

Scheduling in muddyboots.online

muddyboots.online (MBO) has a full suite of scheduling functionality for creating PM (planned maintenance) schedules and for scheduling Ad-hoc / CM (corrective maintenance) tasks. Scheduling requires site or equipment assets to exist along with the availability of Activities for the applicable task. This document will cover how to configure PM and CM/Ad-hoc schedules.

Scheduled Tasks

Scheduling is initiated in two ways within MBO:

- a) **Schedule Defaults:** Schedule defaults are applied to all sites or all of a specific equipment type, across an entire field. These default tasks can be updated or deleted for individual sites or pieces of equipment, where required after the defaults have been setup. Once a Schedule default has been set, any sites or equipment that matches the default parameters added in the future, will automatically be scheduled based on the default schedule

Note: Single Tasks (non-repeating) and Run Hours Scheduling options are only available at the site and equipment scheduling level. They are not available for generating schedule defaults.

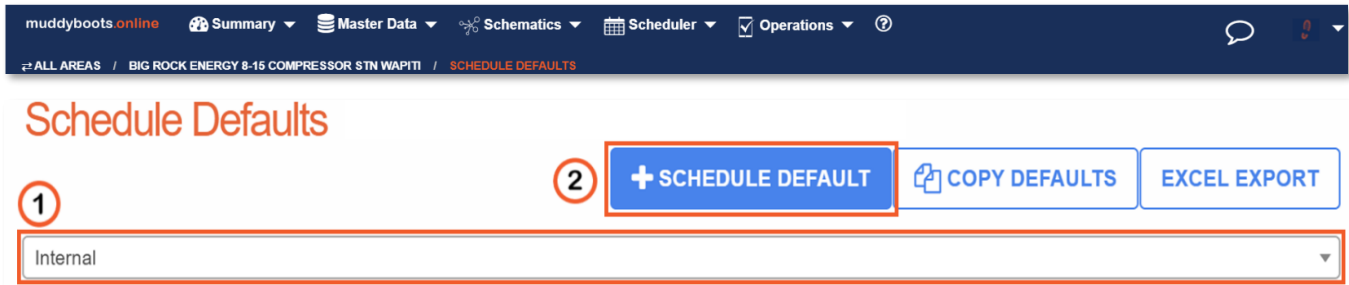
- b) **Scheduled Tasks:** Tasks are applied on an individual site or individual equipment basis. This works similar to the schedule default but will only apply to the specific site or piece of equipment that the schedule has been created for.

Tip: Equipment can have both schedule defaults as well as non-default scheduled tasks assigned at the same time.

(a) Schedule Defaults

1) Creating Schedule Defaults

Setting up a schedule default is one way to schedule the activities that were made active in “Configuring Activities to be Recorded” portion of this document. Schedule defaults are applied across the selected field and can be edited or deleted for individual sites or pieces of equipment where required.



- Navigate to the “Scheduler” drop down selection in the top dropdown bar of the page and select “Schedule Defaults”.
- **1** Select the Field from the drop down that the schedule default will apply too.
- **2** Click the **+ SCHEDULE DEFAULT** button to create a new schedule default.

muddyboots.online Summary Master Data Schematics Scheduler Ops/Maintenance

ALL AREAS / MUDDY BOOTS INC. / TEST / SCHEDULE DEFAULTS / ADD SCHEDULE DEFAULT

Add Schedule Default

1 Equipment Type: RECIP COMPRESSOR - GAS

Service Provider: []

2 * Activity Type: Overhaul

Estimated Completion (hours): []

3 Beginning Date: 2020-06-01

4 Assigned to: Group or User

Description: []

5 Request Category: recurring

Recurring - Occurs on a repeating schedule and will be missed if not completed within the date range
 Rolling - Next request is scheduled only once the active request is completed. Shows overdue until completed

Repeat Using: Calendar Range Custom Range

7 Days after considered missed: 90

6 Every: 1 Repeats: Year

Overhaul for RECIP COMPRESSOR - GAS
 Repeats every Year on the 1st day of June - shows as missed after 90 Days


[CREATE SCHEDULED REQUEST TEMPLATE](#)

- **1** Select the equipment type that the schedule default will apply to from the “Equipment Type” drop down.
 - If the activity is being scheduled for a site, leave “SITE ACTIVITY” selected in the Equipment Type dropdown.
 - **Note:** Only equipment that has activities configured and does not have a schedule default assigned for the selected field, will show up in this drop down.
- **2** Select the activity type that the schedule default will apply to from the “Activity Type” Drop down.
 - **Note:** Only activity types that have been configured for the selected equipment type and do not have existing schedule defaults, will show up in this drop down.
- **3** Select the desired date for the schedule default to start in the beginning date box.
 - **Note:** It is possible to set a “Beginning Date” in the past, this can generate missed Tasks if the frequency of the Schedule Default generates Activity completion windows that end before the current date.
- **4** Assign the tasks to a group, individual, or leave unassigned.

- ⑤ Select Recurring or Rolling from the “Request Category” drop down.
 - Recurring occurs on a repeating schedule and will show up as “Missed” if the activity is not completed on time.
Note: *Recurring* verbiage is being phased out, individual Scheduled Tasks will refer to *Recurring as Repeats Every*. These are equivalents.
 - Rolling will keep the scheduled task open until it has been completed and then automatically re-schedule the activity once it has been completed.
Note: *Rolling* verbiage is being phased out, individual Scheduled Tasks will refer to *Rolling as Repeats After*. These are equivalents.


Note: Run hour scheduling is discussed in the ‘**Scheduled Tasks**’ section of this document.

Note: Non-default Scheduled Tasks are discussed in the ‘**Updating Scheduled Tasks or Creating Non-Default Scheduled Tasks for Unique Equipment and Sites**’ section of this document.

- ⑥ Select how often the schedule default should repeat. Under the “Every” box, state how often the schedule should repeat. Daily, weekly, monthly and yearly categories are available in the “Repeats” drop down.
- **Note:** ⑦ Option to use a Custom Date Range with a Recurring schedule.
 - Calendar Range: Uses previously defined boundaries: Monthly, Annually, etc.
 - Custom Range: Customizes the recurrence pattern
 - In the example above, the Custom range is set to 90 days for an annual inspection starting June 1st. The example tasks therefore will be active for 90 days after June 1st. Once outside of this custom range, the task will then be marked as missed.
- Click the  button at the bottom of the page to create the request.
- **Remember:** Creating a schedule default template, schedules the activity for all the sites or equipment of the same type, contained in the specified field, in muddyboots.online.

2) Editing Schedule Defaults

As operations and regulations evolve, maintenance frequencies and inspections will change. These changes will require revisiting and modifying schedule defaults. Editing a schedule default that was generated in "Creating Schedule Defaults" will be reviewed in this portion of the document.

- **1** Click the  button to open the editing options on the schedule default. This will open the selected schedule default.
- Edit the schedule default as explained in the **Schedule Defaults Setup** instructional section above
- When editing an Schedule Default, three Update / Delete options will be available:

Overhaul for RECIP COMPRESSOR - GAS

Repeats every Year on the 1st day of June - shows as missed after 90 Days

- **1** Modify All: Selecting "Update All" or "Delete All" from this option, will modify all or delete all recurring schedules created from this schedule default.
- **2** Apply to New: Selecting "Update None" will apply the updated schedule default to only all future equipment or sites added to the system. Selecting "Delete None" will not apply the schedule default to all future equipment or sites added to the system.
- **3** Modify All Unchanged: "Update Unchanged" or "Delete Unchanged" from this option, will modify or delete recurring schedules created from this schedule default that have not been individually edited.

(b) Scheduled Tasks

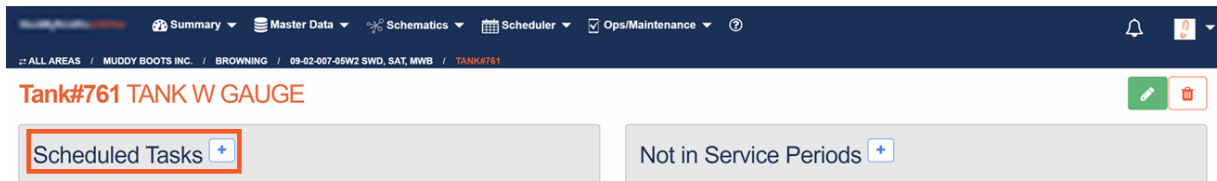
Creating a scheduled task can be done at the site level, or on a specific piece of equipment. Scheduled Task generation can be initiated from the Site page, Equipment page, Scheduled Tasks page, and on individual work orders.

1) Creating Scheduled Tasks

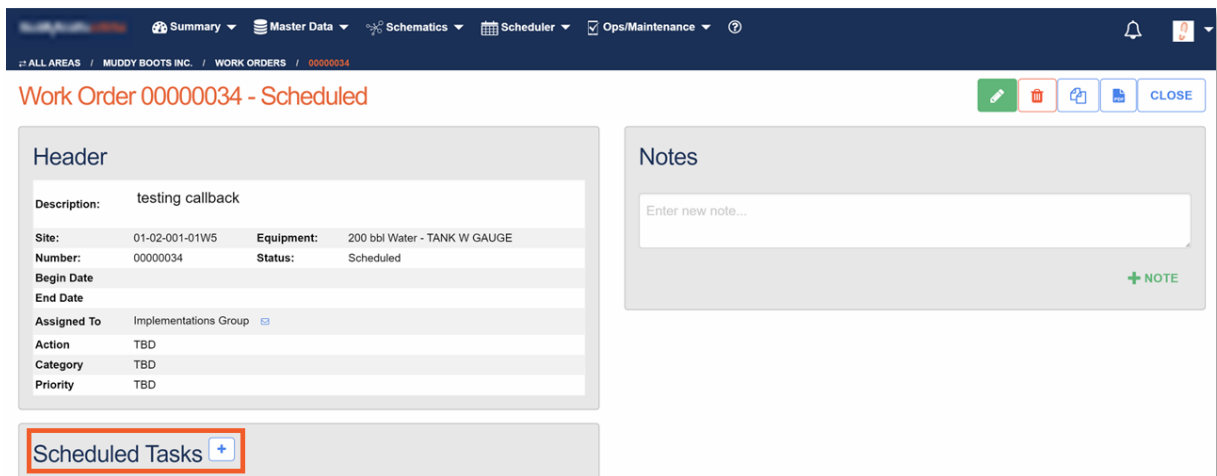
Often it is necessary to create a non-default scheduled task for a specific piece of equipment or site. This is generally for equipment or sites that require a unique scheduling setup (i.e., different scheduling frequencies, assignment, etc.).

To create a scheduled task, navigate to the one of the following locations:

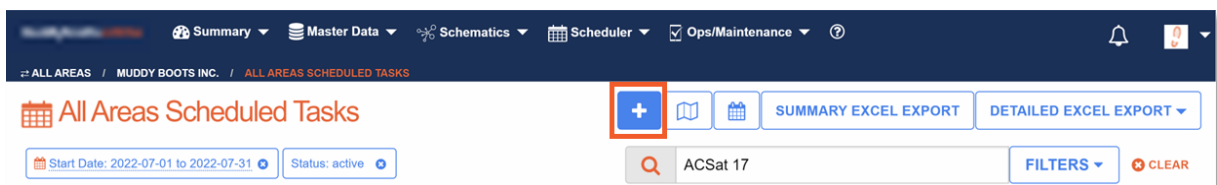
- Desired **Site** or **Equipment** page
 - Note: Clicking an Activity name hyperlink will allow the scheduled task selected to be altered for that specific asset.





- An Individual **Work Order** or

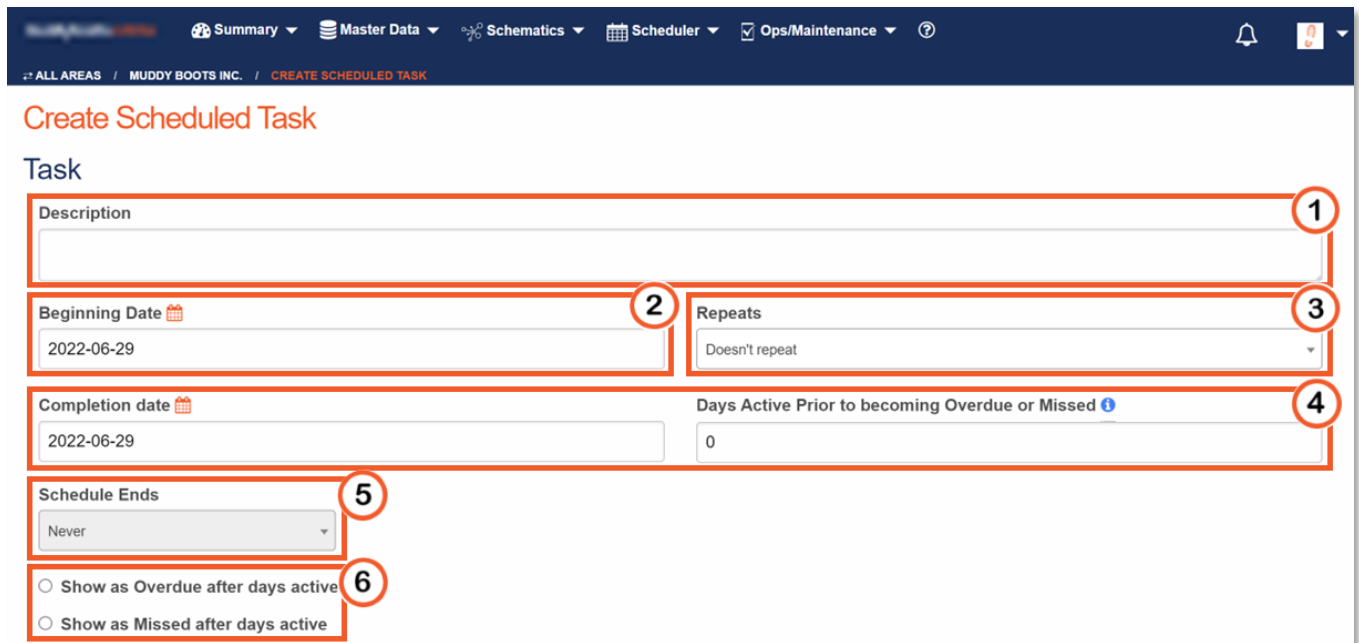


- The **Scheduled Tasks** page



Click the  symbol to add a scheduled task.

- Single, Recurring, Rolling, and Run Hour tasks are all available to be scheduled.
- After clicking the  symbol, follow the steps outlined in the creating schedule defaults window to create a new scheduled activity.
- **Remember:** Only the specific site or equipment asset will be affected by this schedule creation.



The screenshot shows the 'Create Scheduled Task' form with the following fields and callouts:

- 1:** Description text input field.
- 2:** Beginning Date calendar input field (value: 2022-06-29).
- 3:** Repeats dropdown menu (value: Doesn't repeat).
- 4:** Completion date calendar input field (value: 2022-06-29) and Days Active Prior to becoming Overdue or Missed input field (value: 0).
- 5:** Schedule Ends dropdown menu (value: Never).
- 6:** Radio button options: 'Show as Overdue after days active' and 'Show as Missed after days active'.

- **1** A custom description can be added to the scheduled task where the task requires additional details for clarification. The Description entered appears on the scheduled task screen, scheduled task exports, and when recording the activity from within the application
 - **Note:** This is not a field for substantial task procedures/instructions, those should be incorporated into the activity form.
- **2** Select the desired date for the schedule default to start in the beginning date box.
 - **Note:** It is possible to set a “Beginning Date” in the past, this can generate missed Tasks if the frequency of the Schedule Default generates Activity completion windows that end before the current date.

- **3** **Repeats:** Selectable dropdown options for scheduling type
 - Select how often the scheduled task should repeat. Daily, weekly, monthly, etc. categories are available in the “Repeats” drop down.
 - For additional scheduling options select: **Custom...** to define the custom recurrence or to define run hour parameters.

Custom Recurrence

Repeat after 1 Run Hours 2

Date when Last Completed Run Hours when Last Completed

Completed Completed

CANCEL DONE

- **1** Set to one of two options:
 - **Repeats Every:** This is the standard repeat frequency and the scheduled tasks will repeat on the exact frequency as defined.
Note: This was previously referred to as a **Recurring** schedule
 - **Repeats After:** Scheduling this way generates the next scheduled task at the prescribed interval once the current ‘Active’ task is completed
Note: *Repeats After* tasks cannot be edited once completed as future tasks rely on the completed details
Note: This was previously referred to as **Rolling** or **Run Hour** scheduling
- **2** Set the frequency duration and type: days, weeks, months, years, or Run Hours
 - Complete any additional dropdowns as required.
Run Hours Note: The Date when Last Completed and Run Hours when Last Completed are the basis for calculation of the next scheduled task.
- **4** Setting a Completion Date / ‘Days Active’ will set the ‘Active’ completion window for the tasks prior to them becoming overdue / missed
 - **Note:** Updating either field will modify the other based on the ‘Beginning Date’
- **5** If applicable, you can select a date to end the repeat frequency of the scheduled task
 - **Example:** Monthly schedule ending December 1st
- **6** Set the scheduled task to be marked as either overdue or missed when outside of the ‘Active’ completion window.
 - **Note:** Missed requests are only available for scheduled that ‘Repeat Every’ and not ‘Repeat After’ (i.e., not available for rolling or run hour scheduled tasks)

The screenshot shows a web form for creating a scheduled task. The form is divided into several sections, each with a numbered callout:

- 7**: * Site (dropdown menu) and Equipment (dropdown menu).
- 8**: * Activity Type (dropdown menu).
- 9**: Assigned To (dropdown menu).
- 10**: Trade (dropdown menu), Service Provider (text input), Production Loss (dropdown menu), Estimated Completion (hours) (text input), Estimated Labor Cost (\$) (text input), and Estimated Materials Cost (\$) (text input).
- 11**: Priority (dropdown menu).
- 12**: Work Order # (dropdown menu).



At the bottom of the form is a green button labeled "CREATE SCHEDULED TASK".

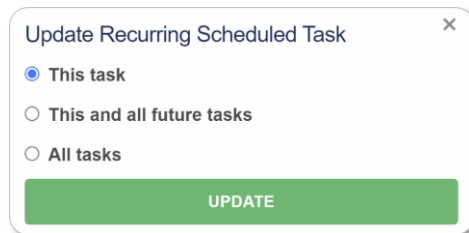
- **7** Select the desired site (and if applicable, equipment type) that the scheduled task should be applied to.
 - **Note:** The Site and Equipment may already be populated depending on where the scheduling was initiated from.
 - **Note:** Once Site and Equipment have been selected, the asset details will appear below this selection.
- **8** Once an asset (site/equipment) has been selected, an activity type will be selectable as applicable to said asset
 - **Note:** To see the complete list of selectable activities, type two spaces
- **9** Assign the schedule to a group or an individual user as required.
- **10** Apply additional task details as required. These fields are optional and to be utilized as defined by your business.
 - **Note:** The *Trade* drop-down list is customizable for your business.
- **11** Priorities are optional and customizable for your business.
 - **Note:** Work Order and Scheduled tasks share a common priorities list.
 - **Note:** When scheduling a task from a Work Order, the priorities field will be populated with the priority set for the Work Order.
- **12** Link to an existing work order by selecting from the list.
 - **Note:** Work Order details will be displayed when a work order is defined.
 - **Note:** When scheduling a task from a Work Order, the work order field will be populated with the Work Order details.
- Click **CREATE SCHEDULED TASK** to finalize the new scheduled task.

2) Updating / Deleting Scheduled Tasks

To update or delete scheduled tasks navigate to the desired scheduling location (i.e., scheduled tasks datatable, work order, or asset (equipment / site) page.

i) Updating / Editing Scheduled Tasks

- Start by viewing the scheduled task you wish to edit 
- Follow the same steps as above when creating the scheduled task and update all details that require changing.
- Click 
- You now have three options:




Update Recurring Scheduled Task

This task



This and all future tasks

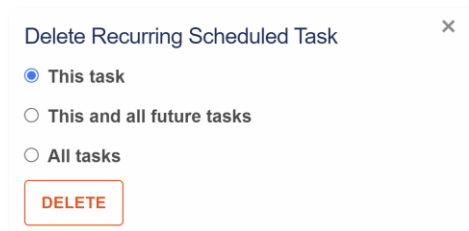
All tasks



1. **This task:** Updates only the task that was selected. (i.e., Tank Inspection for January)
2. **This and future tasks:** Updates the selected task and all those going forward. (i.e., January Tank Inspection and all Future Inspections)
3. **All tasks:** Updates all associated tasks. (i.e., All past and future Tank Inspections)

ii) Deleting Scheduled Tasks

- Start by viewing the scheduled task you wish to edit 
- Navigate to the bottom of the task and click 
- You now have three options:




Delete Recurring Scheduled Task

This task

This and all future tasks

All tasks



1. **This task:** Deletes only the task that was selected. (i.e., Tank Inspection for January)
2. **This and future tasks:** Deletes the selected task and all those going forward. (i.e., January Tank Inspection and all Future Inspections)
3. **All tasks:** Deletes all associated tasks. (i.e., All past and future Tank Inspections)