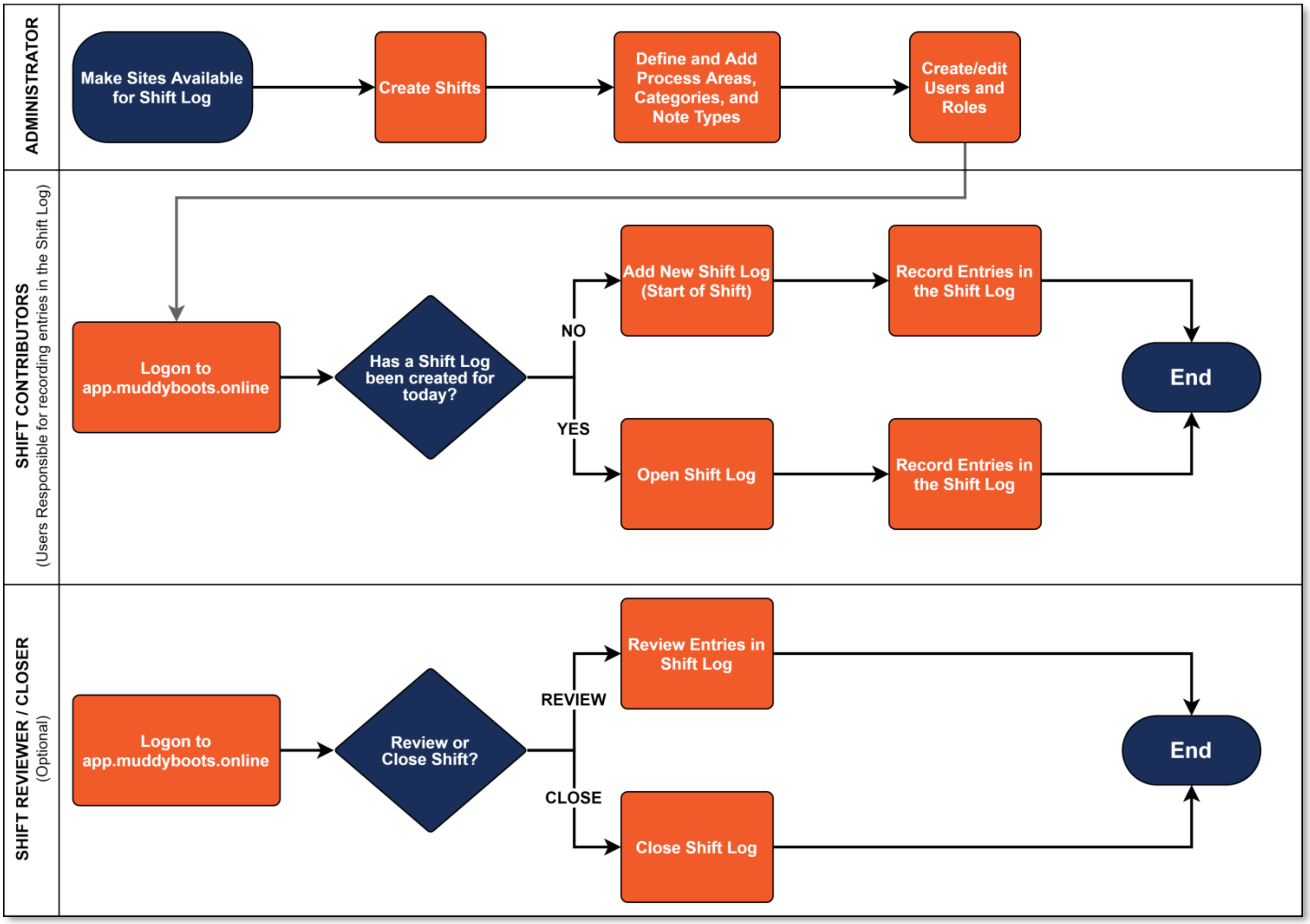
Shift Logs in muddyboots.online

The muddyboots.online Shift Log module provides a searchable, ABSA compliant log, that provides continuity between shifts and the ability to access the log from anywhere with an internet connection. This document will cover logging in to the muddyboots.online app, setting the user home page, starting a new shift log and adding entries to the shift log.

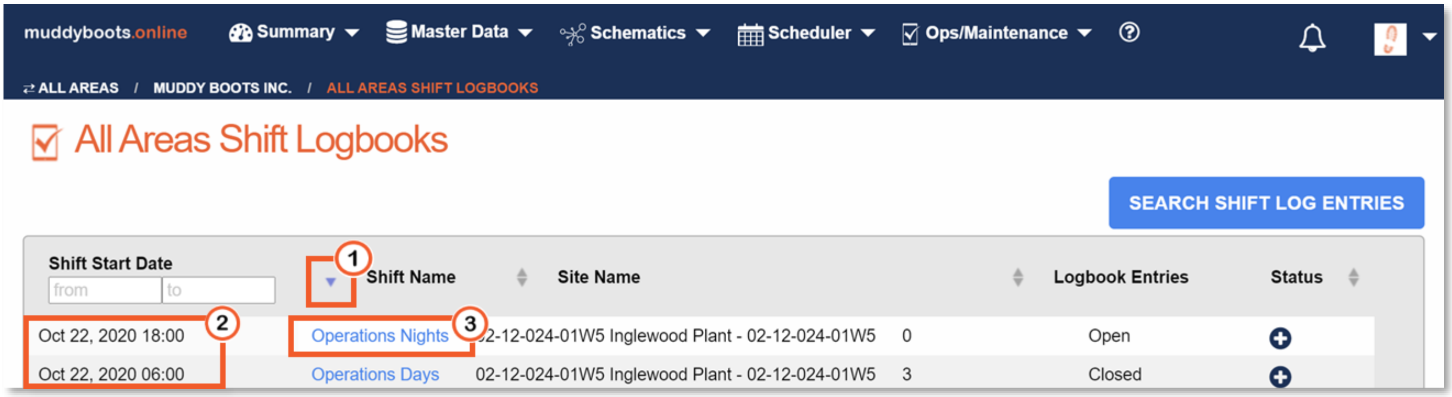
Shown below is a flow chart demonstrating the workflow that will be followed to set up and use the muddy boots electronic shift log. This document will cover the "Shift Contributors" portion of the workflow. All the administrative tasks will have been completed prior to shift contributors completing the steps shown below.



Navigating to Ongoing/Closed Shift Logs

Before starting a new Shift Log, users should confirm that there has not already been a log started for that day.

- Navigate to the “Shift Logbooks list” Page by clicking the “List” tab located under the “Shift Logs” portion of the “Operations” drop down



- 1 Organize the “Shift Logbooks” list from newest to oldest by clicking the organization buttons next to the “Shift Start Date” heading.
  - Ensure the arrow is in the downward position to list the most recent shift logbooks at the top of the list.
- 2 Check for the current date in the “Shift Start Date” column.
  - If the correct date is not listed, go to “Starting A New Shift Log” instructions in this document
- 3 Click the blue hyperlink to open a shift log and begin making entries.

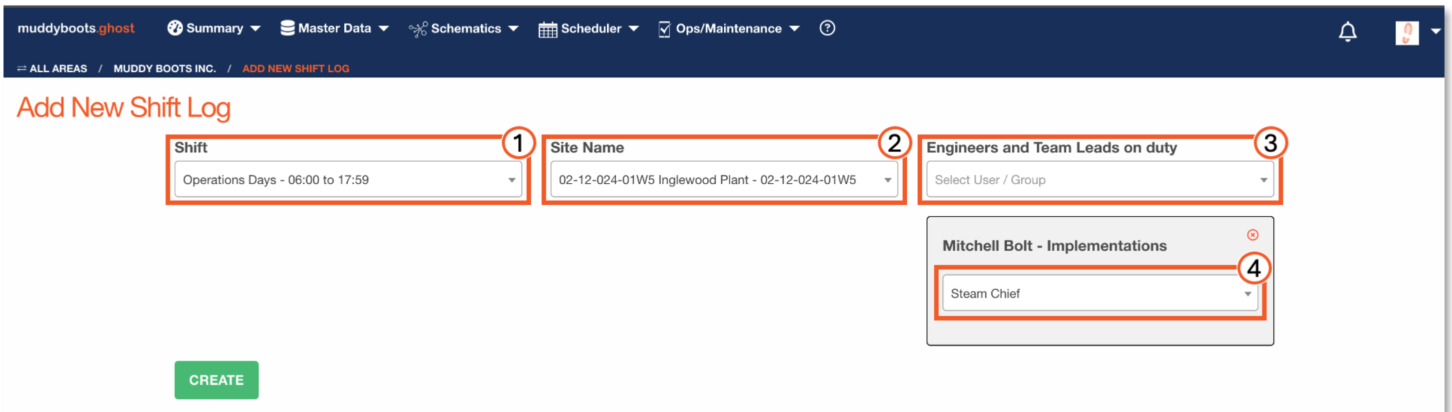
- Go to the “Entering Information in Shift Logs” instructions in this document.

Starting a New Shift Log

At the beginning of every shift, users will check to make sure that a new shift log has not already been opened, and if one has not been started, start a new shift log.

Note: Users will need to have the "Shift Contributor" Role to create new shift logs.

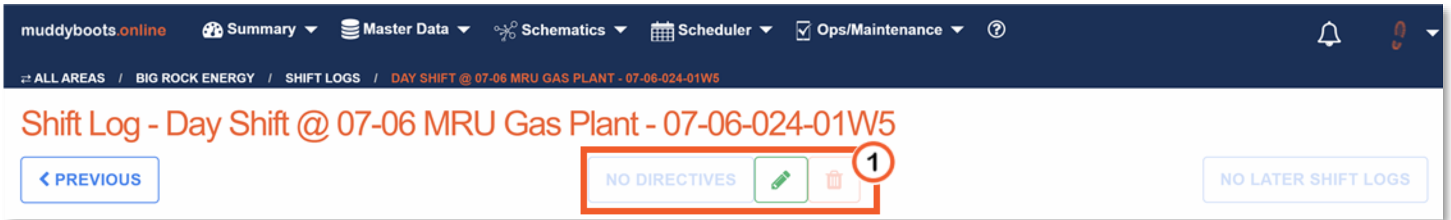
To add a New Shift Log, click the "New" link under the "Shift Log" section of the **Operations** or **Ops/Maintenance** drop down.



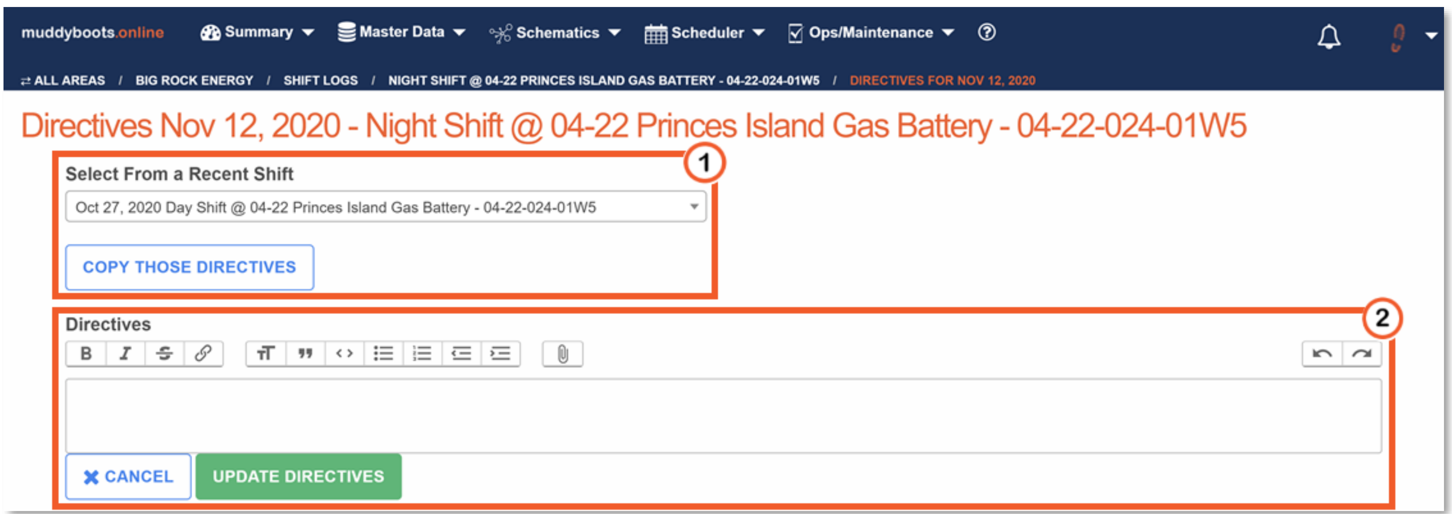
- 1 Select the applicable shift.
- 2 Select the site that the new shift is being created for from the "Site Name" drop down.
    - All the sites available for shift log are contained in this drop down.
      Note: sites that show up in the "Site Name" drop down will be limited by the user's hierarchy selection.
- 3 Once a site has been chosen, engineers and team leads who are responsible for the shift can be selected by clicking on the "Engineers and Team Leads on Duty" drop down.
    - Engineers and team leads are the users who are responsible for the shift, not necessarily the users entering information in the Shift Log.
    - The drop down displays groups and individual users. The groups appear at the top of the list.
      Note: Engineers and Team Leads can also be added after a new shift log has been created.
- 4 Assignments can be selected for each user in the drop down. The assignments are set by the company administrator.
- Click the CREATE button to create the new shift log.

Shift Log Directives

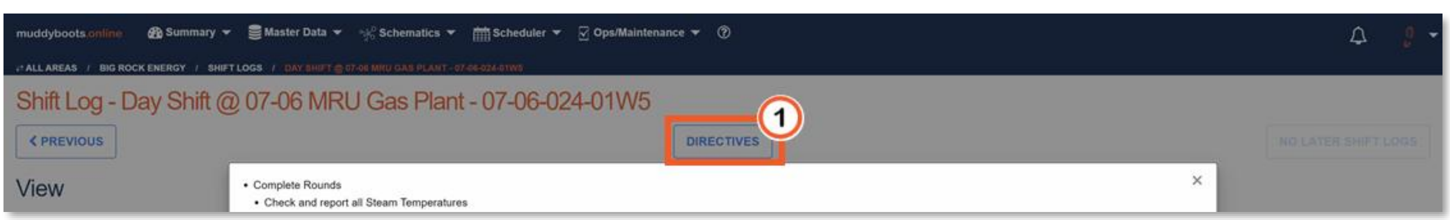
Once a shift has been opened, Directives can be added to the Shift by those users with the *Shift - Directives Admin* role. These Directives can be used to communicate Daily Directives, KPI's, etc.



- 1 To Create a Shift Directive, click ✎. To delete a Shift Directive on an Open Shift, click 🗑.
  Note: Creating and Editing Directives will only be available to users with the *Shift - Directives Admin* role.



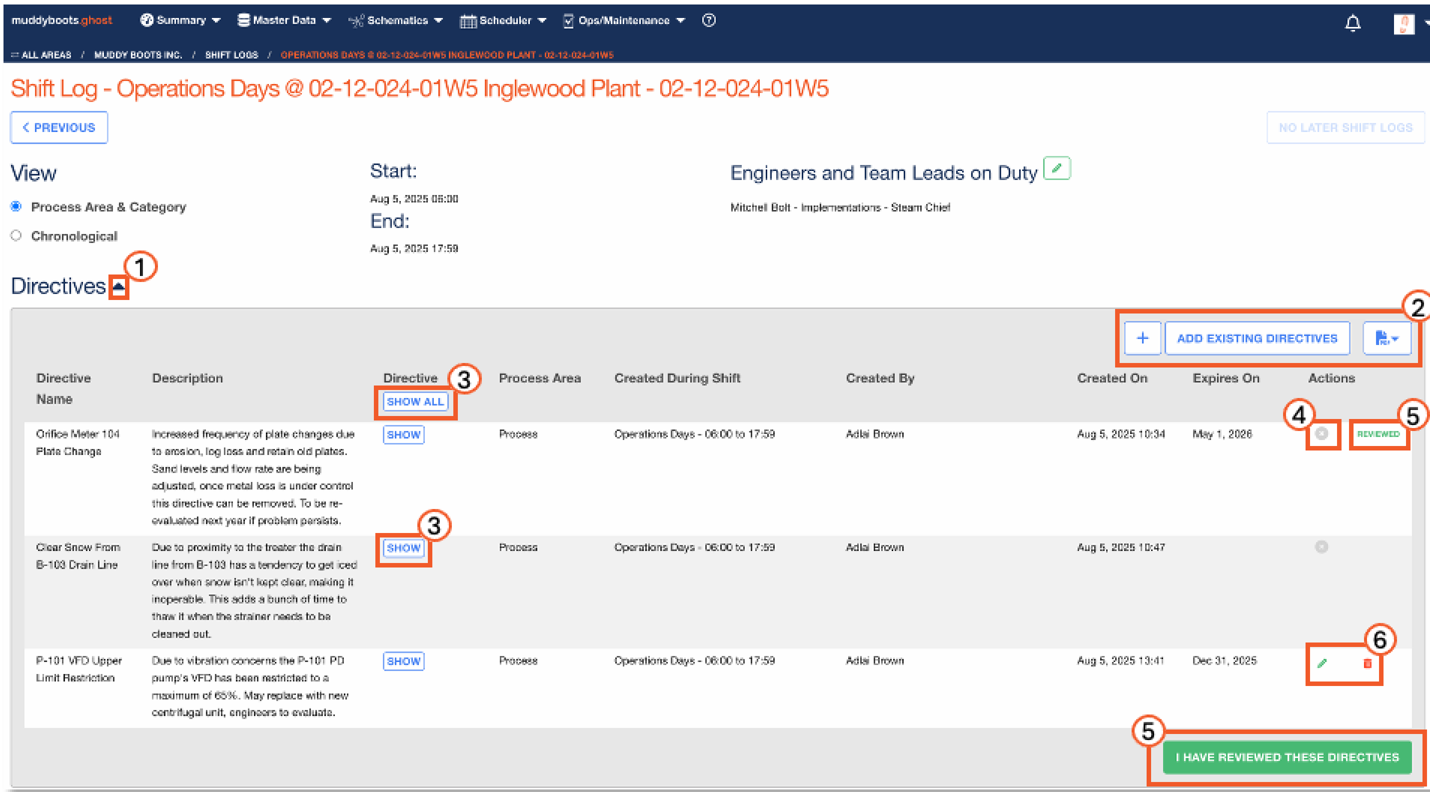
- 1 If applicable, Copy the directives from a previous Shift. The previous Directives will be copied to the Directives text box for editing.
- 2 Create new Directives or edit copied Directives in the text editor. These Directives will be visible to all viewers of the Shift Log. Click UPDATE DIRECTIVES to complete.



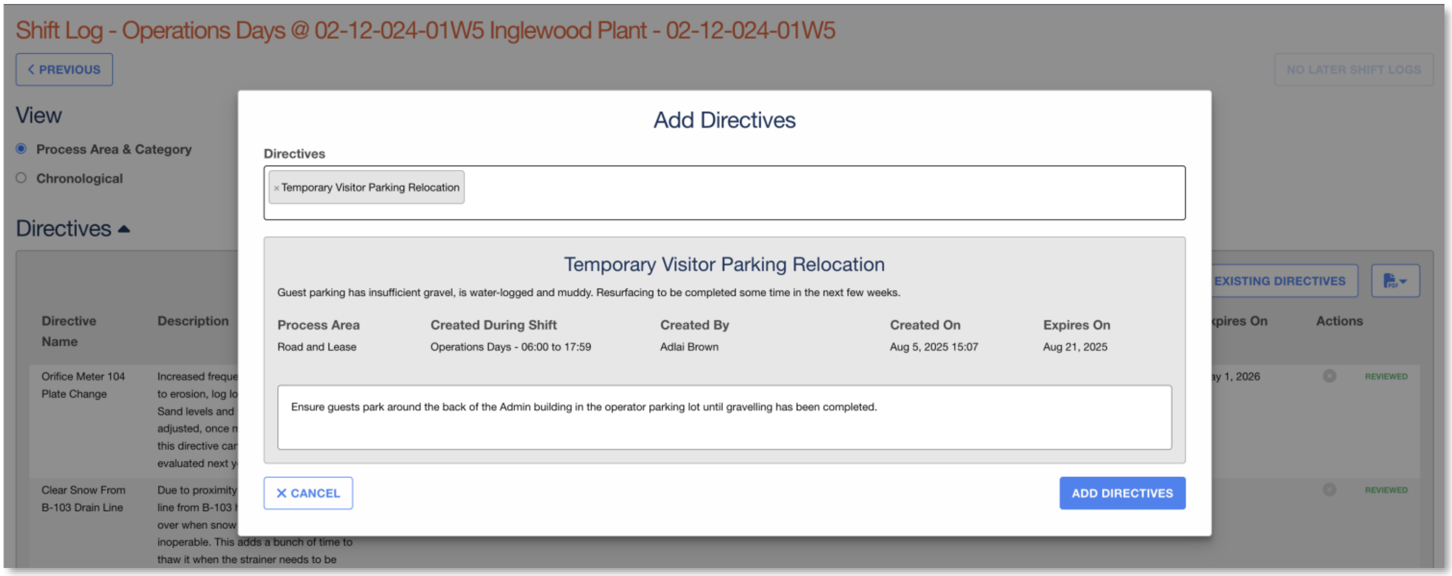
- 1 To view Directives set for the shift, click DIRECTIVES. All Directives set for the Shift will now be visible.

Shift Log Enhanced Directives

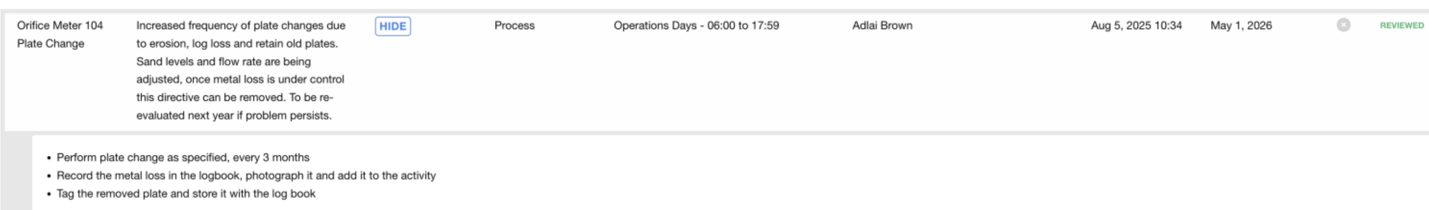
Where desired, an enhanced version of the Directives feature can be enabled. This is toggled at the Site level by the Company Administrator. As with the standard Directives, these are managed by users with the *Shift - Directives Admin* role.



- 1 Toggle visibility of the Directives section.
- 2 Clicking the + button will send users to a page where new directives can be created (see the "Creating Enhanced Directives" section for more details).
- 2 When ADD EXISTING DIRECTIVES is clicked, a modal will appear allowing users to add existing directives; several can be selected at once.
  Note: Only directives for the same site will be shown that are unselected and have an *Active* status.



- ② By clicking the user can choose between either a *Detailed* or *Summary* PDF export of all directives in the current Log Book. The *Detailed* export displays the information shown in the Directives list; the *Summary* export shows only the Name, Description, and Directive information.
- ③ All directives can be shown at once by clicking the SHOW ALL button. The button will then change to HIDE ALL.
- ③ Individual directives can be shown by clicking the SHOW button. Once clicked the button will change to HIDE.



- ④ Clicking will remove the directive from the list.
- ⑤ Users with the *Shift – Reviewer* Role can see the I HAVE REVIEWED THESE DIRECTIVES button, when clicked it will:
    - Change any *Pending* status directives (those that can be edited or deleted) to *Active*, where they are no longer editable, and will now carry forward to the next shift.
    - Show REVIEWED next to each directive
    - Add a "Reviewed by" stamp to the bottom of the Directives list:

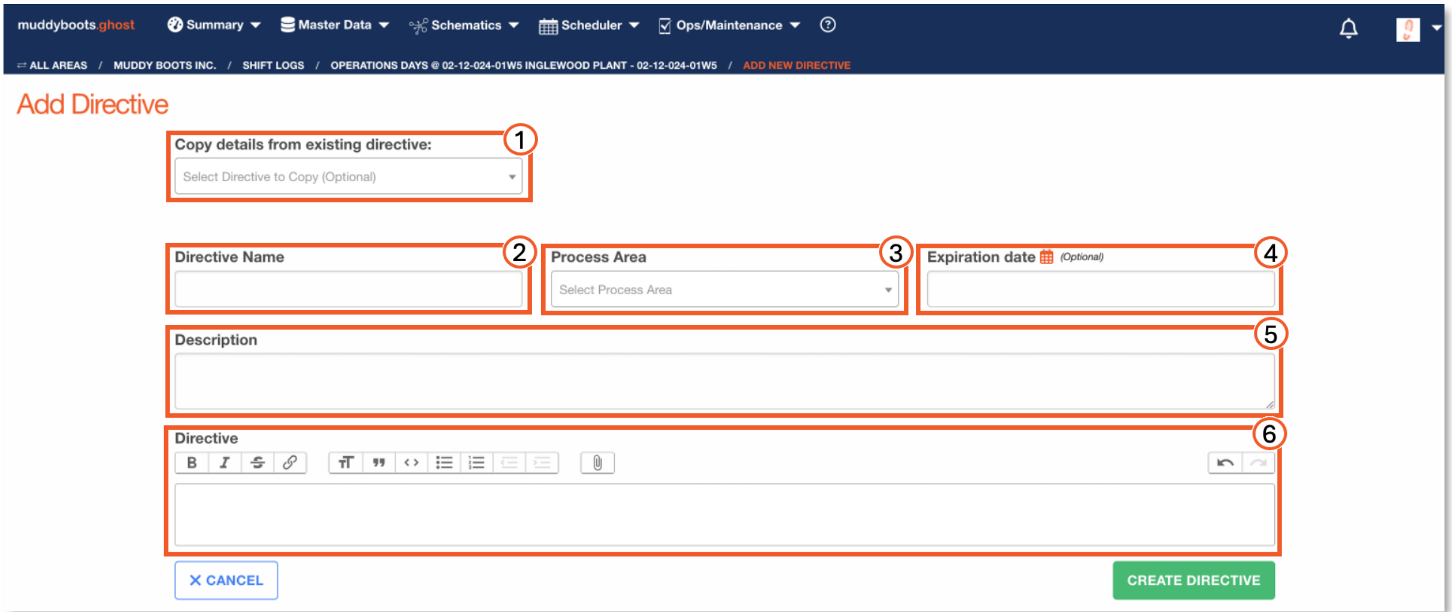
Note: Any changes to the list (adding or removing a directive) will remove any "Reviewed by" stamps, though the unchanged directives will retain their REVIEWED markers. Multiple users can review the same Directives list; each review will be added below as another line item.

- 6 Newly created directives will be in a *Pending* state and can be edited or permanently deleted.
  - Clicking the button will send the user to the edit page.
  - The button will open a confirmation window, allowing the user to permanently delete the directive.

Notes:

- Enhanced Directives with an *Active* status (not editable) are automatically carried forward to any shifts for the same site. *Pending* directives are not carried forward until the Directives list has been reviewed, after which their status changes to *Active*.
- Once directives reach their "Expires On" date their status will change to *Expired*, and they will no longer be selectable.

Creating Enhanced Directives



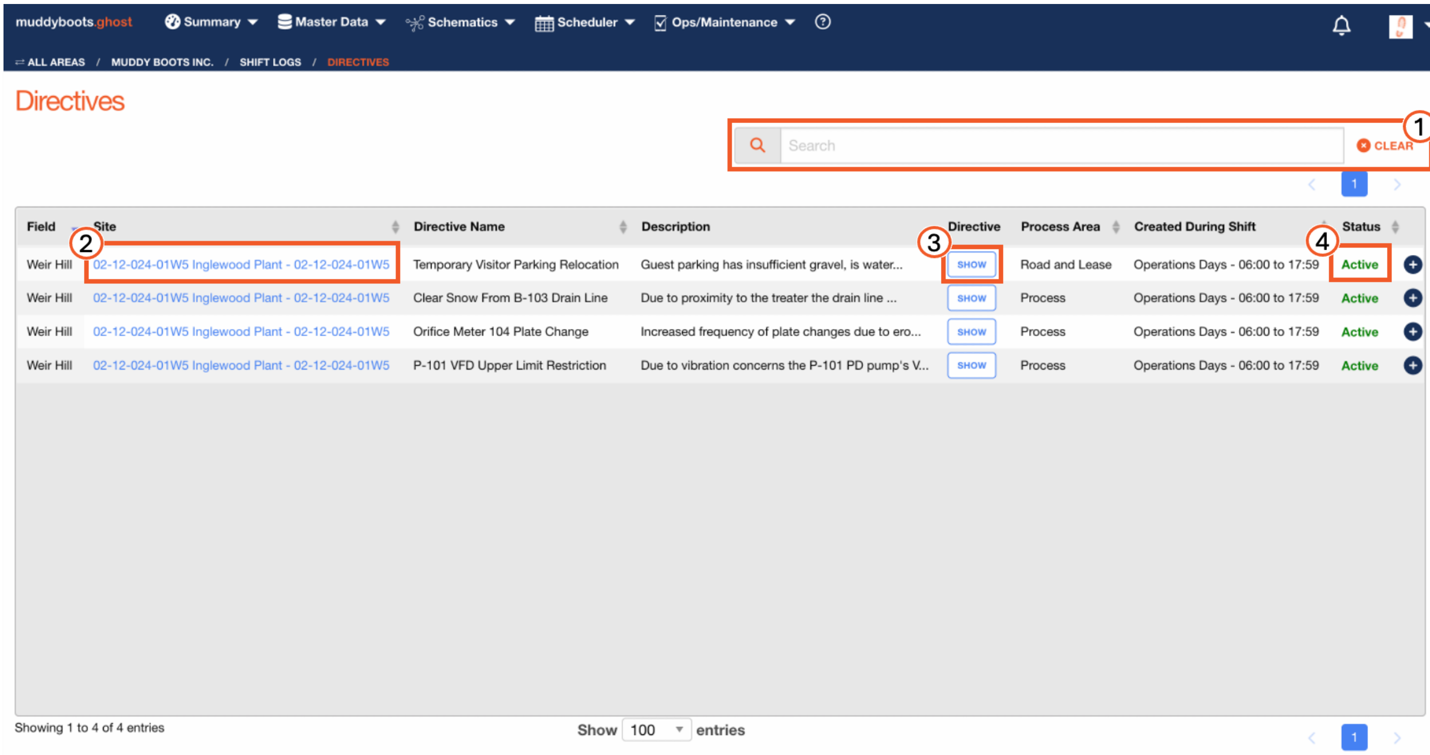
- 1 Optionally select an existing directive to copy from. “Process Area”, “Description”, and “Directive” will be automatically populated from the selection. Clearing the selection will clear the inputs that were automatically populated.
  Note: *Active* directives for all sites will appear in the list.
- 2 Create a unique name for the directive. This is a required field.
- 3 Select an optional process area that the directive will be recorded for.
- 4 Optionally select a date on which the directive will expire. At the specified date its status will change to *Expired* and it will not carry forward to subsequent shifts, nor will it be selectable.
  Note: To remove a selected date, click on the input field and clear the text.
- 5 Enter an optional description for the directive.
- 6 Add the details for the new directive. This is a required field.

Click the CREATE DIRECTIVE button to save the new directive, redirecting back to the Shift Log it was created for.

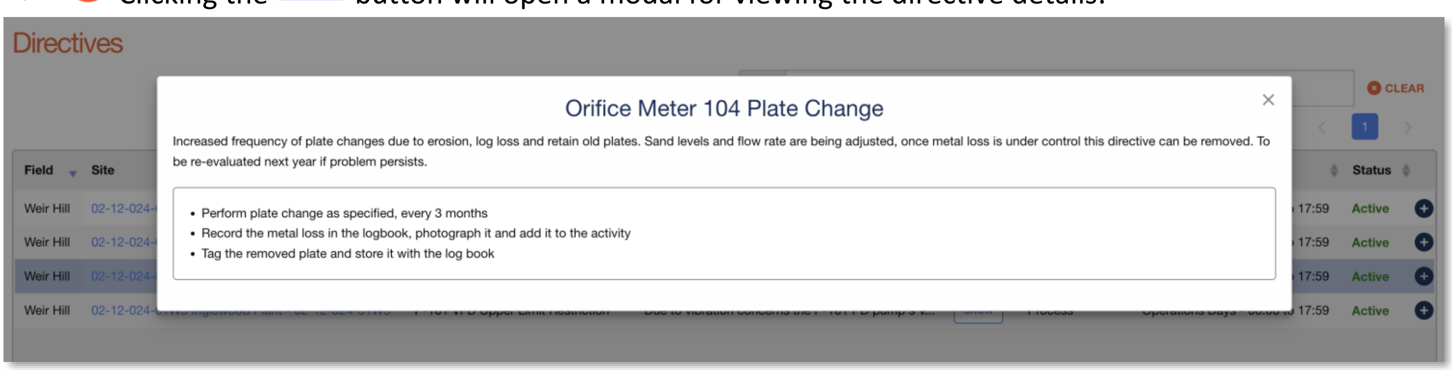
Viewing All Enhanced Directives

Directives for all sites can be viewed from the “Directives” list, with the ability to search and sort.

- Navigate to the “Directives” tab located under the “Shift Logs” section of the “Ops/Maintenance” drop down.



- ① Use the search box to filter the Directives list, showing only directives that contain specific key words.
- ② Clicking the blue hyperlink will navigate to the Site the Directive was recorded for.
- ③ Clicking the SHOW button will open a modal for viewing the directive details.

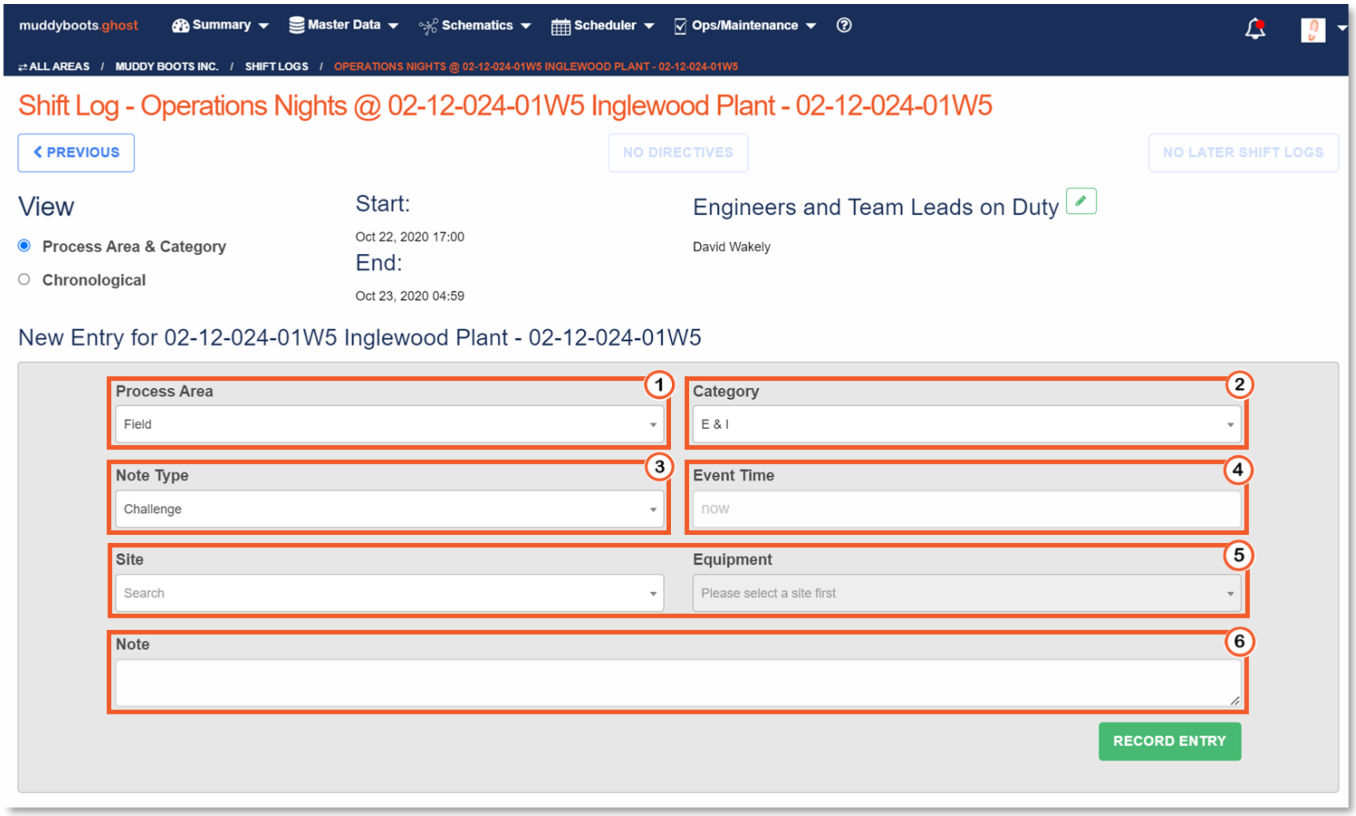


- ④ The directive status is either: Active, Pending, or Expired. *Active* directives will carry-forward into subsequent Shift Logs, *Pending* directives will not, but can be edited or deleted. *Expired* directives are locked.

Entering Information in Shift Logs

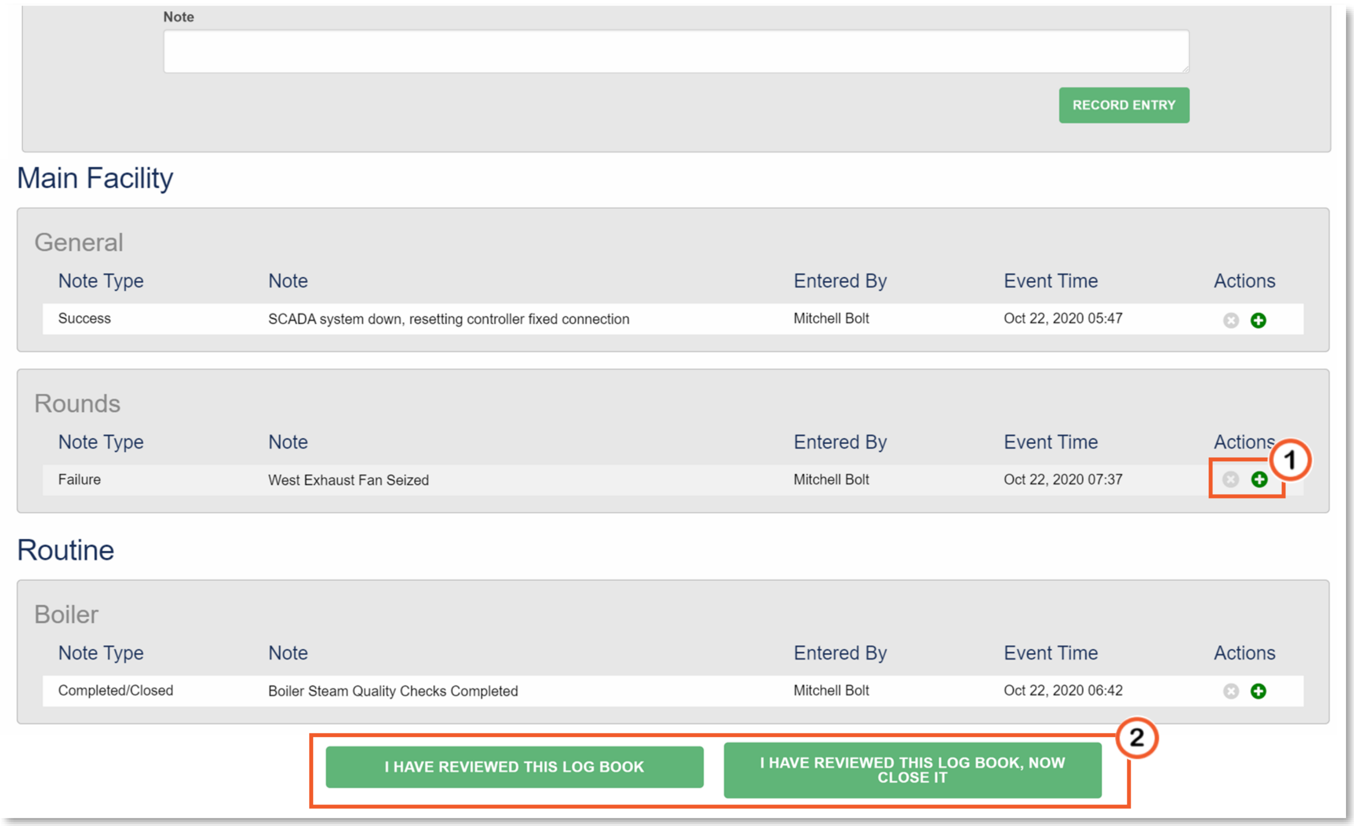
Once a shift logbook has been opened either by navigating to the shift through the shift log books list or the add new shift log page, users can enter data entries into the shift log.

Note: Users need to have the *Shift – Contributor* Role to enter data in shift logs.



- The "Process Area", "Category", and "Note Type" drop downs are created by the company administrator. Each dropdown selection will need to be made to ensure that the shift log entry is under the correct heading in the log.
- 1 Select the area that the entry will be recorded for from the "Process Area" drop down.
- 2 Select the category that the entry will be associated with from the "Category" drop down.
- 3 Select the type of entry that is being entered in the shift log from the "Note Type" drop down.
- 4 Enter the time that the entry is being record for. This should be entered in 24-hour format.
  - Leaving the box blank will automatically record the current time.
- 5 Site and Equipment is an optionally selectable dropdown, only available if enabled by the company administrator and provides the available site and equipment selection for the users' current hierarchy.
- 6 Enter notes or observations pertaining to what was completed or observed.

- Click the RECORD ENTRY button to save the shift log entry.
  Note: Once the RECORD ENTRY button has been clicked the entry can no longer be edited or altered.
- Repeat steps 1-5 as many times as necessary to add entries to the shift log.



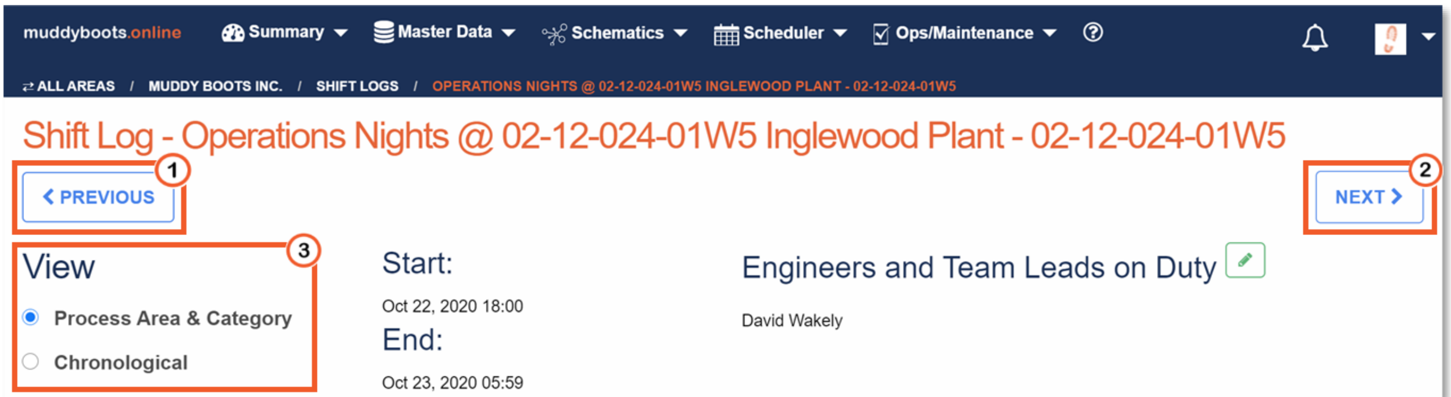
If additional notes are required, or a mistaken entry is recorded on the shift log entries, the following steps can be taken:

- 1 Clicking the button will add a strike through (~~Strike Through~~) of the original entry. This can be used to show that a mistake was made, or the entry is not necessary
- 1 Clicking the will allow users to add a note to a shift log entry. Much like a shift log entry, notes cannot be deleted.
  - Notes can also be struck through by clicking the next to the note.
- 2 For Those users with the *Shift – Reviewer* or *Shift – Closer* Roles, the following actionable buttons will be available:
  - I HAVE REVIEWED THIS LOG BOOK: A *Shift – Reviewer* can review the log, creating a timestamp as to when they reviewed the shift log. Further log entries can be completed after the review.
  - I HAVE REVIEWED THIS LOG BOOK, NOW CLOSE IT: A *Shift – Closer* can review and close the log, creating a reviewed and closed timestamp. A shift log that has been closed can no longer be modified.

Viewing Past Shift Log Entries within Shift Logs

Shift Log entries can be viewed by Process Area and Category, or in Chronological Order within the shift log.

- Navigate to a current or past shift log using the "List" tab located under the shift log portion of the operations drop down.



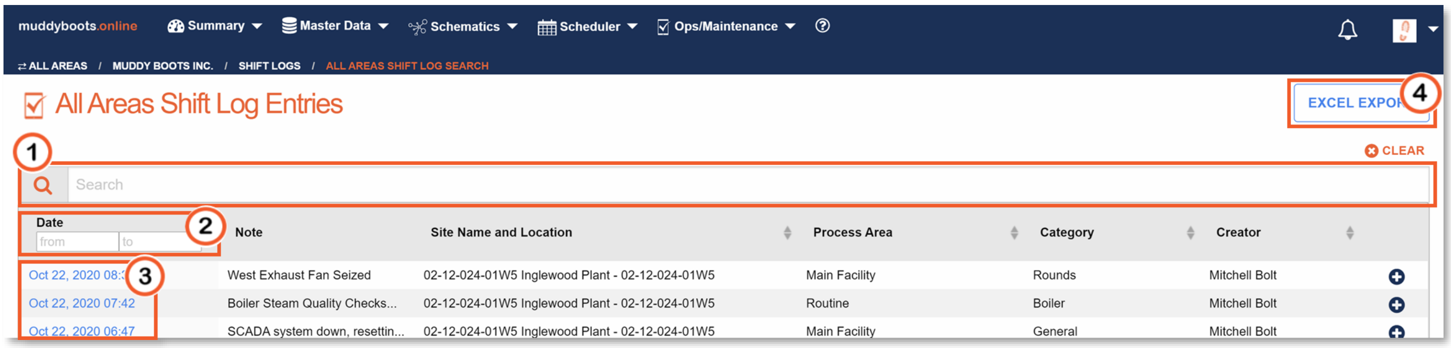
- 1 Clicking the PREVIOUS button will take the user to the previous shift log.
  - This is helpful if the user wants to view or check entries from the previous shift and compare them.
- 2 Clicking the NEXT button will take the user to the next most recent shift log.
- 3 The "View" selections will organize the entries in the shift log by either Process Area and Category or Chronological Order
  - Selecting "Process Area & Category" will organize the entries based on what was selected from the "Process Area" drop down with subheading for the "Category" drop down selection.
  - Selecting "Chronological" will organize the shift log entries by the time the entry was recorded for, regardless of the process area or category that the entry was recorded under.

- Scroll to the Shift Log Entries, located under the "New Entry" portion of the shift log page, to view the entries.

Searching and Viewing Shift Log Entries Using the “Search Entries” Data Table

Entries can be viewed outside the shift log they were entered in by using the “Search Entries” list. This list contains all shift log entries with all indexed for convenient lookup of information.

- Navigate to the “Search Entries” tab located under the shift log portion of the operations drop down.



- 1 Use the search box to narrow entries down.
  - This is a helpful function if users want to see all the entries containing specific key words.
- 2 Use the date boxes to see entries between two dates or starting on or before a specific date.
- 3 Click the blue hyperlinks located in the date column to be taken to the shift log that the entry was recorded in.
- 4 Once the table has been sorted to contain the desired data, clicking the EXCEL EXPORT button will export the data to an Excel sheet.

  Note: The excel export will only contain those entries remaining on a filtered list. To export all entries, clear any filters and select EXCEL EXPORT again.

- For a more in-depth description of how to sort data tables in MBO please refer to the “Sorting Data Tables and Exporting to Excel in MBO” portion of the Navigation Quick Start document.