

## Maintenance Work Orders In muddyboots.online

Muddyboots.online (MBO) provides a maintenance platform to manage Work Orders that need to be completed in the MBO system.

### Work Orders Tables and Screens

To view work orders first navigate to the **Ops/Maintenance** drop down menu located at the top of the screen, from the dropdown under the maintenance heading select **“Work Orders”**.

**Note:** Work orders can also be viewed on activities with associated work orders by opening an activity and scrolling to the bottom of the completed activity.

Created	Number	Site	Initiating Record	Description	Status	Assigned to	Category	Priority
2021-01-29	00000183	03-10 Wapiti		New meter	Scheduled	T.J. Bergeson	Regulatory Compliance	Medium
2021-01-11	00000182	04-22 Princes Island Gas Battery		Take truck in for oil change	New	Nobody	Regular Maintenance	Medium

- Like all tables in MBO data can be narrowed or searched for using the provided tools.
  - **Reference:** Refer to the “Navigation” quick start document section for a refresher on using the tables in MBO.
- ① Use the search box and search filtering to search for work orders containing specific date ranges, terms, status’s, descriptions, initiating records, priority, ext.
  - Clicking the **CLEAR** button will clear all current search entries, applied filters and sorts on the table.
  - **Note:** The search box needs to be manually cleared as the selection will remain until the user clears the box and presses the enter key on the keyboard or clicks the **CLEAR** button under the search box to clear all current search, filters, and sorts.
- ② To remove a single filter chip, click the blue **X** within each filter chip bubble.
- ③ Clicking the work order number hyperlink will open the work order.
- ④ Clicking the **+ WORK ORDER** button will allow users to create a new work order.
  - This will be covered in the “Creating a Work Order” section of this document.
- Refer to the “Navigation Quick Start” for more useful tips on sorting and searching tables in MBO.

**Note:** Tables can be narrowed by date, and table columns can be organized numerically/alphabetically.

## Viewing and Working with Work Orders







Click on a work order number hyperlink to open the work order as shown in step 2 of the “Finding Work Orders” portion of this document.

The screenshot displays the MBO system interface for work order 00000181. The top navigation bar includes 'Summary', 'Master Data', 'Schematics', 'Scheduler', and 'Ops/Maintenance'. The breadcrumb trail shows 'CANADIAN OPERATIONS / BIG ROCK ENERGY / WORK ORDERS / 00000181'. The main content area is titled 'Work Order 00000181 - Scheduled'. On the left is a 'Header' section with the following details:

Description: Corrective Action Required? - Needs Attention for 07-15 Wapiti	
Site: 07-15 Wapiti	Equipment: C01M - METER - TURBINE
Number: 00000181	Status: Scheduled
Begin Date: 2020-12-01	
End Date: 2020-12-31	
Assigned To: Mike Tester	
Action: Service Company Assigned	
Category: Administrative	
Priority: Medium	


On the right is a 'Notes' section with a text input field and a '+ NOTE' button. Below the header is a 'Scheduled Requests' section containing a link for 'Liquid Meter Proving Report' with a right-pointing arrow. Below that is a section titled 'Created from Site Inspection for 07-15 Wapiti' with a right-pointing arrow. Underneath is a 'Note from Site Inspection' with the text: 'There is a new meter on this lease and no calibration report has been completed'. It lists 'Created By: Mike Tester', 'Updated By: Mitchell Bolt', 'Created On: Dec 15, 2020 15:40', and 'Updated On: Apr 6, 2021 12:33'. At the bottom left is a 'CHOOSE FILES...' button.

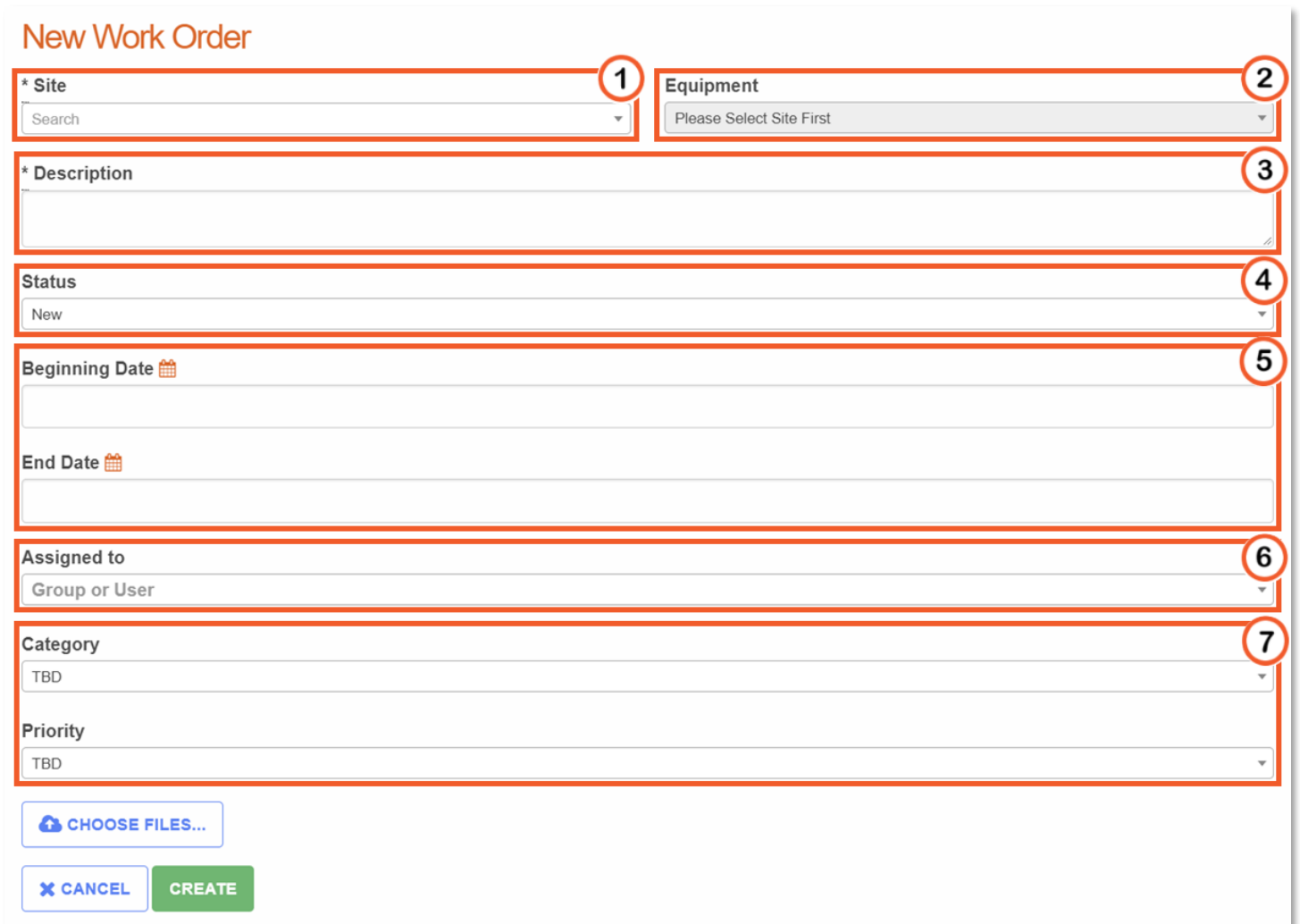
- **1** Function buttons are located in the top right corner of the screen.
  - Will open edit mode, allowing users to update or edit the information contained in the Header portion of the page. This functionality will be covered in the “Editing a Work Order” portion of this document.
  - Will delete the work order from the MBO system.
    - **Note:** Once a work order has been deleted it can not be restored and all data related to the work order will be lost.
  - Will create a pdf report of the work order.

-  Can be used to clone a work order. This Functionality will be covered in the “Creating a Work Order” portion of this document.
-  Will display the workflow associated with the Work Order, if applicable.
-  Will close the work order and set its status to “Closed”
- **2** Activity requests can be Created by clicking the  button located beside the Scheduled Requests heading.
  - This will be covered in the “Adding Scheduled Requests to a Work Order portion of this document
- **3** Add a note to the work order by typing in the Add New Note box
  - Click  to save the note to the work order.
- **4** To view the activity that the work order was created from click on the hyperlink containing the activity name.
- **5** Files can be uploaded to work orders by clicking the  and selecting the desired file.
  - Once a file has been selected the green upload button will become active, click it to upload the selected file.

### Creating a Work Order




Work Orders are automatically created from activities when corrective actions are noted. Work Orders can also be created manually, as per the following instruction.

Navigate to the **Ops/Maintenance** drop down menu located at the top of the screen, from the dropdown under the maintenance heading select **“Work Orders”**. Click the  button in the top corner. Refer to the “Work Orders Tables and Screens” portion of this document for the button location.



The screenshot shows the 'New Work Order' form with the following fields and callouts:



- 1**: \* Site (Search dropdown)
- 2**: Equipment (Please Select Site First dropdown)
- 3**: \* Description (text area)
- 4**: Status (New dropdown)
- 5**: Beginning Date (calendar icon) and End Date (calendar icon) (text areas)
- 6**: Assigned to (Group or User dropdown)
- 7**: Category (TBD dropdown) and Priority (TBD dropdown)

At the bottom of the form are three buttons: , , and .

- **1** Select the site that the work order will apply to within muddyboots.online.
  - Click the search box and type at least 2 characters to search for a site within the system.
  - Select the target site from the dropdown list.
- **2** After a site has been selected, the equipment on that site will become available for selection.
  - To assign the work order to the site, leave the equipment box blank.
  - To assign the work order to a specific piece of equipment, click on the box and select the desired piece of equipment from the resulting list.

- ③ Enter a description for the work order.
- ④ Assign a Status to the work order. The status drop down contains selections on the state of the work order. This includes New, Approved, Closed and Cancelled
- ⑤ Enter beginning and ending dates for the work order if desired.
  - Leaving the Beginning and End date boxes blank will result in the dates defaulting to the day that the work order was created.
- ⑥ Assign a group or an individual responsible for the work order.
- ⑦ Assign work order Category, Priority, etc.
  - The Category, Priority, etc. drop downs includes selections for the task category that can be assigned to the work order.
  - These selections can be customized to meet users needs as required. Contact your maintenance admin in order to modify these lists.

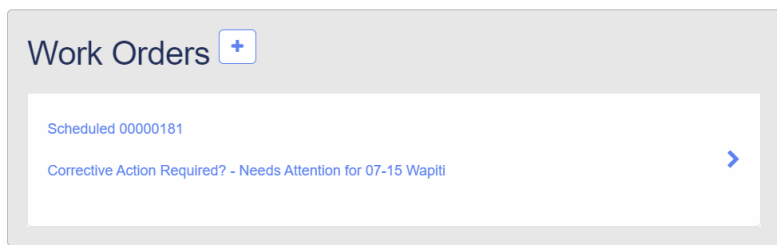
Note: The visible choices can be modified based on the Work Order Status, this will be covered under the Maintenance Administrator Tasks section

- If there are files associated with the work order, use the  button to attach them to the work order.
- Once all the required and desired fields have been filled out click the  button to save the work order.


### Creating a Work Order from an Activity

To create a work order that is related to a completed activity first navigate to and open the desired activity. Reference the Activities Quick Start for tips on viewing and finding activities.

After opening the activity scroll to the bottom of the page, if there are work orders associated with the activity the work orders portion the activity will be shown like the example below, otherwise the Work Orders Box will be empty.




Clicking existing work order hyperlinks will load the work order for viewing or editing purposes.

In both instances clicking the  button will create a new work order. Follow the steps laid out in the “Creating A Work Order” portion of this document to create the new work order.

**Note:** Multiple work orders can be created for a single activity.


### Cloning a Work Order

A new work order can be created by cloning an existing work order. This will create an identical work order with updated dates.


To Clone a work order, first navigate to the work order that is to be cloned. In the work order view window click the  button. The work order will automatically be cloned and loaded. To edit the cloned work order reference the “Editing Work Orders” section of this document.

### Editing Work Orders

As work orders are worked through and completed editing will be necessary to keep them up to date. Navigate to the desired work order following the steps laid out in the “Work Orders Tables and Screens” portion of this document.

Click the  button to enter edit mode when viewing a work order to enter edit mode. Reference the “Viewing and Working with Work Orders” portion of this document.

To edit the work order, follow the steps in the “Creating a Work Order” portion of this document.

Click the  button once finished to save any changes that were made to the work order.

**Note:** The Category, Action and Priority can be updated from the Work Order table by clicking on the column and selecting from the resulting drop down.

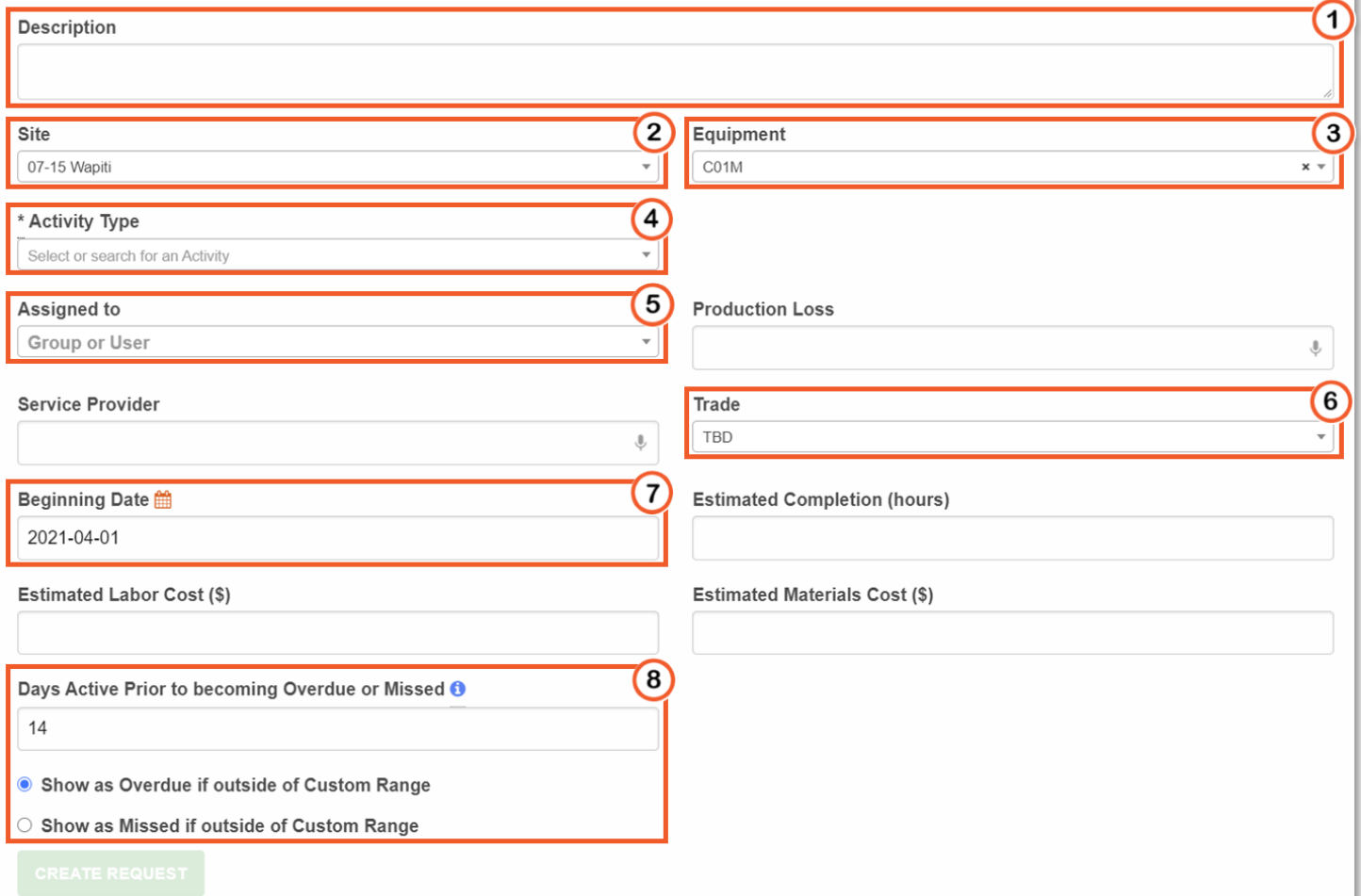
### Adding Scheduled Requests to a Work Order

Scheduled requests define specific activities to be done, at a specific time, and by a specific person or group. Work Orders may contain multiple schedule requests. Scheduled requests can be seen on the dashboard and on the Run Sheet for the associated sites.

Under the Requests portion of the work order, click the  button to create a scheduled request.

#### Scheduled Request - Creating:


##### Request Details



The screenshot shows a form for creating a scheduled request. The fields are as follows:

- 1**: Description (text input)
- 2**: Site (dropdown menu, currently showing '07-15 Wapiti')
- 3**: Equipment (dropdown menu, currently showing 'C01M')
- 4**: \* Activity Type (dropdown menu, currently showing 'Select or search for an Activity')
- 5**: Assigned to (dropdown menu, currently showing 'Group or User')
- Production Loss (text input)
- Service Provider (text input)
- 6**: Trade (dropdown menu, currently showing 'TBD')
- 7**: Beginning Date (calendar icon, currently showing '2021-04-01')
- Estimated Completion (hours) (text input)
- Estimated Labor Cost (\$) (text input)
- Estimated Materials Cost (\$) (text input)
- 8**: Days Active Prior to becoming Overdue or Missed (text input, currently showing '14')
- Radio buttons:  Show as Overdue if outside of Custom Range,  Show as Missed if outside of Custom Range
- CREATE REQUEST (button)

- **1** Enter a description for the scheduled request
- **2** & **3** Select a Site and the Equipment on the site that the scheduled request will apply to
  - **Note:** the selected site will populate the equipment that the scheduled activity can be assigned to.
- **4** Once the site and equipment have been selected, choose the response activity. The response activity defines the data to be captured when the work is completed
  - **Note:** The selected equipment will dictate which response activity types can be selected

- ⑤ Assign a Group or an Individual to complete the activity, if required.
- ⑥ Assign a Trade to complete the scheduled activity, if required.
- ⑦ Assign a Beginning Date for the activity.
  - By default, the beginning date will be the day that the request is being created.
- ⑧ State the number of days to complete the scheduled request and set the request to be marked missed or overdue when beyond the prescribed date range.
  - This is the number of days that can pass before the activity becomes missed or overdue.  
**Note:** By Default, this box will display the number of days left before the date that was entered in the “End Date” box of the work order.
- Click the  button to save the scheduled request.








## Maintenance Administrator Tasks

The Maintenance admin is responsible for creating and maintaining the lists for Actions, Categories, priorities and trades. The maintenance admin can also customize the Work Order number format.

To access the Maintenance Administrator menu, users must have the Maintenance Admin roll. The maintenance Admin Menu is accessed by first navigating to the personal dropdown in the top right corner and selecting "Maintenance Admin" from the menu.

**Note:** All the lists behave the same in this screen. Other category sections are visible below the Actions and Categories.

- ① Click the  button located beside Work Order Number Format to edit the displayed work order number.
  - Enter the desired prefix to lead the work order number format.
  - Enter the desired number of characters for the work order number.
  - Enter the starting point for the work order numbers.
    - This dictates what the work order numbers will start generating from, for example if 100 is entered the next work order created will be 101.
- ② Click the  button located beside Work Order Overrides to modify what details users can see when viewing a work order of a specific status. Each Work Order status can be edited to hide fields such as: Priority, Assigned to, Actions, Categories, Beginning and End Dates, etc.
- ③ Click the  button located beside a list title to add a new selection to the list.
- ④ To edit an existing list entry, click the  button located to the right of the entry title.
- ④ Click the  button located to the right of the list entry title to delete the entry from the list.