

Summary:

The ability to have a user-editable lookup table in Sockeye to associate Maintenance Plans to specific Employees. When Sockeye sees a work order with a particular Maintenance Plan it can use the lookup table to find the Employee and schedule them automatically.

Tools / Resources:

1. Optional features can be available; Reach out to your Sockeye Rep for further details.
2. Email: support@getsockeye.com
3. User Guide and videos: <https://www.getsockeye.com/support/feature/maintplan>

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Revision Log:

Revision	Date	Reason/Update	Updated By:
Rev 2.1	2023-02-28	Update Alert Link	C. Banham
Rev 2	2023-02-28	Add Alert and Employee Code Flag	C. Banham
Rev 1.1	2023-02-08	Updated 'Import from Excel' Notes	C. Banham
Rev 1	2022-06-10	Generate Document	C. Banham

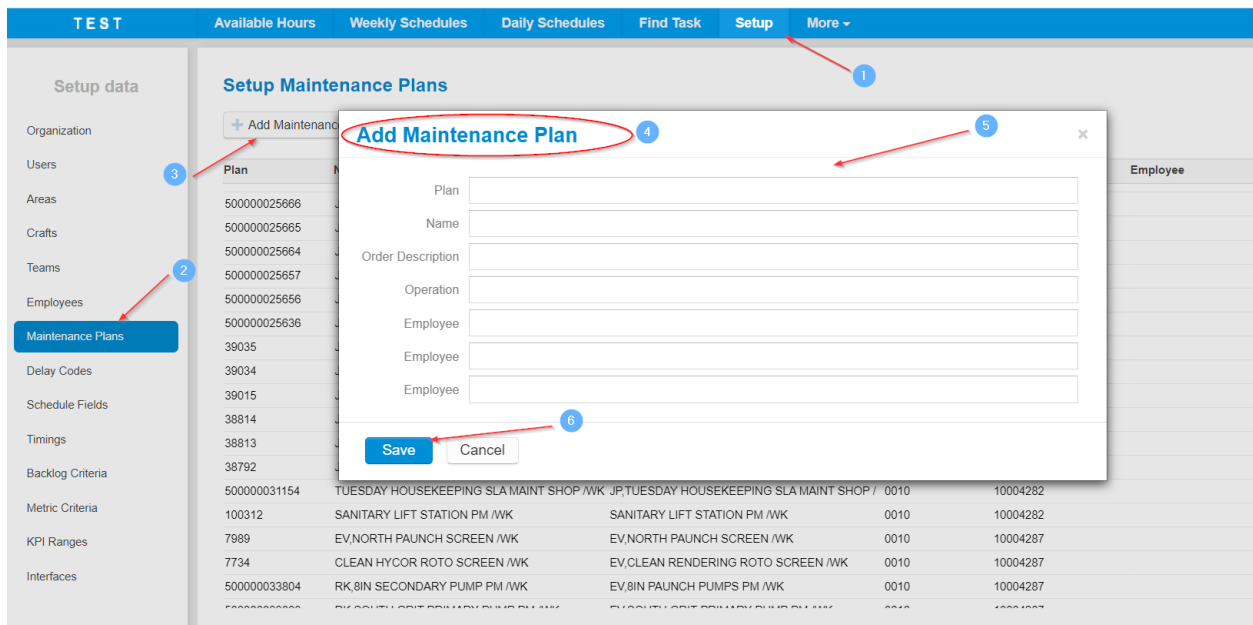
Setup

Adding assigned Maintenance Plan

Video Link: [Add Maintenance Plan](#)

Manually adding a Maintenance Plan to a specific employee.

1. Select **Setup** in the blue ribbon.
2. Click on **Maintenance Plans** under the Setup data menu.
3. Under the Setup Maintenance Plans click on **+ Add Maintenance Plan** button.
4. An **Add Maintenance Plan** dialogue box will appear.
5. Input the following details:
 - **Plan** – The maintenance plan number referenced from the CMMS.
 - **Name** – Name of the maintenance plan referenced.
 - **Order Description** – Short description of the work order.
 - **Operation** – Operation number or task number.
 - **Employee** – The employee code referenced within the CMMS.
6. Click **Save**.



View or Edit Maintenance Plans

Video Link: [View or Edit](#)

Updating the details of a Maintenance Plan and reassign to an additional or new trades person.

1. Select **Setup** in the blue ribbon.
2. Click on **Maintenance Plans** under the Setup data menu.
3. Select and click on the Maintenance Plan to edit.
 - **NOTE:** Click on any *FIELD* name, the list of fields will update in alphabetical or numerical order.
4. An **Edit Maintenance Plan** dialogue box will appear.
5. Make the applicable changes to any field.
 - **Plan** – The maintenance plan number referenced from the CMMS.
 - **Name** – Name of the maintenance plan referenced.
 - **Order Description** – Short description of the work order.
 - **Operation** – Operation number or task number
 - **Employee** – The employee code within the CMMS.
6. Click **Save**.

The screenshot shows the 'Setup Maintenance Plans' interface. The top ribbon includes 'TEST', 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The left sidebar shows 'Setup data' with 'Maintenance Plans' selected. The main area displays a table of maintenance plans. A dialog box titled 'Edit Maintenance Plan' is open, showing fields for Plan, Name, Order Description, Operation, and Employee. The 'Save' button is highlighted.

Plan	Name	Order Description	Operation	Employee	Employee
500000032563	EB, PM ON TRIM AREA BENCH SCALES/WK	EB, PM ON TRIM AREA BENCH SCALES/WK	0010	10003885	
500000031723	EB, WEEKLY SCALES PRINTER CLEANING	EB, WEEKLY SCALES PRINTER CLEANING	0010	10003885	
500000031719	EB, MONDAY NIGHT-OFFAL BENCH SCALES/WK	EB, MONDAY NIGHT-OFFAL BENCH SCALES/WK	0010	10003885	
500000027902					
500000027896					
500000027895					
500000027894					
500000027893					
500000027843					
500000027832					
500000027831					
500000027830					
500000027829					
500000026231					
500000026230					
500000026229					
500000025836					
500000023438					
500000023427					

Deleting a Maintenance Plan

Video Link: [Delete a Maintenance Plan](#)

A Maintenance Plan may need to be deleted all together as a specific resource may not be needed.

1. Select **Setup** in the blue ribbon.
2. Click on **Maintenance Plans** under the Setup data menu.
3. Select and click on the pattern to delete.
 - **NOTE:** Click on any **FIELD** name, the list of fields will update in alphabetical or numerical order.
4. An **Edit Delay Code** dialogue box will appear.
5. Click **Delete**.

The screenshot shows the 'Setup Maintenance Plans' interface. The ribbon at the top includes 'TEST', 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The left sidebar shows 'Setup data' with 'Maintenance Plans' selected. The main area displays a table of maintenance plans with columns: Plan, Name, Order Description, Operation, Employee, and Employee. A dialog box titled 'Edit Maintenance Plan' is open, showing fields for Plan (500000031723), Name (EB, WEEKLY SCALES PRINTER CLEANING), Order Description (EB, WEEKLY SCALES PRINTER CLEANING), Operation (0010), and Employee (10003885). The 'Delete' button in the dialog box is highlighted.

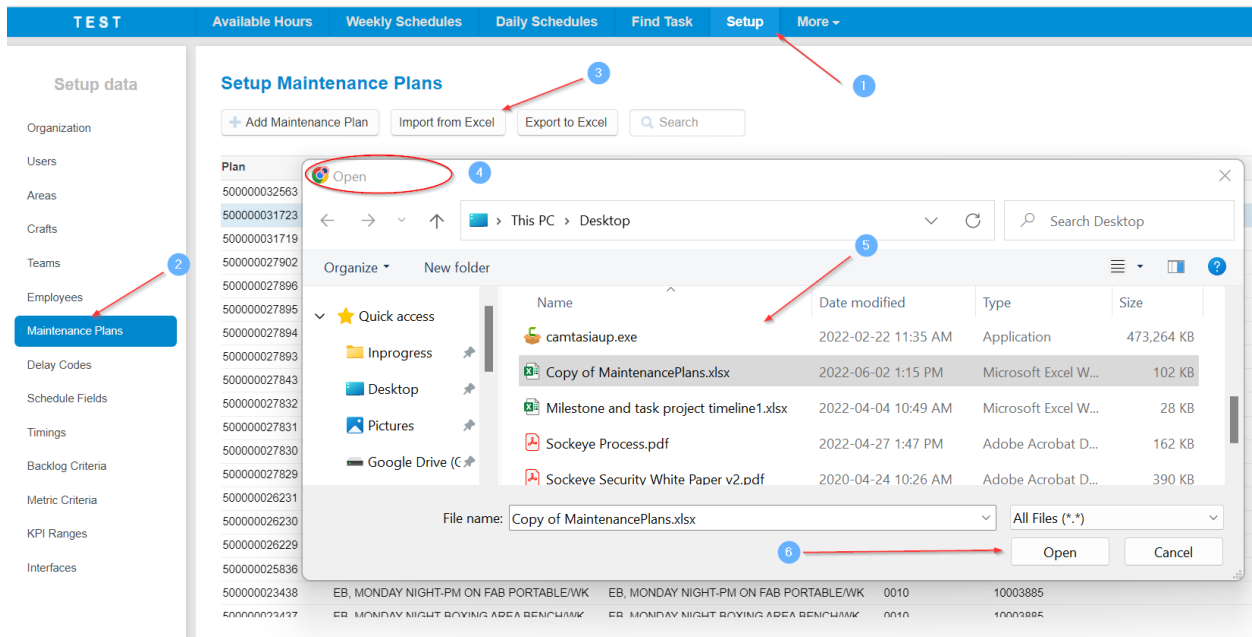
Plan	Name	Order Description	Operation	Employee	Employee
500000032563	EB, PM ON TRIM AREA BENCH SCALES/WK	EB, PM ON TRIM AREA BENCH SCALES/WK	0010	10003885	
5000000031723	EB, WEEKLY SCALES PRINTER CLEANING	EB, WEEKLY SCALES PRINTER CLEANING	0010	10003885	
500000031719	EB, MONDAY NIGHT-OFFAL BENCH SCALES/WK	EB, MONDAY NIGHT-OFFAL BENCH SCALES/WK	0010	10003885	
500000027902					
500000027896					
500000027895					
500000027894					
500000027893					
500000027843					
500000027832					
500000027831					
500000027830					
500000027829					
500000026231					
500000026230					
500000026229					
500000025836					
500000023438					
500000023437					

Import from Excel

Video Link: [Import Maintenance Plans from Excel](#)

This feature allows mass changes to take place and could be used to update a single employee for multiple Maintenance Plans. Uploading the changes on the excel spreadsheet and importing the updates will allow for multiple changes instead of individual line items.

1. Click on **Setup** in the blue-ribbon at the top of the screen.
2. Select **Maintenance Plans** under the Setup Data menu on the left-hand side.
3. Click on **Import from Excel** under the Setup Schedule Fields.
4. A **'File Explorer'** box will appear.
5. Select the Maintenance Plan Template that has been updated.
6. Click **Open**.



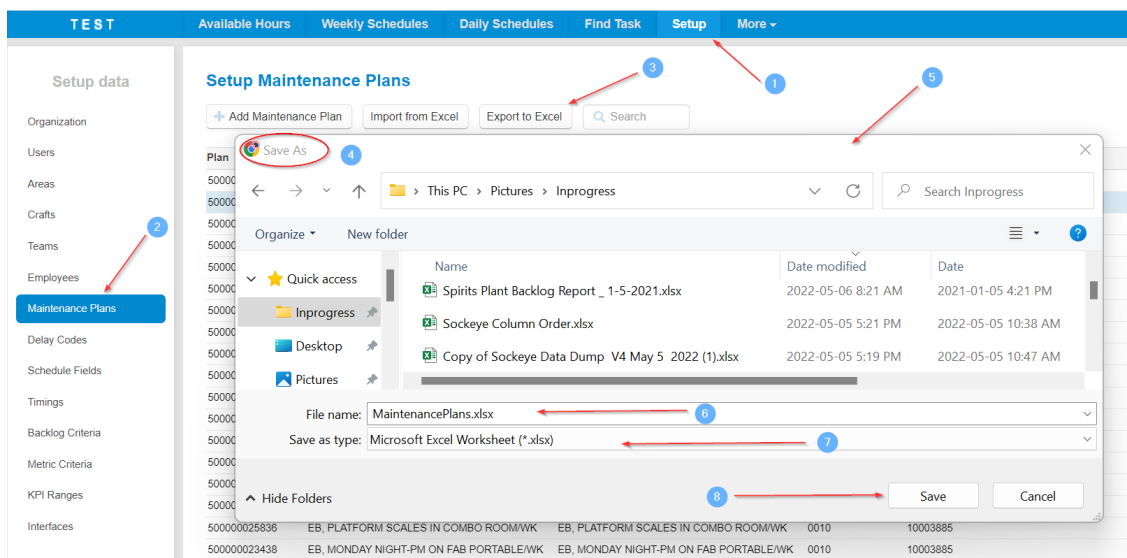
Note: Try Exporting to Excel first to ensure the latest assignments are pulled into Sockeye. When utilizing 'Import from Excel' this will replace all current Maintenance plan details.

Export to Excel

Video Link: [Export Maintenance Plan to Excel](#)

Allows the Administrator to pull the most to-date list of Maintenance Plans currently auto assigned within Sockeye.

1. Click on **Setup** in the blue-ribbon at the top of the screen.
2. Select **Maintenance Plans** under the Setup data menu on the left-hand side.
3. Click on **Export to Excel** under the Setup Users.
4. A **'File Explorer'** box will appear.
5. Select where the file should be saved.
6. 'MaintenancePlans.xlsx' defaults; however, can be renamed.
7. Select a file type from the drop-down menu if the default is different.
8. Click **Save**.



Note: All details viewed within the Maintenance Plan menu will be available within the excel export.

Example:

PlanCode	PlanName	OrderDescription	Operation	Employee1	Employee2	Employee3
7409	CHANGE FINAL FILTERS SOUTH AIR MAKEUP	CHANGE FINAL FILTERS SOUTH AIR MAKEUP	0010	10005222		
7437	MV, PM FOR #1 INCLINE AUGER /WK	MV, INSPECT #1 INCLINE AUGER/WK	0010	10004621		
7475	CHANGE FINAL FILTERS NORTH AIR MAKEUP	CHANGE FINAL FILTERS NORTH AIR MAKEUP	0010	10005222		
7726	MONDAY MORNING WEEKLY PURGE CO2 TANKS	EC, PURGE NORTH & MID NORTH CO2 TANK /WK	0010	10004813		
7734	CLEAN HYCOR ROTO SCREEN /WK	EV,CLEAN RENDERING ROTO SCREEN /WK	0010	10004287		
7792	AUTOMATED RIB SAW WEEKLY	PT, INSPECTION E. AUTOMATED RIB SAWS /WK	0010	10005369		
7793	AUTOMATED RIB SAW WEEKLY	PT, INSPECTION W. AUTOMATED RIB SAWS /WK	0010	10005369		
7833	PTECH, TRAINING WK	PTECH, TRAINING WK 4-6 P.M.	0010	10005369		
7862	INSPECTION OF ULTRA VAC/DAILY	JLEDN, INSPECTION ULTRAVAC /DAILY	0010	10011271		
7863	OA, MONTHLY OIL CHANGE ULTRAVAC 2100	OA, OIL CHANGE BUSCH PUMP /MO	0010	10010326		
7951	PREFILTERS MID NORTH AIR MAKEUP SLA /MO	PREFILTERS MID NORTH AIR MAKEUP SLA /MO	0010	10005222		
7963	PROCHA, SMART SAW GUIDE REPLACEMENT WK	PR, SAW BLADE GUIDE REPLACEMENT /WK	0010	10017017		
7989	EV,NORTH PALUNCH SCREEN /WK	EV,NORTH PALUNCH SCREEN /WK	0010	10004287		
8033	HLOPEZ, TRAINING WK	HLOPEZ, TRAINING WK (TUES 12-2a.m.)	0010	10007061		
8424	AG, INSPECTION ASRS SYSTEM DAILY	AG, INSPECTIONS ASRS SYSTEM	0010	10022435		
8471	VM TRAINING WK	VM, TRAINING WK	0010	10007040		
8472	EM TRAINING WK	EM TRAINING WK	0010	10022555		
8473	ND TRAINING WK	NDOBRUSK TRAINING WK	0010	10007042		
8813	KG, GREASE MOTOR BEARINGS #2 SYSTEM	KG, GREASE BOTH MOTORS 438 TRICANTERS	0010	10004675		
8814	KG, GREASE MOTOR BEARINGS BIRDS	KG, GREASE MOTORS W & E BIRDS	0010	10004675		
8816	MV, GREASE MOTOR BEARINGS BLOOD SHARPLES	MV, GREASE MOTORS FOR THE BLOOD SHARPLES	0010	10004903		
8827	SPRAY CHILL WATER FILTER PM	SPRAY CHILL WATER FILTER PM	0010	10016725		
8874	QAVILA, TRAINING WK	QAVILA, TRAINING WK (THUR 2-4 a.m.)	0010	10010326		
8888	DOUFLADA, TRAINING WK	DOUFLADA, TRAINING WK	0010	10007330		

Search

Video Link: [Search within Maintenance Plan details](#)

Finds specific details within the table. Details can be specific or general.

1. Click on **Setup** in the blue-ribbon at the top of the screen.
2. Select **Maintenance Plans** under the Setup data menu on the left-hand side.
3. Click in the box under the Setup Users.
4. Enter key details and select the enter button.
5. A list of Maintenance Plans will be available meeting the search requirements inputted.

Setup Maintenance Plans

Plan	Name	Order Description	Operation	Employee	Employee
500000032287	JP, SRM K9000 VIBRATION TEST /MO	ER, SRM K9000 VIBRATION TEST /MO	0010	10004171	
500000032410	MV,GREASE SAMPLE K9000 SEPARATOR /WK	MV,GREASE SAMPLE K9000 SEPARATOR /WK	0010	10004621	
500000032281	MV, SRM K9000 HORIZONTAL SEPERATER /WK	MV, SRM K9000 HORIZONTAL SEPERATER /WK	0010	10004621	
500000028001	OPER CARE - RENDERING K9000 GREASE/DAILY	AC,OPER CARE - RENDERING K9000 GREASE/DA	0010	10005282	

Identify Maintenance Plans with Invalid Employee Codes

Video Link: [Identify Employee Codes](#)

The Setup Maintenance Plans table will use red to indicate invalid employee codes within the table. To update a Maintenance Plan, refer to [View or Edit Maintenance Plans](#) or [Import from Excel](#).

1. Click on **Setup** in the blue-ribbon at the top of the screen.
2. Select **Maintenance Plans** under the Setup data menu on the left-hand side.
3. Any employee code no longer active are identified in **red** under the Employee column(s).

Plan	Name	Order Description	Operation	Employee	Employee	Employee
100489	CLEAN OUT NORTH MIST ELIMINATOR /MO	CLEAN OUT NORTH MIST ELIMINATOR /MO	0010	10009759		
105350	BGONZALEZ, TRAINING /WK	BGONZALEZ, TRAINING /WK	0010	10010758		
105401	AROBLES, TRAINING /WK	AROBLES, TRAINING /WK	0010	10024383		
05402	AGARTNER, TRAINING /WK	AGARTNER, TRAINING /WK	0010	10022435		
105967	CL, INSPECT LAB EXHAUST FANS /WK	CL, INSPECT LAB EXHAUST FANS /WK	0010	10009095		
106833	MS, FILTER REPLACEMENT YARDS BUILDINGS	MS, FILTER REPLACEMENT YARDS BUILDINGS	0010	10004892		
108159	EROCHA, TRAINING WK	EROCHA, TRAINING WK	0010	1111		
109200	JR,CAPTIVE SHACKLE CHAIN PM /DAILY	JR,CAPTIVE SHACKLE CHAIN PM /DAILY	0010	10020572		
111196	INSPECT HIGH SIDE ACCUMULATOR PUMPS	INSPECT HIGH SIDE ACCUMULATOR PUMPS	0010	10018725		
111197	INSPECT INTERMEDIATE LIQUID PUMPS /WK	INSPECT INTERMEDIATE LIQUID PUMPS /WK	0010	10018725		
116307	PM ON HIDES DEPT AIR MAKE-UP/WK	PM ON HIDES DEPT AIR MAKE-UP/WK	0010	10007035		

Weekly Schedule

Work Orders Automatically Assign

Video Link: [Work Orders Auto Scheduling](#)

Selecting the Weekly Schedule tab any updates made to the Maintenance Plan tab will automatically update within the backlog section. Work orders already scheduled under the Weekly Schedule will need to manually be updated.

1. Click on **Weekly Schedules** tab in the blue ribbon.
2. Click on the **Week** that is being updated.
3. Select the applicable Team.
4. Any work orders within the Backlog meet the Maintenance Plan criteria they will automatically schedule if the employee code is available.

The screenshot shows the 'Weekly Schedules' interface. At the top, there's a navigation bar with tabs: 'Available Hours', 'Weekly Schedules' (selected), 'Daily Schedules', 'Find Task', 'Setup', and 'More'. Below this, there's a header for 'Weekly Schedule for week of May 21, 2022'. On the left, there's a calendar for May 2022 with the 21st selected. Below the calendar are filters for 'Labor Filters' (Employees: Villaiba, Jose M) and 'Task Filters' (Priority: All, Status: All, Type: All, Start Date: All, Timing: All). The main area shows a table of work orders. The first row is highlighted: WO # 407788714, WO Description VM, DUSKE BONE DRYER /WK, Op # 0010, Plan 500000031554 (circled in red), Basic Start May 21, 2022. To the right of this row is a 'Scheduled Hours' grid for the week of May 21st, showing 9 hours on Sunday. Below the work order table is a 'Backlog for Harvest' section with a table of work orders. The first row in the backlog is: WO # 408932079, WO Description TA, ICE MAKER AUGER INSPECTION/DAILY, Op # 0010, Plan 500000026929, Basic Start May 14, 2022.

Alert

Alert Feature Link: [Alert Details](#)

Video Link: [Maintenance Plan Alert](#)

The Maintenance Plan alert will generate when a work order or task has an invalid employee code attached to the Maintenance Plan. The work order will default to the first available trades person and an alert will generate. Review [View or Edit Maintenance Plans](#) to update the employee code.

Example: Maintenance Plan is assigned to employee 111; however, that employee has left the company the work order is assigned to employee 222 and an alert generated.

