

**Summary:**

Sockeye's Key Performance Indicators (KPIs) provide an automated approach in tracking.

A dashboard of KPIs replicating the Society of Maintenance Reliability Professionals (SMRP) scheduling standards have been setup within Sockeye.

Sockeye's KPI target ranges are pre-set to industry standard targets. Administrator users can adjust KPI target ranges to fit their organization's standards and select which KPIs are used.

**Tools / Resources:**

- Society of Maintenance Reliability Professionals (SMRP) Standards
- Updated / Completed Resource Availability Tab
- Updated / Completed Weekly or Daily Schedule Tab
- Email Support: [support@getsockeye.com](mailto:support@getsockeye.com)
- User Guides and Video's: <https://getsockeye.com/support>

**Revision Log**

Revisions	Date	Reason/Update	Updated By:
Rev 5	November 3, 2023	Updated Standard KPI Details	C. Banham
Rev 4.1	May 12, 2023	Feature 'Close Weekly Schedule'	C. Banham
Rev 4	December 1, 2022	Added YouTube Links and Annual Review	C. Banham

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## KPIs

Sockeye's Key Performance Indicators (KPIs) provide an automated approach in tracking.

A dashboard of KPIs replicating the Society of Maintenance Reliability Professionals (SMRP) scheduling standards have been setup within Sockeye.

Sockeye's out of the box KPI metrics include:

### ***Schedule Compliance (Hours)***

**Video Link:** [Schedule Compliance by Hours](#)

**Definition:** Measure of adherence to the maintenance schedule as a percent of total time available to schedule.

**Objective:** Measures compliance to the maintenance schedule and reflects the effectiveness of the work scheduling process.

**Formula:** Schedule Compliance (%) = Weekly Schedule Work Performed (hrs.) / Total Time Available to

Schedule (hrs.) X 100

**Component Definitions:**

Weekly Schedule Work Performed – Actual hours worked on scheduled work per the maintenance schedule.

Total Time Available to Schedule – The total craft hours available to schedule.

\*\*\*Does not include vacation, illness or injury and other similar time off.

**Sample Weekly Calculation:** The available work hours are 20 craft workers X 8 hrs./day X 5 days/week = 800 hrs. During this week, 675 hrs. of work was scheduled, while 125 were not scheduled due to anticipated emergency work or other unscheduled work. The actual scheduled work performed was limited to 482 hrs. due to emergency work and work that extended beyond the scheduled time.

Schedule Compliance (%) = [Scheduled Work Performed (hrs.) / Total Time Available to Schedule (hrs.)] X 100

Schedule Compliance (%) = [482 hrs. / 800 hrs.] X 100

Schedule Compliance (%) = 0.603 X 100

Schedule Compliance (%) = 60.3%

***Schedule Compliance (Orders)***

**Video Link:** [Schedule Compliance by Work Order](#)

**Definition:** A measure of adherence to the weekly maintenance work schedule expressed as a percent of total number of scheduled work orders

**Objective:** Measures compliance to the weekly maintenance schedule and reflects the effectiveness of the work scheduling process.

**Formula:** Scheduled Compliance (%) = Number of Weekly Schedule Work Orders performed / Total Number of Weekly Schedule Work Orders X 100

**Component Definitions:**

Number of Weekly Schedule Work Orders performed – Number of work orders on the maintenance schedule that were executed when scheduled.

Total Number of Scheduled Work Orders – Total work orders on the weekly maintenance schedule.

Weekly Schedule – List of maintenance work to be done in a week. Usually finalized 3 to 4 days before the start of the work week.

**Sample Weekly Calculation:** For a given week there were 135 work orders scheduled. At the end of the week 113 scheduled work orders and 45 emergency work orders were completed

Scheduled Compliance (%) = (Number of Work Orders Performed as scheduled / Total number of scheduled work orders) X 100

Scheduled Compliance (%) = (113 / 135) X 100

Scheduled Compliance (%) = 0.837 X 100

Scheduled Compliance (%) = 83.7%

## ***Available Hours Used***

**Video Link:** [Available Hours Used](#)

**Definition:** The percentage of available maintenance hours scheduled during a week.

**Objective:** Measures the utilization of available maintenance resources.

**Formula:** Total Hours Scheduled / Total Hours Available to Schedule (hrs.) X 100

### **Component Definitions:**

Total Hours Scheduled – total maintenance hours scheduled for the week.

Total Hours Available to Schedule – total available resource hours for the week.

**Sample Weekly Calculation:** The available work hours are 20 craft workers X 8 hrs./day X 5 days/week = 800 hrs. During this week, 728 hrs. of work was scheduled.

Available Hours Used = (Total Hours Scheduled / Total Hours Available to Schedule) × 100

Available Hours Used = (728 Hrs. / 800 Hrs.) X 100

Available Hours Used = (0.91) X100

Available Hours Used = 91%

## ***Reactive Work (Hours)***

**Video Link:** [Reactive Work by Hours](#)

**Definition:** Maintenance work that breaks into the weekly schedule

**Objective:** Measures and monitors the amount of work performed outside of the weekly schedule.

**Formula:** Reactive Work (%) = [Work that breaks into the weekly schedule (hrs.) / Total Maintenance Labor Hours] X 100

### **Component Definitions:**

Total Maintenance Labor Hours – Expressed in hours and includes maintenance labor hours for normal operating times as well as outages, shutdowns, and turnarounds.

Weekly Schedule –List of maintenance work to be done in the week.

**Sample Weekly Calculation:** Total hours worked by the maintenance organization on all work types and priorities is 1000 hours. A total of 350 hours was worked on emergencies and similar work that was not on the weekly schedule.

Reactive Work (%) = [Work that breaks into the weekly schedule (hrs.) / Total Maintenance Labor Hours] X 100

Reactive Work (%) = [350 hrs. / 1000 hrs.] X 100

Reactive Work (%) = 0.35 X 100

Reactive Work (%) = 35%

## ***Preventive Maintenance (Hours)***

**Video Link:** [Preventive Maintenance](#)

**Definition:** Percentage of maintenance labor hours used to perform fixed interval maintenance tasks.

**Objective:** To quantify the labor resource impact of work done on preventive maintenance tasks.

Trending the percentage of preventive maintenance hours can provide feedback to evaluate the quantity of preventive activities when compared to the percentage of labor hour trends of all maintenance work types.

**Formula:** Preventive Maintenance Hours (%) = (Preventive Maintenance Hours / Total Maintenance Labor Hours) X 100

### **Component Definitions:**

**Preventive Maintenance Hours** – Maintenance labor hours to replace or restore an asset at a fixed interval. Scheduled restoration and replacement tasks are examples of preventive maintenance.

**Preventive Maintenance (PM)** – An equipment maintenance strategy based on replacing or restoring an asset at a fixed interval regardless of its condition. Scheduled restoration and replacement tasks are examples of preventive maintenance.

**Total Maintenance Labor Hours** – Expressed in hours and includes all maintenance labor hours for normal operating times, as well as outages, shutdowns, and turnarounds.

**Sample Weekly Calculation:** A given plant has total maintenance hours of 1800 hours of straight time and 125 hours of overtime. The scheduled operator rounds of lubrications, filter changes, burner cleanings and adjustments consumed another 150 hours. The total hours from preventive work orders totaled 452 hours.

Preventive Maintenance Hours (%) = (Preventive Maintenance Hours / Total Maintenance Labor Hours) X 100

Preventive Maintenance Hours (%) = [452 hrs. / (1800 + 125 + 150)] X 100

Preventive Maintenance Hours (%) = (452 hrs. / 2075) X 100

Preventive Maintenance Hours (%) = 0.218 X 100

Preventive Maintenance Hours (%) = 21.8%

## ***Corrective Maintenance (Hours)***

**Video Link:** [Corrective Maintenance](#)

**Definition:** Percentage of total maintenance labor hours used to restore equipment to a functional state during or after a failure.

**Objective:** Quantifies the labor resource impact of work done on corrective maintenance tasks.

Trending corrective maintenance hours can provide feedback to evaluate the effectiveness of proactive

activities.

**Formula:** Corrective maintenance Hours (%) = Corrective Maintenance Hours / Total Maintenance Labor Hours X 100

**Component Definitions:**

Corrective Maintenance Labor Hours – Labor used to restore the function of an asset after failure or when failures are imminent.

Total Maintenance Labor Hours – Total maintenance labor is expressed in hours and includes all maintenance labor hours for normal operating times, outages, shutdowns, and turnarounds. Include labor hours for capital expenditures directly related to end-of-life machinery replacement so that excessive replacement versus proper maintenance is not masked.

**Sample Weekly Calculation:** The total internal maintenance labor used was 2400 hours of straight time and 384 hours of overtime. Maintenance done by contractors consumed another 480 hours. Corrective maintenance labor was 1832 hours.

Corrective maintenance Hours (%) = (Corrective Maintenance Hours X 100) / Total Maintenance Labor Hours)

Corrective maintenance Hours (%) = [1832 / (2500 + 384 + 480)] X 100

Corrective maintenance Hours (%) = (1832 / 3264) X 100

Corrective maintenance Hours (%) = 0.561 X 100

Corrective maintenance Hours (%) = 56.1%

## **Condition-Based Maintenance (Hours)**

**Video Link:** [Condition Based Maintenance](#)

**Definition:** Maintenance hours that are used to measure, trend, and compare equipment conditions against known standards to detect, analyze and correct problems before they cause functional failures.

**Objective:** Track hours on condition based (predictive) maintenance tasks. Trending the percentage of condition-based maintenance hours can provide feedback to evaluate the effectiveness of proactive activities when compared to the percentage of hours of all maintenance work types.

**Formula:** Condition Based Maintenance Hours (%) = [Condition Based Maintenance Hours / Total Maintenance Hours] X 100

**Component Definitions:**

Condition Based Maintenance Hours - Measure the condition of equipment against known standards to assess whether it will fail during some future period.

Condition Based Maintenance (PdM) - An equipment maintenance strategy based on measuring the condition of equipment against known standards to assess whether it will fail during some future period and taking appropriate action to avoid the consequences of that failure.

Total Maintenance Hours - Expressed in hours and includes all maintenance labor hours for normal operating times, as well as outages, shutdowns, and turnarounds.

**Sample Weekly Calculation:** The total internal maintenance labor used was 2400 hours of straight

time and 384 hours of overtime. Maintenance done by contractors consumed another 480 hours. Condition-Based maintenance labor was 500 hours.

Condition-Based Maintenance Hours (%) = Condition Based Maintenance Hours / Total Maintenance Labor Hours X 100

Condition-Based Maintenance Hours (%) = [500 / (2500 + 384 + 480)] X 100

Condition-Based maintenance Hours (%) = (500 / 3264) X 100

Condition-Based maintenance Hours (%) = 0.153 X 100

Condition-Based maintenance Hours (%) = 15.3%

## ***Other Maintenance (Hours)***

**Video Link:** [Other Maintenance](#)

**Definition:** All other hours that are not captured within preventive, corrective, condition-based, proactive, continuous-improvement, standing and emergency work KPIs.

**Objective:** The objective of this metric is to quantify the maintenance labor hours used on other activities. This metric can be used to trend resource investment.

**Formula:** Other Hours (%) = (Other Hours ÷ Total Maintenance Employee Hours) x 100

### **Component Definitions:**

**Other Hours** - The total direct and indirect maintenance labor hours used on activities that are not captured within preventive, corrective, condition-based, proactive, continuous-improvement, standing work and emergency work KPIs.

**Total Maintenance Employee Hours** - Includes all internal maintenance labor hours, both straight time and overtime.

**Maintenance Employees** - All personnel, salaried and hourly, direct, and indirect, who are responsible for executing work assignments pertaining to the maintenance of physical assets and components.

**Sample Weekly Calculation:** A given plant invested the following maintenance resources to improve performance. Total Maintenance Employee Hours worked were 2,058.

Mechanics and supervisory hours used for a safety review were 59 hours.

Maintenance administrative hours used to improve time keeping accuracy was 47.

Other Hours (%) = (Other Hours ÷ Total Maintenance Employee Hours) x 100

Other Hours (%) = [(59+47) ÷ 2,058] x100

Other Hours (%) = (106 ÷ 2,058) x 100

Other Hours (%) = 0.051 x 100

Other hours (%) = 5.12%

## ***Planned Work (Hours)***

**Video Link:** [Planned Work Hours](#)



**Definition:** The amount of planned maintenance work completed versus the total maintenance labor hours, expressed as a percentage. Planning adds value for the craft worker through preparation and an understanding of work request prior to the commencement of work.

**Objective:** Measure the amount of planned work that is being executed. This is a measure of the effectiveness of the routine maintenance planning process.

**Formula:**  $\text{Planned Work (\%)} = \left[ \frac{\text{Planned Work Executed (hrs.)}}{\text{Total Maintenance Labor Hours (hrs.)}} \right] \times 100$

**Component Definitions:**

Planned Work - Jobs in which all labor, materials, tools, safety considerations and coordination with the asset owner have been estimated and communicated prior to the commencement of work.

Planned Work Executed - Work that was planned and completed per plan.

Total Maintenance Labor Hours - Includes all maintenance labor hours for normal operating times as well as outages, shutdowns, and turnarounds.

**Sample Weekly Calculation:** In a week the available maintenance labor hours were: 25 craft workers  $\times$  8 hrs./day  $\times$  5 days/wk. = 1000 hrs. There were 75 hours of overtime worked on emergency unplanned work. Operators performed 23 hours of unplanned maintenance work and 17 hours of planned preventive maintenance. Total hours = 1000 + 75 + 23 + 17 = 1115 hours

The total amount of hours expended on planned jobs by maintenance craft workers was 650 hours.

$\text{Planned Work (\%)} = \left[ \frac{\text{Planned Work Executed (hrs.)}}{\text{Total Maintenance Labor Hours (hrs.)}} \right] \times 100$

$\text{Planned Work (\%)} = \left[ \frac{(650 \text{ hrs.} + 17 \text{ hrs.})}{(1000 \text{ hrs.} + 75 \text{ hrs.} + 23 \text{ hrs.} + 17 \text{ hrs.})} \right] \times 100$

$\text{Planned Work (\%)} = \left[ \frac{667 \text{ hrs.}}{1115 \text{ hrs.}} \right] \times 100$

$\text{Planned Work (\%)} = [0.598] \times 100$

$\text{Planned Work (\%)} = 59.8\%$

## ***Unplanned Work (Hours)***

**Video Link:** [Unplanned Work Hours](#)

**Definition:** The amount of unplanned maintenance work that was completed versus the total maintenance labor hours, expressed as a percentage.

**Objective:** Measure the amount of unplanned work that is being executed. Any completed work done that was not planned is defined as unplanned work.

**Formula:**  $\text{Unplanned Work (\%)} = \left[ \frac{\text{Unplanned Work Executed (hrs.)}}{\text{Total Maintenance Labor Hours (hrs.)}} \right] \times 100$

**Component Definitions:**

Unplanned Work - Jobs in which all labor, materials, tools, safety considerations and coordination with

the asset owner have not been estimated and communicated prior to the commencement of work.

Unplanned Work Executed - Unplanned work that has been completed.

**Sample Weekly Calculation:** In a week the available maintenance labor hours were: 25 craft workers × 8 hrs./day × 5 days/wk. = 1000 hrs.

There were 75 hours of overtime worked on emergency unplanned work.

Operators performed 23 hours of unplanned maintenance work and 17 hours of planned preventive maintenance.

Total hours = 1000 + 75 + 23 + 17 = 1,115 hours

The total amount of hours expended on unplanned jobs by maintenance craft workers was 350 hours.

Unplanned Work (%) = [Unplanned Work Executed (hrs.) ÷ Total Maintenance Labor Hours (hrs.)] × 100

Unplanned Work (%) = [(350 hrs. + 75 hrs. + 23 hrs.) ÷ (1000 hrs. + 75 hrs. + 23 hrs. + 17 hrs.)] × 100

Unplanned Work (%) = [(448 hrs.) ÷ (1,115 hrs.)] × 100 = 40.2%

Unplanned Work (%) = [0.401] × 100 = 40.2%

Unplanned Work (%) = 40.2%

## ***Proactive Work (Hours)***

**Video Link:** [Proactive Work Hours](#)

**Definition:** Proactive work is maintenance work that is completed to avoid failures or to identify defects that could lead to failures. It includes routine preventive and predictive maintenance activities and work tasks identified from these defects.

**Objective:** Measure and monitor the amount of work that is being done to prevent failures or to identify defects that could lead to failures.

**Formula:** Proactive Work (%) = [Work completed on preventive, predictive, and corrective work identified from preventive and predictive work orders (hrs.) ÷ Total Maintenance Labor Hours] × 100

### **Component Definitions:**

**Preventive Maintenance** - Preventive maintenance is an equipment maintenance strategy based on replacing or restoring an asset at a fixed interval regardless of its condition.

**Predictive Maintenance** - Equipment maintenance strategy based on assessing the condition of an asset to determine the likelihood of failure and taking appropriate action to avoid failure.

**Corrective Work** - Work that is identified through preventive and/or predictive maintenance tasks and completed prior to failure to restore the function of an asset.

**Failures** - When an asset is unable to perform its required function.

**Total Maintenance Labor Hours** - Expressed in hours and includes all maintenance labor hours

for normal operating times as well as outages, shutdowns, and turnarounds.

**Sample Weekly Calculation:** The total hours worked by the maintenance organization is 1,000 hours. A total of 150 hours was worked on preventive maintenance, 100 hours was worked on predictive maintenance and 400 hours was worked on corrective maintenance from preventive and predictive maintenance work orders.

Proactive Work (%) = [Work completed on preventive maintenance work orders, predictive maintenance work orders and corrective work identified from preventive and predictive work orders (hrs.) ÷ Total Maintenance Labor Hours] × 100

Proactive Work (%) = [(150 hours + 100 hours + 400 hours) ÷ 1,000 hours] × 100

Proactive Work (%) = [650 hours ÷ 1,000 hours] × 100

Proactive Work (%) = 0.65 × 100

Proactive Work (%) = 65%

## ***Standing Work Orders (Hours)***

**Video Link:** [Standing Work Order Hours](#)

**Definition:** Ratio of hours worked on standing work orders to the total maintenance labor hours.

**Objective:** This metric measures the amount of maintenance work charged to standing work orders.

**Formula:** Standing Work Orders (%) = [Hours worked on standing work orders ÷ Total maintenance labor hours] × 100

**Component Definitions:** Standing Work Order - A work order opened for a specific period to capture labor and material costs for recurring or short duration maintenance work and for work that is not associated with a specific piece of equipment in which tracking work history or formalizing individual work orders is not cost effective or practical. Examples include shop housekeeping, meetings, training, etc. Standing work orders are also referred to as a blanket work order(s).

Total Maintenance Labor Hours - Expressed in hours and includes all maintenance labor hours for normal operating times, as well as outages, shutdowns, and turnarounds.

**Sample Weekly Calculation:** For a given week 100 hours were spent on standing work orders. The total maintenance hours worked during the week was 1,500 hours.

Standing Work Orders (%) = [Hours worked on standing work orders ÷ total maintenance labor hours] × 100  
Standing Work Orders (%) = [100 ÷ 1,500] × 100

Standing Work Orders (%) = 0.067 × 100

Standing Work Orders = 6.7%

## ***Continuous-Improvement (Hours)***

**Video Link:** [Continuous Improvement Hours](#)

**Definition:** Percentage of maintenance employee labor hours used on continuous improvement activities.

**Objective:** The objective of this metric is to quantify the maintenance labor hours used on continuous improvement activities. This metric is also used to trend the resource investment in continuous improvement activities.

**Formula:** Continuous Improvement Hours (%) = (Maintenance Labor Hours Used for Continuous Improvement ÷ Total Maintenance Employee Hours) x 100

### Component Definitions:

**Maintenance Labor Hours** - The total direct and indirect maintenance labor hours used on continuous improvement activities.

**Total Maintenance Employee Hours** - Includes all internal maintenance labor hours, both straight time and overtime.

**Maintenance Employees** - All personnel, salaried and hourly, direct, and indirect, who are responsible for executing work assignments pertaining to the maintenance of physical assets and components.

**Sample Weekly Calculation:** A given plant invested the following maintenance resources to improve performance. Total Maintenance Employee Hours worked were 8,083.

Mechanics and supervisor hours used for a safety fish bone analysis was 12.

Electrician hours used on a task force to improve the quality on a production line was 28.  
Reliability engineer hours used to extend the Meant Time Between Failure (MTBF) on a critical piece of equipment was 24.

Maintenance supervisor hours used on a production debottlenecking project was 6.  
Maintenance trainer hours used to instruct on an improved alignment method was 9.  
Maintenance planner hours used on a Lean Six Sigma (LSS) project to improve planning accuracy was 11. Maintenance administrative hours used to improve time keeping accuracy was 4.

Maintenance manager hours used to analyze work sampling results (to eliminate barriers) was 3.

Continuous Improvement Hours (%) = (Maintenance Labor Hours Used for Continuous Improvement ÷ Total Maintenance Employee Hours) x 100

Continuous Improvement Hours (%) = [(12 + 28 + 24 + 6 + 9 + 11 + 4 + 3) ÷ 8,083] x 100

Continuous improvement hours (%) = (97 ÷ 8,083) x 100

Continuous improvement hours (%) = 0.012 x 100 = 1.2%

Continuous improvement hours (%) = 1.2%

## Emergency Work (Hours)

**Video Link:** [Emergency Work](#)

**Definition:** Percentage of maintenance employee labor hours used on emergency work.

**Objective:** The objective of this metric is to quantify the maintenance labor hours used on emergency

activities.

**Formula:** Emergency Work Hours (%) = (Emergency Work Hours ÷ Total Maintenance Employee Hours) x 100

### Component Definitions:

Emergency Work Hours - The total direct and indirect maintenance labor hours used on break-in work.

Total Maintenance Employee Hours - Includes all internal maintenance labor hours, both straight time and overtime.

Maintenance Employees - All personnel, salaried and hourly, direct, and indirect, who are responsible for executing work assignments pertaining to the maintenance of physical assets and components.

**Sample Weekly Calculation:** A given maintenance team pulled maintenance resources throughout the week as 6 additional work orders were added as priority one work orders to get equipment back up and running. Total Maintenance Employee Hours worked were 1,285.

Mechanics hours of 6 hours for engine noise

3 hours of electrical no power to dry.

16 hours with welding trade on a cracked caliper.

Mechanical call to replace one tooth at 4 hours.

Mechanics to replace drill bit at 6 hours.

Electrical panel no functioning on loader 2 hours running repair.

Emergency Work Hours (%) = (Maintenance Labor Hours Used for Emergency Work ÷ Total Maintenance Employee Hours) x 100

Emergency Work Hours (%) = [(6+ 3 + 16 + 4 + 6 + 2) ÷ 1,285] ×100

Emergency Work Hours (%) = (37 ÷ 8,083) × 100

Emergency Work Hours (%) = 0.028 × 100

Emergency Work Hours (%) = 2.8%

## Schedule Committed (Hours)

**Video Link:** [Schedule Committed](#)

**Definition:** Percentage of work committed to the schedule.

**Objective:** The objective of this metric is to quantify the number of hours that are scheduled versus available resources.

**Formula:** Schedule Committed Hours (%) = (Number of hours committed to the weekly schedule ÷ Total available hours) x 100

### Component Definitions:

Schedule Committed – The total hours of all tasks identified with a ‘W’ in the Schedule Compliance column. By committing to the weekly schedule Sockeye will take a snapshot of the current approved schedule. As the week progresses and changes take place the teams KPI’s will update.

Total Available - Total available resource hours for the week

Maintenance Employees - All personnel, salaried and hourly, direct, and indirect, who are responsible for executing work assignments pertaining to the maintenance of physical assets and components.

**Sample Weekly Calculation:** At a scheduling meeting a given plant committed to 2,666 total resource hours and a Weekly Schedule of 2,659 hours scheduled.

Scheduled Committed Hours (%) = (Number of hours committed to the weekly schedule ÷ Total Available Hours) x 100

Schedule Committed Hours (%) = [2659 ÷ 2,666] × 100




Schedule Committed Hours (%) = 0.09973 × 100

Schedule Committed Hours (%) = 99.7%

## Schedule Compliance

Sockeye offers SMRP (Society for Maintenance & Reliability Professionals) scheduling metrics. These are triggered when an individual selects the ‘commit weekly schedule’.




The following define the Sched Comp field available within the Weekly Schedule Tab:

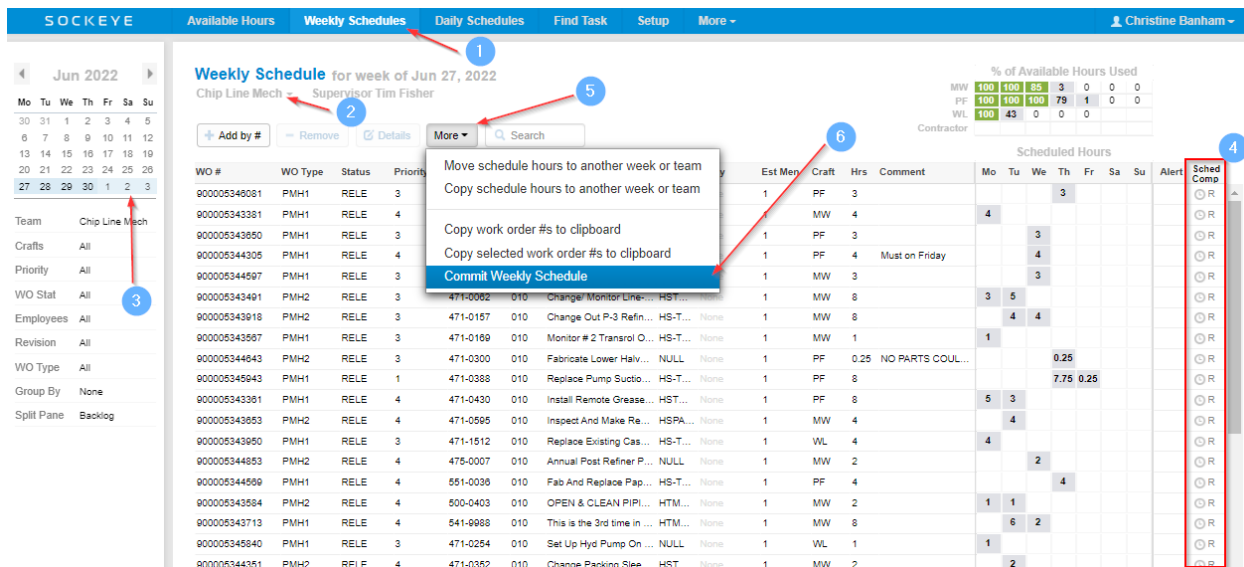
-  R = Ready to Schedule
-  W = Weekly Committed Schedule
-  R = Reactive Work

## Commit Weekly Schedule

**Video Link:** [Commit Schedule](#)

By committing the weekly schedule Sockeye will take a snapshot of the current approved schedule. As the week progresses and changes take place the teams KPI’s will update.

1. Click on the  tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. The Sched Comp column will show an  R = Ready to Schedule.
5. **Click** on the  at the top of the weekly schedule.
6. Select **Commit Weekly Schedule**.



7. Schedule Complete will turn to a **W = Weekly Committed Schedule**.

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
900005346480	PMH1	RELE	3	310-0306	010	Monitor Elec Motor No...	HS-T... None	1	WL	4					4						W

\*\*\*\*NOTE: After committing the weekly schedule, it cannot be undone. Only an administrator has access to reverse those changes to the weekly schedule.

### Uncommit Weekly Schedule

Video Link: [Uncommit Schedule](#)

By uncommitting the weekly schedule Sockeye stops tracking any changes to the schedule and all work currently scheduled is then identified as 'R = Ready to Schedule' within the Sched Comp column. Sockeye users with an administrative role can uncommit a scheduled.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **Weekly Schedule for week of**
3. Click on the calendar **Week** for the specified period.
4. The Sched Comp column currently shows **W** = Weekly Committed Schedule.
5. **Click** on the **More** at the top of the weekly schedule.
6. Select **Uncommit Weekly Schedule**

**SOCKEYE** Available Hours Weekly Schedules Daily Schedules Find Task Setup More - Christine Banham -

Weekly Schedule for week of Jun 20, 2022  
Chip Line Mech - Supervisor Tim Fisher

Mo Tu We Th Fr Sa Su  
30 31 1 2 3 4 5  
6 7 8 9 10 11 12  
13 14 15 16 17 18 19  
20 21 22 23 24 25 26  
27 28 29 30 1 2 3

Team Chip Line Mech  
Crafts All  
Priority All  
W/O Stat All  
Employees All  
Revision All  
W/O Type All  
Group By None  
Split Pane Backlog

More -  
Move schedule hours to another week or team  
Copy schedule hours to another week or team  
Copy work order #s to clipboard  
Copy selected work order #s to clipboard  
Uncommit Weekly Schedule

WO #	WO Type	Status	Priority	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp
900005346460	PMH1	RELE	3	1	WL	4					4					W
900005614243	PMH1	RELE	3	1	MW	4		4								W
900005821314	PMH1	RELE	4	1	MW	1						1				W
900005902416	PMH1	RELE	4	1	MW	4							3.5			W
900005947557	PMH2	RELE	2	1	MW	1					1		1			W
900005971264	PMH1	RELE	3	465	010	Repairs/Fixes To ...	NULL				3					W
900005975570	PMH1	RELE	3	465-0501	010	Install Spectacle ...	NULL				4					W
900005346081	PMH1	RELE	3	465-0701	010	Connect And Disc...	NULL				3					W
900005343381	PMH1	RELE	4	471	010	Tha Required For ...	NULL		4							W
900005343650	PMH1	RELE	3	471	010	Refiner Lube Pan...	HS-T...			2	1					W
900005344305	PMH1	RELE	4	471	010	Replace Existing ...	HST...					4				W
900005344597	PMH1	RELE	3	471	010	Rebuild Tmp Foot...	NULL		3							W
900005557661	PMH1	RELE	3	471	010	Safety Mirror Falie...	NULL		2							W
900005712127	PMH1	RELE	2	471	010	Create Plate To Is...	NULL		2							W
900005737834	PMH1	RELE	4	471	010	471 Tmp Re & Re...	HTM...				4					W
900005343491	PMH2	RELE	3	471-0062	010	Change/ Monitor ...	HST...		1	7						W
B009067	BRK	RELE	1	310	010	Replace failed B1...				1						R
900005346446	PMH1	RELE	4	471-0071	010	Monitor, Reducer, ...	HS-T...					0.25				W

% of Available Hours Used  
MW 100 100 87 104 105 100  
PF 117 117 100 100  
WL 100 100  
Contractor 100 100

7. Work orders will change to an R = Ready to Schedule.

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
B009067	BRK	RELE	1	310	010	Replace failed B1...	None	1	ME	2	Must be done ...			2							R



## Manually Complete a Work Order

Video Link: [Manually Complete Work](#)

By indicating that a work order has been completed can provide a visual assistance to where you currently are within the schedule along with generating the Weekly KPI's accordingly. Manual completions can override an automatic import.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the **▼** under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Refer to the **Sched Comp** column located on the far right of the Weekly Schedule.
5. Click on the **🕒** button beside the **W** (Weekly Committed Schedule) or **R** (Reactive Work) of the work order that has been completed.
6. A **✓** will appear indicating completion.



Sockeye only updates KPIs for that specific weekly extension. Any work orders completed after the specified day will not update the schedule compliance column or KPI within Sockeye.

## Complete a Work Order Through CMMS


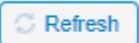


**Video Link:** [Automatically Complete Work](#)

Sockeye automatically checks the schedule Compliance Box by refreshing the backlog and any work orders that has an updated status for that specific scheduling week. Refer to the Feature [Automate Complete Work Orders Tasks](#) for details.

## Add Schedule Breakers

**Video Link:** [Add Schedule Breakers](#)

For many different reasons break-ins happen; these can be added to the schedule and be tracked based on the R = Reactive Work identified in the Sched Comp column.

1. Click on the  tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4.  Backlog if it has not yet been completed.
5. Add the **Break-in work order** to the schedule
6. Any work that is added to the schedule after being committed will be identified as an  **R =** **Reactive Work** in the  column.

**SOCKEYE** Available Hours **Weekly Schedules** Daily Schedules Find Task Setup More - Christine Banham

---

Jun 2022

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

**Weekly Schedule** for week of Jun 20, 2022  
Chip Line Mech Supervisor Tim Fisher

**1** **2** **3**

**% of Available Hours Used**

MW	100	100	87	53	121	100
PF			117	117	100	100
WL				100	100	
Contractor			108	100		

**Scheduled Hours**

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
900005344643	PMH2	RELE	3	471-0300	010	Fabricate Lower H...	NULL	None	1	PF	0.25	NO PARTS CO...				0.25					●	⊙ W
900005345943	PMH1	RELE	1	471-0388	010	Replace Pump Su...	HS-T...	None	1	PF	8							6.75			●	⊙ W
900005343361	PMH1	RELE	4	471-0430	010	Install Remote Gr...	HST...	None	1	PF	8			2	2	2	2				●	⊙ W
900005867922	PMH1	RELE	3	471-0467	010	Increase Tubing D...	HS-T...	None	1	PF	8					3.75					●	⊙ W
900005349336	PMH1	RELE	4	471-0468	010	Replace Rubber E...	HTM...	None	1	WL	4			4							●	⊙ W
900005346335	PMH1	RELE	4	471-0461	010	Replace Rubber E...	HTM...	None	1	WL	4			1	3						●	⊙ W
900005821261	PMH1	RELE	4	471-0460	010	Install A 3/4" Tee ...	HTM...	None	1	PF	4							4			●	⊙ W
900005817468	PMH1	RELE	4	471-0577	010	Install A 3/4" Drain...	HST...	None	1	PF	4	End of shift only					2				●	⊙ W
900005349553	PMH2	RELE	4	471-0595	010	Inspect And Make...	HSPA...	None	1	MW	4						4				●	⊙ W
900005343650	PMH1	RELE	3	471-1512	010	Replace Existing ...	HS-T...	None	1	WL	4			4							●	⊙ W
900005614183	PMH1	RELE	4	471-8705	010	Rack Room Integr...	NULL	None	1	MW	2						2				●	⊙ W
900005629006	PMH1	RELE	4	471-8692	010	Clear White Water...	HST...	None	1	PF	4						4				●	⊙ W
900005681009	PMH1	RELE	3	475	010	Sewer Grating Br...	NULL	None	1	WL	2			2							●	⊙ W
900005344653	PMH2	RELE	4	475-0007	010	Annual Post Refin...	NULL	None	1	MW	2						2				●	⊙ W
900005346477	PMH2	RELE	4	475-0007	010	Install Spare Refin...	HS-T...	None	1	MW	4						4				●	⊙ W
900005597195	PMH2	RELE	4	475-0007	010	Inspect Refiner Pl...	NULL	None	1	MW	4						2.5	1.5			●	⊙ W
900005597184	PMH2	RELE	4	475-0011	010	Inspect Refiner Pl...	NULL	None	1	MW	3						1		2		●	⊙ W
900005344569	PMH1	RELE	4	561-0036	010	Fab And Replace...	HST...	None	1	PF	4						4				●	⊙ W
900004911534	PMH1	RELE	1	471-0416	010	Change #34 gear...	NULL	None	1	MW	4	Carry over to n...						4			●	⊙ W

**5** **6** **OR**

Team Chip Line Mech

Crafts All

Priority All

WO Stat All

Employees All

Revision All

WO Type All

Group By None

Split Pane Backlog

---

Backlog for Chip Line Mech

**4**

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
900004911534	PMH1	RELE	1	471-0416	020	Change #34 popit ...	NULL	None	1	PF	2											—
900004911534	PMH1	RELE	1	471-0416	030	Reweld safety shield	NULL	None	1	WL	1	Must be done ...										—
900005343520	PMH1	RELE	3	471-0468	010	Bleach Recirc Val...	HST...	None	1	PF	2											—
900005343522	PMH1	RELE	3	471-0468	010	Caustic Feed Line...	HST...	None	1	PF	2	no parts pleas...										—
900005343528	PMH2	RELE	3	471-0366	010	Replace Sleeve O...	HTM...	None	1	MW	1	No parts pleas...										—
900005343564	PMH2	RELE	4	500-0403	010	OPEN & CLEAN ...	HTM...	None	1	MW	2											—

**Refresh**

Refresh

## Identify Removed Work Order(s)

**Video Link:** [Remove Scheduled Work](#)

Schedule breakers happen for many different reasons. When removing work from a committed schedule the work order or task can still be referenced under the schedule compliance column by the 'W = Weekly Committed Schedule' within the backlog section of the screen.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule for week of**.
3. Click on the calendar **Week** for the specified period.
4. Select the **work order(s)** to be removed.
5. Click on **Remove** within the Weekly Schedule portion of the screen.
6. Work orders will be removed from the schedule and visible within the Backlog section.
7. Those work orders moved to the backlog section can be identified with a **W = Weekly**

Committed Schedule under the **Sched Comp** column.

The screenshot displays the 'Weekly Schedules' 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 is titled 'Weekly Schedule for week of Jun 20, 2022' for 'Chip Line Mech'. A calendar on the left shows the selected week. The work order list includes columns for WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi... Delay, Est Men, Craft, Hrs, Comment, and a grid for Scheduled Hours (Mo-Su). A 'Remove' button is highlighted with a red circle and arrow. Below the main table is the 'Backlog for Chip Line Mech' section, which shows work orders that have been removed. A 'W' in the 'Sched Comp' column is highlighted with a red circle and arrow.

## Review Metrics During the Week

**Video Link:** [Review Current Metrics](#)

Allows a visual throughout the week to identify where the team is at for weekly KPI's.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Click on **Split Pane** in the filter pane.
  - a. A drop-down box will appear with a list of fields.
5. Select **Weekly KPIs**.
  - a. The drop-down box will disappear.
6. The bottom portion will update with the Weekly KPIs for that specific team.
7. Click on any **KPI** visible.
  - a. The selected KPI will appear with a circle and bar graph showing the status for the week.
8. **Hover** the mouse over the formula of the KPI.
9. A **line** will become visible **click** on it.
10. All work orders that are identified to the KPI will highlight in blue within the Weekly Schedule section. **\*\*\*Note:** *KPI's that do not reflect a work order such as 'Available Hours' will not have a link available.*

**SOCKEYE** Available Hours Weekly Schedules Daily Schedules Find Task Setup More - Christine Banham

---

Jun 2022

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Team: Chip Line Mech

Crafts: All

Priority: All

WO Stat: All

Employees: All

Revision: All

WO Type: All

By: None

Split Pane: Weekly KPIs

### Weekly Schedule for week of Jun 20, 2022

Chip Line Mech - Supervisor Tim Fisher

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp
900005340460	PMH1	RELE	3	310-0306	010	Monitor Elec Moto...	HS-T...	None	1	WL	4				4					W
900005914243	PMH1	RELE	3	310-0306	010	310-0306 Chip Be...	NULL	None	1	MW	4	4								W
900005821314	PMH1	RELE	4	310-0307	010	Clean Build Up Of...	HST...	None	1	MW	1					1				W
90000007	BRK	RELE	1	310	010	Replace failed B1...	None	1	ME	2	Must be done ...			2						R
900005902416	PMH1	RELE	4	471-0356...	010	Replace Rotating ...	NULL	None	1	MW	4						3.5			W
900005947557	PMH2	RELE	2	623-3832	010	Replace missing ...	HTM...	None	1	MW	1				1		1			W
900005971264	PMH1	RELE	3	465	010	Repairs/Fixes To ...	NULL	None	1	PF	3			3						W
900005975570	PMH1	RELE	3	465-0501	010	Install Spectacle ...	NULL	None	1	PF	4			4						W
900005340081	PMH1	RELE	3	465-0701	010	Connect And Disc...	NULL	None	1	PF	3			3						W
90000543381	PMH1	RELE	4	471	010	Tha Required For ...	NULL	None	1	MW	4	4								W
900005343650	PMH1	RELE	3	471	010	Refiner Lube Pan...	HS-T...	None	1	PF	3			2	1					W
900005344305	PMH1	RELE	4	471	010	Replace Existing ...	HST...	None	1	PF	4					4				W
900005344597	PMH1	RELE	3	471	010	Rebuild Tmp Foot...	NULL	None	1	MW	3		3							W
900005657661	PMH1	RELE	3	471	010	Safety Mirror Fall...	NULL	None	1	MW	2		2							W
900005712127	PMH1	RELE	2	471	010	Create Plate To Is...	NULL	None	1	MW	2		2							W
900005737834	PMH1	RELE	4	471	010	471 Tmp Re & Re...	HTM...	None	1	PF	4				4					W
900005343491	PMH2	RELE	3	471-0062	010	Change/Monitor ...	HST...	None	1	MW	6		1	7						W
900005340446	PMH1	RELE	4	471-0071	010	Monitor, Reducer...	HS-T...	None	1	WL	0.25					0.25				W
900005737841	PMH1	RELE	4	471-0077	010	Clear Refiner Dilut...	HTM...	None	1	PF	0.25						0.25			W
900005340413	PMH1	RELE	4	471-0079	010	Modify P-1 Refine...	HS-T...	None	1	MW	2			2						W

**% of Available Hours Used**

MW	100	100	87%	100	100	100
PF			117	117	100	100
WL				100	100	
Contractor			108	100		

**Scheduled Hours**

---

#### Weekly KPIs for Chip Line Mech

- 6% Schedule Compliance (...)
- 6% Schedule Compliance (...)
- 100% Available Hours Used
- 1% Reactive Work (Hours)
- 25% Preventive Maintenance
- 49% Corrective Maintenance
- 49% Condition-Based Mainte...
- 100% Planned Work
- 0% Unplanned Work
- 27% Proactive Work
- 2% Standing Work Orders

#### Schedule Compliance (Hours)

12.5 hrs for complete tasks from committed schedule

+214.0 hrs available to schedule

#### Schedule Compliance (Hours) by Day

■ hrs for complete tasks from committed schedule

■ hrs available to schedule

## Group By Schedule Compliance



**Video Link:** [Group Sched Comp](#)

Quickly highlights the work that was identified as reactive work throughout the week.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Click on **Group By** **None** in the filter pane.
  - a. A drop-down box will appear with a list of fields.
5. Select **Sched. Comp.**
  - a. The drop-down box will disappear.
6. All work orders will be grouped by Weekly committed work on schedule and Reactive work on the schedule.

**Weekly Schedule** for week of Jun 6, 2022  
 Chip Line Mech Supervisor Tim Fisher

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi... Delay	Est Men	Craft	Hrs	Comment	Mo	Tu	We	Th	Fr	Sa	Su	Alert	Sched Comp	
<b>Weekly committed work on schedule</b>																					
900004911534	PMH1	RELE	1	471-0416	010	Change #34 gear...	NULL	None	1	MW	4	4									W
900004911534	PMH1	RELE	1	471-0416	020	Change #34 popit ...	NULL	None	1	PF	2	2									W
900005343361	PMH1	RELE	4	471-0430	010	Install Remote Gr...	HST...	None	1	PF	8	8									W
900005343381	PMH1	RELE	4	471	010	The Required For ...	NULL	None	1	MW	4	4									W
900005343491	PMH2	RELE	3	471-0082	010	Change/ Monitor ...	HST...	None	1	MW	8	8									W
900005343520	PMH1	RELE	3	471-0488	010	Bleach Recirc Val...	HST...	None	1	PF	2	2									W
900005343522	PMH1	RELE	3	471-0488	010	Caustic Feed Line...	HST...	None	1	PF	2	2									W
900005343528	PMH2	RELE	3	471-0369	010	Replace Sleeve O...	HTM...	None	1	MW	1	1									W
900005343567	PMH1	RELE	3	471-0169	010	Monitor # 2 Transr...	HS-T...	None	1	MW	1	1									W
900005343564	PMH2	RELE	4	500-0403	010	OPEN & CLEAN ...	HTM...	None	1	MW	2	2									W
900005343950	PMH1	RELE	3	471	010	Refiner Lube Pan...	HS-T...	None	1	PF	3	3									W
900005343952	PMH2	RELE	3	471-0590	010	Inspect And Make ...	HSPA...	None	1	MW	4	4									W
<b>Reactive work on schedule</b>																					
900005343953	PMH2	RELE	4	471-0595	010	Inspect And Make ...	HSPA...	None	1	MW	4	4									R
900005343713	PMH1	RELE	4	541-9988	010	This is the 3rd tim...	HTM...	None	1	MW	8	7	1								R
900005343918	PMH2	RELE	3	471-0157	010	Change Out P-3 ...	HS-T...	None	1	MW	8	3	5								R
900005343960	PMH1	RELE	3	471-1512	010	Replace Existing ...	HS-T...	None	1	WL	4	4									R
<b>Backlog for Chip Line Mech</b>																					
<b>Unscheduled work</b>																					
900005344643	PMH2	RELE	3	471-0300	010	Fabricate Lower H...	NULL	None	1	PF	0.25										
900005344853	PMH2	RELE	4	475-0007	010	Annual Post Refin...	NULL	None	1	MW	2										

## Setup

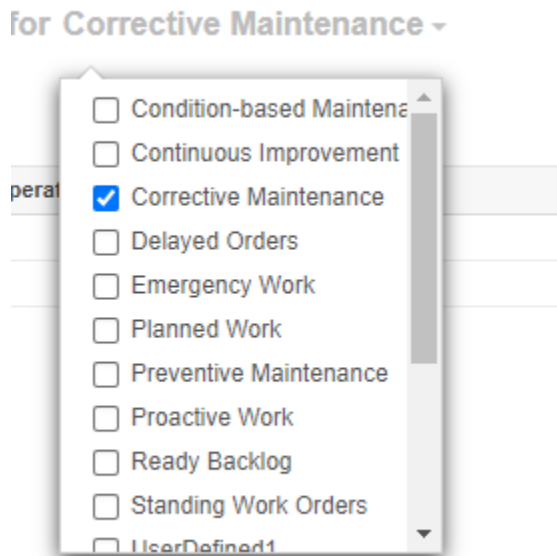
### Metric Criteria

#### Add New Criteria

Identifies specific fields to categorize work orders for the purpose of identifying and calculating KPI's.

**Video Link:** [Adding Criteria](#)

1. Click on the **Setup** tab in the blue ribbon at the top of the screen.
2. Select **Metric Criteria** under Setup Data on the left-hand side of the screen.
3. **Setup Metric Criteria for** will populate in the center of the screen.
4. Click on the **▼** at the end of the **Setup Metric Criteria for** and select the metric.



5. Click on **+ Add Criteria** button.
6. Add Metric Criteria dialog will appear.
7. Populate Metric Criteria
  - a. **Metric:** KPI defining criteria for.
  - b. **Work Order Field:** The work order field that holds specific values that can be used to identify which tasks are the selected KPI tasks.
  - c. **Operator:** The qualifying condition for the specified values.



Operator	Definition	Example for Status Field	Returns all record where the status field is...
Is	Pulls data that equals or matches data indicated in the value(s) field.	'Ready to Schedule'	set to Ready to Schedule.
Is not	Filters out value(s) that do not match data provided, null values or blank fields.	'Waiting on Materials''	set to a status other than waiting on materials
Starts with	Returns records for all value(s) that start with indicated for that field.	'RSCH'	starting with RSCH, such as RSCH APR
Is less than	Searches for value(s) of less than the specified value.	4	less than 4
Ends with	Returns records for all value(s) that ends with indicated for that field	'APR'	Ends with APR, such as RSCH APR, CREAT APR
Contains	Contains the specified string	Schedule	schedule
Does not contain	Removes values that do not contain the data provided.	Schedule	not included

- d. **Values:** The values associated with the work order field that will identify the selected KPI.

8. Click 

Work Order Field	Operator	Values
WO Type	is	PMH1
Activity Type	is	150,175

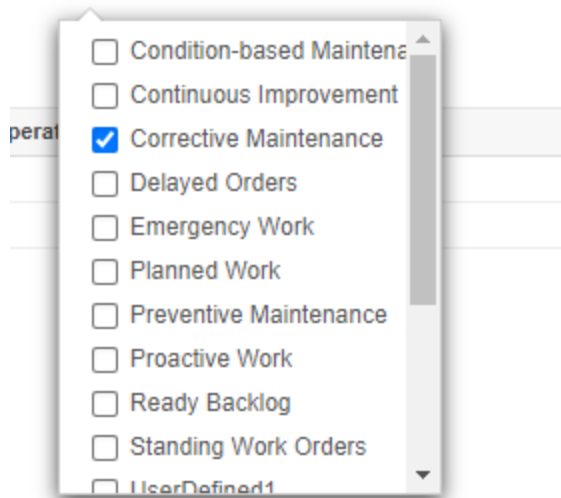
## Edit Criteria

All fields in the Edit Metric Criteria dialog are editable. Make the desired changes and click 'Save.'

**Video Link:** [Editing Criteria](#)

1. Click on the **Setup** tab in the blue ribbon at the top of the screen.
2. Select **Metric Criteria** under Setup Data on the left-hand side of the screen.
3. **Setup Metric Criteria for** will populate in the center of the screen.
4. Click on the **▼** at the end of the **Setup Metric Criteria for** and select the metric.

for Corrective Maintenance ▾



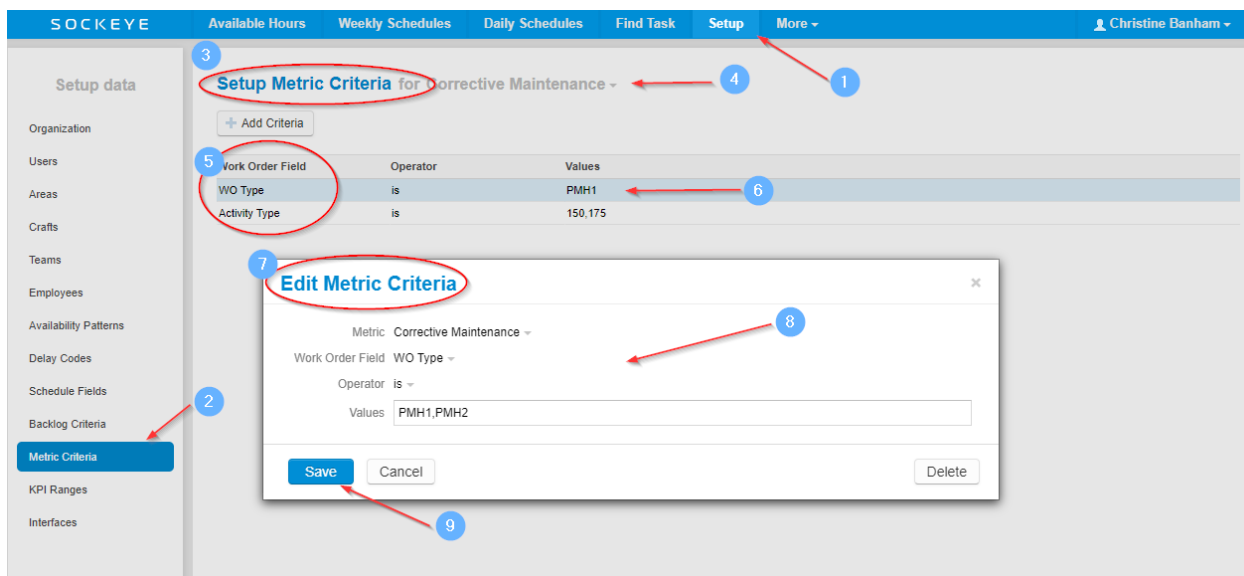
5. A list of criteria will appear.
6. Click on the criteria details to be updated.
7. An Edit Metric Criteria dialog will appear.
8. Edit the Metric Criteria:
  - a. **Metric:** KPI defining criteria for.
  - b. **Work Order Field:** The work order field that holds specific values that can be used to identify which tasks are the selected KPI tasks.
  - c. **Operator:** The qualifying condition for the specified values.

Operator	Definition	Example for Status Field	Returns all record where the status field is...
Is	Pulls data that equals or matches data indicated in the value(s) field.	'Ready to Schedule'	set to Ready to Schedule.
Is not	Filters out value(s) that do not match data provided, null values or blank fields.	'Waiting on Materials''	set to a status other than waiting on materials
Starts with	Returns records for all value(s) that start with indicated for that field.	'RSCH'	starting with RSCH, such as RSCH APR
Is less than	Searches for value(s) of less than the	4	less than 4

Ends with	specified value. Returns records for all value(s) that ends with indicated for that field	'APR'	Ends with APR, such as RSCH APR, CREAT APR
Contains	Contains the specified string	Schedule	schedule
Does not contain	Removes values that do not contain the data provided.	Schedule	not included

d. **Values:** The values associated with the work order field that will identify the selected KPI.



9. Click 



### Delete Criteria

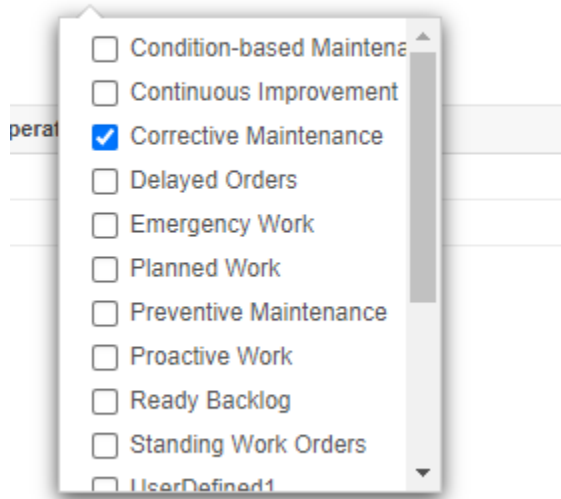
Allows specific criteria to be removed from the KPI calculation.

**Video Link:** [Delete Criteria](#)

1. Click on the  tab in the blue ribbon at the top of the screen.
2. Select  under Setup Data on the left-hand side of the screen.

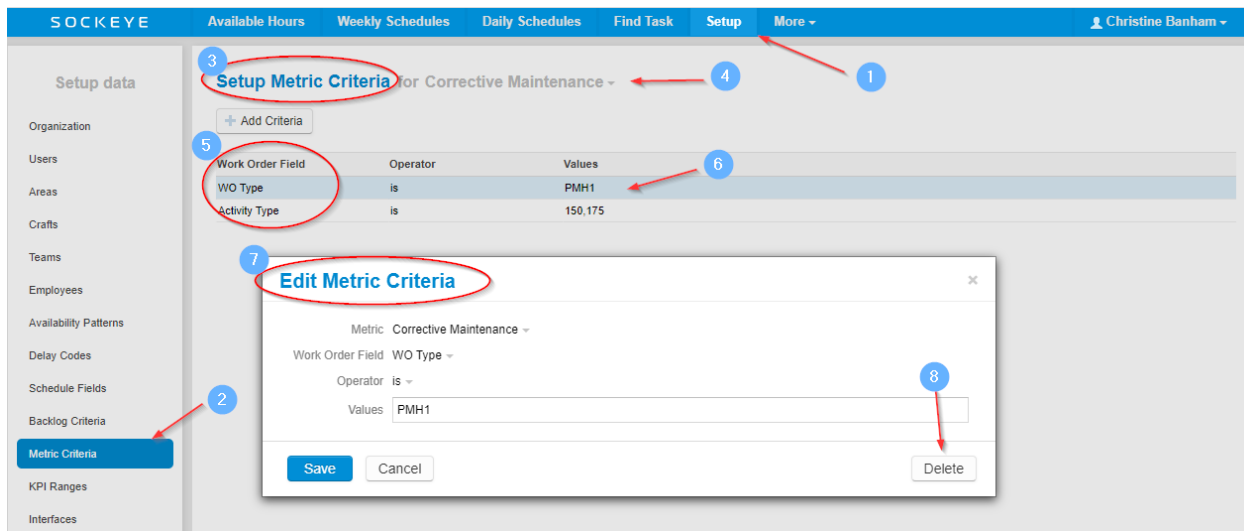
3. **Setup Metric Criteria** for will populate in the center of the screen.
4. Click on the **Setup Metric Criteria** for and select the metric.

for Corrective Maintenance



5. A list of criteria will appear.
6. Click on the criteria details to be updated.
7. An Edit Metric Criteria dialog will appear.

8. Click **Delete**







## KPI Ranges

### Edit KPI Ranges

KPI ranges will be setup in Sockeye with industry standard target ranges.

**Video Link:** [Editing Ranges](#)

1. Click on the  tab in the blue ribbon at the top of the screen.
2. Select  under Setup Data on the left-hand side of the screen.
3.  will populate the main part of the screen.
4. Click on the KPI to be updated.
5. An **Edit Range** dialog box will appear.
6. Update applicable fields:
  - a. **KPI:** Name of the tracked KPI.
  - b. **Active:** Yes or No determines whether the selected KPI will show on the KPI Summary tab, the Weekly KPIs pane and the print/export report.
  - c. **Video Link:** [Activate or Inactivate a KPI](#)
  - d. **Type:** Defines which ends of the range is to be shown with green (good), grey (neutral), red (bad), or no indicator.
  - e. **Low Threshold:** Set the low percentage threshold.
  - f. **High Threshold:** Set the high percentage threshold.
  - g. **Percentage Ranges:** Displays, in graphic form, the breakdown of low and high threshold and the neutral area in between. When scheduled performance reaches or exceeds the specified thresholds, the corresponding color will be displayed.
  - h. **Description:** Allows details or point of reference if your business calls this KPI something different.
7. Click .

KPI	Active	Type	Percentage Ranges	Description
Schedule Compliance (Hours)	Yes	High values are better	0 70 90	
Schedule Compliance (Orders)	Yes	High values are better	0 70 90	
Available Hours Used	Yes	High values are better	0 60 80	
Reactive Work (Hours)	Yes	Low values are better	0 10 30	
Reactive Work (Orders)	Yes	Low values are better	0 10 30	
Preventive Maintenance	Yes	High values are better	0 70 90	

## Activate or Inactivate KPI

Determines if the KPI will show on the KPI Summary tab, Weekly KPI pane and or the print/export report.

**Video Link:** [Activate or Inactivate a KPI](#)

1. Click on the **Setup** tab in the blue ribbon at the top of the screen.
2. Select **KPI Ranges** under Setup Data on the left-hand side of the screen.
3. **Setup KPI Ranges** will populate the main part of the screen.
4. Click on the KPI to be updated.
5. Edit Range dialog box will appear.
6. Update **Active** field:
  - a. **Yes** – Specific KPI is active and will be available to view.
  - b. **No** - Removes the KPI from all reporting within Sockeye.
7. Click **Save**.

**SOCKEYE** Available Hours Weekly Schedules Daily Schedules Find Task Setup More - Christine Banham -

Setup data

Organization

Users

Areas

Crafts

Teams

Employees

Availability Patterns

Delay Codes

Schedule Fields

Backlog Criteria

Metric Criteria

**KPI Ranges**

Interfaces

KPI	Active	Type	Percentage Ranges	Description
Schedule Compliance (Hours)	Yes	High values are better	0 70 90	
Schedule Compliance (Orders)	Yes	High values are better	0 70 90	
Available Hours Used	Yes	High values are better	0 60 80	
Reactive Work (Hours)	Yes	Low values are better	0 10 30	
Reactive Work (Orders)	Yes	Low values are better	0 10 30	
Preventive Maintenance	Yes	High values are better	0 90 100	

**Edit Range**

KPI Available Hours Used

Active Yes -

Type  No  Yes

Low Threshold

High Threshold 80

Percentage Ranges 0 60 80 100

Description

Save Cancel



## KPI Summary

Video Link: [KPI Summary](#)

1. Click on the **More** tab in the navigation bar
2. Choose the **'KPI Summary'** option.
3. A KPI Summary will appear in the main screen.
4. Utilize the **filters** on the left-hand side for details.
  - Organization
  - Area
  - Team
  - From Week
  - To Week
5. Click on the **▾** beside a KPI this will provide further breakdown of the KPI.

	Feb 14 Week	Feb 21 Week	Feb 28 Week	Mar 7 Week
<b>Chip Line Mech</b>				
▶ Schedule Compliance (Hours)	85%	84%	46%	7%
▶ Schedule Compliance (Orders)	93%	83%	70%	10%
▶ Available Hours Used	92%	100%	85%	86%
▶ Reactive Work (Hours)	2%	2%	14%	2%
Hours of work that breaks into committed...	4	4	34	4
Hours used	234.25	253	241	171
▶ Reactive Work (Orders)	1%	1%	18%	2%
▶ Preventive Maintenance	21%	20%	27%	0%
▶ Corrective Maintenance	51%	55%	42%	57%
▶ Condition-Based Maintenance	51%	55%	42%	57%
▶ Other Maintenance	19%	19%	12%	21%
▶ Planned Work	100%	100%	100%	100%
▶ Unplanned Work	0%	0%	0%	0%
▶ Proactive Work	23%	21%	29%	2%
▶ Standing Work Orders	2%	2%	1%	3%
▶ Continuous-Improvement	6%	4%	18%	19%
▶ Emergency Work	0%	0%	0%	0%
▶ Schedule Committed (Hours)	88%	100%	73%	95%
▶ Delayed Work	0%	0%	0%	0%
▶ PM Compliance	100%	92%	67%	No Data

## Exporting

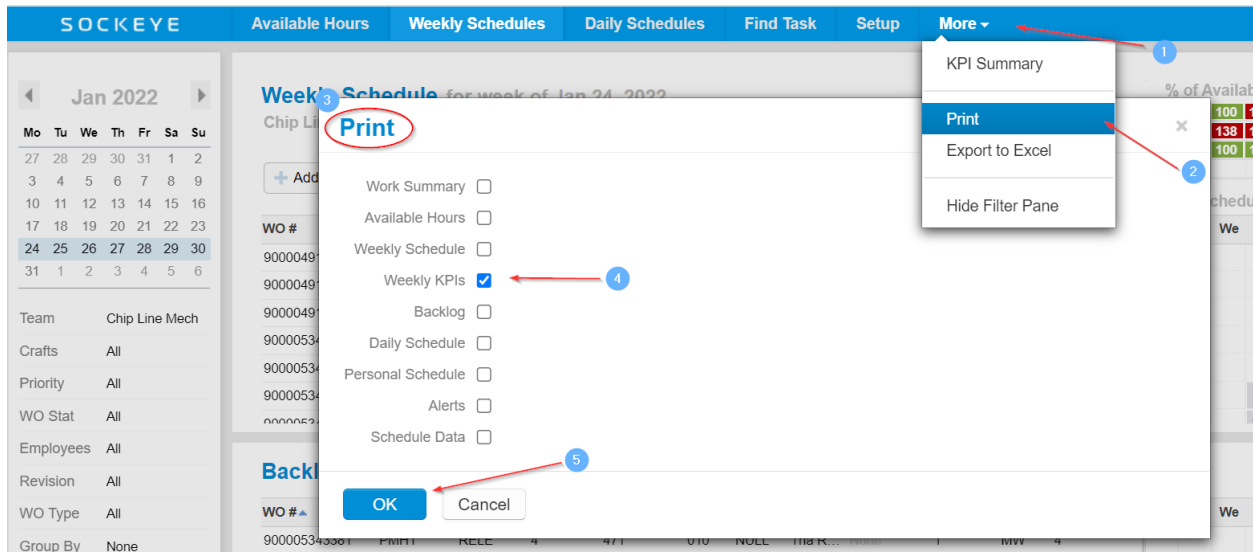
### Print

Video Link: [Print](#)

Print or export to PDF. These reports or data pulls will look like the current Sockeye screen.

1. Click on the **More** tab at the top of the screen in the blue ribbon.

2. Choose **Print** option.
3. A 'Print' dialog box will appear.
4. Select  **Weekly KPIs**.
5. Click **OK**

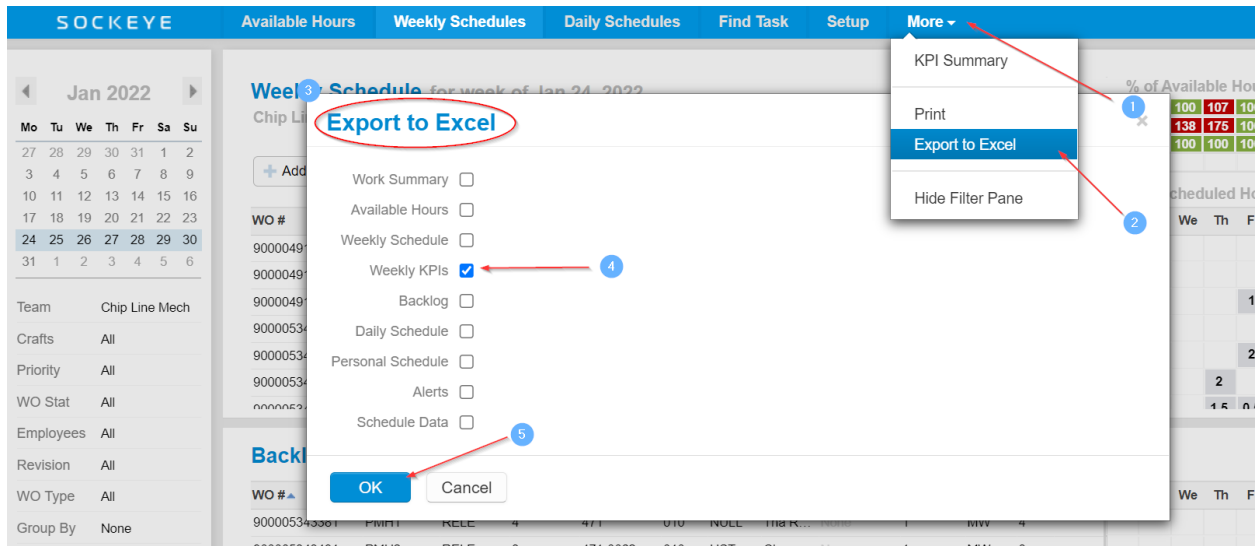


## Export to Excel

**Video Link:** [Export to Excel](#)

Export KPIs to Microsoft Excel.

1. Click on the **More** tab at the top of the screen in the blue ribbon.
2. Choose the **Export to Excel** option.
3. A 'Export to Excel' dialog box will appear.
4. Select  **Weekly KPIs**.
5. Click **OK**



## Features:

### Automate Complete Work Order Tasks

**Website Link:** <https://www.getsockeye.com/support/kpi/autocomplete>

**Video Link:** [Automatically Complete Work](#)

Automatically updating the schedule compliance column based on work orders or tasks that have been completed by an import through the CMMS. Typically, these are identified by a status change within the work order of the CMMS that identifies completion. This indicates the status of the schedule and adjusts the KPI's.

1. Click on the **Weekly Schedules** tab in the blue ribbon at the top of the screen.
2. Select the **Team** by clicking on the ▼ under **Weekly Schedule** for week of .
3. Click on the calendar **Week** for the specified period.
4. Click **Refresh** on the lower right-hand side of the **Backlog** section.
5. Work order statuses will update with any changes or updates in both the backlog and weekly schedule section.
6. Any work orders that have a status of complete will automatically initiate a ✓ in the Sched Comp column.

**\*\*\*Note:** Sockeye will only update these work orders for that specific week. Any work orders completed a month later will not update within Sockeye for that selected week.

## Custom KPI Development

**Website Link:** [Custom KPIs](#)

Generate specific work scheduling KPI(s) that meet business practices. Sockeye can develop additional KPIs based on details such as:

- Metric formula
- Ensuring Sockeye has access to the field(s) to accommodate the formula
- Defining the metric

## Close Weekly Schedule

**Website Link:** [Manually Close Weekly Schedule](#)

Handles actual hours and completion statuses for KPI calculations, an additional weekly snapshot can be added to store each team's "closed" schedule. A user can close a team's schedule by selecting "Close Weekly Schedule" from the More dropdown on the Weekly Schedule tab.

## Extend Schedule Compliance Dates

**Website Link:** [Extend Schedule Compliance Dates](#)

Add a specified day and time after the current week to allow some follow up and work order completions that may need to be adjusted after the specific week.

## ***Distribute / Email KPIs Automatically***

**Website Link:** [Distribute KPIs](#)

A summary and detail list of KPIs can be emailed out automatically on a specific day and time each week. Review the most recent KPIs anywhere quickly. Email addresses, dates, and a review of the current KPIs being used will be part of the setup to enable this feature.

Reach out to support desk ([support@getsockeye.com](mailto:support@getsockeye.com)) if any changes or updates are required for emails and dates.

## ***Link to Dashboard and or Microsoft Power BI***

**Website Link:**

**Video Link:**

Providing an endpoint to access KPIs to a specified dashboard requested by the customer and power BI.