



### Summary:

When this feature is enabled, users can add notes within the Available Hours tab. Each note associates with a specific date and employee. This can aid with future vacation requests, possible project availability, future resource support, etc.

### Tools / Resources:

- Sockeye Support: [support@getsockeye.com](mailto:support@getsockeye.com)
- User Guide and videos can be found at the following link:  
<https://www.getsockeye.com/support/feature/notesfilter>

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### Revision Log:

Revision	Date	Reason/Update	Updated By:
Rev 1	2022-06-21	Document Creation	C. Banham

## Available Hours, Split Pane Filter

### Add Note

Video Link: [Add Notes to Filter](#)


1. Select **Available Hours** in the blue ribbon.
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. Click on **'Split Pane.'** A drop-down selection will appear.
5. Select **Notes.**
6. Select the **cell** required to add a note.
7. Click on the **Add Note** box.
8. A **'Add Note'** dialogue box will appear.
9. Enter **Notes** under the Note section.
10. Click **Save**.

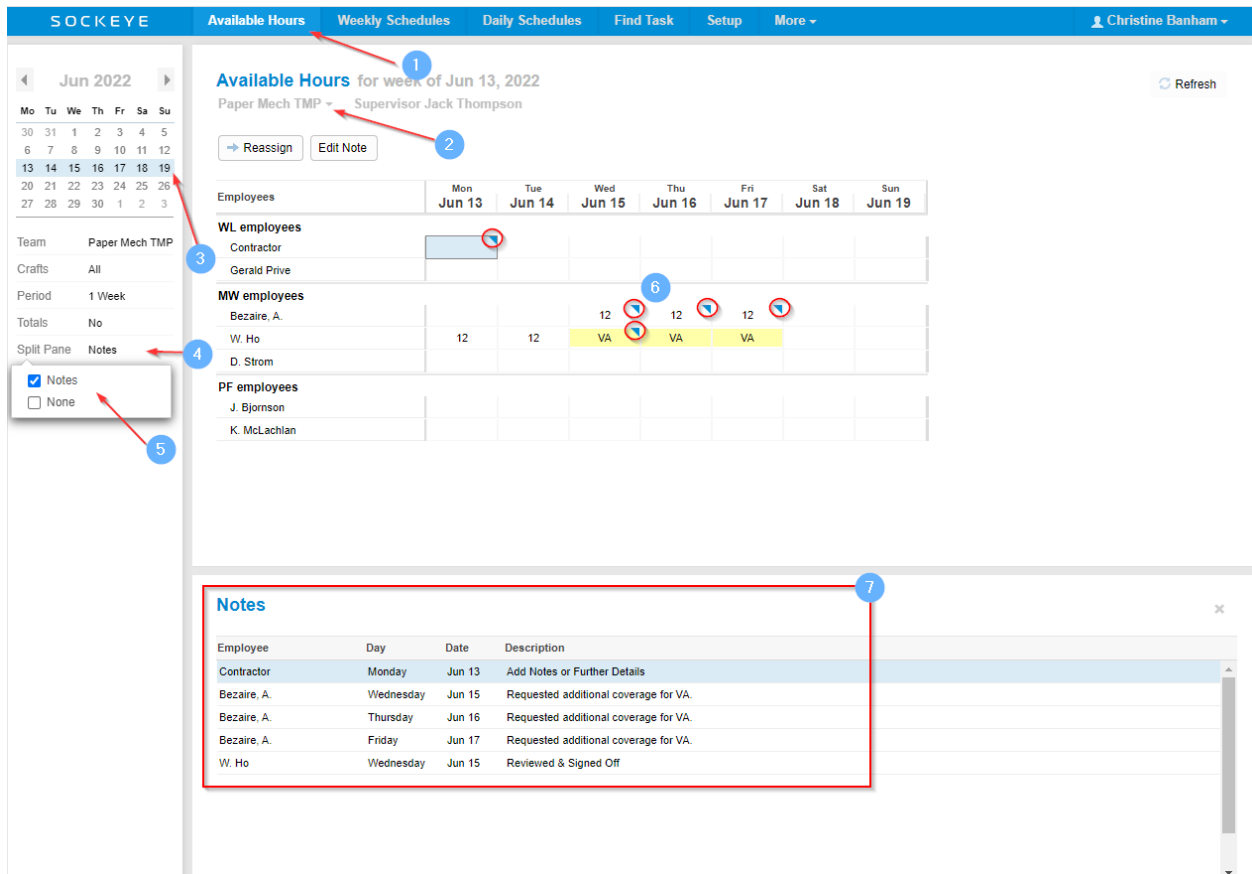
The screenshot shows the SOCKEYE software interface. The top navigation bar includes 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The main content area displays 'Available Hours for week of Jun 13, 2022' for 'Paper Mech TMP' under supervisor 'Jack Thompson'. A calendar shows the week from June 13 to 19. Below the calendar, there are sections for 'WL employees' (Contractor, Gerald Prive) and 'MW employees' (Bezaire, A., W. Ho, D. Strom). A 'PF employees' section lists J. Bjornson and K. McLachlan. On the left, a sidebar shows 'Split Pane' and 'Notes' options. An 'Add Note' dialog box is open, showing fields for 'User' (Christine Banham), 'Employee' (Contractor), and 'Date' (Jun 13, 2022). A text area for 'Add Notes or Further Details' is present, along with 'Save', 'Cancel', and 'Delete' buttons. A 'Notes' table at the bottom lists previous entries with columns for Employee, Day, Date, and Description.

Employee	Day	Date	Description
Bezaire, A.	Wednesday	Jun 15	Requested additional coverage for VA.
Bezaire, A.	Thursday	Jun 16	Requested additional coverage for VA.
Bezaire, A.	Friday	Jun 17	Requested additional coverage for VA.
W. Ho	Wednesday	Jun 15	Reviewed & Signed Off

## View Note

Video Link: [View Notes to Filter](#)

1. Select **Available Hours** in the blue ribbon.
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. Click on **'Split Pane.'** A drop-down selection will appear.
5. Select **Notes.**
6. A blue triangle  will appear in the top right corner of each cell that indicates a Note is attached.
7. The bottom section of the Available Hours tab has been split to show all the Notes for the specific week, team, and resource(s).



The screenshot shows the 'Available Hours' tab in the SOCKEYE software. The interface includes a calendar for June 2022, a team selection dropdown (Paper Mech TMP), and a grid of available hours for various employees. A 'Split Pane' dropdown menu is open, showing 'Notes' selected. A 'Notes' panel is also visible at the bottom, displaying a list of notes for the selected week and team.

Employees	Mon Jun 13	Tue Jun 14	Wed Jun 15	Thu Jun 16	Fri Jun 17	Sat Jun 18	Sun Jun 19
<b>WL employees</b>							
Contractor							
Gerald Prive							
<b>MW employees</b>							
Bezaire, A.			12	12	12		
W. Ho	12	12	VA	VA	VA		
D. Strom							
<b>PF employees</b>							
J. Bjornson							
K. McLachlan							

Employee	Day	Date	Description
Contractor	Monday	Jun 13	Add Notes or Further Details
Bezaire, A.	Wednesday	Jun 15	Requested additional coverage for VA.
Bezaire, A.	Thursday	Jun 16	Requested additional coverage for VA.
Bezaire, A.	Friday	Jun 17	Requested additional coverage for VA.
W. Ho	Wednesday	Jun 15	Reviewed & Signed Off

## Edit Note

Video Link: [Edit Notes to Filter](#)

1. Select **Available Hours** in the blue ribbon.
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. Click on **'Split Pane.'** A drop-down selection will appear.
5. Select **Notes.**
6. Select the **cell** required to add a note.
7. Click on the **Edit Note** box.
8. An **'Edit Note'** dialogue box will appear.
9. Update details under the **Note** section.
10. Click **Save**.
11. The Notes section will update with the new comments.

The screenshot displays the SOCKEYE software interface. The top navigation ribbon includes 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The main content area shows 'Available Hours for week of Jun 13, 2022' for 'Paper Mech TMP' under supervisor Jack Thompson. A calendar on the left shows the week of June 13-19, 2022. Below the calendar, there are sections for 'WL employees', 'MW employees', and 'PF employees'. An 'Edit Note' dialog box is open, showing the user 'Christine Banham' and employee 'W. Ho' for the date 'Jun 15, 2022'. The note text is 'Reviewed & Not Approved; To Follow up'. The dialog box has 'Save', 'Cancel', and 'Delete' buttons. The 'Notes' section at the bottom shows a list of notes for various employees, with the note for 'W. Ho' on 'Wednesday Jun 15' with the text 'Reviewed & Signed Off' highlighted in red.

## Delete Note

Video Link: [Delete Note in Filter](#)

1. Select **Available Hours** in the blue ribbon.
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. Click on **'Split Pane.'** A drop-down selection will appear.
5. Select **Notes.**
6. Select the **cell** required to add a note.
7. Click on the **Edit Note** box.
8. An **'Edit Note'** dialogue box will appear.
9. Click **Delete**.
10. Notes for the specific cell will no longer be available.

The screenshot displays the SOCKEYE software interface. At the top, the navigation bar includes 'SOCKEYE', 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The user 'Christine Banham' is logged in. The main content area shows 'Available Hours for week of Jun 13, 2022' for 'Paper Mech TMP' under supervisor 'Jack Thompson'. A calendar on the left shows the week of June 13-19, 2022. Below the calendar is a grid of available hours for employees: Contractor (Gerald Prive), MW employees (Bezaire, A., W. Ho, D. Strom), and PF employees (J. Bjornson, K. McLachlan). An 'Edit Note' dialog box is open, showing the user 'Christine Banham', employee 'Bezaire, A.', and date 'Jun 16, 2022'. The note text is 'Requested additional coverage for VA.' and there are 'Save', 'Cancel', and 'Delete' buttons. A red circle highlights the 'Notes' section at the bottom of the page, which lists notes for various employees and dates.

## More, Reporting

### Print, Export to PDF or Excel

Video Link: [Print or Export Available Hours](#)

1. Select **More** in the blue ribbon.
2. Select **Print** or **Export to Excel**.
3. A dialogue box will appear.
4. Check **Available Hours**.
5. Click **OK**

The screenshot shows the SOCKEYE software interface. The top ribbon includes 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The 'More' menu is open, showing options: 'KPI Summary', 'Print', 'Export to Excel', and 'Hide Filter Pane'. The 'Export to Excel' dialog box is open, showing a list of options with checkboxes: 'Work Summary', 'Available Hours' (checked), 'Weekly Schedule', 'Weekly KPIs', 'Backlog', 'Daily Schedule', 'Personal Schedule', 'Alerts', and 'Schedule Data'. The 'OK' button is highlighted. The background shows the 'Available Hours' report for the week of Jun 13, 2022, for Paper Mech TMP, Supervisor Jack Thompson. The report includes a calendar view and a table of employees and their schedules.

Employees	Mon Jun 13	Tue Jun 14	Wed Jun 15	Thu Jun 16	Fri Jun 17	Jun 18	Jun 19
<b>WL employees</b>							
Contractor							
Gerald							
<b>MW emp</b>							
Bezaire, A.							
W. Ho							
D. Str							
<b>PF emp</b>							
J. Bjor							
K. Mc							

Employee	Day	Date	Description
Contractor	Monday	Jun 13	Add Notes or Further Details
Bezaire, A.	Wednesday	Jun 15	Requested additional coverage for VA.
Bezaire, A.	Thursday	Jun 16	Requested additional coverage for VA.
Bezaire, A.	Friday	Jun 17	Requested additional coverage for VA.
W. Ho	Wednesday	Jun 15	Reviewed & Signed Off

A copy of the current Available Hours for the team and week will generate.  
 For Example:

	A	B	C	D	E	F	G	H
1								
2	<b>Available Hours for week of Jun 13, 2022</b>							
3	Paper Mech TMP Supervisor Jack Thompson							
4								
5	<b>Employees</b>	<b>Mon Jun 13</b>	<b>Tue Jun 14</b>	<b>Wed Jun 15</b>	<b>Thu Jun 16</b>	<b>Fri Jun 17</b>	<b>Sat Jun 18</b>	<b>Sun Jun 19</b>
6	<b>WL employees</b>							
7	Contractor							
8	Gerald Prive							
9	<b>MW employees</b>							
10	Bezaire, A.			12	12	12		
11	W. Ho	12	12	VA	VA	VA		
12	D. Strom							
13	<b>PF employees</b>							
14	J. Bjornson							
15	K. McLachlan							
16								
17	<b>Notes</b>							
18	<b>Employee</b>	<b>Day</b>	<b>Date</b>	<b>Description</b>				
19	Contractor	Monday	Jun 13	Add Notes or Further Details				
20	W. Ho	Wednesday	Jun 15	Reviewed & Signed Off				
21	Bezaire, A.	Wednesday	Jun 15	Requested additional coverage for VA.				
22	Bezaire, A.	Thursday	Jun 16	Requested additional coverage for VA.				
23	Bezaire, A.	Friday	Jun 17	Requested additional coverage for VA.				
24								
25								
26								
27								