

Summary:

The More Tab is a drop-down menu that provides Key Performance Indicator(s) along with an opportunity to print and or export any of the schedules at any time during the week.

Tools / Resources:

- Email Support: support@getsockeye.com
- User Guides and Video's: <https://getsockeye.com/support>

Revision Log

Revisions	Date	Reason/Update	Updated By:
Rev 7	May 11, 2023	Update/Export Data to CMMS	C. Banham
Rev 6	Nov. 23, 2022	Document Review/Update	C. Banham
Rev 5	June 21, 2022	Available Hours Print or Export Feature	C. Banham
Rev 4	June 7, 2019	Added Revision Log, Table of Contents, and updated Logo.	C. Banham

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KPI Summary


Video Link: [KPI Summary](#)

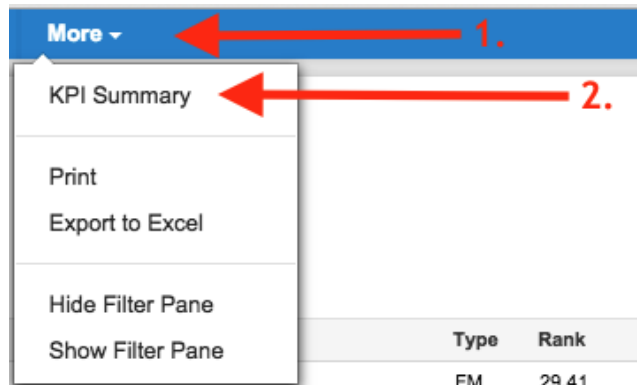
Sockeye’s Key Performance Indicators (KPIs) provide an automated approach in tracking. A dashboard of KPIs replicating the Society of Maintenance Reliability Professionals (SMRP) standards has been set up within Sockeye.

Sockeye’s out of the box KPI metrics include:

METRIC	Definition	FORMULA
Schedule Compliance Hours	Measure of adherence to the maintenance schedule as a percent of total time available to schedule.	$\text{Weekly Scheduled Hrs. Performed} / \text{Total Hrs.} \times 100$
Schedule Compliance Work Orders	Measure of adherence to the work schedule expressed as a percent of total number of scheduled work orders	$\text{Number of work orders performed as scheduled} / \text{Total number of scheduled work orders} \times 100$

METRIC	Definition	FORMULA
Available Hours Used	The percentage of available maintenance hours scheduled during a week.	Total Hours Scheduled / Total Hours Available to Schedule (hrs.) X 100
Reactive Work	Maintenance work that breaks into the weekly schedule	Break-in Hrs. / Total Available Hrs. X 100
Preventive Maintenance Hrs.	Scheduled hours worked on preventive work orders	Preventive Hrs. / Total Hrs. X 100
Corrective Maintenance Hrs.	Scheduled hours worked on corrective work orders	Corrective Hrs. / Total Hrs. X 100
Condition-based Maintenance Hrs.	Scheduled hours worked on condition-based work orders	Condition-based Hrs. / Total Hrs. X 100
Planned Work	Scheduled hours on planned work orders	Planned Hrs. / Total Hrs. X 100
Unplanned Work	Total hours minus planned hours	Unplanned Hrs. / Total Hrs. X 100
Proactive Work	Preventive and predictive hours plus corrective hours identified from preventive and predictive work orders	Proactive Hrs. / Total Hrs. X 100
Standing Work Orders	Scheduled hours on standing work orders	Hrs. worked on standing work orders / Total Hrs. X 100
Continuous Improvement Hrs.	Scheduled hours on continuous improvement work orders	Continuous Improvement Hrs. / Total Hrs. X 100

1. Click on the  tab in the navigation bar.
2. Choose the 'KPI Summary' option, this will display the print dialog.



3. Utilize the **filters** on the left-hand side for details. Reporting is pulled from three (3) levels:
 - Organization
 - Area
 - Team
4. **Select** the appropriate week or time frame. i.e., **From Week:** Jun 1, 2015 **to Week:** Dec 31, 2015

5. Click on the **+** beside a specific KPI this will provide further details of the calculation breakdown.
6. KPI's are **automatically** generated for **each** Team.
7. KPI's are **automatically** generated for **the Total** Team outcome for that specific Week.

KPI Summary for week of Aug 24, 2015

Paper	Area	Paper E// TMP	Paper Mech TMP	Total
+ Schedule Compliance (Hours)				
		No Data	100%	101%
Hours for complete tasks from committed schedule		380		380
Hours available to schedule		376		376
+ Schedule Compliance (Orders)				
		No Data	84%	84%
+ Available Hours Used				
		No Data	100%	108%
+ Reactive Work (Hours)				
		No Data	9%	9%
+ Reactive Work (Orders)				
		No Data	6%	6%
+ Preventive Maintenance				
		No Data	12%	12%
+ Corrective Maintenance				
		No Data	23%	23%
+ Condition-Based Maintenance				
		No Data	0%	0%
+ Other Maintenance				
		No Data	66%	66%
+ Planned Work				
		No Data	100%	100%
+ Unplanned Work				
		No Data	0%	0%
+ Proactive Work				
		No Data	40%	40%
+ Standing Work Orders				
		No Data	0%	0%
+ Continuous-improvement				
		No Data	23%	23%

Exporting

The following data details can be pulled from Sockeye to print, export pdf or export to excel:

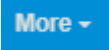


- **Work Summary** – The summary report is based on the activities of resources. Provides information about activities for projects, contacts and shared resources and gives a great overview of how much work has been assigned.
- **Available Hours** – Shows availability of the specific team during a selected period. These can be used to show trends – a graphic view of the status during a selected time.
- **Weekly Schedule** – Pulls the weekly schedule based on the selected week date. ‘Grouped By’ options are available and can be used for specific reporting purposes throughout the week. Refer to Setup > Schedule Fields if some fields need to be adjusted when reporting. This schedule is the most common data pull and provides an overview throughout the week.
- **Weekly KPIs** – Identifies all Scheduled KPI’s that have been turned on for a specified week providing specific data details for each KPI.
- **Backlog** – Pulls all Backlog tasks listed for that specified team. ‘Grouped By’ options are available and can be used for specific reporting purposes throughout the week. This report is typically used when cleaning up backlog within a CMMS.

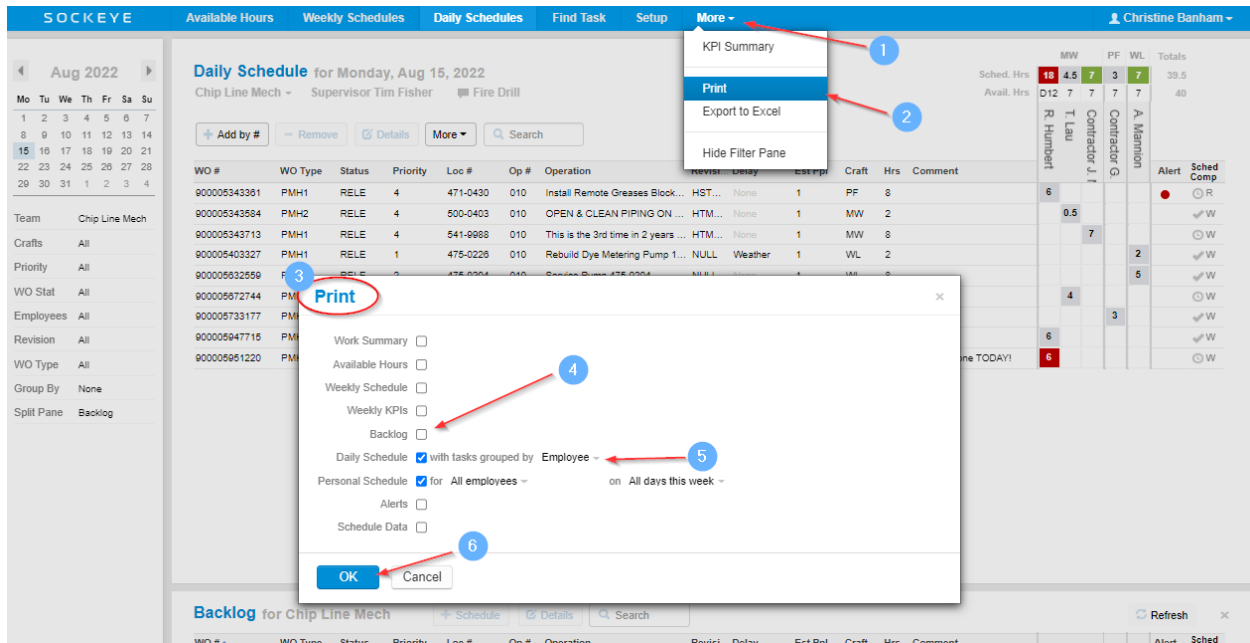
- **Daily Schedule** - Pulls individual daily schedules based on the selected week date. 'Grouped By' options are available and can be used for specific reporting purposes throughout the week. Currently the default is by 'Employee'. Refer to Setup > Schedule Fields if some fields need to be adjusted when reporting.
- **Personal Schedule** – A daily schedule report that is specified by resource and can be filtered by all or individual resources and the day of the week. This report is commonly used for supervisors when assigning work for the day or week.
- **Alerts** – Identifies which alert(s) were generated against specific work orders. This report can be used to update future PMs within the CMMS.
- **Schedule Data** – Specified data details to be generated in a csv or pdf file to export to a separate business application.

Print

Video Link: [Print](#)

Print or export to PDF schedules, backlogs, KPI's and much more. These reports or data pulls will look like the current Sockeye screen. When exporting backlog, weekly or daily schedule additional options to "Group by" are available.

1. Click on the  tab at the top of the screen in the blue ribbon.
2. Choose  option.
3. A 'Print' dialog box will appear.
4. **Select** the document(s) to export.
5. Select ▾ **"tasks grouped by"** for specific groupings or sorting.
 - a. Further groupings are available for Weekly Schedule, Backlog, Daily Schedule, Personal Schedule, and Schedule Data.
6. Click 



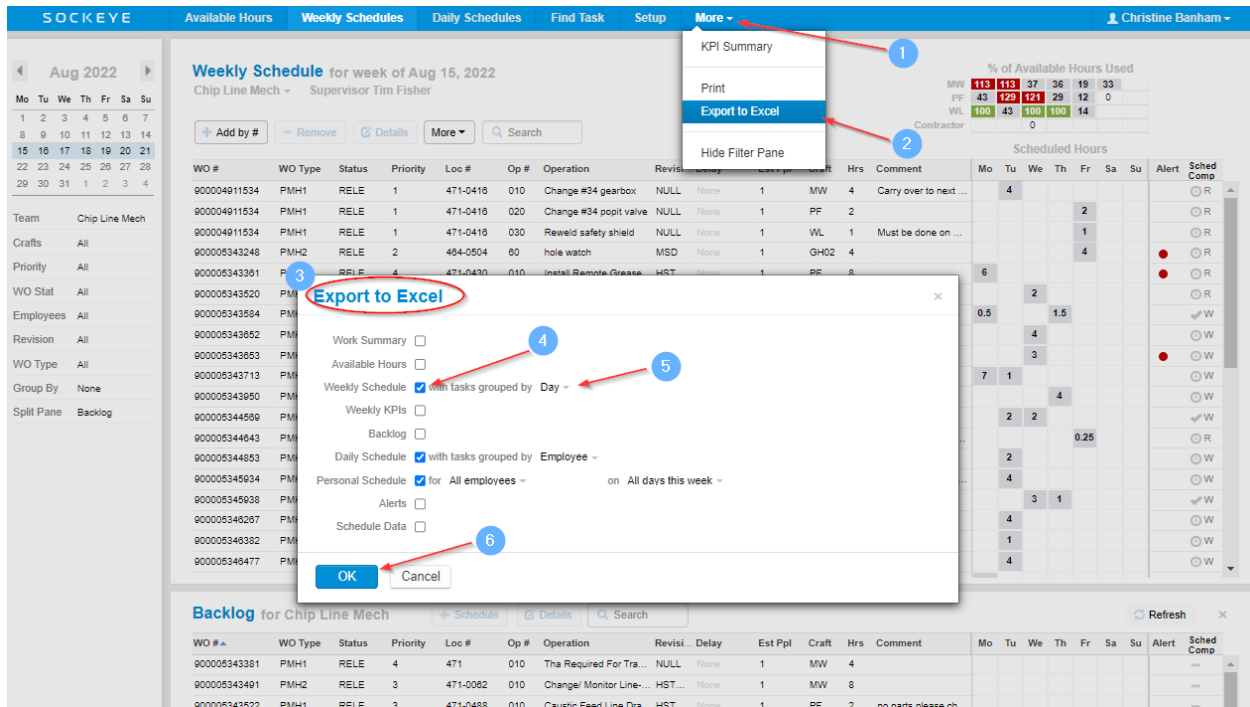
***** Note:** The tab currently being viewed in Sockeye will automatically populate. For example, when on the Daily Schedules tab and clicking More > Print. The Daily Schedule will be automatically checked in the dialog box.

Export to Excel

Video Link: [Export to Excel](#)

Export schedules, backlogs, KPI's and much more to Microsoft Excel. When exporting backlog, weekly or daily schedule additional options to "Group by" are available.

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** the document(s) to export.
5. Select **"tasks grouped by"** for specific groupings or sorting.
 - a. Further groupings are available for Weekly Schedule, Backlog, Daily Schedule, Personal Schedule, and Schedule Data.
6. Click **OK**



***** Note:** The tab currently being viewed in Sockeye will automatically populate. For example, when on the Daily Schedules tab and clicking More > Export to Excel. The Daily Schedule will be automatically checked in the dialog box.

Export to CMMS

Video Link: [Export to CMMS](#)

Some Sockeye setups have been setup to write back to a CMMS. If this option has been enabled a 'Export Weekly Schedule to CMMS' will be available under the More drop-down box. Refer to Sockeye's [integration options](#) for further details.

Refer to [Features Export to CMMS](#) section for details on how to commit or uncommit a weekly schedule.

Note: When exporting back to a CMMS all team schedules for that specified week will be written back to the identified CMMS.

Update Incomplete Work from Last Week in CMMS

Video Link: [Update Incomplete Work](#)

Some Sockeye setups have been setup to update incomplete work back to a CMMS. If this option has been enabled a 'Update Incomplete Work from Last Week in CMMS' will be available under the More drop-down box. Refer to Sockeye's [integration options](#) for further details.

Refer to [Update Incomplete Work from Last Week in CMMS](#) section on how to activate updates within the CMMS.

Note: When exporting back to a CMMS all team schedules will be updated for that specified week period.

Hide Filter Pane

Video Link: [Hide Filter Pane](#)

The filter pane located on the left side of the screen can be hidden to provide more screen space for schedule fields.

1. Click on the **More** tab at the top of the screen in the blue ribbon.
2. Select **Hide Filter Pane** from the drop-down box.

The screenshot shows the SOCKEYE software interface. At the top, there is a blue ribbon with tabs: Available Hours, Weekly Schedules, Daily Schedules, Find Task, Setup, and More. The 'More' tab is selected, and a dropdown menu is open, showing options: KPI Summary, Print, Export to Excel, and Hide Filter Pane. The 'Hide Filter Pane' option is highlighted. On the left side, there is a filter pane with various filters like Team, Crafts, Priority, etc. The main area shows a 'Weekly Schedule for week of Aug 15, 2022' for 'Chip Line Mech' supervised by 'Tim Fisher'. It includes a table of tasks with columns for WO #, WO Type, Status, Priority, Loc #, Op #, Operation, Revisi..., Delay, Est Ppl, Craft, Hrs, and Comment. To the right, there is a grid showing scheduled hours for each day of the week.



Pop-up Filter Pane

Video Link: [Pop-up Filter Pane](#)

Quickly hide the left-hand side filter pane with one click to allow more screen space for schedule fields. And utilize a one click shortcut to access the filter pane as a pop-up box.

- Click **SOCKEYE** in the blue ribbon the filter pane will automatically hide.
- Click **☰** on the far-left side of the blue ribbon to have the filter list appear as a pop-up box.
- Click on **☰** to remove the pop-up box.

The screenshot shows the SOCKEYE software interface. In the blue ribbon, the 'SOCKEYE' logo and a hamburger menu icon (☰) are highlighted with red boxes. The filter pane is shown as a pop-up box on the left side of the screen, displaying a calendar for January 2022 and a list of tasks. The main area shows a 'Weekly Schedule for week of Jan 24, 2022' for 'Chip Line Mech' supervised by 'Tim Fisher'. It includes a table of tasks with columns for Status, Priority, Loc #, Op #, Revisi..., Operation, Delay, Est Ppl, Craft, Hrs, and Comi. The filter pane is currently open, showing a calendar for January 2022 and a list of tasks.

Show Filter Pane

Video Link: [Show Filter Pane](#)

Have the filter pane on the left-hand side remain visible.

1. Click on the **More** tab at the top of the screen in the blue ribbon.
2. Select **Show Filter Pane** from the drop-down box.

Weekly Schedule for week of Aug 15, 2022
Chip Line Mech - Supervisor Tim Fisher

WO #	WO Type	Status	Priority	Loc #	Op #	Operation	Revisi...	Delay									Alert	Sched Comp
900004911534	PMH1	RELE	1	471-0416	010	Change #34 gearbox	NULL	None	1	MW	4	Carry over to next week 2 Hours		4				
900004911534	PMH1	RELE	1	471-0416	020	Change #34 popit valve	NULL	None	1	PF	2					2		
900004911534	PMH1	RELE	1	471-0416	030	Reweld safety shield	NULL	None	1	WL	1	Must be done on Monday				1		
900005343248	PMH2	RELE	2	484-0604	60	hole watch	MSD	None	1	GH02	4					4		
900005343301	PMH1	RELE	4	471-0430	010	Install Remote Greases Blocks For Bridge	HST...	None	1	PF	8		6					
900005343520	PMH1	RELE	3	471-0488	010	Bleach Redirc Valve (Leaking) Borol. Hyd	HST...	None	1	PF	2			2				
900005343564	PMH2	RELE	4	500-0403	010	OPEN & CLEAN PIPING ON DEGASS MC ...	HTM...	None	1	MW	2		0.5		1.5			
900005343652	PMH2	RELE	3	471-0590	010	Inspect And Make Any Required Repairs To	HSPA...	None	1	MW	4				4			
900005343653	PMH2	RELE	4	471-0595	010	Inspect And Make Repairs To Chest	HSPA...	None	1	MW	4				3			
900005343713	PMH1	RELE	4	541-9958	010	This is the 3rd time in 2 years that the	HTM...	None	1	MW	8		7	1				
900005343950	PMH1	RELE	3	471-1512	010	Replace Existing Cascade Mix Tank With A	HS-T...	None	1	WL	4					4		
900005344569	PMH1	RELE	4	551-0036	010	Fab And Replace Paper Machine Ww Diluto	HS-T...	None	1	PF	4		2	2				

Features:

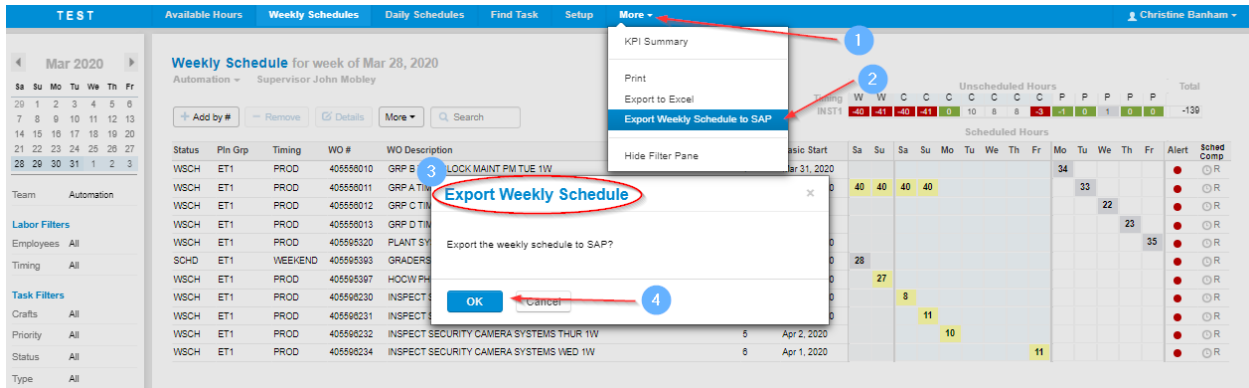
Export to CMMS

Video Link: [Export to CMMS](#)

In some cases, a business has elected to write details back to their current CMMS. If this option has been enabled a 'Export Weekly Schedule to CMMS' will be available under the More drop-down box.

Note: When exporting back to a CMMS all team schedules for that specified week will be written back to the identified CMMS.

1. Click on the **More** tab at the top of the screen in the blue ribbon.
2. Select **Export Weekly Schedule to CMMS**.
3. An 'Export Weekly Schedule' dialog box will appear.
4. Click **OK**.
5. All work orders for all teams scheduled for the week will be updated back to the CMMS.



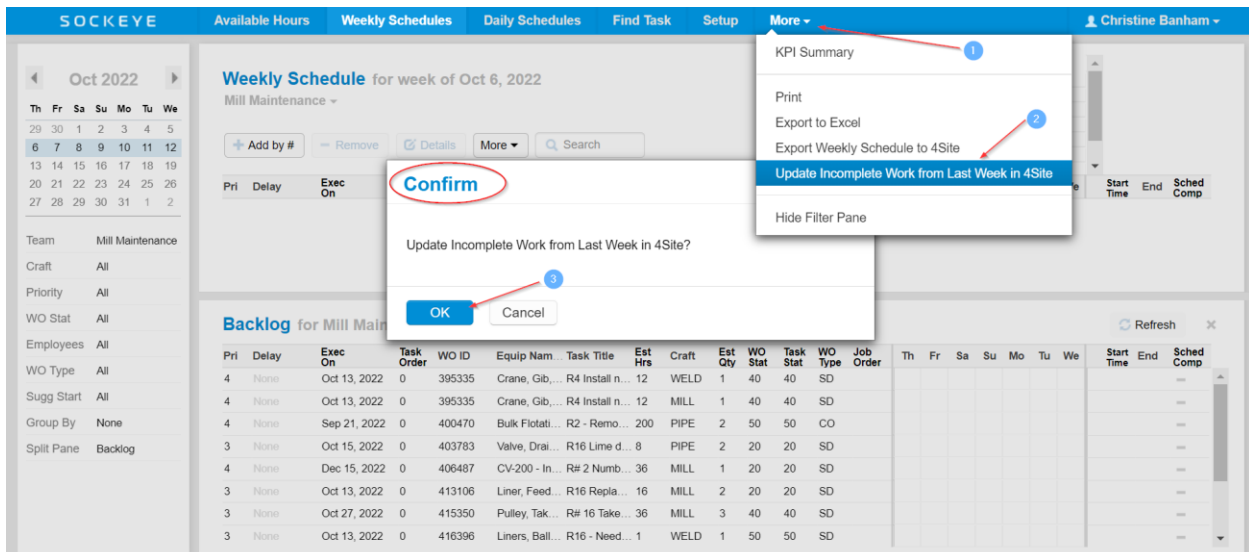
Update Incomplete Work from Last Week in CMMS

Video Link: [Update Incomplete Work](#)

Some Sockeye setups can update incomplete work back to a CMMS. If this option has been enabled a 'Update Incomplete Work from Last Week in CMMS' will be available under the More drop-down box. Refer to Sockeye's [integration options](#) for further details.

Note: When exporting back to a CMMS all team schedules will be updated for that specified week period.

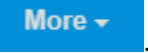

1. Click on the **More** tab at the top of the screen in the blue ribbon.
2. Select **Update Incomplete Work from Last Week in CMMS**.
3. A 'Confirm' dialog box will appear.
4. Click **OK**.
5. All incomplete work orders from the previous week identified in Sockeye will update specified fields within the CMMS.

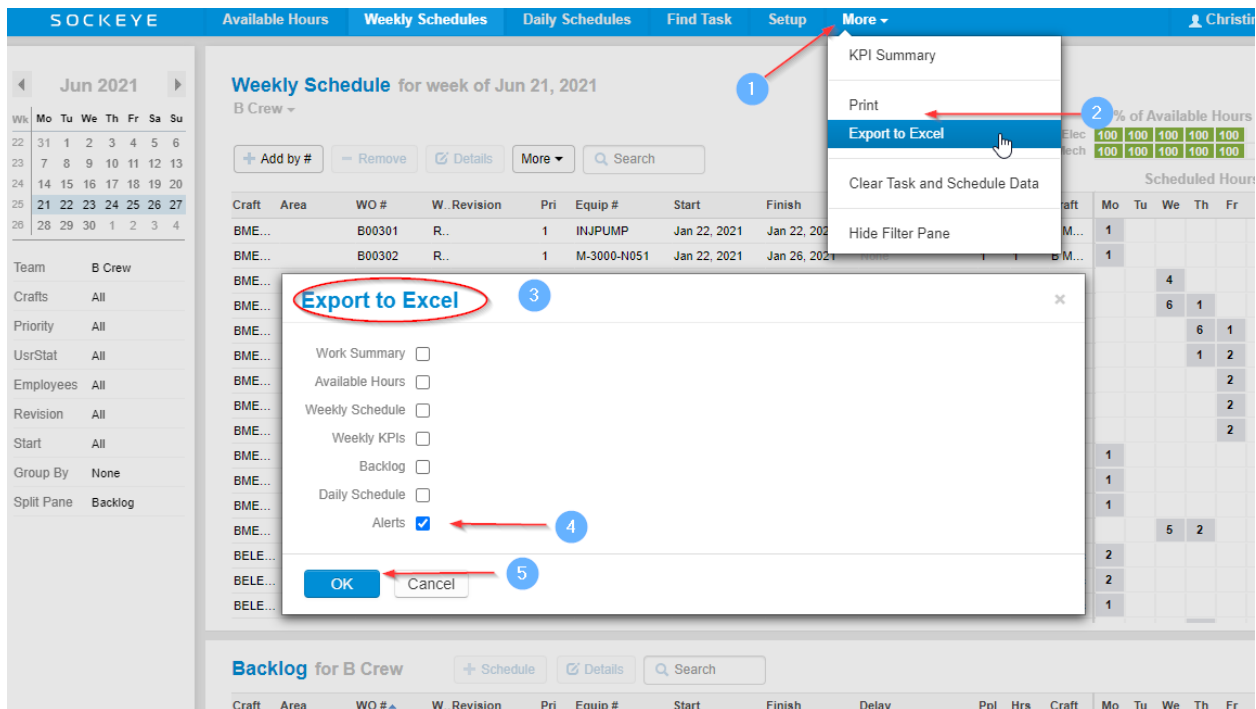


Pulling Alert Report

Website Link: [Alerts](#)

In some cases, pulling a report on the Alerts that were generated becomes helpful in updating future work orders in a CMMS.

1. Click .
2. Select **Print** or **Export to Excel**.
3. A Print or Export to Excel dialogue box will appear.
4. Select Alerts .
5. Click .



A pdf or excel report will generate identifying which alert and the reassignment.

Alerts for week of Jun 21, 2021

B Crew

WO #	WO Description	Alert Type	Message
B00422	Fab And Replace Machine Diluter	Hours	4 hours required. 2.5 hours scheduled.
B00422	Fab And Replace Machine Diluter	Hours	4 hours required. 1.5 hours scheduled.
B00425	Annual Post Refiner Inspection	Hours	2 hours required. 1 hour scheduled.
B00425	Annual Post Refiner Inspection	Craft	B Mech required. B Elec scheduled on Tuesday.
B00426	Set Up CP Pump On Test Bench	Craft	B Mech required. B Elec scheduled on Tuesday.
B00426	Set Up CP Pump On Test Bench	Craft	B Mech required. B Elec scheduled on Tuesday.
B00427	Rebuild Post Refiner	Craft	B Mech required. B Elec scheduled on Wednesday.
B00427	Rebuild Post Refiner	Craft	B Mech required. B Elec scheduled on Wednesday.
B00428	Rebuild Reducer	Craft	B Mech required. B Elec scheduled on Wednesday.

Resource Notes Print, Export to PDF or Excel:

Website Link: [Resource Notes Filter](#)

1. Select **More** in the blue ribbon.
2. Select **Print** or **Export to Excel**.
3. A dialogue box will appear.
4. Check **Available Hours**.
5. Click **OK**

The screenshot shows the SOCKEYE software interface. The top navigation bar includes 'SOCKEYE', 'Available Hours', 'Weekly Schedules', 'Daily Schedules', 'Find Task', 'Setup', and 'More'. The 'More' dropdown menu is open, showing options: 'KPI Summary', 'Print', 'Export to Excel', and 'Hide Filter Pane'. The 'Print' and 'Export to Excel' options are highlighted with a red box. A blue circle '1' points to the 'More' dropdown, and a blue circle '2' points to the 'Print' and 'Export to Excel' options.

The main content area displays 'Available Hours for week of Jun 13, 2022' for 'Paper Mech TMP' under supervisor 'Jack Thompson'. It includes a calendar for June 2022, a grid of employee availability, and a list of employees. An 'Export to Excel' dialog box is open, showing a list of options with checkboxes: 'Work Summary', 'Available Hours' (checked), 'Weekly Schedule', 'Weekly KPIs', 'Backlog', 'Daily Schedule', 'Personal Schedule', 'Alerts', and 'Schedule Data'. The 'OK' button is highlighted with a blue circle '3', and a blue circle '4' points to the 'Available Hours' checkbox. A blue circle '5' points to the 'OK' button.

At the bottom, there is a 'Notes' section with a table:

Employee	Day	Date	Description
Contractor	Monday	Jun 13	Add Notes or Further Details
Bezaire, A.	Wednesday	Jun 15	Requested additional coverage for VA.
Bezaire, A.	Thursday	Jun 16	Requested additional coverage for VA.
Bezaire, A.	Friday	Jun 17	Requested additional coverage for VA.
W. Ho	Wednesday	Jun 15	Reviewed & Signed Off