FEATURES

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**.
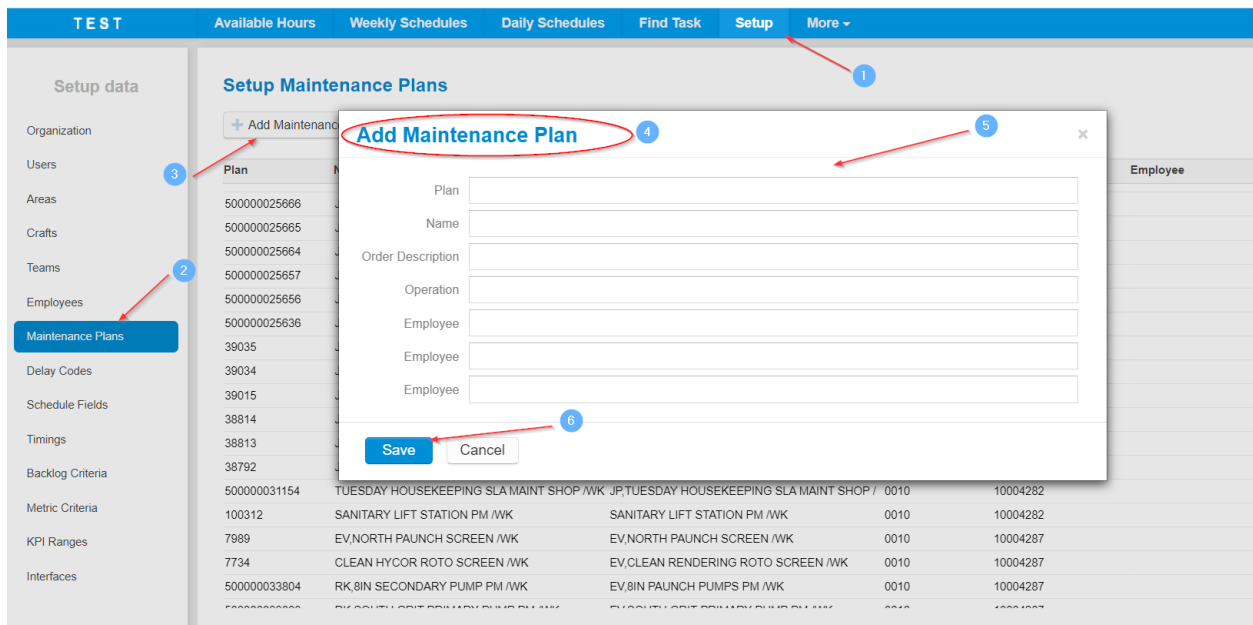
View or Edit Maintenance Plans

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**.

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** .

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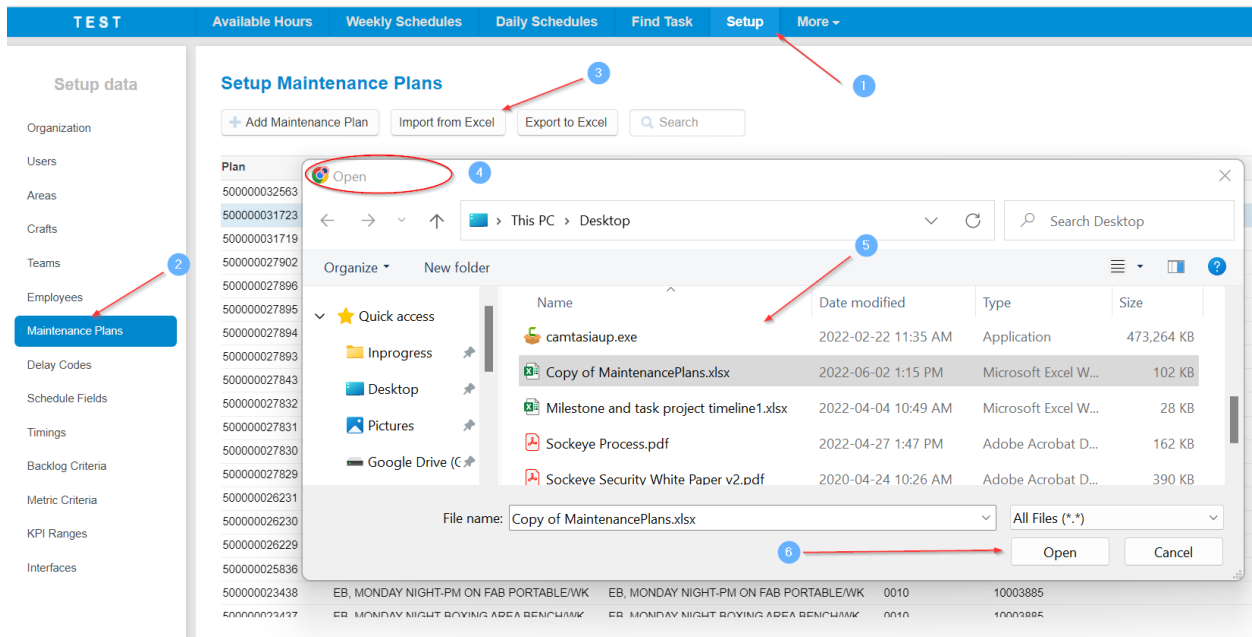
Note: *Try Exporting to Excel first to ensure the latest assignments are pulled into Sockeye. When utilizing 'Import from Excel' this will replace all current Maintenance plan details.*

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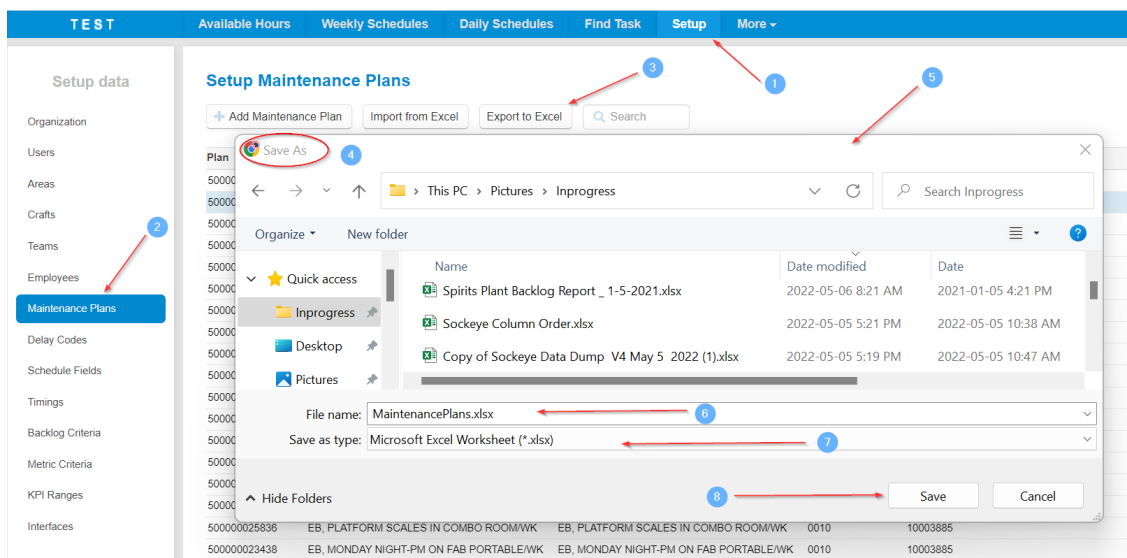
Note: All details viewed within the Maintenance Plan menu will be available within the excel export.
Example:

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 **Q Search** 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.

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).

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.

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.

MECH1 | Unscheduled Hours **-1** | Total **-1**

Scheduled Hours

[Add by #] [Remove] [Details] [More ▾] [🔍 Search]

WO Description	Plan	Est Hrs	Act Hrs	Created By	Loc Desc	Sa	Su	Mo	Tu	We	Th	Fr	Alert
EROCHA, TRAINING WK	108159	0	0	IP1020220430	TRAINING		**1**						●

● **Maintenance Plan**

Maintenance Plan 108159 has invalid Employee Code 1111