## Summary:

Once logged into Sockeye, each user has access to their specific team's schedule and information associated within their team (employees, crafts, work orders, etc.) that has been assigned.

## Tools / Resources:

- Sockeye Login Page: https://app.getsockeye.com
- Sockeye Login ID and Password – Any Sockeye 'Administrator' user can provide these details.
- User Guide and videos can be found at the following link:

  https://www.getsockeye.com/support/sockeyeintro

## Revision Log:

| Revision | Date | Reason/Update | Updated By: |
|---|---|---|---|
| Rev 8 | 2023-08-21 | Forgot password option added | C. Banham |
| Rev 7 | 2023-07-31 | View password option and delay within failed login attempt | C. Banham |
| Rev 6 | 2023-04-12 | Added Spanish Translation Feature & Annual Review | C. Banham |
| Rev 5 | 2022-05-13 | Updated Document | C. Banham |

# Table of Contents

## *Access Sockeye*

## *Login:*

***Video Link:*** *[Login](#)*

Access Sockeye through Chrome and or Microsoft Edge.

1. **Open** Sockeye's login page – [https://app.getsockeye.com/](https://app.getsockeye.com/)
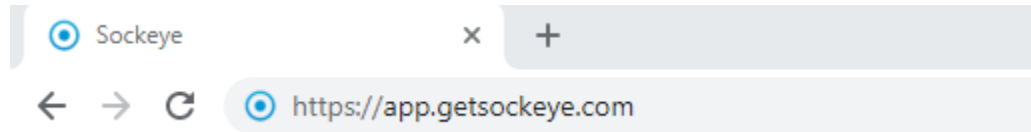


2. Enter **email address.**
3. Click 👁 **eye icon** to view the password field.
4. Enter **password.**
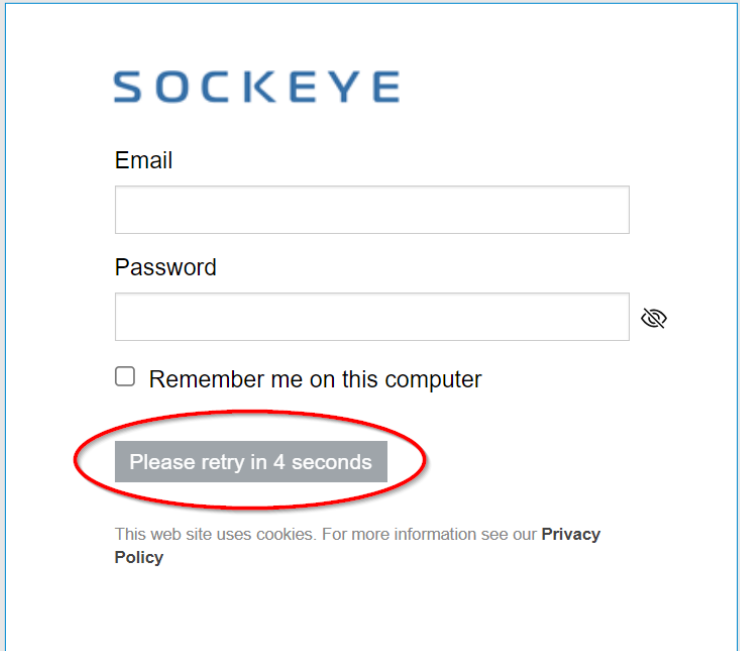5. Click **Log in**



## *Trouble Shooting Access*

## *Error and Delay Login:*

***Video Link:*** *[Login](#)*

If the username and or password is incorrect an error will generate and a 10 second countdown delay will occur. Once the **Log in** button is available try again.

**Log in was unsuccessful. Please correct the errors and try again.**
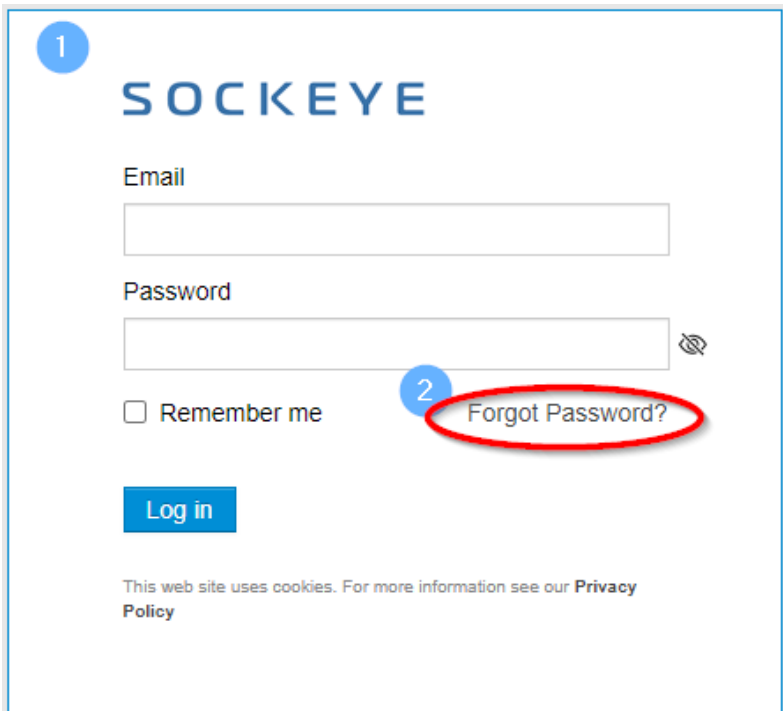  • **The user name or password provided is incorrect.**

**SOCKEYE**

Email

Password

☐ Remember me on this computer

Please retry in 4 seconds

This web site uses cookies. For more information see our **Privacy Policy**

## *Forgot Password:*

***Video Link: [Forgot Password](#)***

Allows Sockeye users to reset their own password if forgotten or needs to be reset.

1. **Open** Sockeye's login page – https://app.getsockeye.com/
2. Click **Forgot Password.**

**1**

**SOCKEYE**

Email

Password

**2**

☐ Remember me      Forgot Password?

Log in

This web site uses cookies. For more information see our **Privacy Policy**

3. A **Forgot Password** dialog box will appear.
4. Input **email** address.
5. Click **Submit**.



6. A **Check your email for a reset link** dialog box will generate.



7. Check **email**.
8. Select the **link** provided within the email to reset password.

Reset your Sockeye Password

From Sockeye
to sockeyeadmin@getsockeye.com

Hi Sockeye

We received a request for a password reset on your Sockeye account.

You can reset your password by clicking this link. 8

The link will expire in 1 hour. After that, you will need to submit a new request in order to reset your password. If you do not want to reset your password, simply disregard this email.

If you need more help or believe this email was sent in error, contact us at support@getsockeye.com

⊙ SOCKEYE

9. A **Reset your Sockeye Password** dialog box will appear in the web browser.

10. Enter **New Password**, click on the 👁️ icon to see the new password.

11. Input **New Password** under the Confirm Password, click on the 👁️ icon to see the entry.

12. Click **Set Password**.
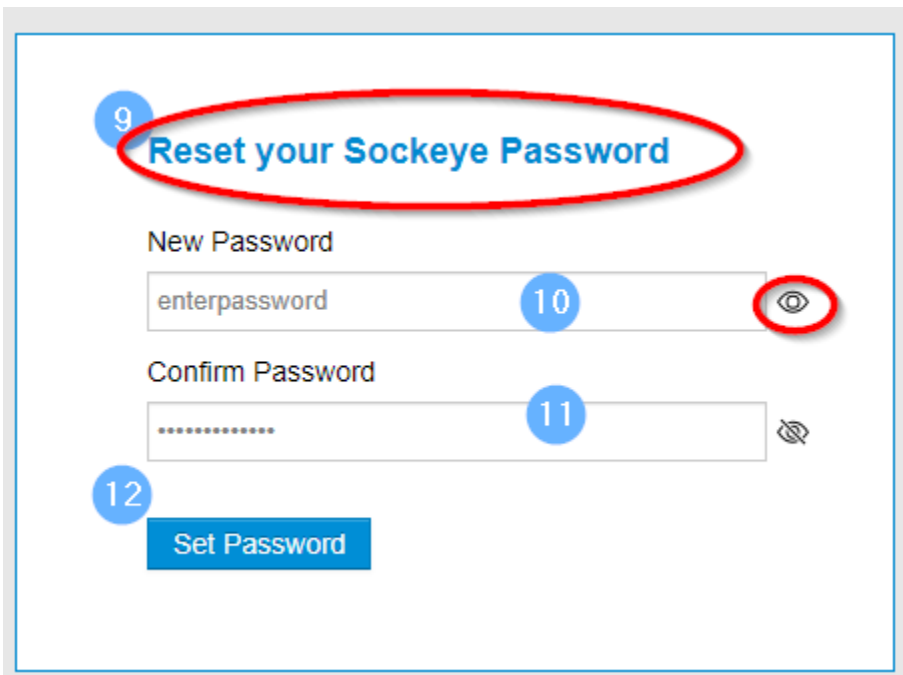


13. A dialog box will appear confirming **Your Sockeye password has been updated** and an email will be sent to confirm the password has been reset.

14. Click on the **Click here to login**.

15. Input new login details by following the Login steps.
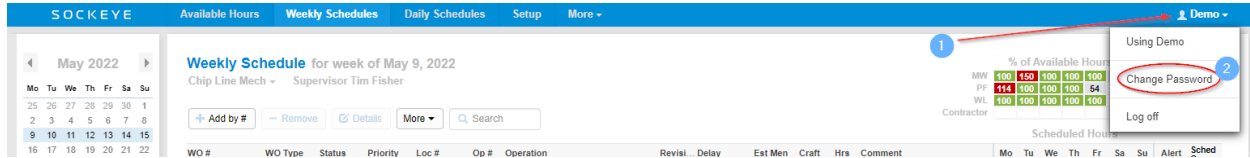
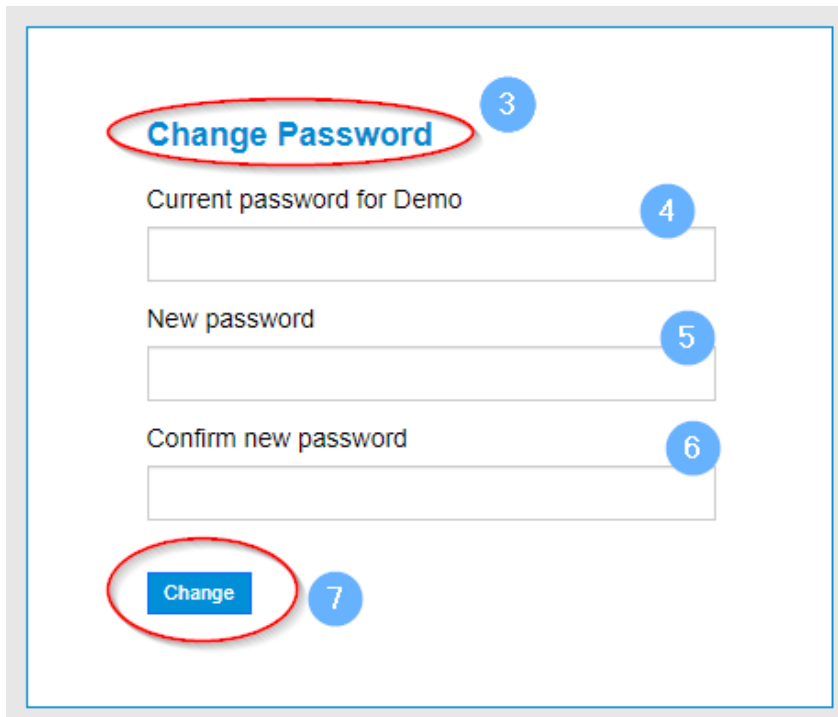13 **Your Sockeye password has been updated.**

14 Click here to login

## Change Password:

**Video Link:** *Change Password*

1. Click **username** on the top right corner of the screen.
2. Select [Change Password]



3. A **Change Password** dialogue box will appear.
4. Enter **current** password.
5. Enter **new** password.

    *** Note: No special character requirements.
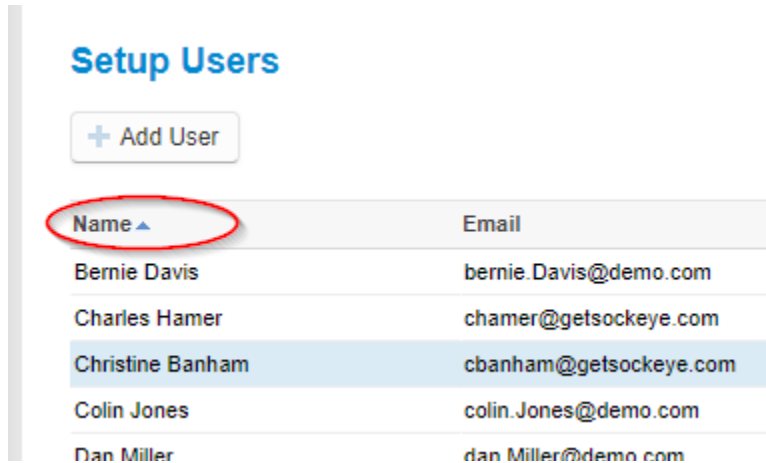6. **Reenter** new password.
7. Click on [Change] .



## Reset Password:

**Video Link:** *Reset Password*

Those that have an 'Administrator' role in Sockeye will have access to reset another user's password.

1. Click on [Setup] in the blue-ribbon at the top of the screen.
2. Select [Users] under the Setup data menu on the left-hand side.
3. Click on the **Sockeye User** under the Setup Users.
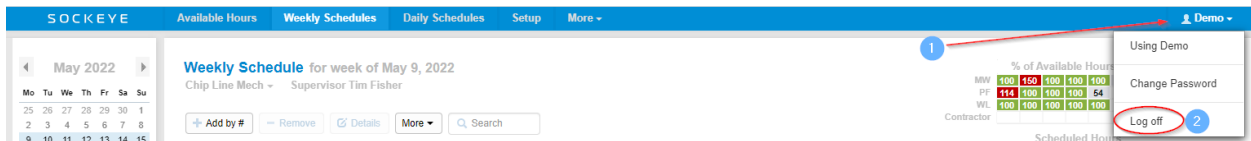    a. ***NOTE:*** *Click on the NAME field, the list of fields will update in alphabetical order.*

4. An **'Edit User'** dialogue box will generate.

5. Click on **Password** and Enter a new **password**.

6. Click [Save] .
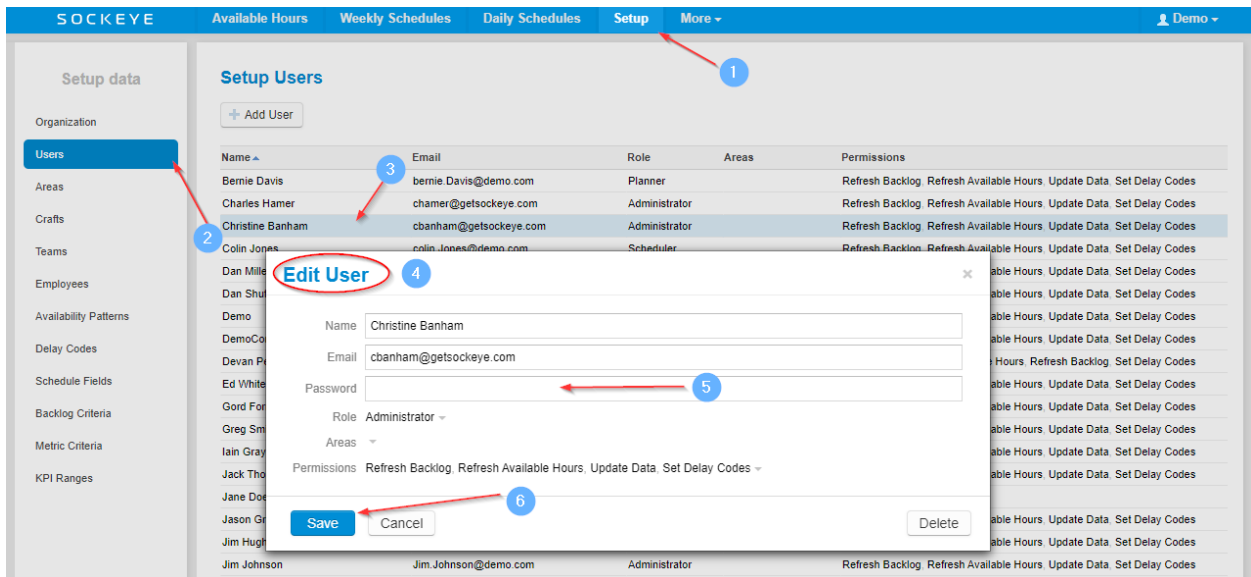


## Log Out:

**Video Link: *Log Out***

1. Click the **username** on the top right corner of the screen.

2. Click [Log off]

## Access to Multiple Sockeye Accounts:

***Video Link: [Access Multiple Accts](#)***

In some cases, a user may have access to 2 or more Sockeye accounts and can be toggled between the different accounts.

1. Click on the **username** in the blue ribbon top right corner of the screen.
2. Select the applicable location.

    **Note**: the location currently reviewing is identified at the top indicating '**Using**.'
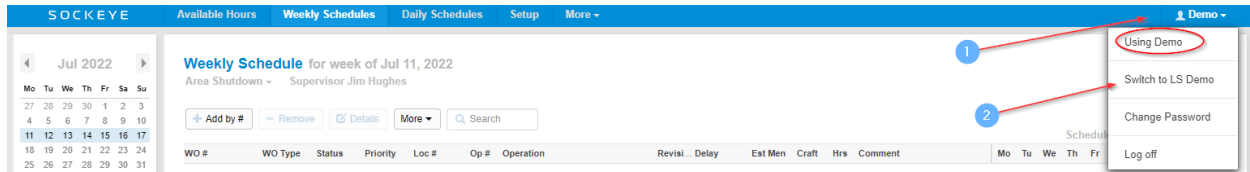


## Single Sign On (SSO):

***Video Link:***

This feature may have been added to your account. To access or setup Sockeye through SSO follow internal business processes along with setting up a Sockeye User under the Setup > User tab.
Refer to Sockeye's Setup User Guide to Add a new user.

## Sockeye Introduction

## Navigation Bar:

***Video Link: [Navigation Bar](#)***

The navigation bar will take you to different sections of the Sockeye system. Click on a different tab in the navigation bar to determine the information to be displayed.
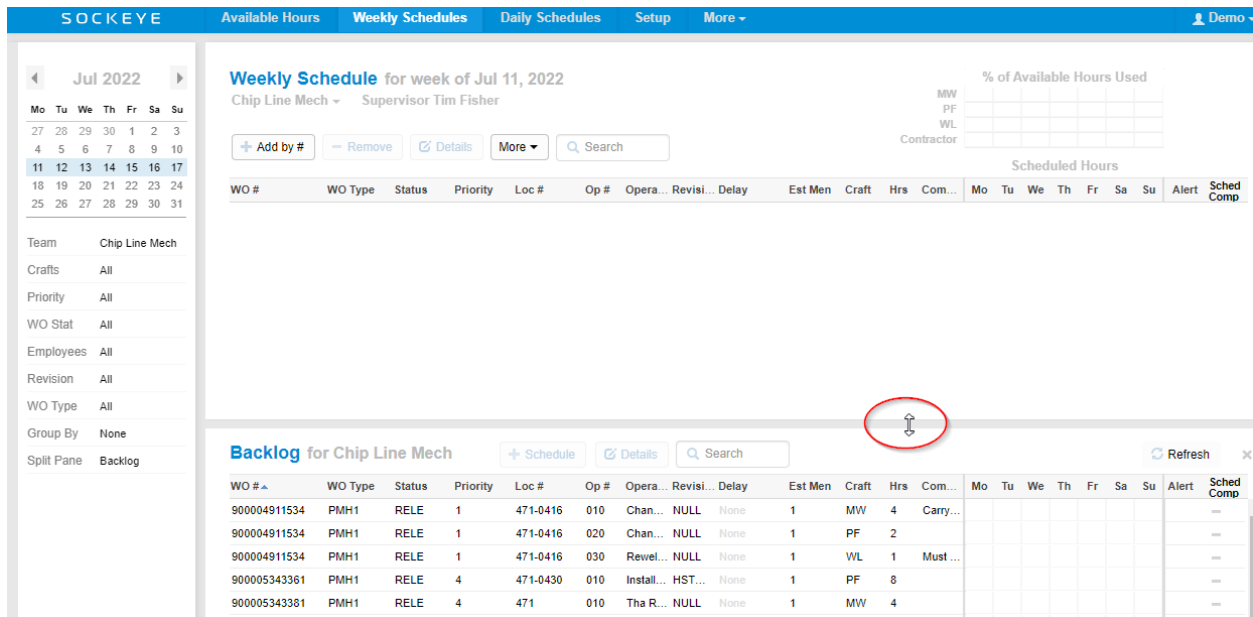


- **Sockeye** – Removes the filter pane and allows access to the filter as a pop up when clicking on 'Sockeye'.
- **Available Hours** – Generates the total hours by craft and resources to effectively assign work to available resources.
- **Weekly Schedules** – Views and create weekly schedules at the craft level.
- **Daily Schedules** – Views and assign work orders to available resources to a specific day.
- **Find Task** – Completes a search on specific work orders to identify if it has been scheduled in the past or future.
- **Setup** – Core details of Sockeye's setup for scheduling purposes.
- **More** – Access to KPI's, printing, exporting and hiding filters.
- **Username** – Sockeye user settings.

## Adjusting Backlog Section by Dragging and Dropping:

**Video Link:** *Adjust Backlog Section*

The Backlog section of Sockeye under the Weekly and Daily Schedules tabs can be adjusted to allow more visibility on the screen.

1. Hover the mouse on the grey line separating the schedule and the backlog.

2. The mouse will change to show an arrow pointing up and down ⬍.

3. Press and hold down the left mouse button

4. Move the grey line up or down on the screen.

5. Release the mouse button when the grey line is in a better placement.



## Search Fields:

**Video Link:** *Search*

Search fields are available for both the scheduling and backlog section. Any keyword from the visible fields can be searched.

1. Click in the search field

2. Enter a specific detail

3. Click the enter key

4. A list of work orders will appear based on the search criteria

## Sort field Numerically or Alphabetically:

**Video Link:** *Sort fields numerically or alphabetically*

The Backlog and Setup sections of Sockeye can sort fields or columns in numerical or alphabetical orders based on the data within that field.

1. Select and click the backlog field to put in order
2. A blue triangle ▲ will appear.
   a. If the triangle is pointing upwards ▲ the order is A to Z or lowest to highest.
   b. The triangle pointing downwards ▼ puts the order Z to A or highest to lowest.

## Filters

## Filters Overview

***Video Link: [Filters](Filters)***

The filter pane allows user(s) to display specific information within the page that meets the selected criteria. Click on any of the filters located on the left side of the screen. These filters can be found under the Resource Availability, Weekly Schedules, Daily Schedules and KPI tabs and offers specific layouts and groupings along with pulling specific details.
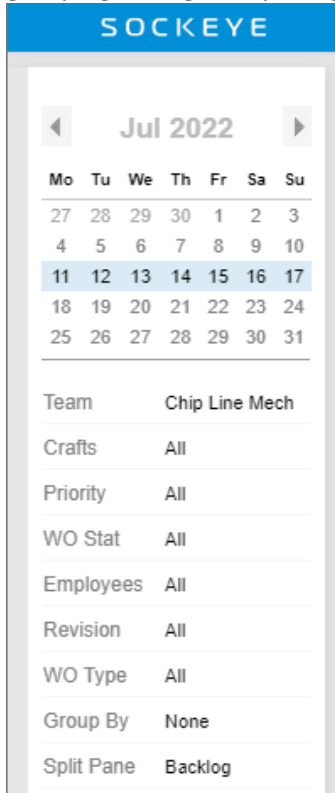
## Change Week or Day:

**Video Link:** *Toggle Weeks/Days*

Use the calendar in the filter section on the far-left side of the screen to change date ranges. The Weekly Schedule and Available Hours will Select the week and the Daily Schedule tab will allow a single day selection.

1. Click on the ◀ or ▶ to toggle from month to month.
2. Change the schedule week or day by clicking on the desired date in the calendar.
    a. The week or day will be highlighted in blue.
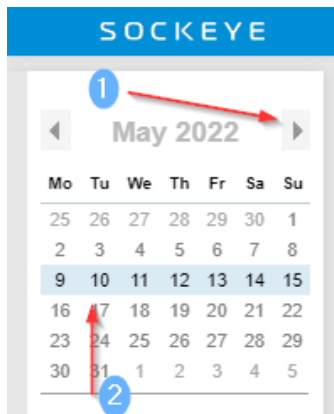


## Teams:

**Video Link:** *Select a Team*

Teams allows flexibility on the number of schedules to build each week and the detail required. This can be broken up by crafts, shifts, and or groupings. Toggle between multiple teams and schedule details.

1. Click on the ▾ under the menu tab header (Available Hours, Weekly Schedules, and Daily Schedules).
    a. A drop-down box will appear with a list of fields.
2. Select the applicable team.
    a. The drop-down box will disappear.
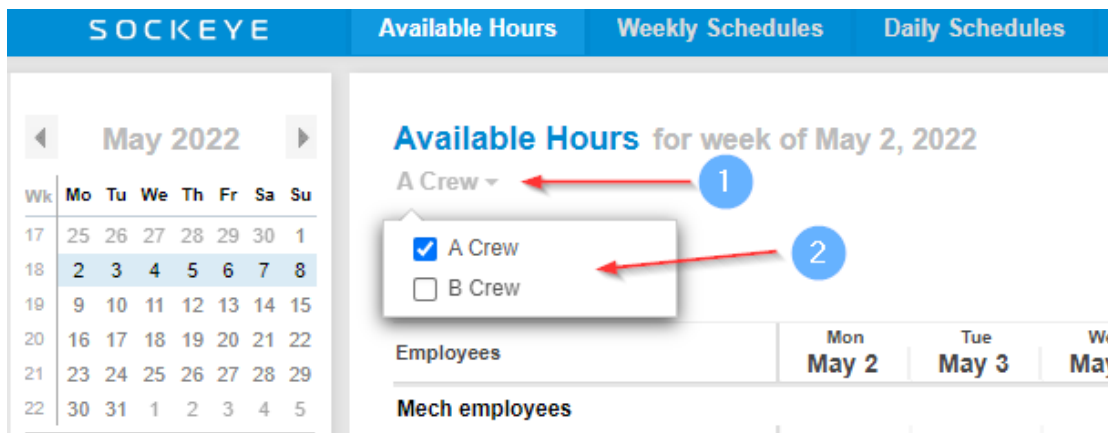
## Group By:

**Video Link:** *Group by Filter*

Allows work orders in both sections to group by a specific field.

1. Click on  Group By     None    in the filter pane.
   a. A drop-down box will appear with a list of fields.
2. Select the criteria required to sort the work orders by.
   a. The drop-down box will disappear.
3. All work orders will be grouped by the field selection.

## Split Pane:

Provides different views in the bottom section of the Weekly and Daily Schedules section.

1. Click on   Split Pane   in the filter pane.
   a. A drop-down box will appear with a list of fields.
      i. Backlog – Pulls all work orders identified as ready to schedule for that team.
      ii. Weekly KPIs – Available to view only under the Weekly Schedule Tab. Offers a view of each of the Sockeye KPI's turned on and the status for the week.
      iii. None – Removes the separation and shows a full Weekly or Daily Schedule.
2. Select the criteria required to sort the work orders by.
   a. The drop-down box will disappear.
3. The bottom portion will update based on the selection from the Split Pane.

# Features:

## *Change or Toggle Language*

**Video Link:** [*Translations in Sockeye*](#)

A user can toggle to the appropriate language setup for that specific account.

1. Click **username** on the top right corner of the screen in the blue ribbon.

2. Select **Change Language** from the drop-down menu.

3. A **Language** dialogue box will appear in the middle of the screen.

4. Under the **Language** field click on the **arrow** pointing down ▼

5. A **drop-down menu** will appear, select the applicable **language**.

6. Click ![Save].

7. Sockeye tables will be updated with the selected language.