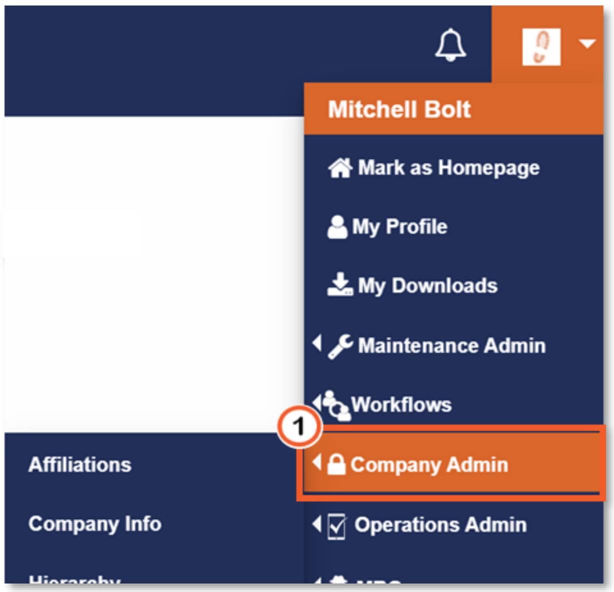
Administrative Functions within muddyboots.online

muddyboots.online (MBO) requires 1 or multiple users to be assigned as administrators for various tasks within the MBO software. Administrators are responsible for adding and deleting employees, assigning roles to employees, managing the hierarchy, and requesting affiliations between companies in MBO.

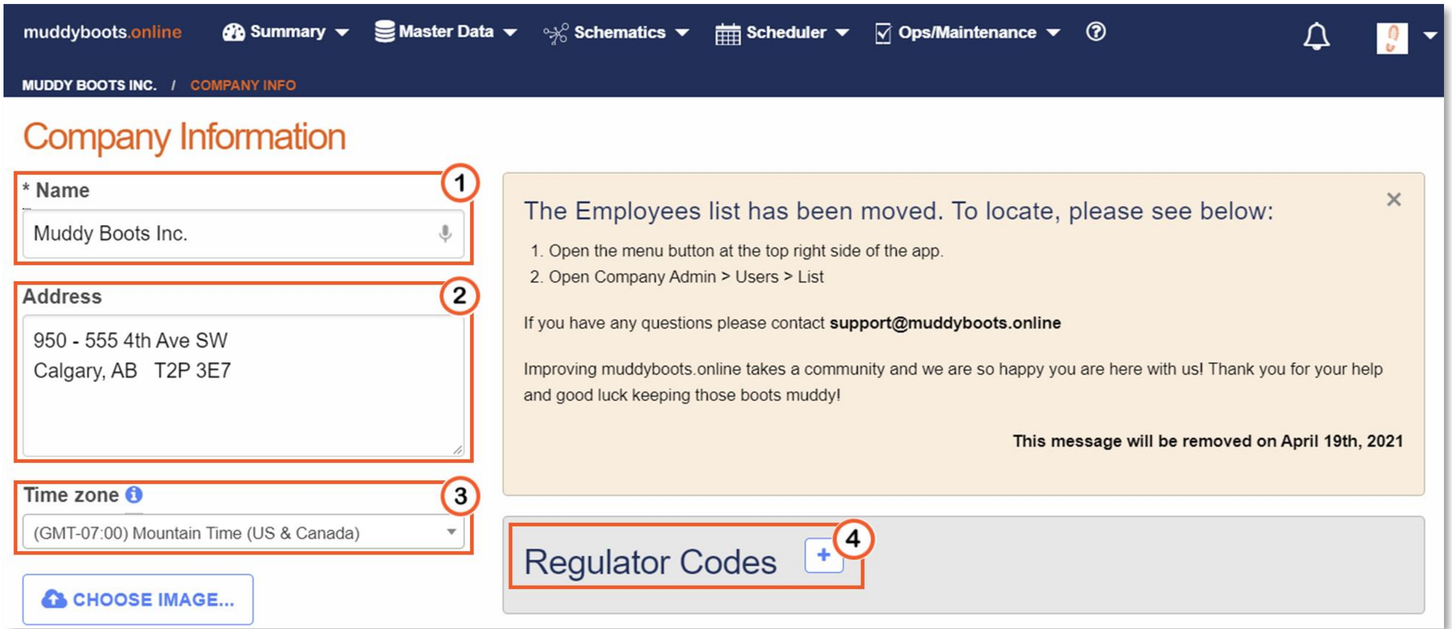
All Company Administrator roles can be found under the *Company Admin* 1 header under the personal user dropdown found in the top righthand corner of the application



All or some of the following options will be available depending on the company accesses and features of muddyboots.online your company is currently using: *Company Info, Users, Affiliations, Hierarchy, Tags, Activity Report Transfers*

Company Information

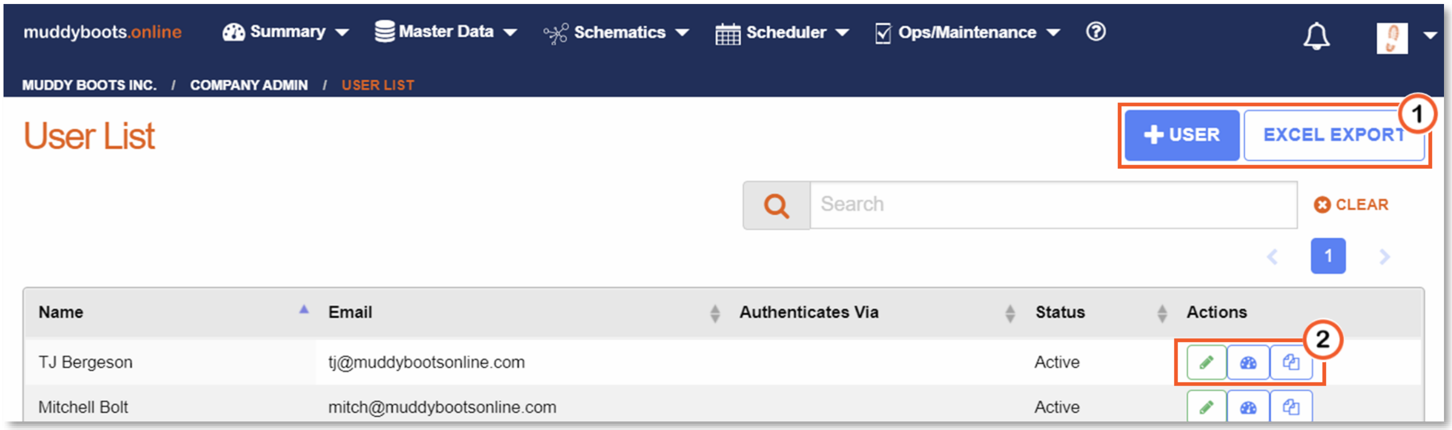
The Company Info selection will direct the user to the Company Information page. On this page several editable sections are made available.



- 1 Type the company name in the name box.
  Note: The company name will have been initially set up by MBO.
- 2 Type the company address in the address box.
- 3 Time zone - This is the time zone that will be used when a new user is added to the company.
- 4 Regulator Codes - Click + to add a reporting regulator code if applicable. Discuss with your muddyboots representative for more information.
- Click the UPDATE button at the bottom of the page to save Company Information changes.

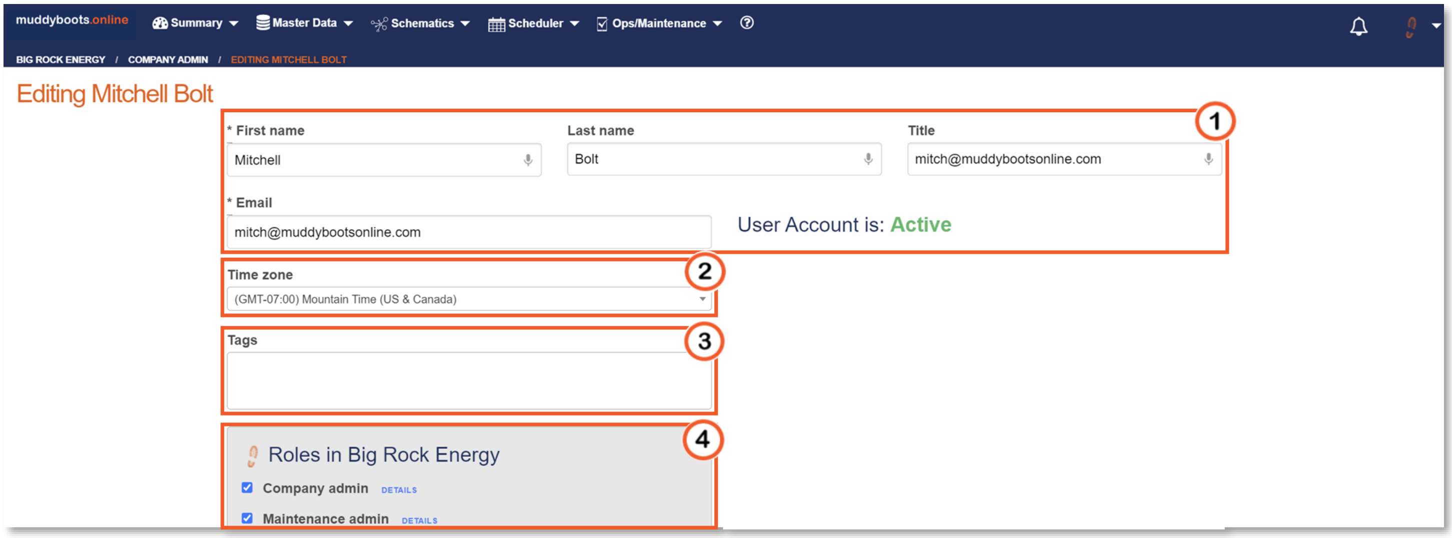
Adding, Editing, and Deleting Employees

Each employee that is required to access the information within the MBO application will require their own unique log in. For security purposes, employees terminating employment with the company or employees transitioning to new roles within the organization will have their privileges removed or updated by the company administrator.



- 1 Click the **+ USER** button to add a new employee to the MBO system.
    - In the resulting window enter the employees name, email, and assign them roles by checking the applicable *Company Role* and *Activity Role* boxes.
        - Each Role will have a **DETAILS** button associated with it, by clicking this button the explanation of each role is provided for ease of user administration.
            - *Company Roles* give users access to system functionality within the muddyboots platform
            - *Activity Roles* give users access to specific activities within the platform which when selected the users will be able to see and complete
    - Click **CREATE USER** to finalize the addition of the new user to the system once the appropriate roles for the employee have been selected
      Note: Employee information and Roles can be added or removed at anytime by editing the employee
- 1 Click **EXCEL EXPORT** to export the User list. This export contains System Roles, User Tags, Workflow Templates, and User Groups associated with the Users
- 2 To modify a user that has already been created in muddyboots the following options are available:
    - – To update an employee's user information or to edit their roles MBO
        - Editing further explained below
    - – To modify an employee's personal dashboard
    - – To copy this employee's dashboard to other users within your organization

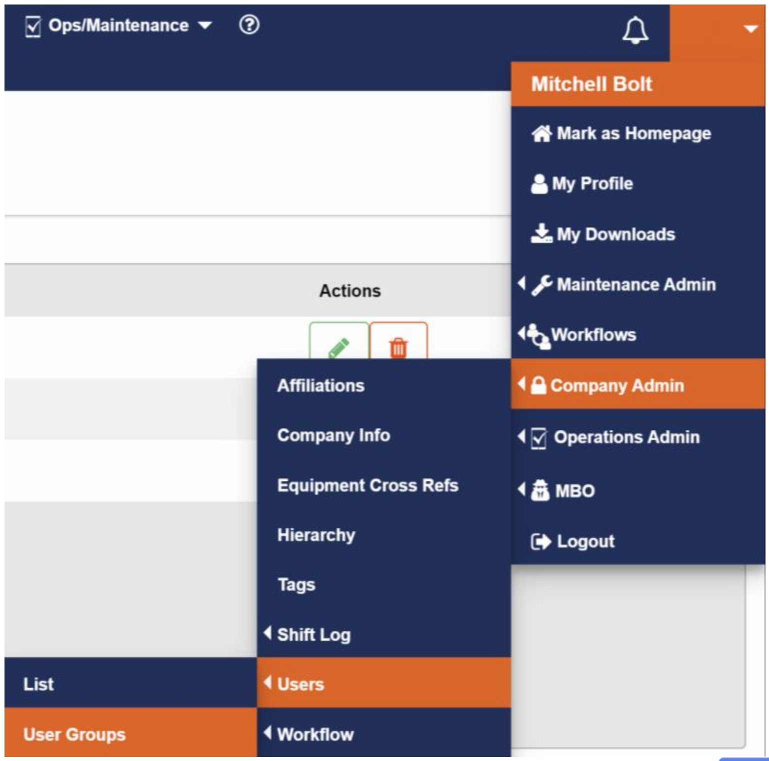
(a) Editing and Deleting A User



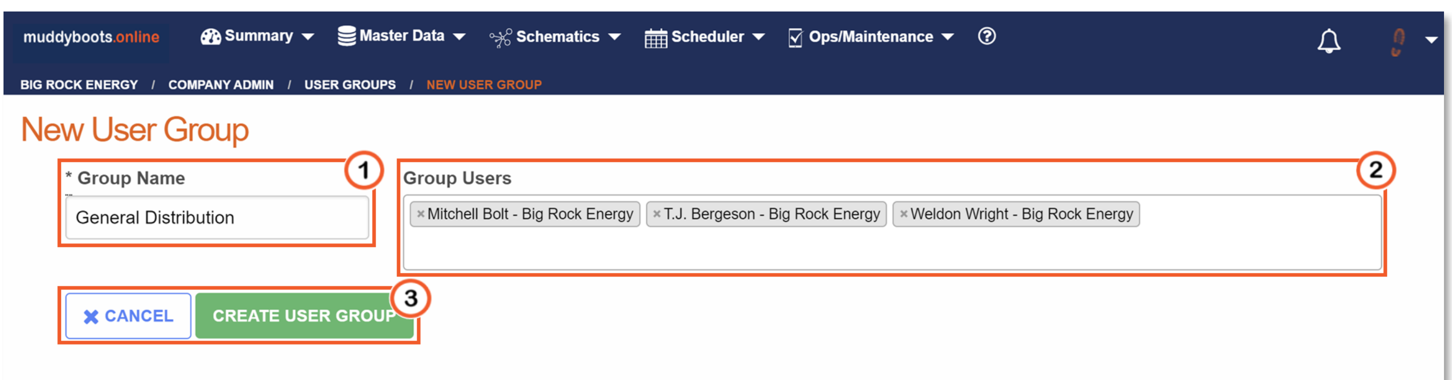
- 1 Update the employees name, title, and email, if required, by typing in the boxes.
    - Note: Only the Employees first name and email are required. Employees can also update this information in their own profile.
- 2 Update the employees working time zone to reflect their geographical working area
- 3 User Tags can be set to indicate the working group of the user. This helps with reporting management for foreman and leads.
    - Tags are setup under the Tags selection under the Company Admin heading
- 4 Update roles by checking the check boxes.
    - Note: Reference the previous section for a role's explanation.
- To Finalize any changes, scroll to the bottom of the Edit employee page to be presented with the following options
    - Click the EMPLOYEE NAME button to delete an employee. If the employee has edited or created data in the system, they will not be deleted from the system completely but will instead be assigned as 'Inactive'. This is to maintain the audit trail for changes in the system. Inactive employees will not be able to log in to MBO and will have all MBO privileges revoked. Inactive employees can be re-activated if required.
    - Click the UPDATE USER button to save the changes made to the employees' profile.
    - Click the ✖ CANCEL button to cancel any changes made to the employees' profile.

Creating a User Group

Create a User Group that can be used to add groups of users to Scheduled Tasks, Scheduled Defaults, Work Orders, Workflow Templates, or open Workflows.
Note: User groups can also be used to for the assignment of activities, work orders and corrective actions.



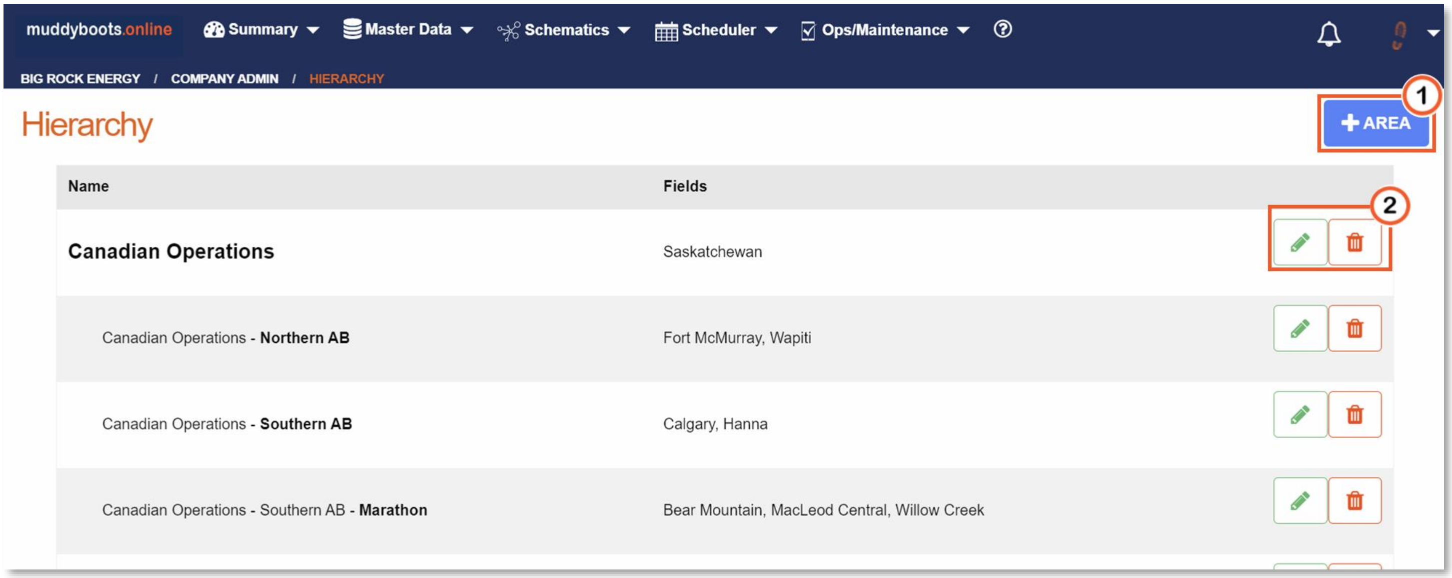
- Navigate to the User Groups under the Company Admin header and Click + USER GROUP



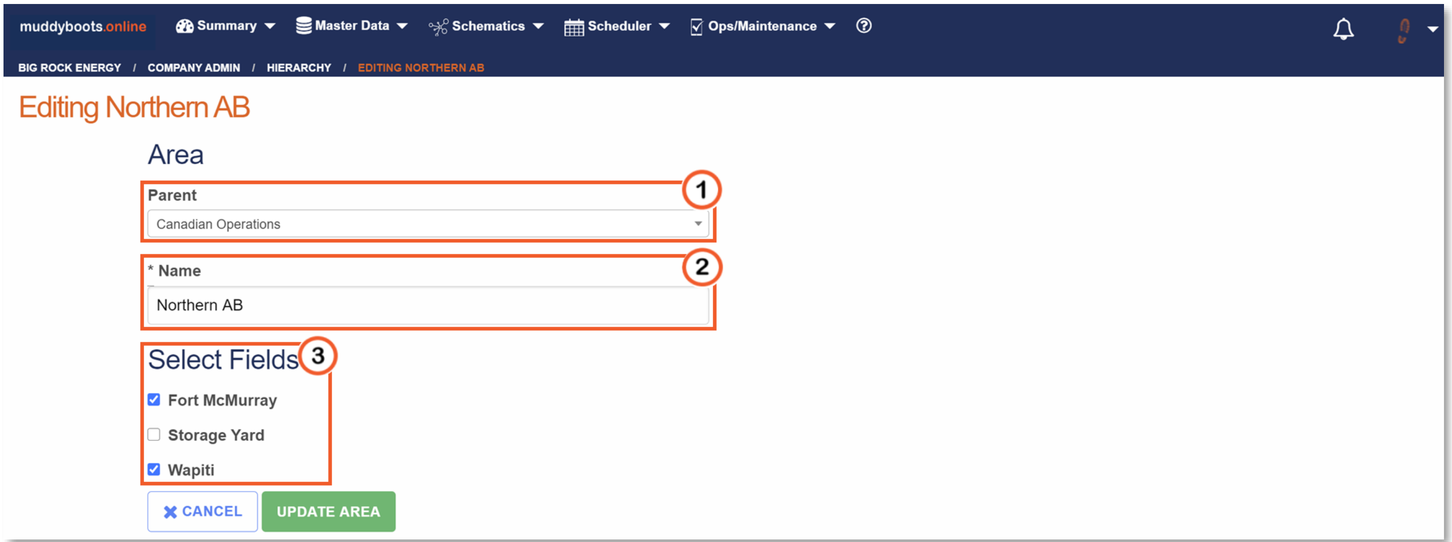
- 1 Set the desired Group name.
- 2 Select the Users for the Group.
- 3 Create the User Group.

Editing the Hierarchy

The Hierarchy is initially set up during the implementation process by muddyboots.online. The hierarchy may need to be updated as a company may acquire / sell assets. The hierarchy is designed to narrow or group data and make it easier for users to narrow their field of work in MBO. The hierarchy contains the fields in MBO organized into areas (groups), generally these areas are areas of operations within the company. Clicking into an area will show all the data for the fields in that area, drilling down farther will narrow the data until only data in a single field is shown.
Under the personal drop down in the top right corner, navigate to company admin and from the resulting menu select “Hierarchy” to load the edit page.



- 1 To add a new area to the Hierarchy, click the  button.
- 2 Click the  edit button to edit an existing area. Click the  delete button to remove an area from the hierarchy.
    - Note: Removing an area from the hierarchy will not delete the area or the data behind it from the MBO system.

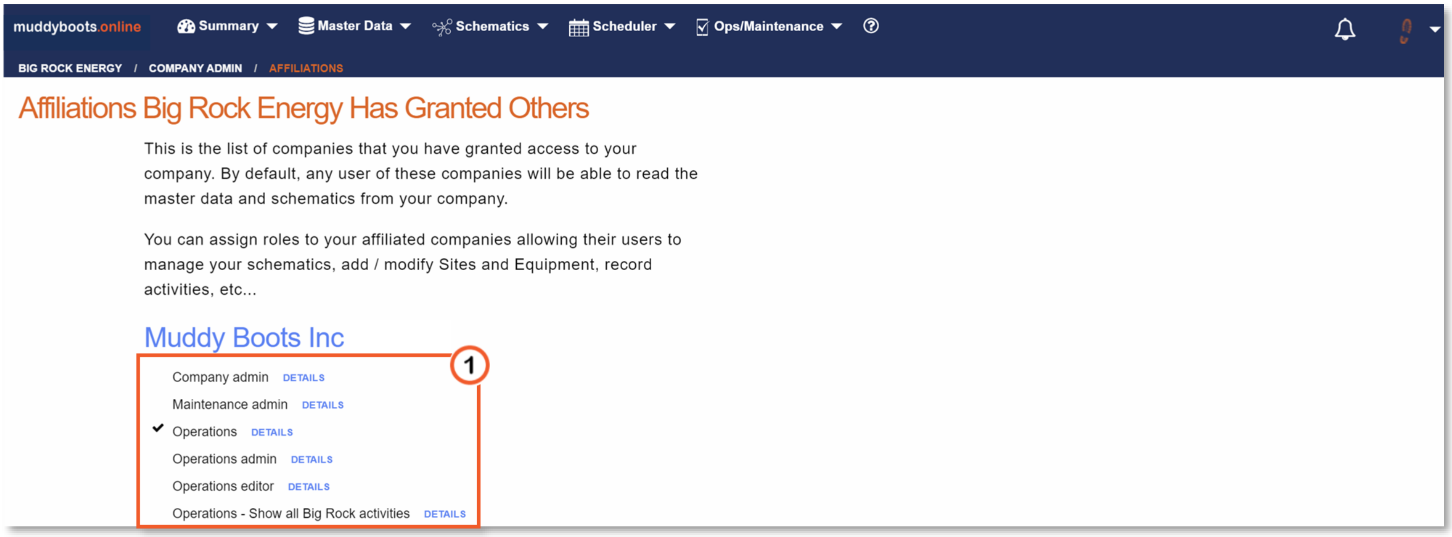


Note: The edit and new hierarchy screens function very similarly. The window used for the example is the edit window, follow the same steps listed below for adding a new area to the hierarchy.

- 1 Select the area parent, if required, from the drop down.
    - If the area has no parent (it is the parent), select “No Parent” from the drop down.
    - Multiple areas can be nested under one parent.
- 2 Give the new area a name. This is the name that will be displayed in the hierarchy for all users in the company.
- 3 Select the fields that reside under the hierarchy area by checking or unchecking the boxes.
    - Only sites that are currently in that area, or have no area in the hierarchy will show.
    - When moving a field from one area of the hierarchy to another, users will have to uncheck the box from its existing area before adding it to a new area
    - Note: When creating a new area, there will only be the option to add fields to that area.
- Click the UPDATE AREA to save the changes.

Affiliations within MBO

Companies using MBO often have 3rd party companies that are required to have access to the data in the MBO platform. To affiliate a company in MBO, users must contact the MBO team. Muddyboots will affiliate the company and assign them access following the requirements laid out by the requesting muddyboots client. To view a list of the companies that have been affiliated, open the personal drop down menu in the top right corner, navigate to company admin and from the resulting menu select “Affiliations”. Note that muddyboots.online is affiliated by default.



- 1 Roles with checkmarks beside them show what privileges affiliated companies have been assigned within the parent company’s muddyboots platform.

Exporting and Importing Equipment and Sites

Bulk data exports and imports are available within muddyboots.online and are facilitated through the use of excel files.

The data imports can be used for the following updates:

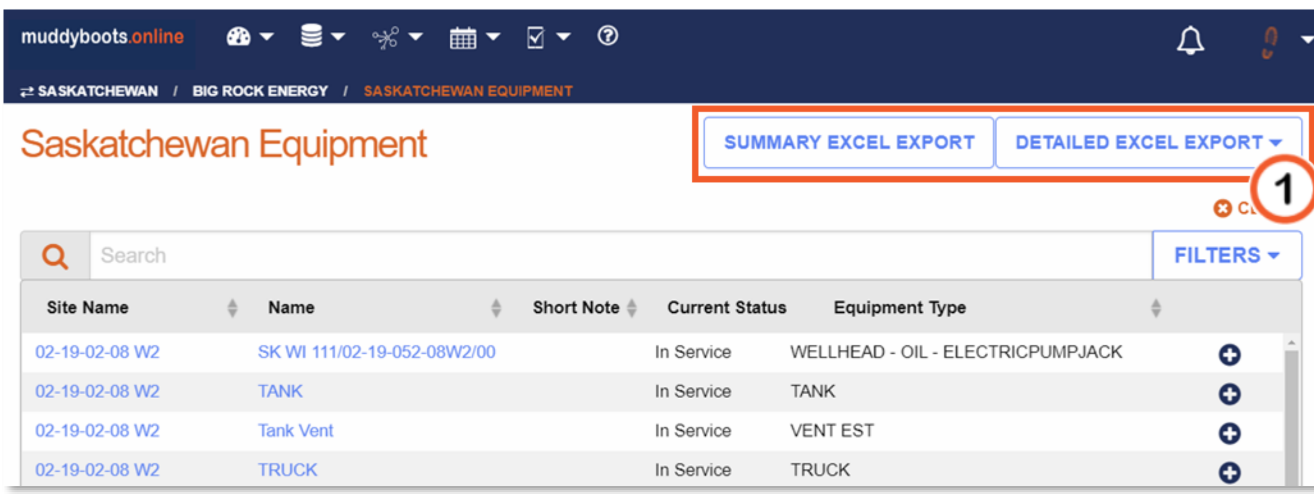
1. Import new equipment or update equipment details
   a. Import equipment details, including details displayed on equipment present on schematics

2. Import new sites or update existing sites

This process is initiated by first exporting an existing equipment list or generating a new (blank) equipment file.

(a) How to Export Equipment Excel Files

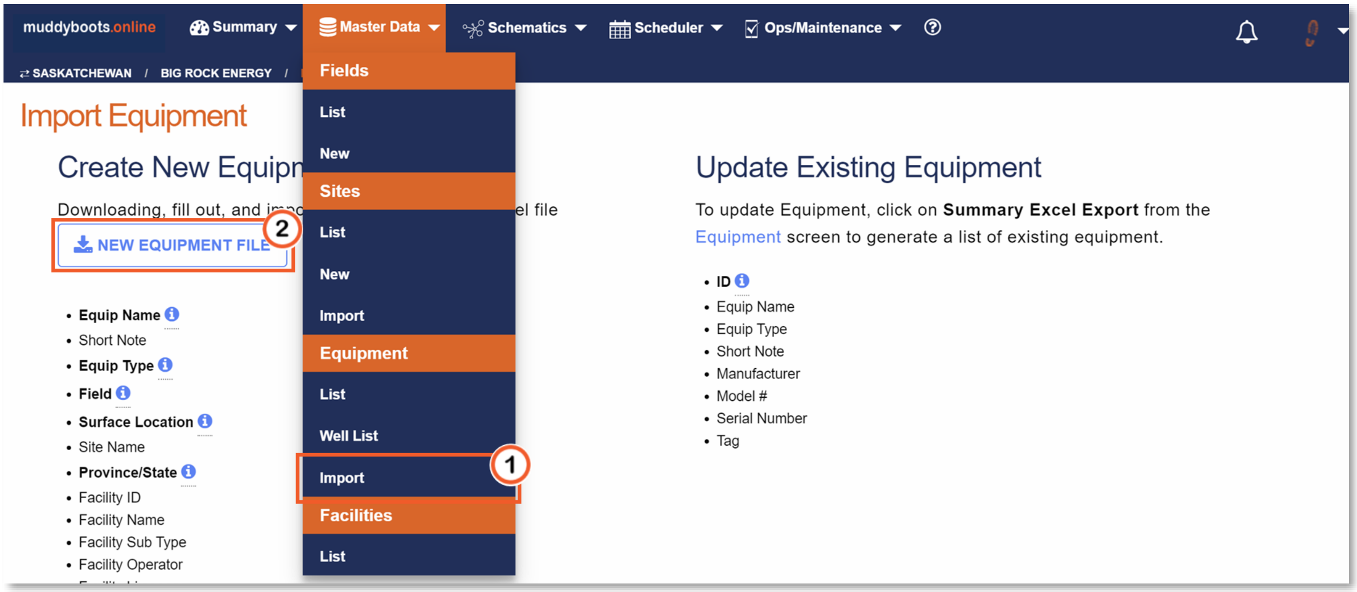
(i) Exporting an existing equipment list (Full detail Excel Export)



- 1 Summary Excel Export: For exporting standard equipment details
  - Equipment Name, Short Note, equipment type
- 1 Detailed Excel Export: For exporting complete equipment details.
  Note: Full equipment detail exports will place each equipment type on an individual excel tab in the export file

Note: Exports of over 200 records will be placed into the *My Downloads* folder found under the users personal dropdown located in the top righthand corner of the MBO application
Note: The MBO ID in the equipment export is fixed to the equipment in the muddyboots.online application, do not modify this column

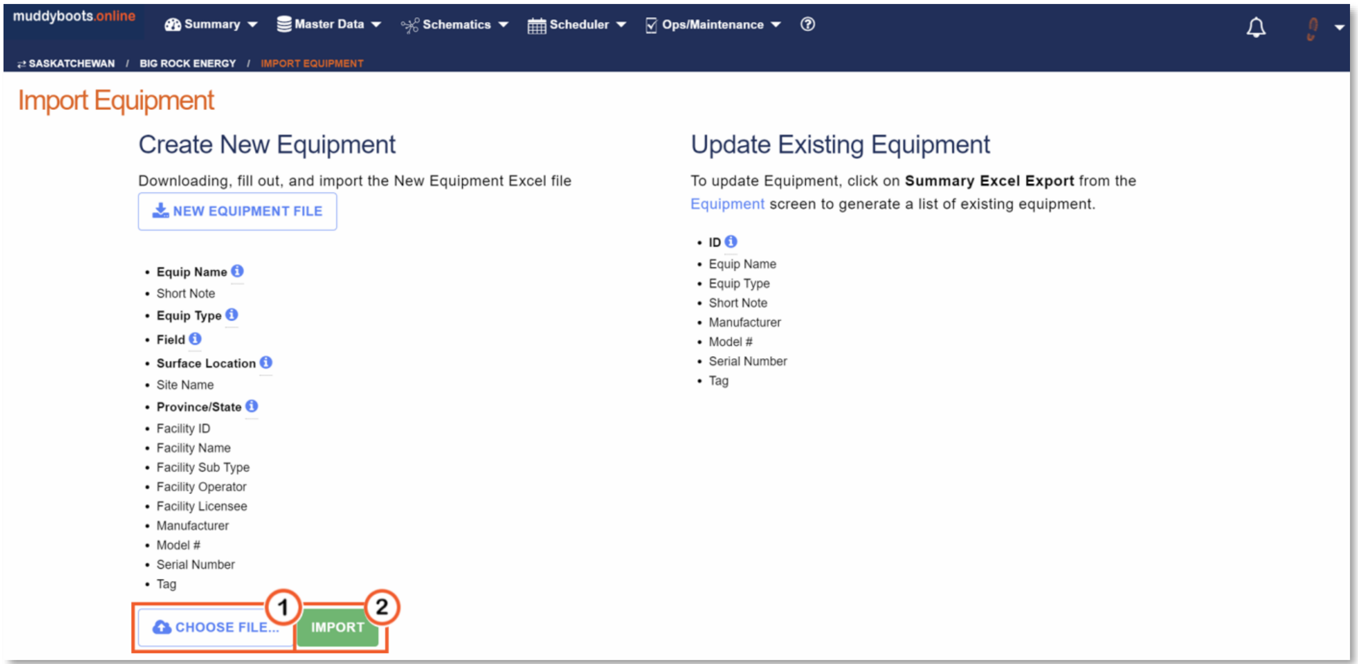
(ii) Exporting an empty equipment file



- 1 Click Import under the equipment heading from the Master Data Dropdown
- 2 Click New Equipment File to download a formatted excel file for populating with new equipment information
- The new equipment file will include a second tab with acceptable equipment types to be populated on the mandatory **Equip Type** column

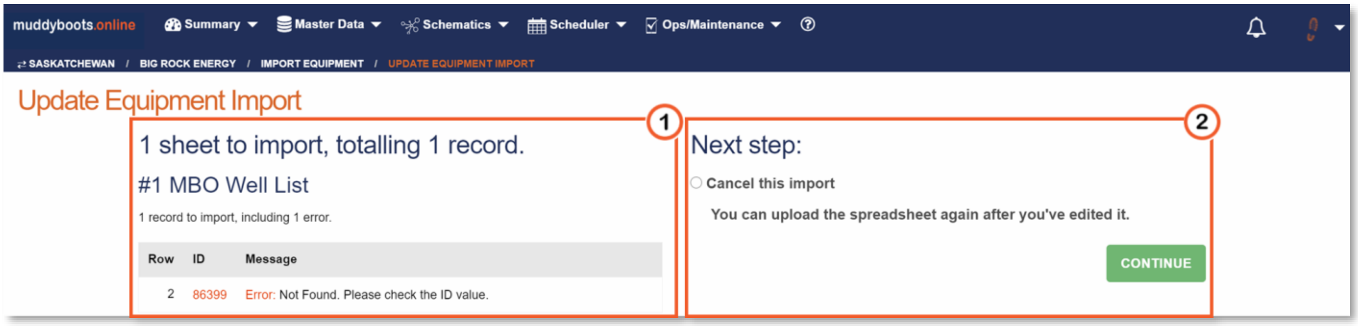
(b) How to Import Equipment Excel Files

- Edit the Excel file for import to include the updated information.
  Note: The import will only accept predefined column headers that match those from the exports. Contact your MBO representative for more information.
- Save the newly updated Excel file.
- Navigate to the Equipment Import page on muddyboots.online by selecting *Import* under the *Equipment* heading from the *Master Data* Dropdown



- ① Choose the file for importing.
  Note: Updating existing equipment and importing new equipment must be completed using separate import file as the files cannot be combined.
- ② Click Import.

Note: Mandatory fields will be highlighted as **Bold** on the *Import* page with a tooltip description of ***Required***

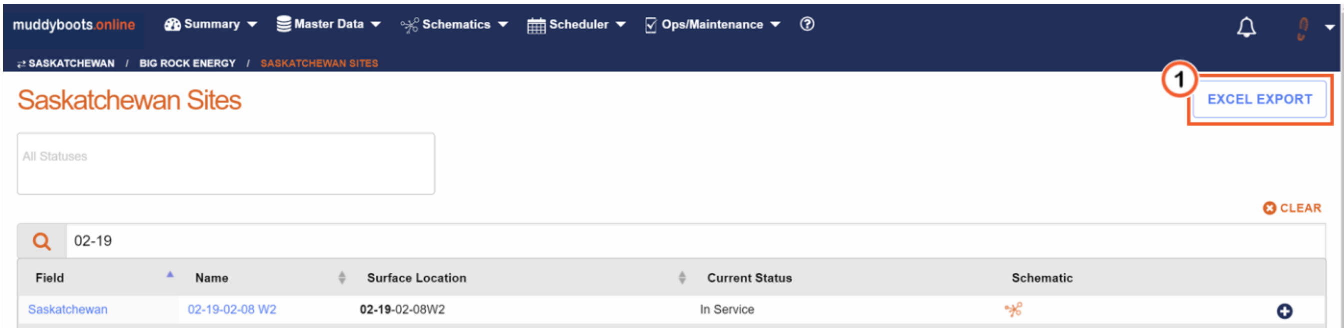


- Once Import has been selected, 1 muddyboots.online will check the file for errors prior to uploading and both note where the error(s) and give an error description.
- 2 Once this check has been completed, you can continue to complete your import or cancel and review the file prior to another upload attempt.

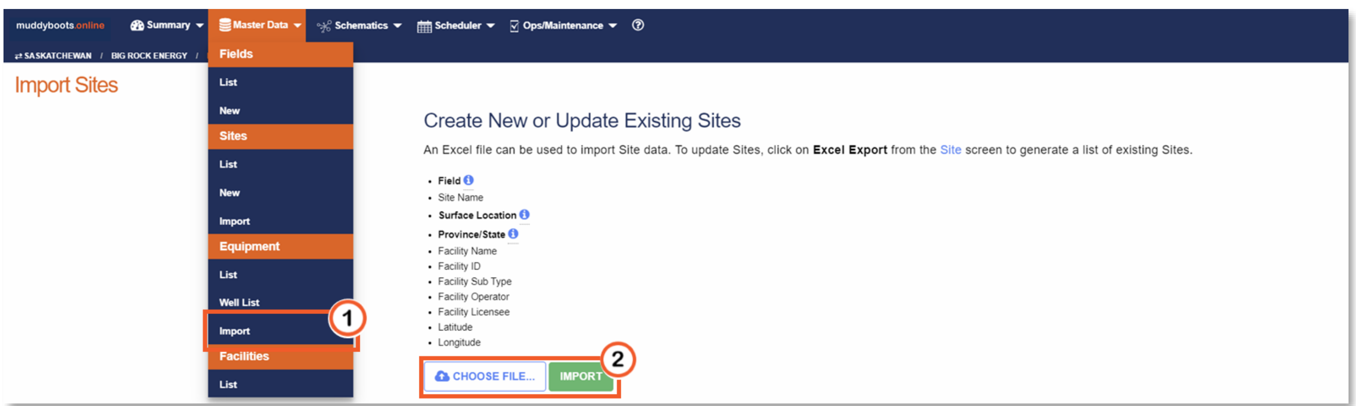
Note: Equipment imports over 200 records may time out during the import process. To prevent timeouts, split the import file to keep the number of updating records below 200. For large imports please contact your MBO representative.
Note: New equipment imported to muddyboots will not be added to schematics. See the schematics training document for adding equipment to schematics.
Note: Schematics will become unverified if equipment details displaying on the schematic are updated and then imported

(c) How to Export and Import Site Excel Files

You can import both new sites and make updates to existing sites using this process.



- Navigate to the Site list
- Filter down to the desired site list
- 1 Click Excel Export to download the filtered list
- Edit and save the Excel file that was downloaded
  Note: Site Surface Location cannot be updated via import, this is accomplished by editing the site within the application



- 1 Click *Import* below the *Site* header under the *Master Data* Dropdown
- 2 Choose the newly saved Excel file and click Import
- muddyboots.online will check the file for errors prior to uploading and both note the location of the error(s) and give an error description.
- Once this check has been completed, you can continue to complete your import or cancel and review the file prior to another site update attempt.

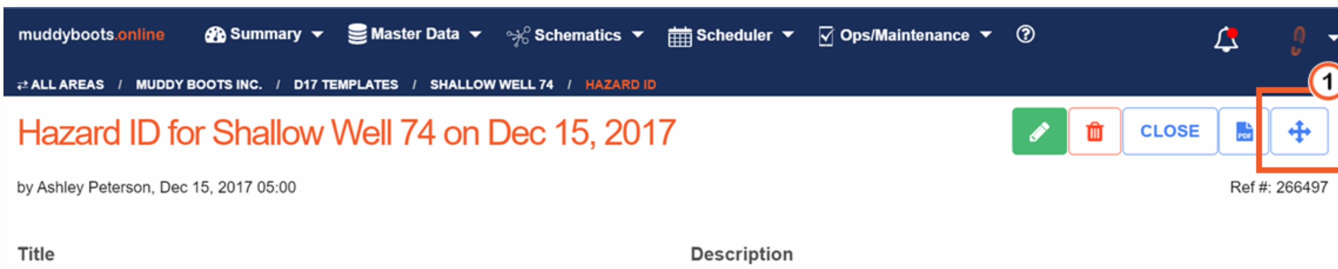
Transferring Activity Reports between Assets (Sites / Equipment)

Reports in Muddyboots may be transferred when recorded on an incorrect Asset (Equipment or Site).

Report Transfers may be required due to one of the following:

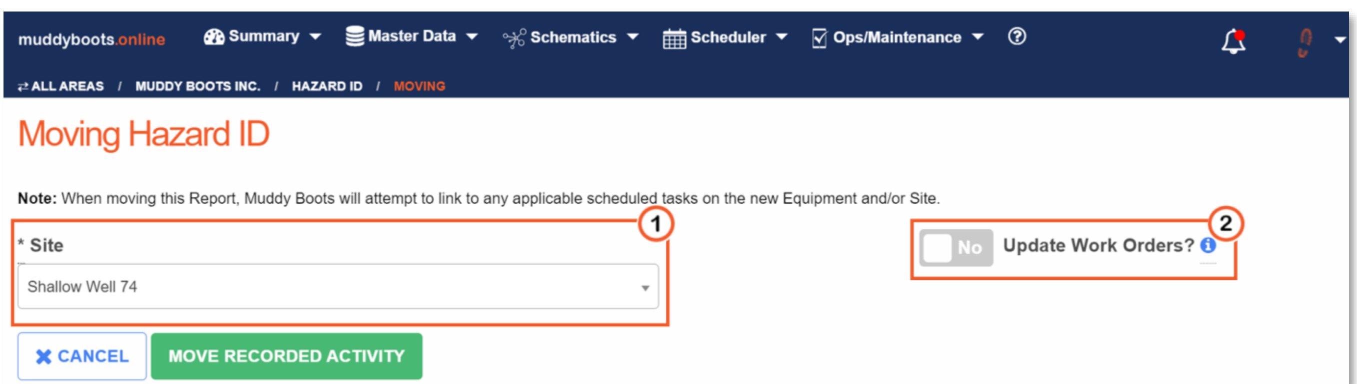
1. Imported results from Third-Parties may have utilized incorrect codes resulting in mis-appropriated reports
2. Operational error when recording an entry on the wrong Asset
3. The correct asset was unavailable when reporting was initiated

(i) Transferring an Activity Report



- Navigate to and view the Report to be transferred
- 1 Click the report transfer icon

Note: Activities that have editing disabled, via workflow or other options, will not be transferrable until the edit lock has been removed.



- 1 Select the New site, and if applicable Equipment, the report is being transferred to.
- 2 Select Yes / No on the option to *Update Work Orders?*
  - This will update all Work Orders associated to the original report to the New Equipment and /or Site.
- Click MOVE RECORDED ACTIVITY to complete the Report transfer.