



### Summary:

Sockeye offers a Single Sign On (SSO) feature that allows user(s) to log into multiple applications and websites with one set of credentials.

This feature may have been added to your account. To access or setup Sockeye through SSO follow the internal business best practices to authenticate a user account.

### Tools / Resources:

- Internal Business Best Practices
- Adding a New Sockeye User
- 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/sso>

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### Revision Log:

Revision	Date	Reason/Update	Updated By:
Rev 1	2022-05-27	Document Creation	C. Banham

## Setup

### Add New User

Video Link: [SSO User Setup](#)

1. Select **Setup** in the blue ribbon.
2. Click on **Users** under the Setup data menu.
3. Under the Setup Users click on the **+ Add User** button.
4. An **Add User** dialogue box will appear.
5. Input the following details:

**Note: Fields with a \* indicates a mandatory field.**

- a. **\* Name:** User's full name.
- b. **\* Email:** User's email address. This will be the username at login and the token for SSO.
- c. **\* Password:** User's password. This will be used at login and is a requirement even if account is setup as SSO.
- d. **Role:** Role will determine how much information the user will be able to see and edit. If no role is chosen, the user will default to Administrator.

Role access:

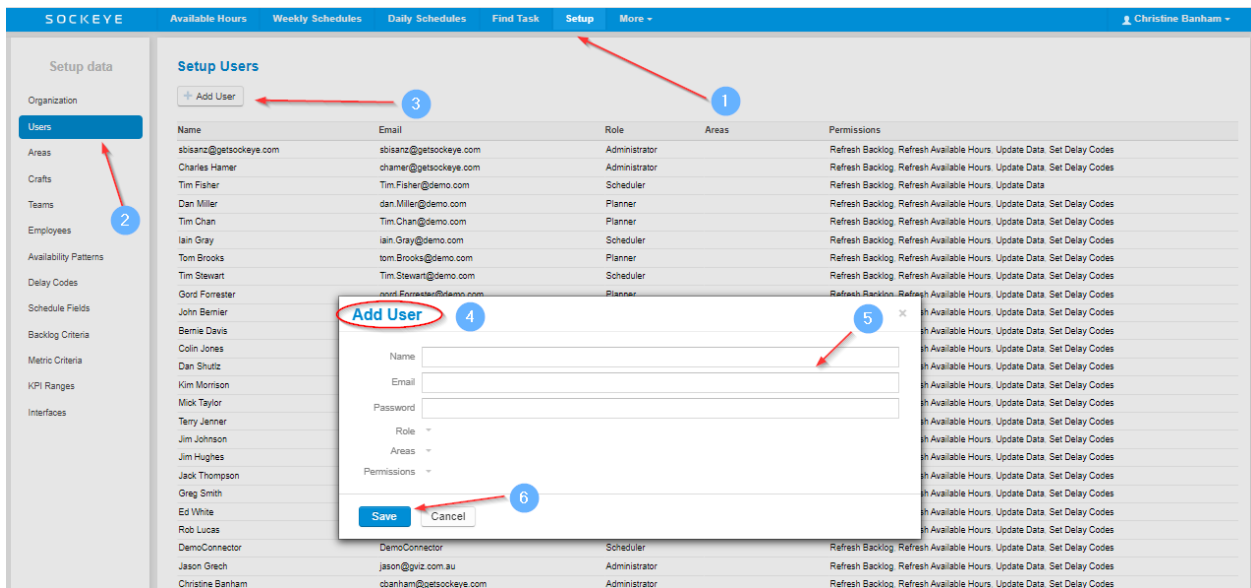
User Role Access							
	Setup	Resource Availability	Weekly Schedule	Commit Weekly Schedule	Un-commit Weekly Schedule	Daily Schedule	KPI Reporting
Administrator	★	★	★	★	★	★	★
Planner		★	★	★		★	★
Scheduler		★	★			★	★
Operations						★	★
Manager						★	★

- e. **Areas:** Select specific areas that user can default and access. Some setups do not have specific areas. If a user has access to more than one Sockeye Account this field must remain blank.
- f. **\* Permissions:** Choose one or multiple of the following permissions that are applicable.

- Read Only
- Refresh Backlog
- Refresh Available Hours
- Update Data
- Set Delay Codes

- Read Only – User can see information; however, cannot make any changes.
- Refresh Backlog – Able to refresh Weekly and Daily Schedule Backlogs
- Refresh Available Hours – Able to refresh hours under the Available Hours Refresh button
- Update Data – Make changes or additions to schedules, hours, complete work orders, etc.
- Set Delay Codes – Allows any Role to select a delay code at the Weekly Schedule level.

6. Click 



The screenshot shows the SOCKEYE application interface. The top navigation bar includes 'SOCKEYE', 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The user 'Christine Banham' is logged in. On the left, a sidebar lists 'Setup data' categories: Organization, Users, Areas, Crafts, Teams, Employees, Availability Patterns, Delay Codes, Schedule Fields, Backlog Criteria, Metric Criteria, KPI Ranges, and Interfaces. The 'Users' category is selected. The main area displays a table of users with columns for Name, Email, Role, Areas, and Permissions. A '+ Add User' button is located at the top left of the table. A modal dialog titled 'Add User' is open, containing fields for Name, Email, Password, Role, Areas, and Permissions, along with 'Save' and 'Cancel' buttons. Red arrows and numbered callouts (1-6) highlight the following elements: 1. The 'Setup' menu item in the top bar. 2. The 'Users' item in the left sidebar. 3. The '+ Add User' button in the table header. 4. The 'Add User' title of the modal dialog. 5. The input fields within the modal dialog. 6. The 'Save' button at the bottom of the modal dialog.

Name	Email	Role	Areas	Permissions
sbisanz@getsockeye.com	sbisanz@getsockeye.com	Administrator		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Charles Hamer	chamer@getsockeye.com	Administrator		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Tim Fisher	Tim.Fisher@demo.com	Scheduler		Refresh Backlog Refresh Available Hours Update Data
Dan Miller	dan.Miller@demo.com	Planner		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Tim Chan	Tim.Chan@demo.com	Planner		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Iain Gray	Iain.Gray@demo.com	Scheduler		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Tom Brooks	tom.Brooks@demo.com	Planner		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Tim Stewart	Tim.Stewart@demo.com	Scheduler		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Gord Forrester	gord.Forrester@demo.com	Planner		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
John Bernier				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Bernie Davis				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Colin Jones				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Dan Shultz				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Kim Morrison				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Mick Taylor				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Terry Jenner				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Jim Johnson				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Jim Hughes				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Jack Thompson				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Greg Smith				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Ed White				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Rob Lucas				Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
DemoConnector	DemoConnector	Scheduler		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Jason Grech	jason@gviz.com.au	Administrator		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes
Christine Banham	cbanham@getsockeye.com	Administrator		Refresh Backlog Refresh Available Hours Update Data Set Delay Codes