

**Summary:**

Manages actual hours and completion statuses for KPI calculations, an additional weekly snapshot can be added to store each team's "closed" schedule.

The workflow would look like the following:

1. CMMS - Update actual hours and task statuses for the scheduling week that just ended.
2. Sockeye - Select the team and week that just ended and click the backlog refresh button to bring the latest actuals hours and statuses from the CMMS to Sockeye.
3. Sockeye - Select "Close Weekly Schedule". This creates a snapshot of that week's actual hours and statuses for the specified week's KPIs.
4. Sockeye – View KPI's.

In addition, Sockeye can set up a scheduled job to close the previous week's schedules automatically at a specific time, such as Friday at 5:00pm PT.

**Tools / Resources:**

- Sockeye Support Email: [support@getsockeye.com](mailto:support@getsockeye.com)
- Sockeye support guides and videos: <https://www.getsockeye.com/support>
- User guide and video link: <https://www.getsockeye.com/support/kpi/close>

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**Revision Log:**

Revision	Date	Reason/Update	Updated By:
Rev 1	2023-05-12	Document Creation	C.Banham

## Weekly Schedule

### Close Weekly Schedule

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

Manages 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.

Once the actual hours and statuses have been updated within the CMMS for the week Sockeye can automate the customized KPI calculations.

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 details will update with any changes or updates in both the backlog and weekly schedule section.
6. Click on **More**.
7. Select **Close Weekly Schedule**.

The screenshot shows the Sockeye software interface. At the top, a blue ribbon contains navigation tabs: 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The 'Weekly Schedules' tab is active. On the left, a sidebar contains filter options for Team, Craft, Priority, WO Stat, Employees, WO Type, Sugg Start, Group By, and Split Plane. The main content area is titled 'Weekly Schedule for week of Sep 29, 2022' and features a calendar on the left and a table of work orders on the right. A 'More' dropdown menu is open over the work order table, with 'Close Weekly Schedule' highlighted in red. Below the weekly schedule, there is a 'Backlog for Mill Maintenance' section with a table of work orders and a 'Refresh' button on the right.

Once the "Close Weekly Schedule" has been selected in Sockeye, no further changes can be made to that week's schedule or available hours.

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

◀ Sep 2022 ▶ **Closed Weekly Schedule** for week of Sep 29, 2022

Mill Maintenance -

Details Search

Pri	Delay	Exec On	Task Order	WO ID	Equip Name	Task Title	Est Hrs	Craft	Est Qty	WO Stat	Task Stat	WO Type	Job Order	Th	Fr	Sa	Su	Mo	Tu	We
2	None	Aug 11, 2022	20	459725	Blower, Belt Cleanup, He...	R64 -Task 20 Remove Fa...	12	MILL	2	40	40	CO					12			
3	None	Oct 4, 2022	0	462226	#2 Cyclone	R20 Cyclone #2 Sanded ...	6	MILL	2	40	40	CO								6
4	None	Aug 29, 2022	0	458408		R16 - Unit 5057 - Rebuild ...	12	MILL	2	40	40	CO		12						
2	None	Sep 16, 2022	0	461095	Ball Mill #3 Clutch	R32 RM3 back up air com	2	MILL	1	40	40	CO		2						

		Th	Fr	Sa	Su	Mo	Tu	We
LUBE	0	0	0	0	0	0	0	0
MILL	0	10	8	12	8	4	0	0
PIPE	0	0	0	0	0	0	0	0
WELD	0	0	0	0	0	0	0	0
LABR	0							
Rebuild Shop	0							
HVAC	0	0						