders with columns for WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi... Delay, Est Ppl, Craft, Hrs, Comment, Alert, and Sched Comp. A 'More' dropdown menu is open, and 'Add note for Daily Schedule' is selected. A dialog box titled 'Add Note' is displayed, containing a text area with 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.' The 'Save' button is highlighted with a red circle and the number 8.

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

This screenshot shows the same interface as the previous one, but with a message indicator 'Fire alarm in main building' appearing next to the team and supervisor. A tooltip is visible over the message indicator, displaying the note details: 'Fire alarm in main building went off today at approximately 1:30pm. All work scheduled after will be removed from the schedule.' The number 9 is placed over the message indicator, and the number 10 is placed over the tooltip.

Edit Note for Daily Schedule

Video Link: [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 displays the 'Daily Schedules' interface. At the top, the 'Daily Schedules' tab is selected in the blue ribbon. Below the ribbon, a calendar for August 2022 shows the 15th selected. The main area shows a 'Daily Schedule for Monday, Aug 15, 2022' for the 'Chip Line Mech' team, supervised by Tim Fisher. A table lists work orders with columns for WO #, WO Type, Status, Priority, Revisi..., Delay, Est Ppl, Craft, Hrs, and Comment. A 'More' dropdown menu is open, showing options like 'Move schedule hours to another day', 'Copy work order #s to clipboard', and 'Edit note for Daily Schedule'. The 'Edit Note' dialog box is open, showing the user 'Christine Banham', the date 'Aug 15, 2022', and a text area containing the note: 'Fire alarm in main building went off today at approximately 1:30pm. All work scheduled after will be removed from the schedule.' The 'Save' button is highlighted.

Delete Note for Daily Schedule

Video Link: [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 'Daily Schedules' interface for Monday, August 15, 2022. The top navigation bar includes 'SOCKEYE', 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The user is identified as 'Christine Banham'. On the left, a calendar for August 2022 is shown with the 15th selected. The main area shows a list of work orders (WO #, WO Type, Status, Priority, Revisi..., Delay, Est Ppl, Craft, Hrs, Comment) and a summary table with columns for 'Sched. Hrs', 'Avail. Hrs', 'MW', 'PF', 'WL', and 'Totals'. An 'Edit Note' dialog box is open at the bottom, containing a text area with the note: 'Fire alarm in main building went off today at approximately 1:30pm. All work scheduled after will be removed from the schedule.' The dialog has 'Save', 'Cancel', and 'Delete' buttons. A dropdown menu is open over the 'More' button, listing 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'. Red arrows and numbers 1-7 highlight the steps: 1. 'Daily Schedules' tab; 2. Team dropdown; 3. Calendar date; 4. 'More' button; 5. 'Edit note for Daily Schedule' option; 6. 'Edit Note' dialog; 7. 'Delete' button.

Note included in Print or Export to Excel

Video Link: [Exporting Note for Daily Schedule](#)

1. Click on the **More** tab in the blue ribbon at the top of the screen.
2. Select Print or Export to Excel.
3. A dialogue box will appear.
4. Select Daily Schedule with tasks grouped by.
5. Click **OK**.

The screenshot shows the 'SOCKEYE' software interface. At the top, a blue ribbon contains tabs for 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The 'More' dropdown menu is open, showing options: 'KPI Summary', 'Print', 'Export to Excel', and 'Hide Filter Pane'. A 'Print' dialog box is open in the foreground, with the 'Print' button circled in red. The dialog box contains several checkboxes: 'Work Summary', 'Available Hours', 'Weekly Schedule', 'Weekly KPIs', 'Backlog', 'Daily Schedule' (checked), 'Personal Schedule', 'Alerts', and 'Schedule Data'. The 'Daily Schedule' checkbox is selected with the option 'With tasks grouped by Employee'. The 'OK' button is also circled in red. The background shows a 'Daily Schedule' for Monday, Aug 15, 2022, for 'Chip Line Mech' with supervisor 'Tim Fisher'. A table lists work orders (WO #, WO Type, Status, Priority, Loc #, Op #, Operation) and their details. A calendar on the left shows the month of August 2022.

Notes are included at the bottom of the specific daily schedule.

Daily Schedule for Monday Aug 15, 2022

Chip Line Mech Supervisor Tim Fisher

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revision	Delay	Est Ppl	Craft	Hrs	Comment	Scheduled Hours	Alert	Sched Comp
A. Mannion															
900005403327	PMH1	RELE	1	475-0226	010	Rebuild Dye Metering Pump 1520-3470	NULL	Weather	1	WL	2		2		✓ W
900005632559	PMH1	RELE	2	475-0204	010	Service Pump 475-0204	NULL		1	WL	8		5		✓ W
Contractor G. Watson															
900005733177	PMH1	RELE	4	475-0122	010	Replace Shower Strainer Isoation Valve #	HTMP1206		1	PF	8		3		✓ W
Contractor J. Niemann															
900005343713	PMH1	RELE	4	541-9988	010	This is the 3rd time in 2 years that the	HTMP1305		1	MW	8		7		W
R. Humbert															
900005343361	PMH1	RELE	4	471-0430	010	Install Remote Greases Blocks For Bridge	HSTMPALL		1	PF	8		6	●	R
900005947715	PMH2	RELE	2	623-3970	010	CLEAN & INSPECT #1 DISC THICKENER SHOWER	HTMP1305		1	MW	6		6		✓ W
900005951220	PMH2	RELE	2	623-3872	010	Repulper conveyor leaking stock at	HTMP1305		1	MW	6	Must be done TODAY!	6		W
T. Lau															
900005343584	PMH2	RELE	4	500-0403	010	OPEN & CLEAN PIPING ON DEGASS MC PUMP	HTMP1305		1	MW	2		0.5		✓ W
900005672744	PMH1	RELE	4	521-0600	010	OPEN AND CLEAR 3 PLUGGED CLEANERS			1	MW	4		4		W

testing fire extinguishers