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
- 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

Table of Contents:

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 X100
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] ×100
Other Hours (%) = (106 ÷ 2,058) × 100
Other Hours (%) = 0.051 × 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: Planned Work (%) = [Planned Work Executed (hrs.) ÷ Total Maintenance Labor Hours (hrs.)] × 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 × 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 = 1115 hours

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

Planned Work (%) = [Planned Work Executed (hrs.) ÷ Total Maintenance Labor Hours (hrs.)] × 100
Planned Work (%) = [(650 hrs. + 17 hrs.) ÷ (1000 hrs. + 75 hrs. + 23 hrs. + 17 hrs.)] × 100
Planned Work (%) = [(667 hrs.) ÷ (1115 hrs.)] × 100
Planned Work (%) = [0.598] × 100
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: Unplanned Work (%) = [Unplanned Work Executed (hrs.) ÷ Total Maintenance Labor Hours (hrs.)] × 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] ×100
Continuous improvement hours (%) = (97 ÷ 8,083) × 100
Continuous improvement hours (%) = 0.012 × 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:

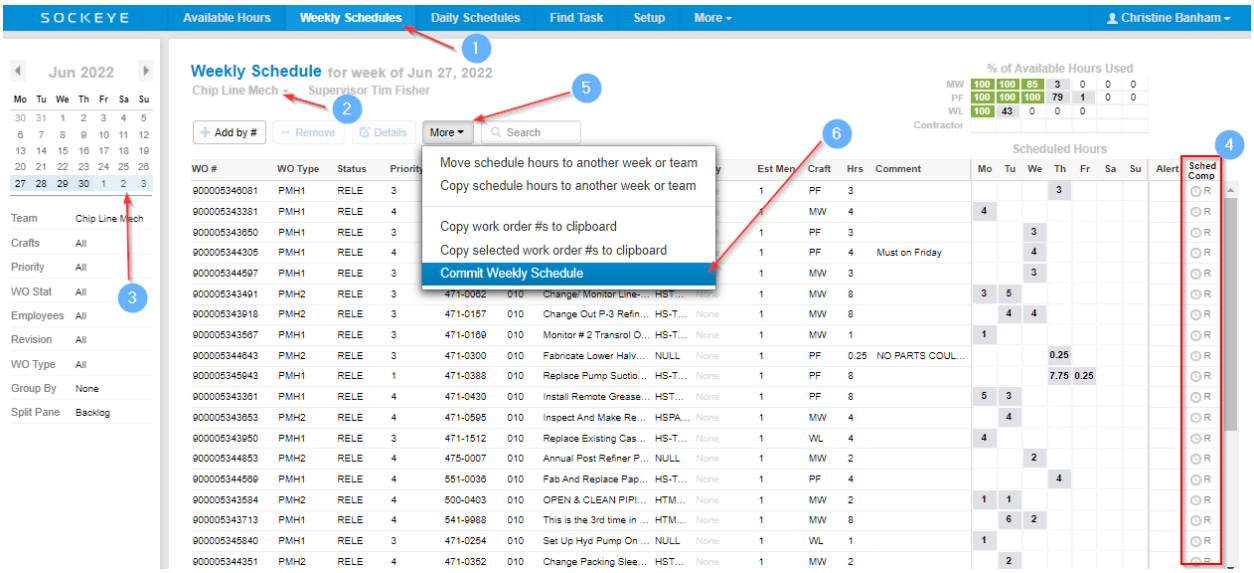
- R = Ready to Schedule
- W = Weekly Committed Schedule
- R = Reactive Work

Commit Weekly Schedule

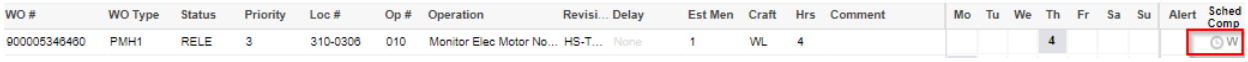
Video Link: Commit Schedule

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 **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. The Sched Comp column will show an R = Ready to Schedule.
5. **Click** on the **More** ▾ at the top of the weekly schedule.
6. Select **Commit Weekly Schedule.**



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



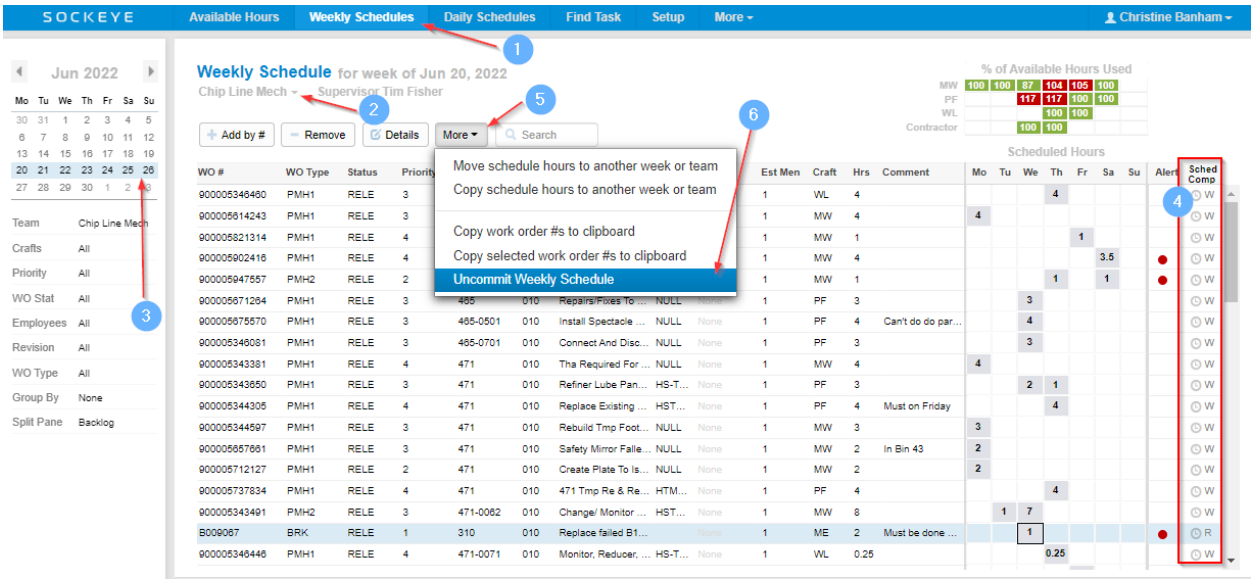
*******NOTE**: After committing the weekly schedule, it cannot be undone. Only an administrator has access to reverse those changes to the weekly schedule.*

Uncommit Weekly Schedule

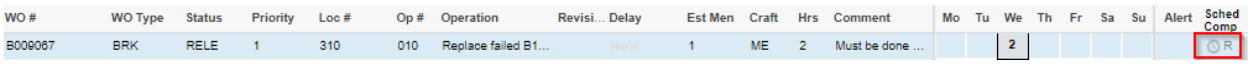
Video Link: Uncommit Schedule

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 ▼ under **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**



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

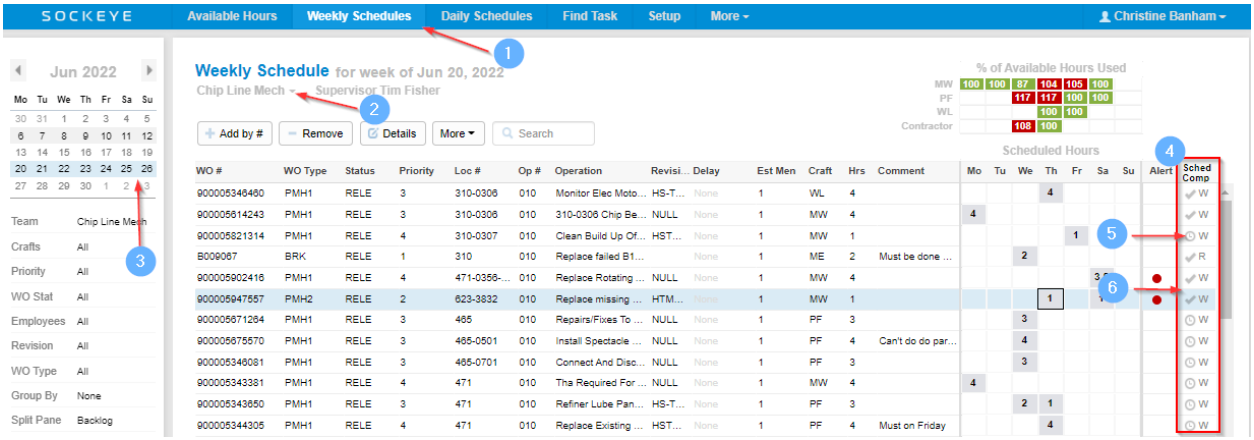


Manually Complete a Work Order

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

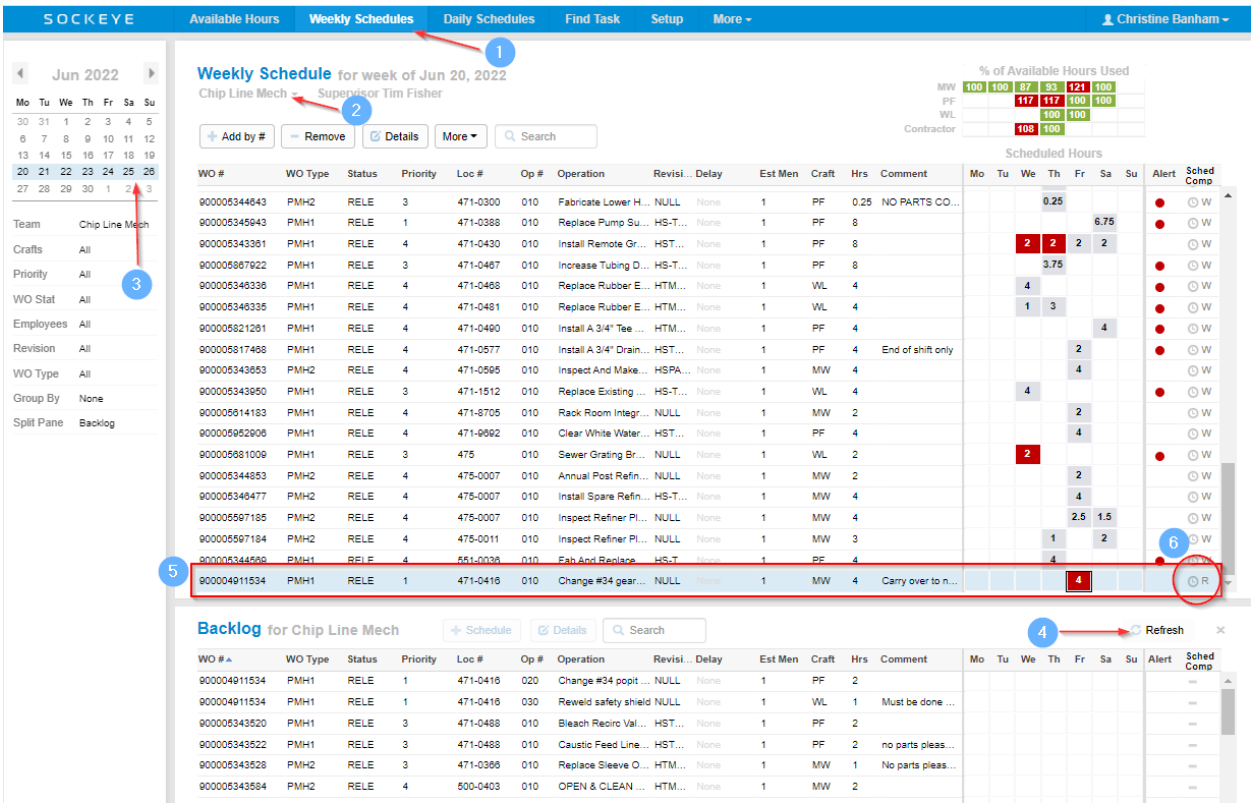
Sockeye automatically checks the schedule Compliance Box by refreshing the backlog and any work orders that has an updated status for that specific scheduling week. Refer to the Feature Automate Complete Work Orders Tasks for details.

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 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. Refresh 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 **R = Reactive Work** in the Sched Comp column.

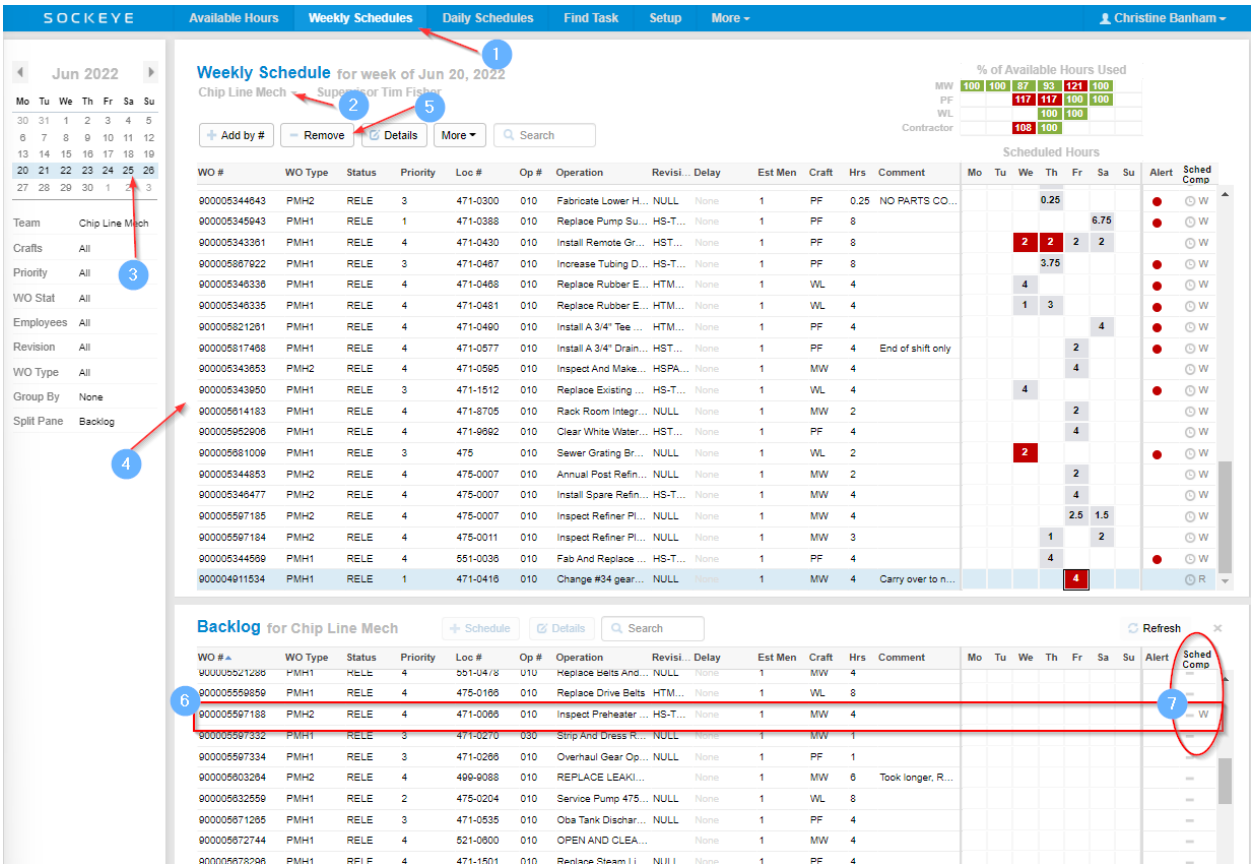

SOCKEYE
Available Hours
Weekly Schedules
Daily Schedules
Find Task
Setup
More
Christine Banham
Weekly Schedule for week of Jun 20, 2022
Chip Line Mech
Supervisor Tim Fisher
% of Available Hours Used
Add by #
Remove
Details
More
Search
Scheduled Hours
Backlog for Chip Line Mech
Schedule
Refresh
1
2
3
4
5
6

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.

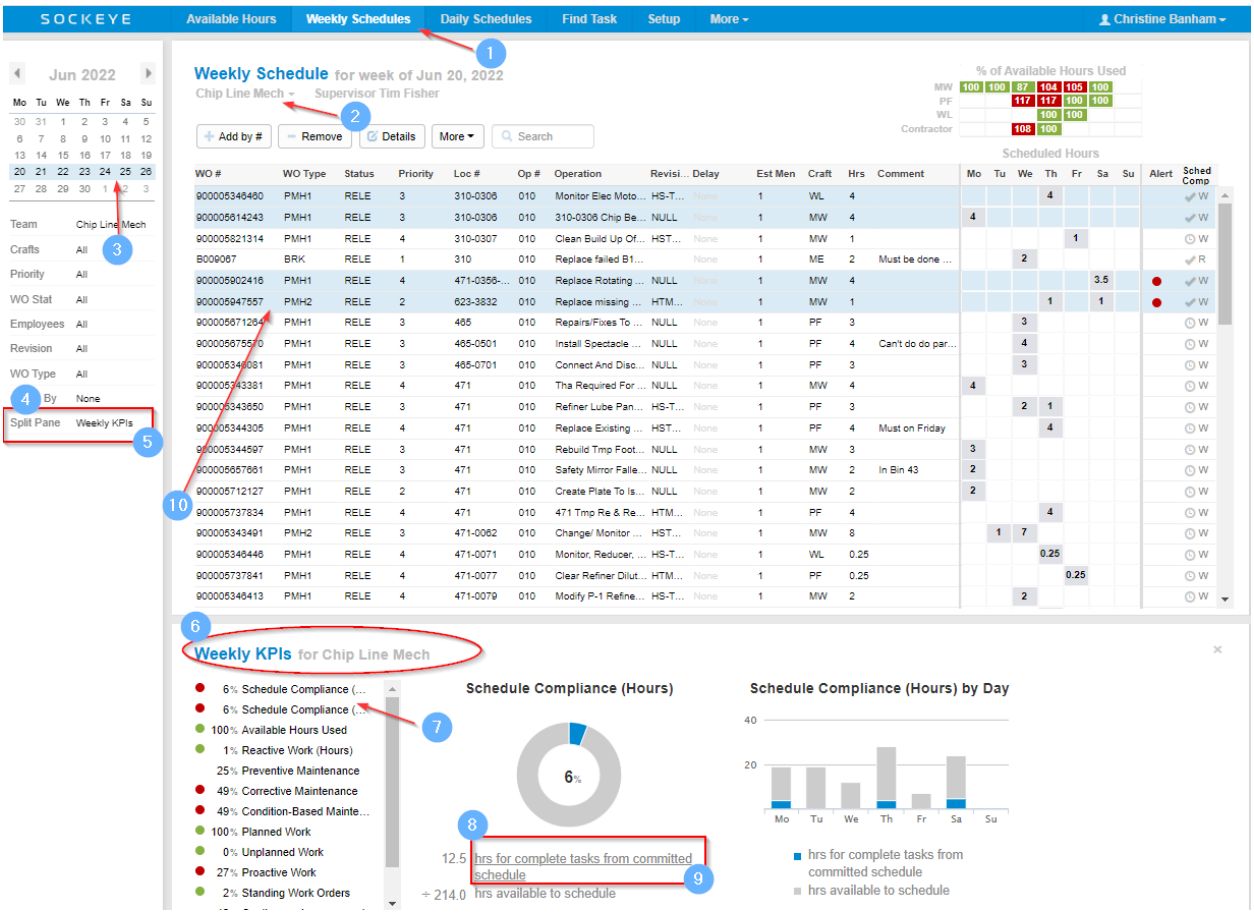


Review Metrics During the Week

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.*

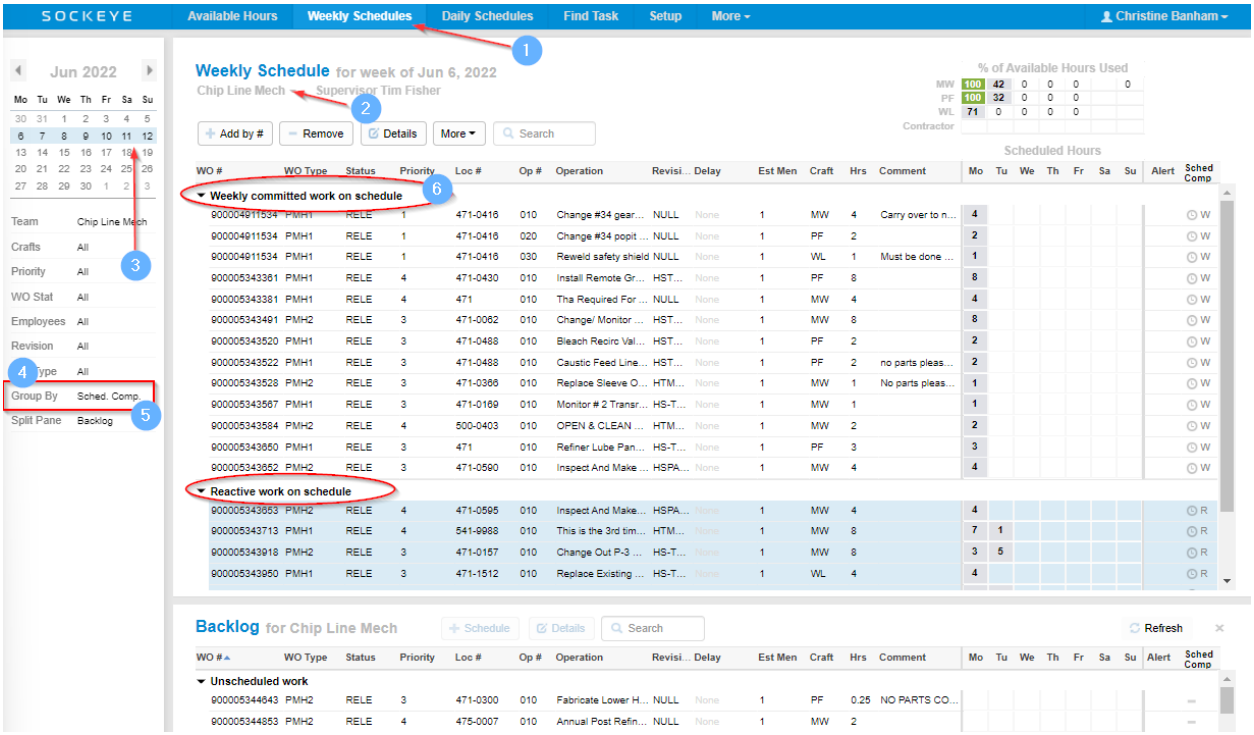

SOCKEYE
Available Hours
Weekly Schedules
Daily Schedules
Find Task
Setup
More
Christine Banham
Jun 2022
Weekly Schedule for week of Jun 20, 2022
Chip Line Mech
Supervisor Tim Fisher
% of Available Hours Used
Add by #
Remove
Details
More
Search
Scheduled Hours
Team Chip Line Mech
Crafts All
Priority All
WO Stat All
Employees All
Revision All
WO Type All
By None
Split Pane Weekly KPIs
Weekly KPIs for Chip Line Mech
Schedule Compliance (Hours)
Schedule Compliance (Hours) by Day
12.5 hrs for complete tasks from committed schedule
÷ 214.0 hrs available to schedule
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.



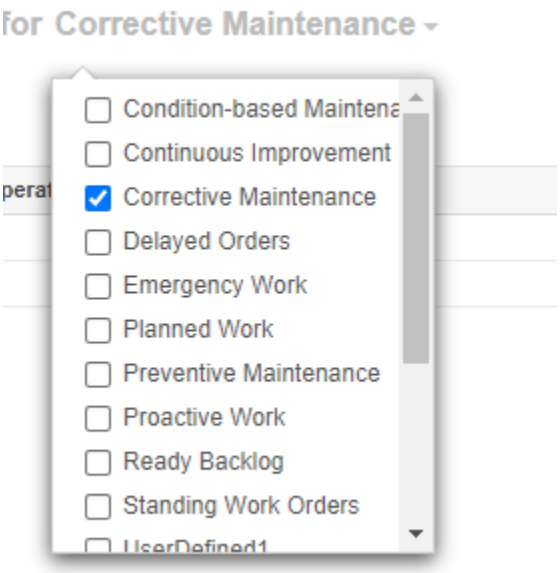
Setup

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.

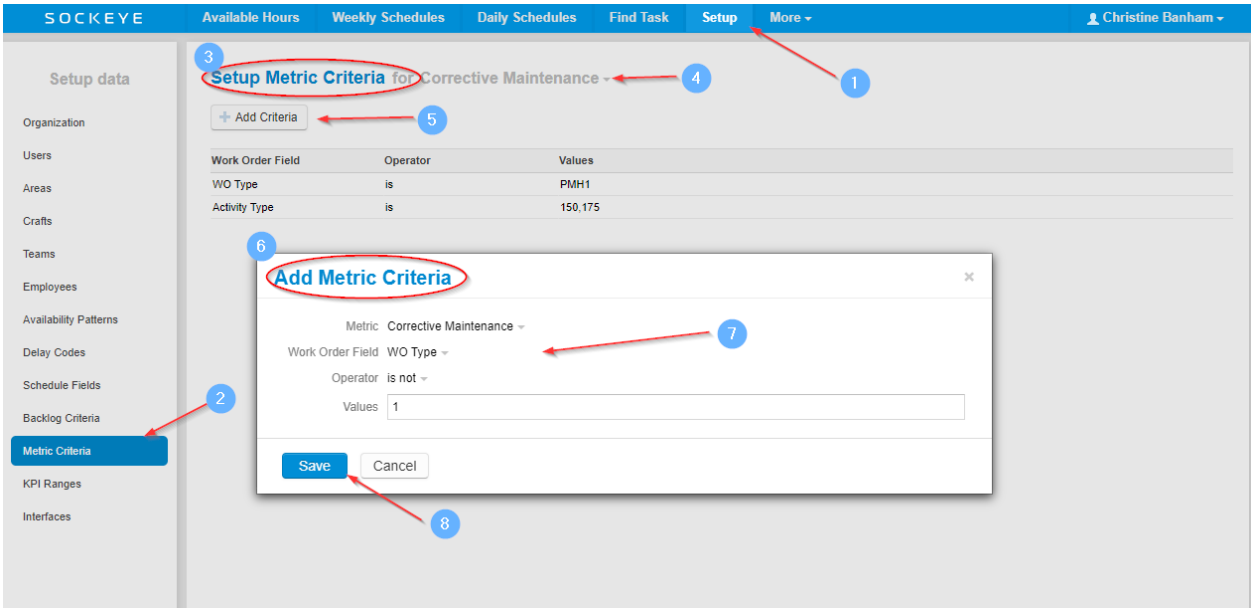


5. Click on + Add Criteria button.
6. Add Metric Criteria dialog will appear.
7. Populate Metric Criteria
    a. **Metric:** KPI defining criteria for.
    b. **Work Order Field:** The work order field that holds specific values that can be used to identify which tasks are the selected KPI tasks.
  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

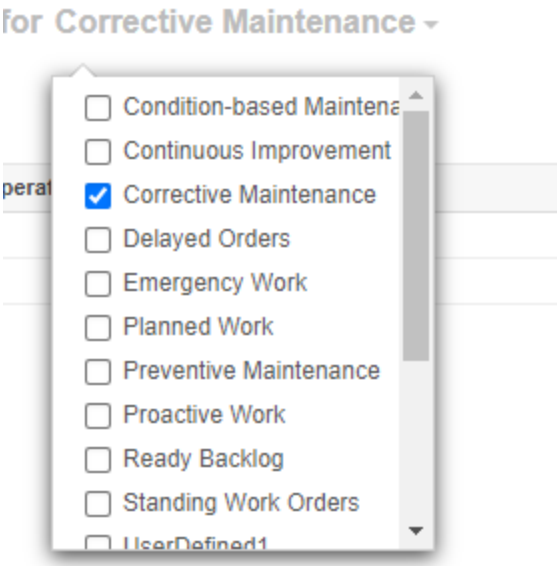


Edit Criteria

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.



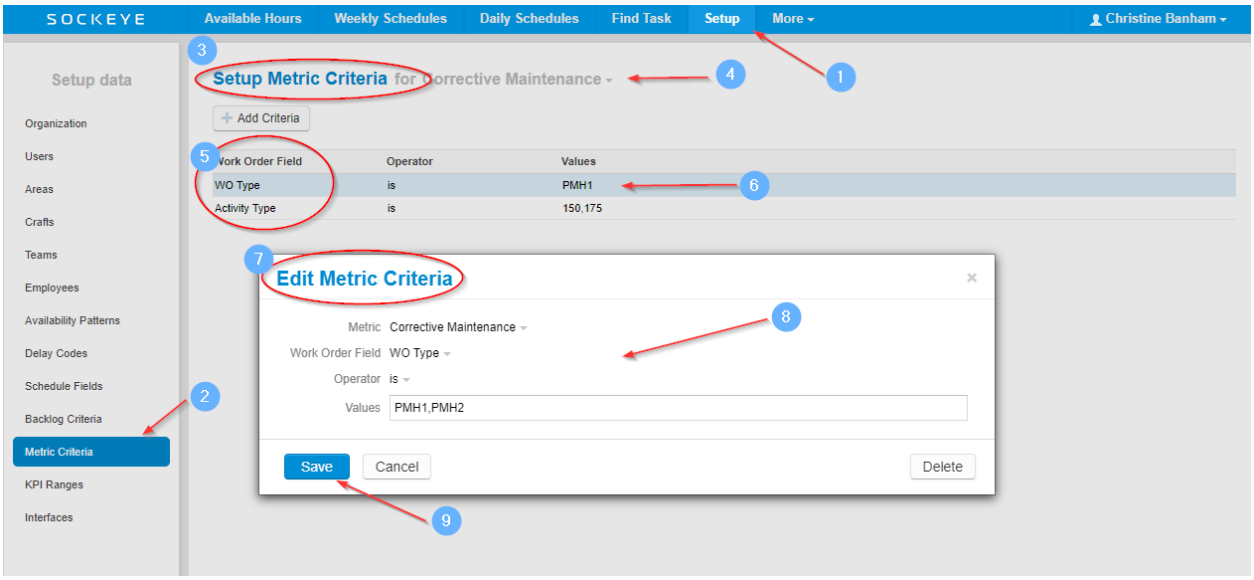
5. A list of criteria will appear.
6. Click on the criteria details to be updated.
7. An Edit Metric Criteria dialog will appear.
8. Edit the Metric Criteria:
    a. **Metric:** KPI defining criteria for.
    b. **Work Order Field:** The work order field that holds specific values that can be used to 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 Save



Delete Criteria

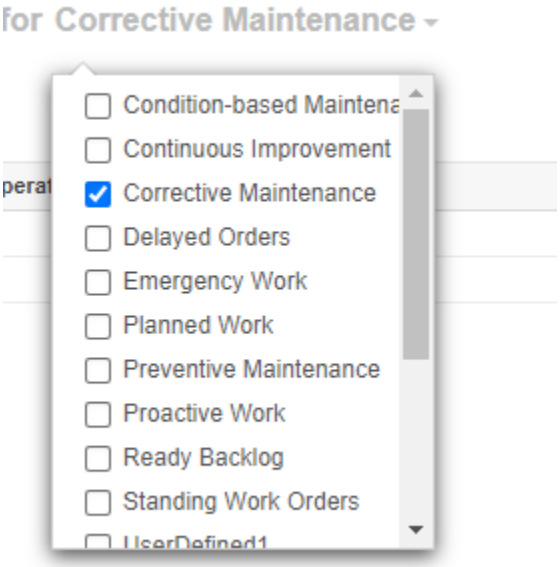
Allows specific criteria to be removed from the KPI calculation.

Video Link: *Delete Criteria*

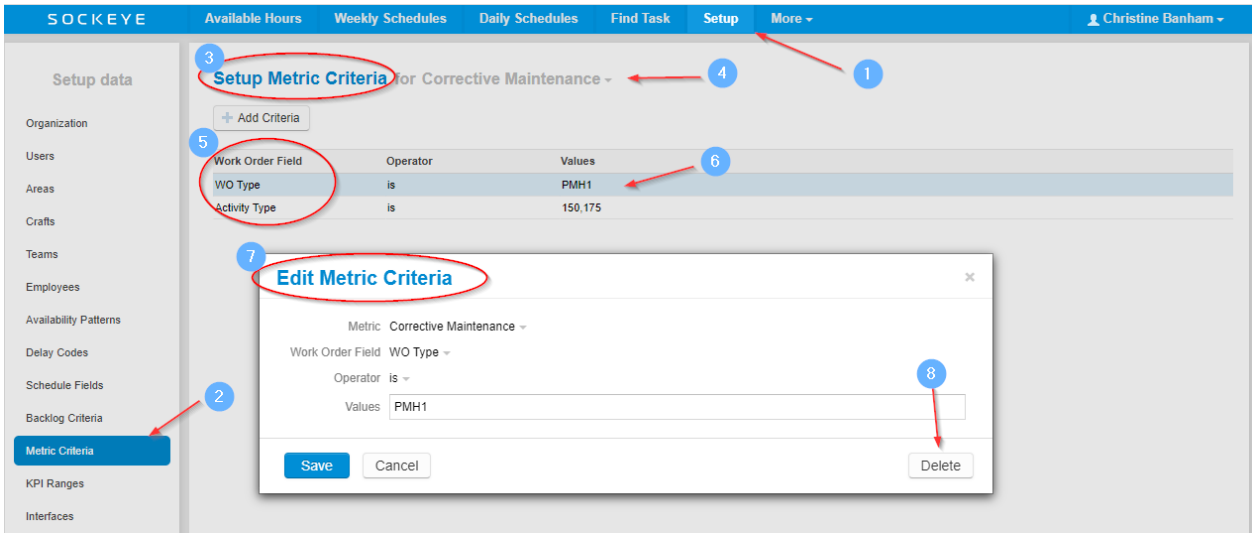
1. Click on the Setup tab in the blue ribbon at the top of the screen.
2. Select Metric Criteria under Setup Data on the left-hand side of the screen.

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. 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



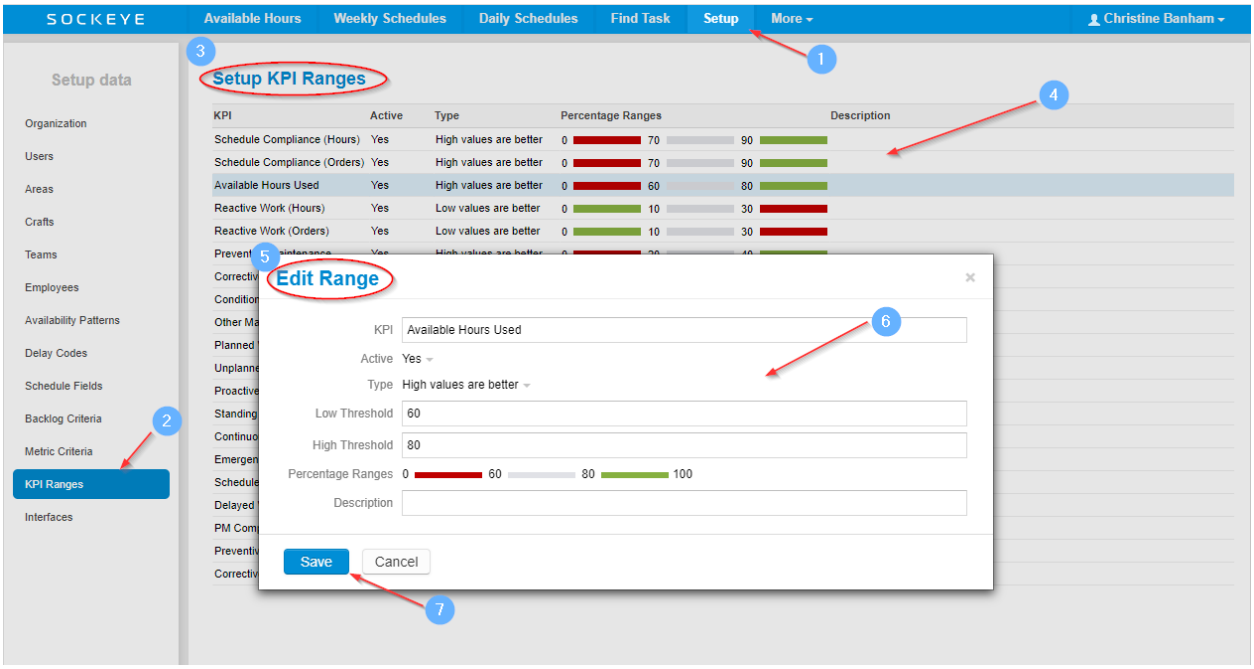
KPI Ranges

Edit KPI Ranges

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

Video Link: *Editing Ranges*

1. Click on the 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. 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 Save.

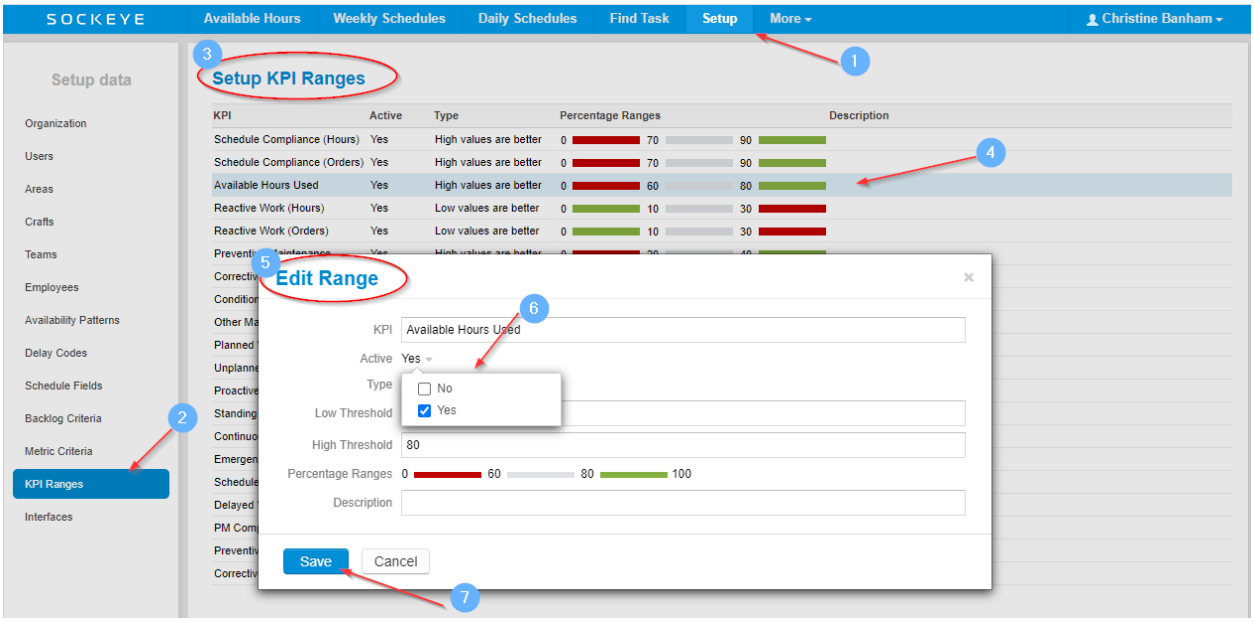


Activate or Inactivate KPI

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*

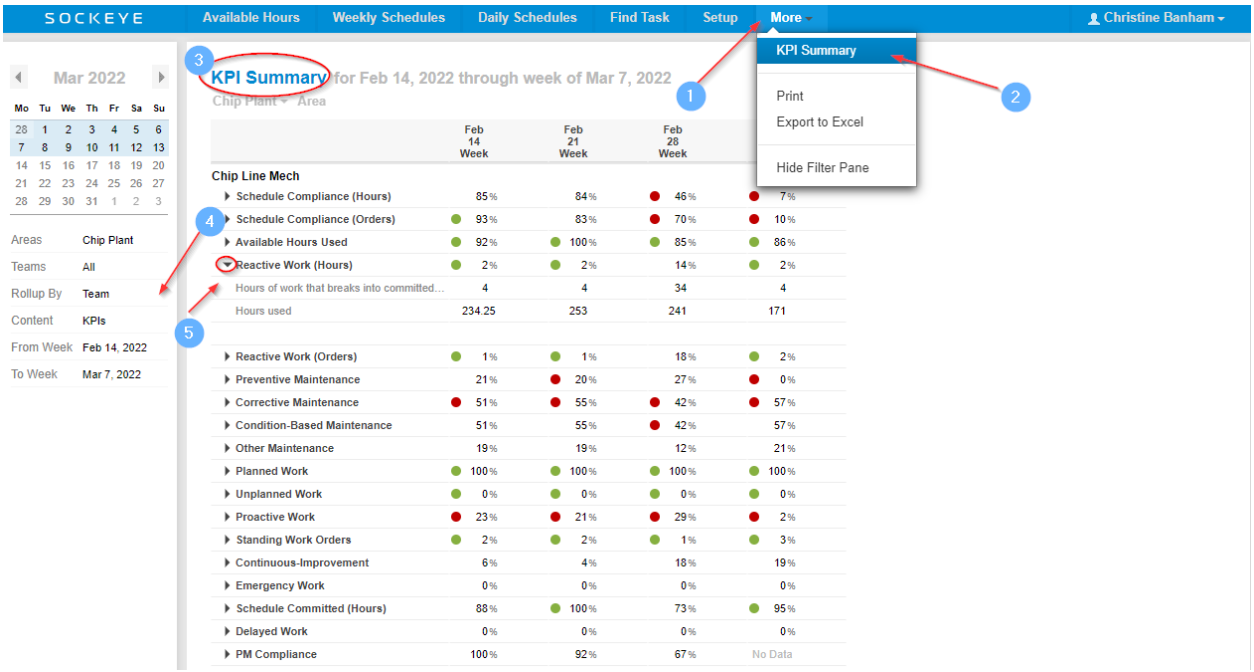
1. Click on the **Setup** tab in the blue ribbon at the top of the screen.
2. Select **KPI Ranges** under Setup Data on the left-hand side of the screen.
3. **Setup KPI Ranges** will populate the main part of the screen.
4. Click on the KPI to be updated.
5. Edit Range dialog box will appear.
6. Update **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
Setup KPI Ranges
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
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
1
2
3
4
5
6
7

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.



Exporting

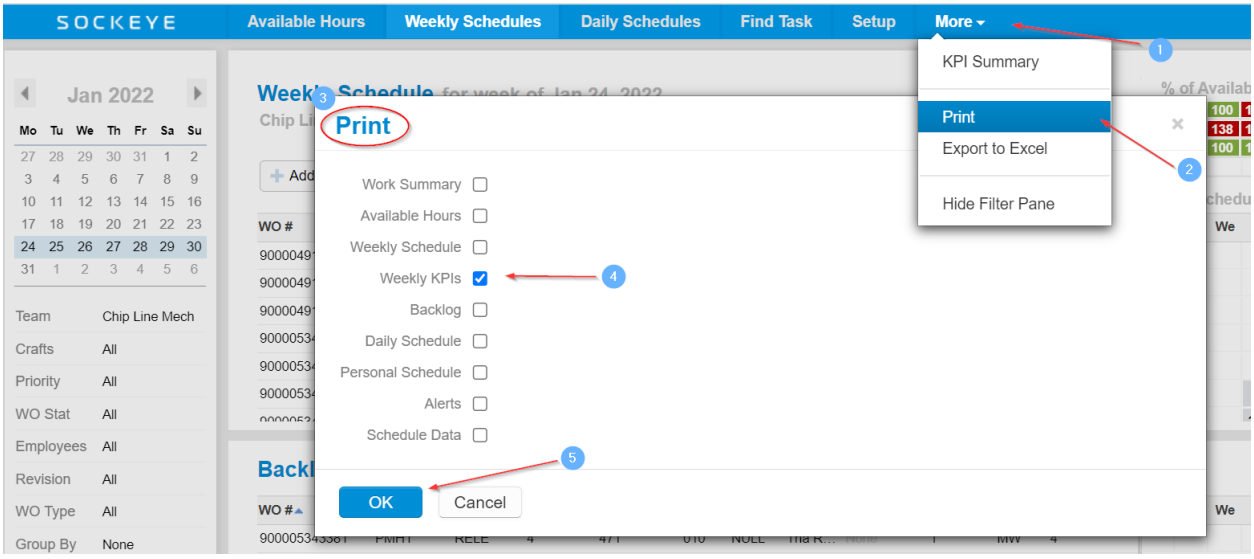
Print

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

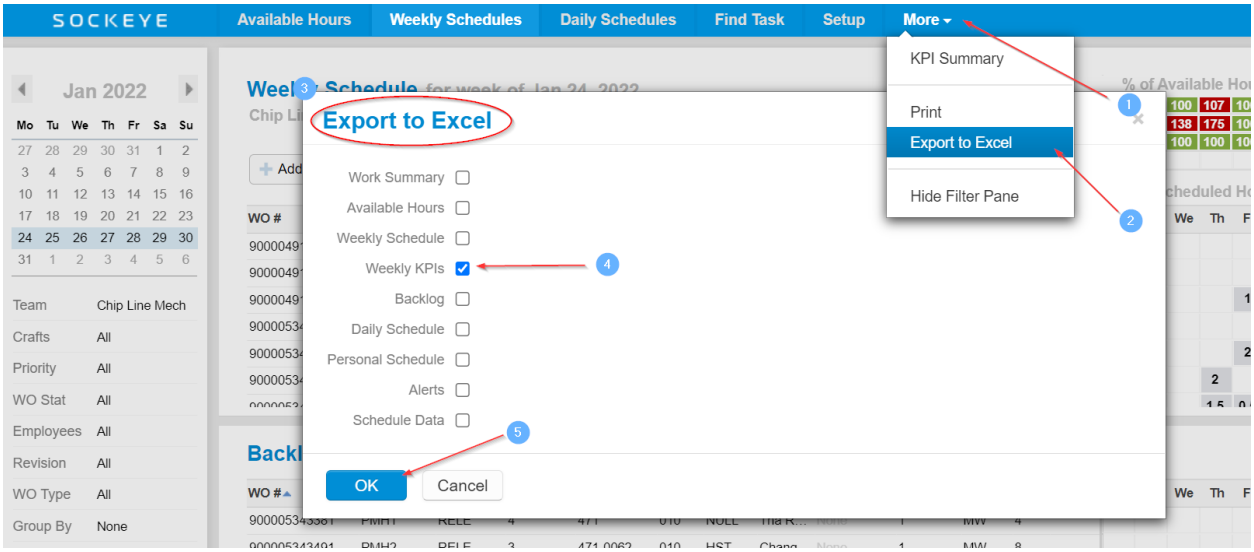


Export to Excel

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:

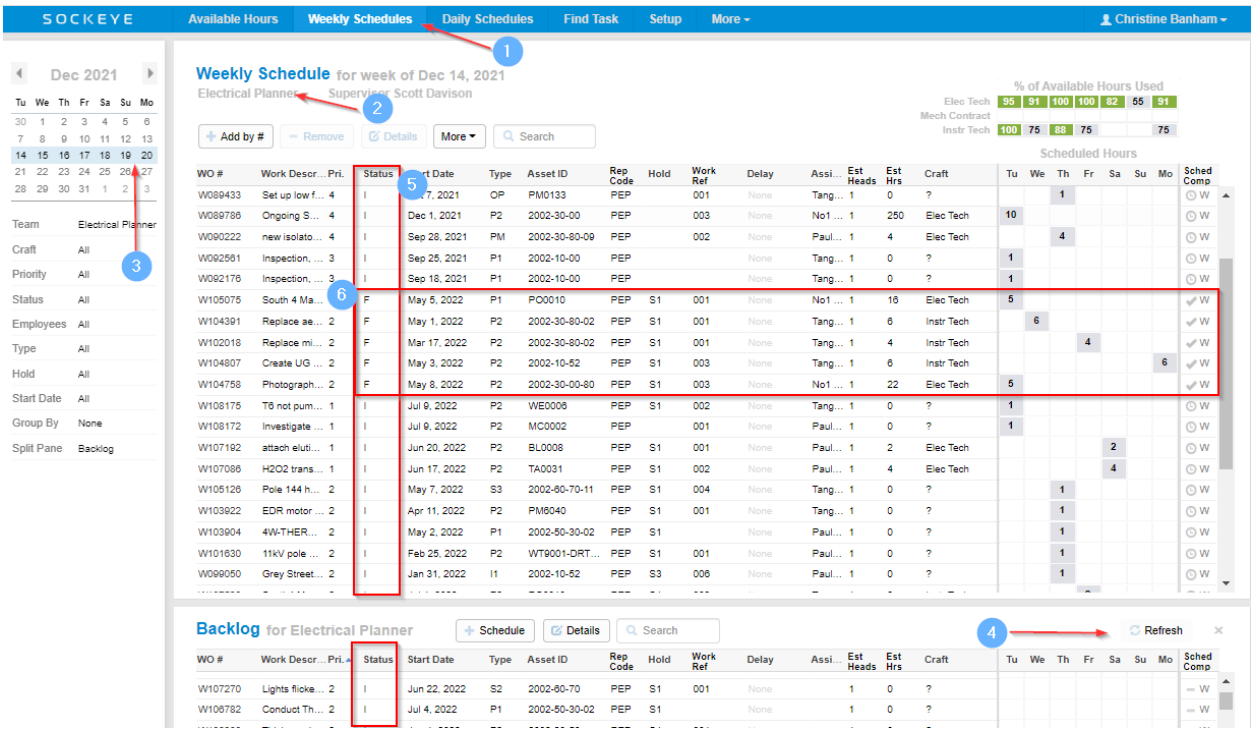
Automate Complete Work Order Tasks

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 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) 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.