

Activities in muddyboots.online

muddyboots.online (MBO) has the functionality to record activities giving the user the ability to store operational data against equipment and sites. This document will cover how to configure activities by selecting the required data entries, how to record activities from the equipment page and how to record activities from the run sheet.

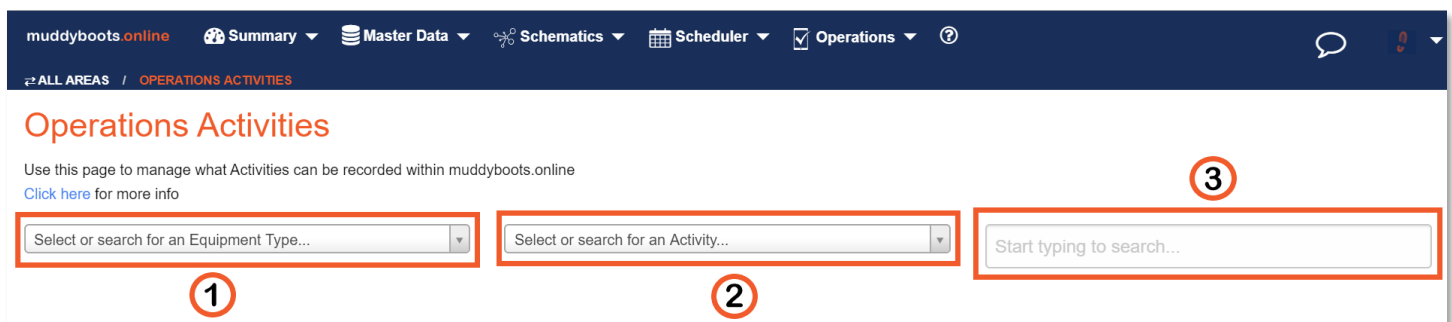
Configuring Activities to be Recorded

In order to schedule and record activities in MBO, the user must first configure their company's activities. The following process can be used to configure any activity in MBO.

Under the personal drop down in the top right corner of the screen, under Operations Admin, select Activities Admin to load the operations activities page.

Note: The operations admin role must be assigned in order to perform the following tasks. If the Operations Admin tab is not present, contact the company administrator to be given the "Operations Admin" role.

The Operations Activities page is where activities can be configured to be recorded in MBO. There are three ways to find the desired activity in MBO. If a particular activity does not exist, it can be created by a member of the MBO team upon request.



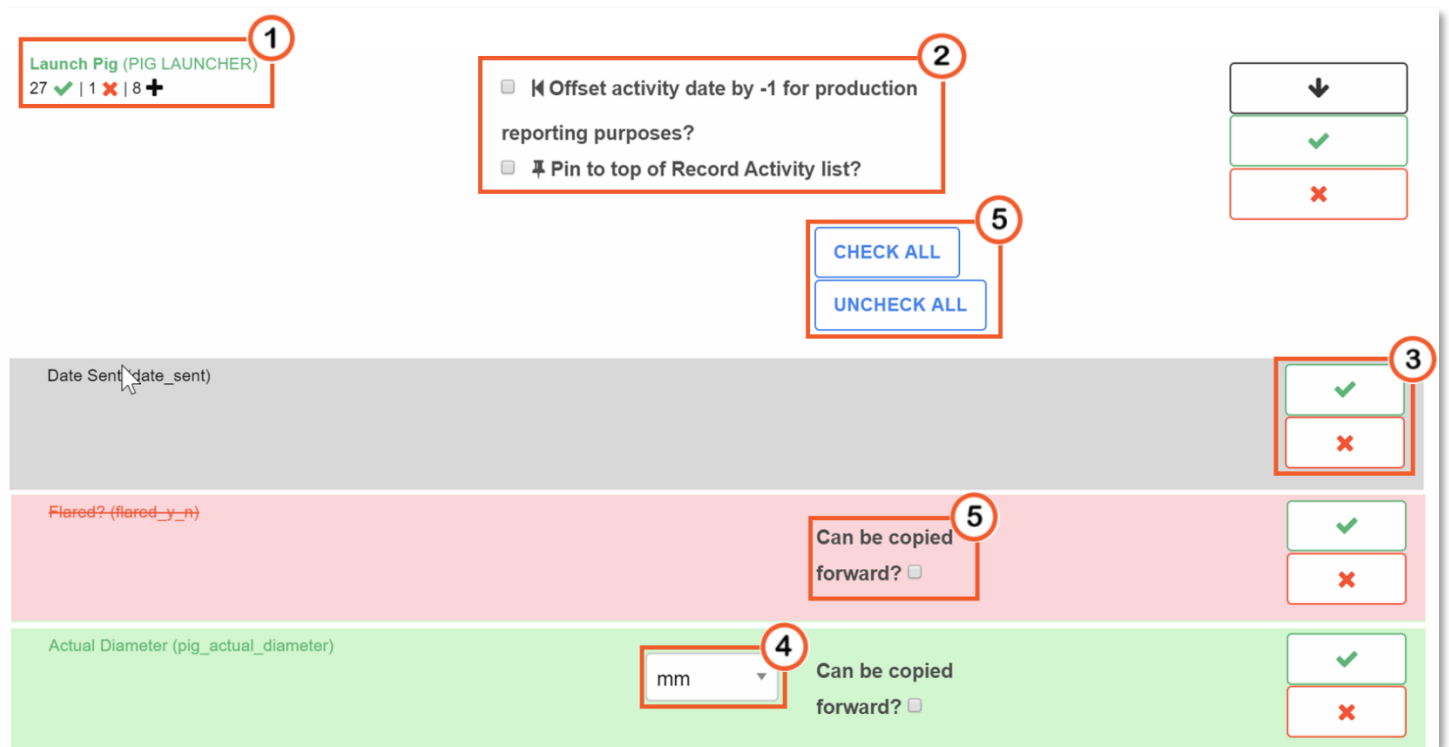
- **1** Searching or selecting by Equipment Type will show all the activities that are associated with the Equipment Type selected from the drop down
- **2** Searching or selecting by Activity Type will show all the Equipment Types that can have the specific activity selected from the drop down, recorded against.
- **3** Using the search box allows the user to search both equipment types and activity types at the same time.
- **Note:** In the example below, "Pig" was entered in the **2** Select or Search for Activity box, and the Launch Pig activity was selected.

Operations Activities

Use this page to manage what Activities can be recorded within muddyboots.online

[Click here](#) for more info

- **1** Activities that can be recorded will be listed on the left side of the page.
 - The number to the left of the indicates how many data entry fields are selected.
 - The number to the left of the indicates how many data entry fields had previously been turned on but have since been turned off.
 - The number to the left of the Indicates how many data entry fields have never been turned on.
 - **Note:** Activity Title Text (**Launch Pig** (PIG LAUNCHER)) listed in green are already turned on, in Black have never been turned on, and in red have been turned on and then turned off.
- **2** Quick action buttons are located on the left side of the screen.
 - Clicking the button will open the data entry fields list.
 - Clicking the button will turn on all the data entry fields available for the activity
 - Clicking the button will turn off all data entry fields available for this activity
 - **Note:** If all data entry fields are turned off, the activity will not be recordable.



- 1 Once data entry fields have been turned on, the activity name will turn green to indicate that the activity is recordable and can be scheduled.

 - Note:** only one data entry field must be selected for the activity to be recordable and scheduled
- The text and background colour of each data entry field dictates the current state of the entry field.

 - Grey data entry fields are turned off and have never been turned on.
 - Green data entry categories are currently turned on.
 - Red data entry fields are fields that have been turned on and then turned off.
- 2 Checking the “Offset activity date” will assign the date completed one day prior to the day that was completed.
- 3 Clicking the and buttons turn on and off individual data entry fields respectively.
- 4 Select the most common unit of measure, for the selected data entry field from the drop down.

 - Note:** Only data entry fields that have a unit of measure associated with them will have the option to select units. Units can be updated for specific pieces of equipment. Refer to the “Setting Default Units of Measure” and “Overriding the Default Units of Measure for Activities on Specific Equipment” portion of this quick start for more information.

- 5 Checking the box next to the “Can be copied forward?” option will allow users to copy the previous data entry into the current data entry field when utilizing the Run Sheet. If the box is not checked the data will not be able to be copied forward.
 - Use the CHECK ALL and UNCHECK ALL buttons to quickly change all eligible data entry fields to copy forward, or do not copy forward
- Work through the data entry fields list and select the desired data entry fields. If a field is required but is not present, contact the MBO team to add to the selection.
- Repeat the above steps for all required activities to be completed in muddyboots.online.

Setting the Default Units of Measure

Data templates that include units of measure should be set to the unit used on the majority of equipment type that the activity is being turned on for. This unit of measure can be customized on equipment of the same type with differing units updated at a later time if desired.

The screenshot shows three rows of data entry fields:

- Oil Pressure (oil_pressure):** Unit dropdown is set to 'kPa'. A red box labeled '1' highlights the dropdown arrow. The 'Can be copied forward?' checkbox is checked.
- Filter Diff Pressure (filter_diff_press):** Unit dropdown is set to 'kPa'. A red box labeled '2' highlights the dropdown menu. The 'Can be copied forward?' checkbox is unchecked.
- Take oil sample (oil_sample):** Unit dropdown is open, showing options: kPa, kPag, bar, MJ/sm², In. WC, In. Hg, Hg, BTU/scf. The 'Can be copied forward?' checkbox is checked.

- 1 Click the unit of measurement box to expand the units of measure drop down selection
 - The unit of measure shown is the currently selected unit that will show up when the entry is being recorded, reports and PDF reports. In the example “kPa” is the selected unit.
- 2 From the drop down select the desired unit of measure.
 - Note:** units of measure can only be changed to equivalent units. For example kPa can only be changed to different units designating pressure.

Recording Activities

There are three ways to record activities in MBO. Activities can be recorded from the site / equipment details page, the scheduled tasks page, as well as on the mobile run sheet.

1) Recording Activities from Details Page

To record historical activities or record current activities directly on the equipment or site, first navigate to the desired piece of equipment or site data page. This can be accomplished by navigating to the “Master Data” drop down and under the Equipment or Site selection, click List. Click on the desired equipment or site name to load the equipment or site information page.

Note: The example will use equipment to demonstrate recording activities outside the mobile runsheet. This process is the same for recording activities on sites within MBO.

The screenshot shows the MBO web interface for a 'RECIP COMPRESSOR - GAS' equipment page. The top navigation bar includes 'Summary', 'Master Data', 'Schematics', 'Scheduler', and 'Ops/Maintenance'. Below the navigation, there are buttons for '1 SCHEMATIC', 'UPSTREAM', and 'RECORD ACTIVITY'. The 'RECORD ACTIVITY' button is highlighted with a red box and a circled '1'. The main content area is divided into three sections: 'Scheduled Requests' (with a table showing 'Overhaul (Est)' activity), 'Equipment Details', and 'Recent Activity (Show All)' (with a table showing run hours for dates 2020-06-12, 2020-06-10, and 2020-05-26).

- 1 Click on the **RECORD ACTIVITY** dropdown button, if required use the search box to find the desired activity. Select the desired activity from the resulting list by clicking the name.
 - This will open the activity form for recording in MBO

muddyboots online Summary Master Data Schematics Scheduler Ops/Maintenance

ALL AREAS / MUDDY BOOTS INC. / D17 TEMPLATES / SOUR GAS PLANT / RECIP COMPRESSOR - GAS / RECORD OVERHAUL

Record Overhaul for RECIP COMPRESSOR - GAS DATA ENTRY

Recorded for 2020-05-27 19:42

Start Date

Hours on Equipment (hr)

Downtime (hr)

Serviced By

Technician Name

Estimated Overhaul (\$ CAD)

Labor Cost (\$ CAD)

Parts Cost (\$ CAD)

Misc. Cost (\$ CAD)

Total Cost (\$ CAD)

Corrective Action Required?

N/A

Needs Attention

Needed Attention & Corrected

Notes

CHOOSE FILES...

RECORD

- Fill out the required information in the boxes provided.
 - **Remember:** more or less data entry fields can be added to this window based on the data entry fields that were selected in the “Configuring Activities” portion of this document.
- Click the button to save the data and complete the activity.

2) Recording Activities from Scheduled Tasks Page

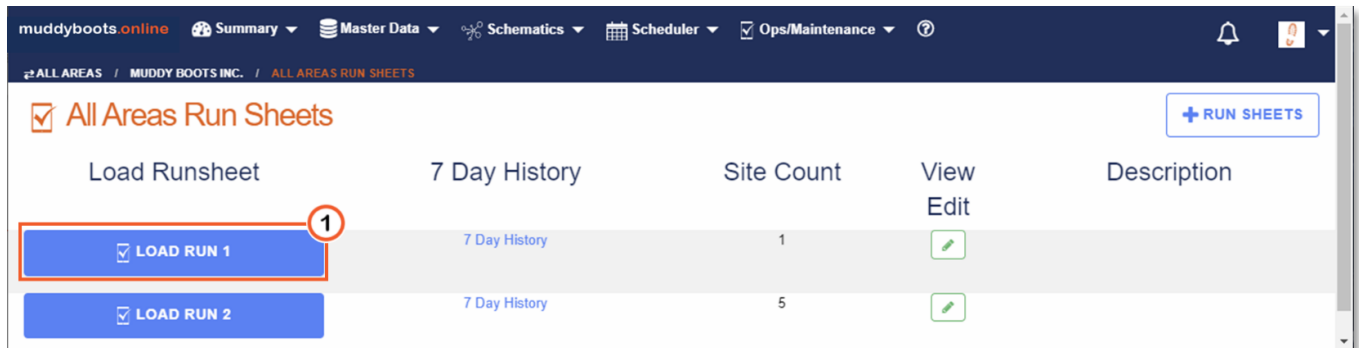
To record active or overdue activities from the scheduled tasks page, begin by clicking on Tasks from the Scheduler dropdown. This Scheduled Tasks page is where all scheduled activities can be viewed. Only Active and Overdue activities can be recorded from this page, with Missed and Complete activities viewable.

To record an Active or Overdue activity, filter to the specific equipment, site, and/or activity to be completed, and click the button.

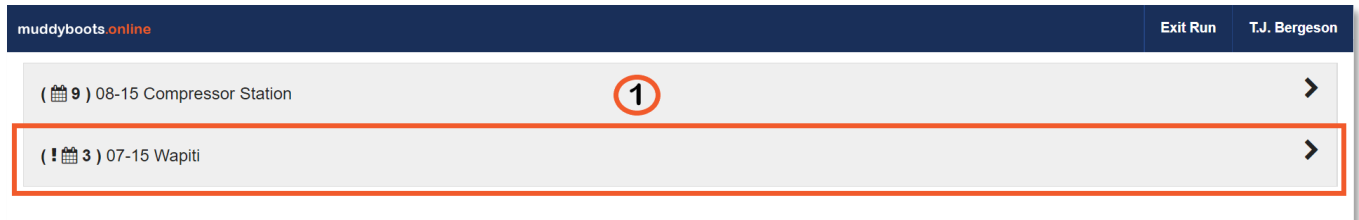
3) Recording Activities on the Runsheet

The Run Sheet portion of muddyboots.online is designed to record activities online or offline while in the field.

To open the Run Sheet, navigate to the Ops/Maintenance drop down across the top of the page and select Run Sheets.

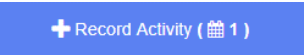

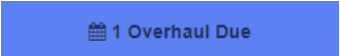



- 1 Select the desired run from the run sheet list to load the Runsheet.
 - Once the Runsheet has loaded it is safe to disconnect the device from the internet, move into an area with poor cellular service or turn off cellular data.
 - Note:** It may take some time to load the Run Sheet. This is normal as the system is configuring the run sheet and populating the specific details required for offline functionality.



- 1 Click on a site to view the site and equipment activities that are scheduled to be recorded or are available to be recorded.



- ① Click the  button to open the activities that can be recorded for the selected site.
 - The  states that an activity is scheduled to be recorded. The number states how many activities are scheduled to be completed for the selected site.
- ② To record the activity, click the blue box with the activity title, e.g. . This will load all the pieces of equipment for the selected site that can have that activity recorded against them.
 - Activities will be shown in orange boxes stating when they are due or how many days are left to complete the activity e.g. .
 - Click the target orange box to open the activity form.
 - **Note:** activities can be completed at anytime even if they are not scheduled to be completed.

- Fill out the required information in the provided data entry fields.
 - **Remember:** Data entry fields can be added or removed from this window. This is covered in the “Configuring Activities” portion of this document.
- **1** After the activity has been filled out, click the green save button in the top corner to save the activity.
 - **Recommendation:** Click the save button after completing each activity to ensure that no data is lost.
- **2** Clicking the < Show Previous 2020-05-27 button, allows users to see the previous activity that was filled out for that piece of equipment.
- **3** Clicking the Copy Previous button will carry forward data from the previous activity
 - **Tip:** Use the copy previous functionality when the data is unchanged from the previous time the activity was completed.

Viewing Completed Activities

Once activities have been completed in MBO they can be viewed under Reports in MBO.








To view the reports page, navigate to the Ops/Maintenance drop down and under the Reporting heading, select Reports.

Note: With an effectively setup Dashboard, Activity summaries can be viewed with links from each Dashboard element to filtered Reports page. For Dashboard setup information, please see the Dashboard quick start guide.

The screenshot shows the MBO Reports interface. At the top, there are navigation tabs: Summary, Master Data, Schematics, Scheduler, and Ops/Maintenance. Below the navigation, there's a header for 'All Areas Reports' with a checked checkbox. To the right of the header are two buttons: 'SUMMARY EXCEL EXPORT' and 'DETAILED EXCEL EXPORT'. Below the header is a search bar (1) and a date range filter (2) set to 'Activity Date: 2020-01-01 to 2020-12-31'. Below the search bar is a table with columns: Activity Date, Field (3), Equipment Name, Activity Type, and Note. The first row of the table shows 'Jun 12, 2020 11:25', 'D17 Templates', 'RECIP COMPRESSOR - GAS', and 'Run Hours' (4). To the right of the table is a 'FILTERS' dropdown (2) and a 'CLEAR' button. Below the table, there are filter chips (5) for each row, each with a plus sign.



- 1 The search box can be used to search the table or narrow down selections by entering phrases, keywords, numbers or search commands.

 - The search box is used by entering the desired search criteria and pressing the enter button on the keyboard
 - Clicking the **✖ Clear** will clear all current search entries, applied filters chips, and sorting on the table.
 - Note:** To clear only the search box, hover and click the **✖**.
 - Note:** Individual filter chips can be cleared by clicking the **✖** within the chip.
 - Clicking the **FILTERS** will open a menu with search filter option commands that can be used to scope desired data.
 - Note:** Refer to the search document, using the **SEARCH HELP** button within the **FILTERS** dropdown for tips and details on utilizing the Filter Chips and manually entered search commands
- 2 To set a date range, use the **FILTERS** button and select an Activity Date from the date selection drop down. To modify these date ranges, click the 'chip' and select the start and end dates.
 - This will make the table only display activities that have been completed between the dates stated in the date boxes.

- ③ Using the  arrows, located to the right of the column names, will organize the column in alphabetical order or biggest to smallest depending on the information in the column.
 -  or  arrows indicate that a column has been sorted.
- ④ To view a completed activity, click on the blue hyperlink in the Activity type column. This will load the completed activity.
- ⑤ When tables are wider than the screen of the device users are using to access the MBO application using the  or  buttons will expand or minimize the additional information columns. This allows all the information to be viewed without the need to scroll horizontally.
- ⑥ Clicking  will export a summary of the activities that have been completed. Clicking  will provide a selection list of the activities that have been completed, selecting one of these activities will export all data recorded for equipment or sites.
 - **Note:** Only data that is displayed in the table will be exported. If the search and date range functions have been applied, only the data falling within that search criteria or date range will be exported into an excel file.

Exporting a Completed Activity as a PDF and Editing Activities

Activities can be viewed by clicking on the hyperlink in the reports table or from the equipment details page. First navigate to the activity by searching for it in the reports page and clicking on the desired activity, or selecting the activity from the Recent Activity portion of the equipment details page.

- 1 clicking the  button will export the activity into a PDF format. Clicking the  edit button will allow users to edit the activity if they have the operations editor role.
 - After the edit button has been clicked, users can update or correct the data within the activity by typing in the data entry boxes.
 - Note:** All changes made in edit will be tracked and the original entries will be displayed in green indicating what has been updated.

Overriding the Default Units of Measure for Activities on Specific Equipment or Site

Navigate to a new or completed activity for a specific piece of equipment or site to override the default units.

To edit the units on a new activity, navigate to the desired piece of equipment or site, click the RECORD ACTIVITY button and select the activity from the drop down.

To edit the units on a completed activity, navigate to the completed activity by using the Reports page, located under the Operations Drop down. Completed activities can also be opened by navigating to an equipment or site page and clicking the Recent Activity tab.

Under the recent activity tab select the desired completed activity to open the activity report and click the EDIT button to enter edit mode.

Note: The Record Activity and Edit Activity pages look and function the same. The example will use the Edit Activity page.

- **1** Click the DATA ENTRY button to toggle edit unit's mode.
 - UNIT OF MEASURE CHANGES AVAILABLE will appear to prompt the user that they are able to edit the units in the activity form.
 - **Note:** Users will not be able to enter units unless the UNIT OF MEASURE CHANGES AVAILABLE is toggled
- Select the desired entry box by clicking inside the entry field.
- **2** Enter the required numbers into the box followed by the correct unit of measurement.
 - For example, replace **345.0** with **345.0 kPa**
 - If an unrecognized unit is entered, the system will prompt the user and show the accepted units of measurement for the specific entry box.
- Repeat the previous steps until all the required units are overridden.
- Click enter on the keyboard or scroll to the bottom of the page and click the UPDATE button to save the unit of measure changes.

- The entry box heading will appear with set unit in brackets, (kPaa), and the default unit crossed out, (kPa). This will show on all activities, and run sheets. Reports will only show the set unit.

Note: All historical reports will show the updated units, and convert the data entries to the new unit of measure. For example, if the entry was **1 m³** and the unit is updated to **cm³**, the data entry box will be updated to display “1000000 cm³”. All activities and reports going forward will show the updated units.