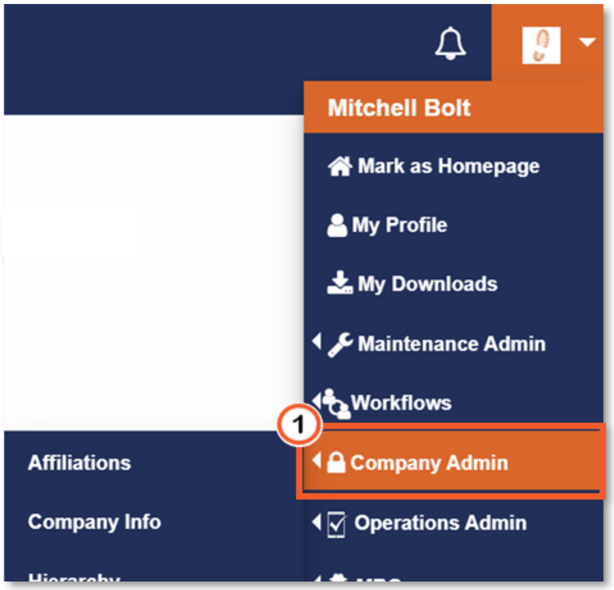
Administrative Functions within muddyboots.online

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.

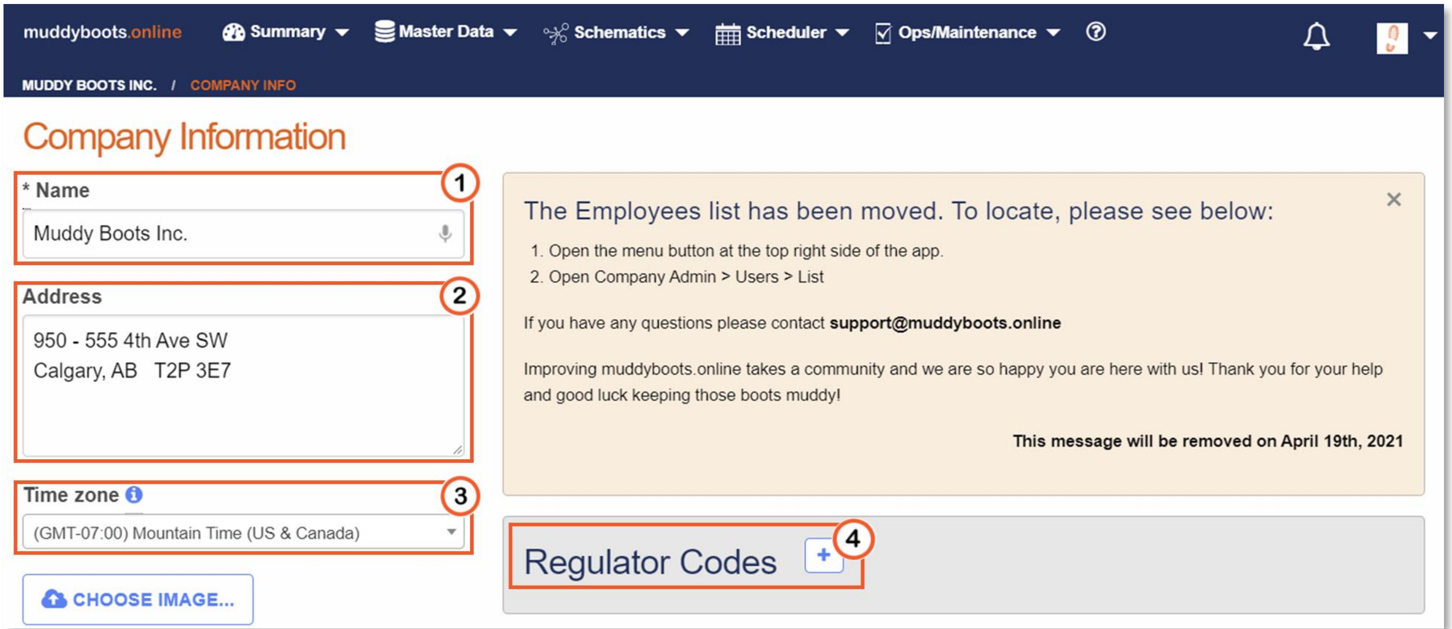
All Company Administrator roles can be found under the *Company Admin* 1 header under the personal user dropdown found in the top righthand corner of the application



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, Shift Log, Workflow*

Company Information

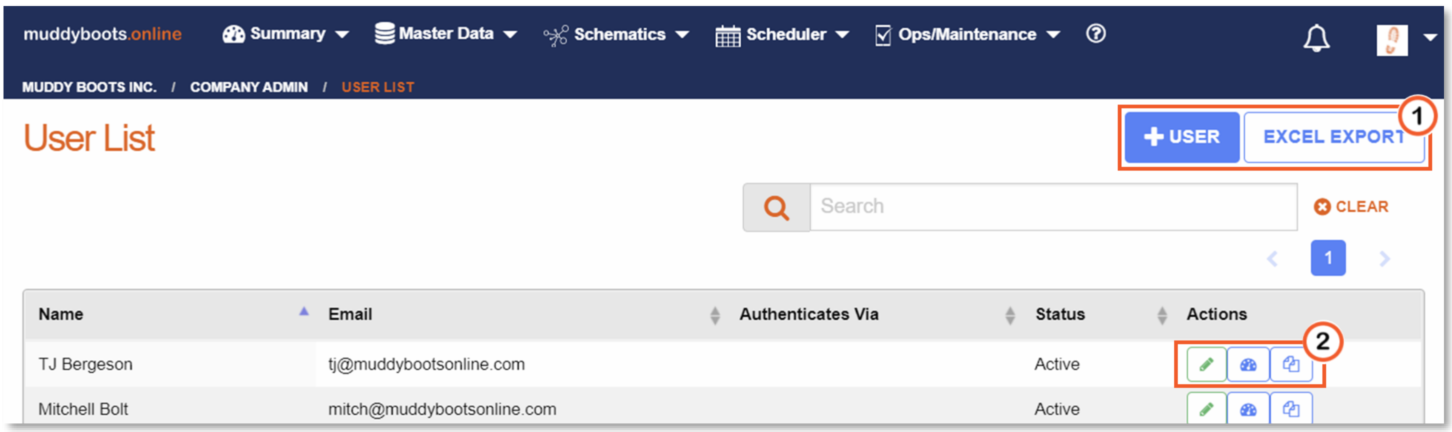
The Company Info selection will direct the user to the Company Information page. On this page several editable sections are made available.



- 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

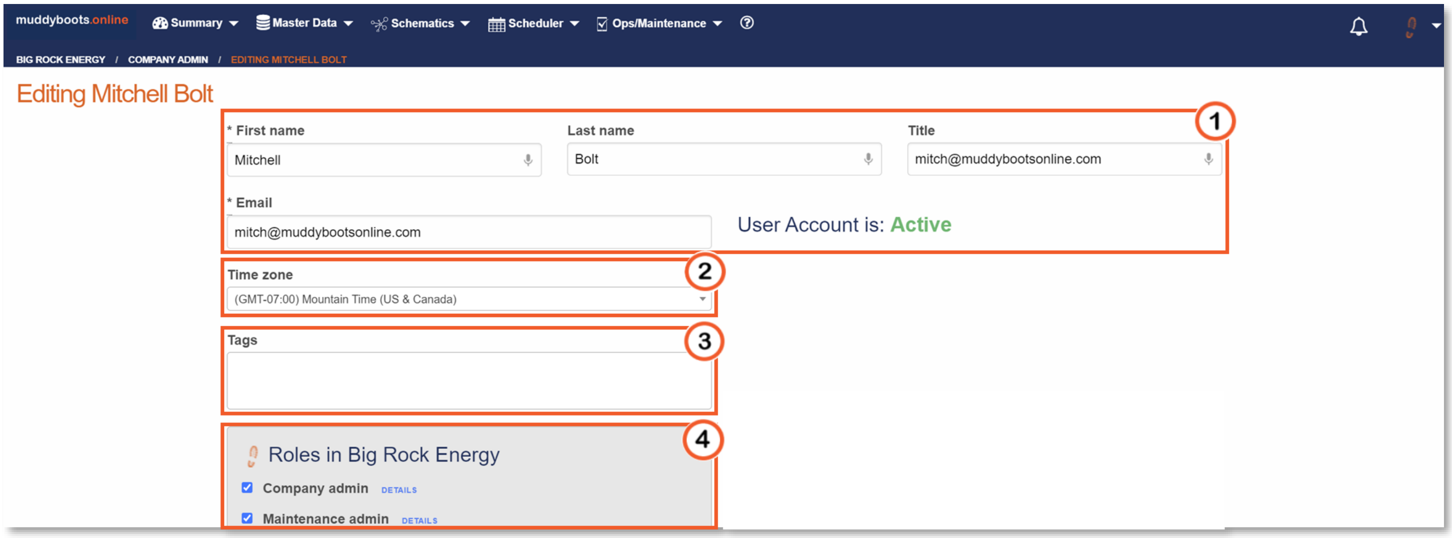
Each employee that is required to access the information within the MBO application will require their own unique log in. For security purposes, employees terminating employment with the company or employees transitioning to new roles within the organization will have their privileges removed or updated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

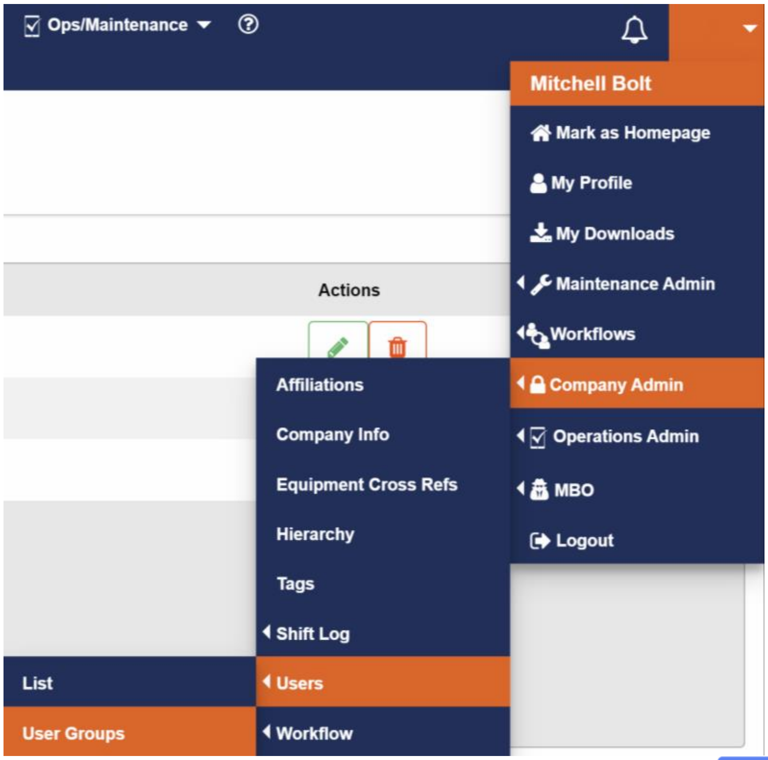
(a) Editing and Deleting A User



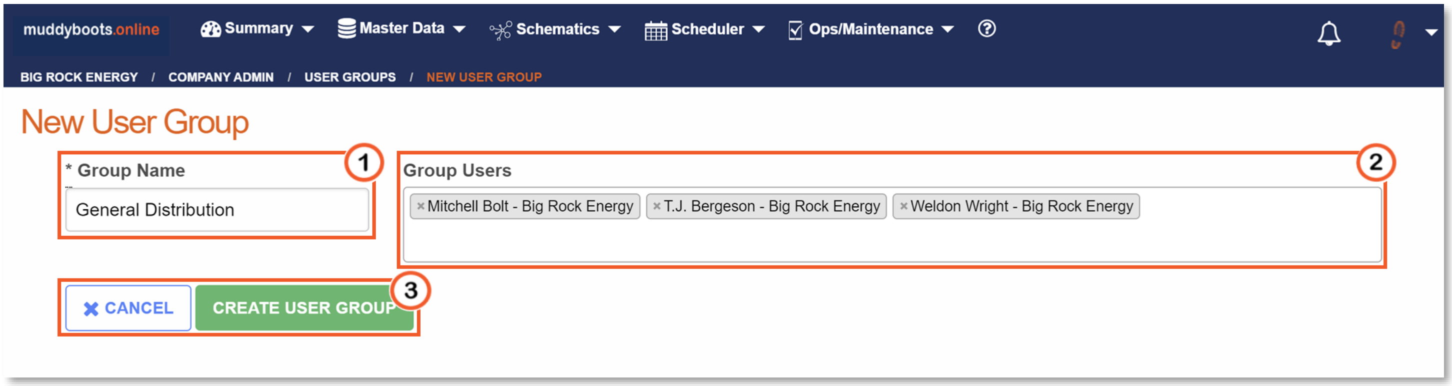
- 1 Update the employees name, title, and email, if required, by typing in the boxes.
    - Note: Only the Employees first name and email are required. Employees can also update this information in their own profile.
- 2 Update the employees working time zone to reflect their geographical working area
- 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 a Scheduled Request, Scheduled Default, Work Order, Workflow Template, or an open Workflow.
Note: User groups can also be used to for the assignment of activities, work orders and corrective actions.



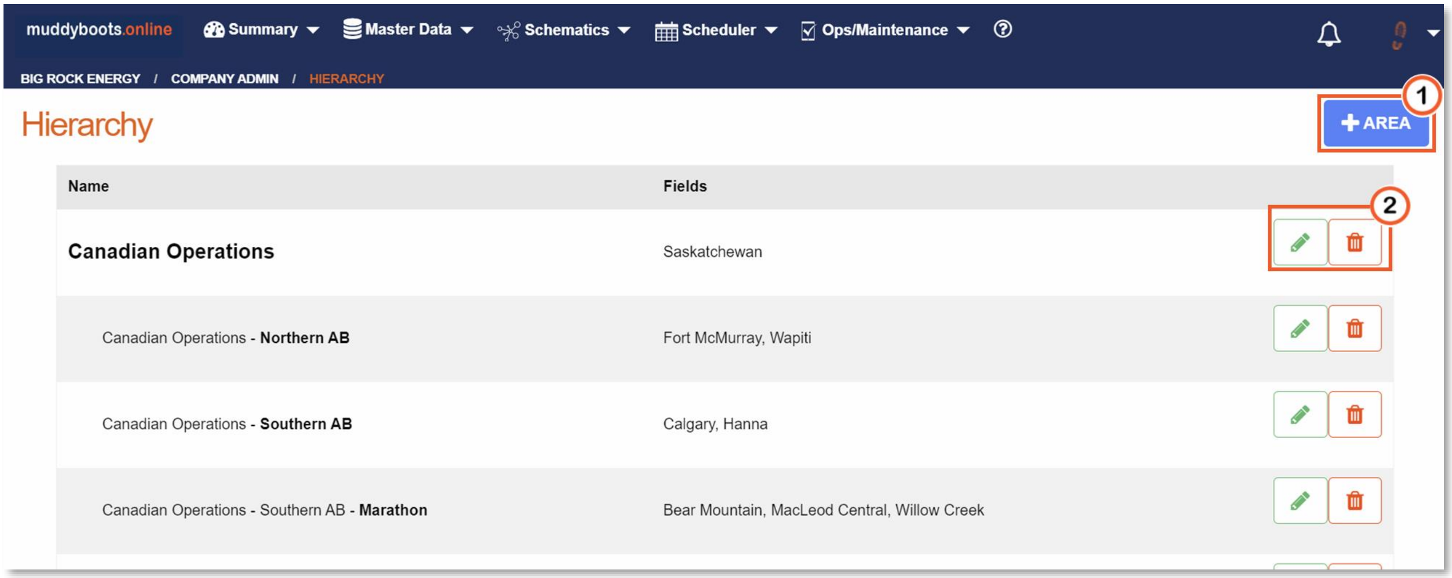
- Navigate to the User Groups under the Company Admin header and Click + USER GROUP



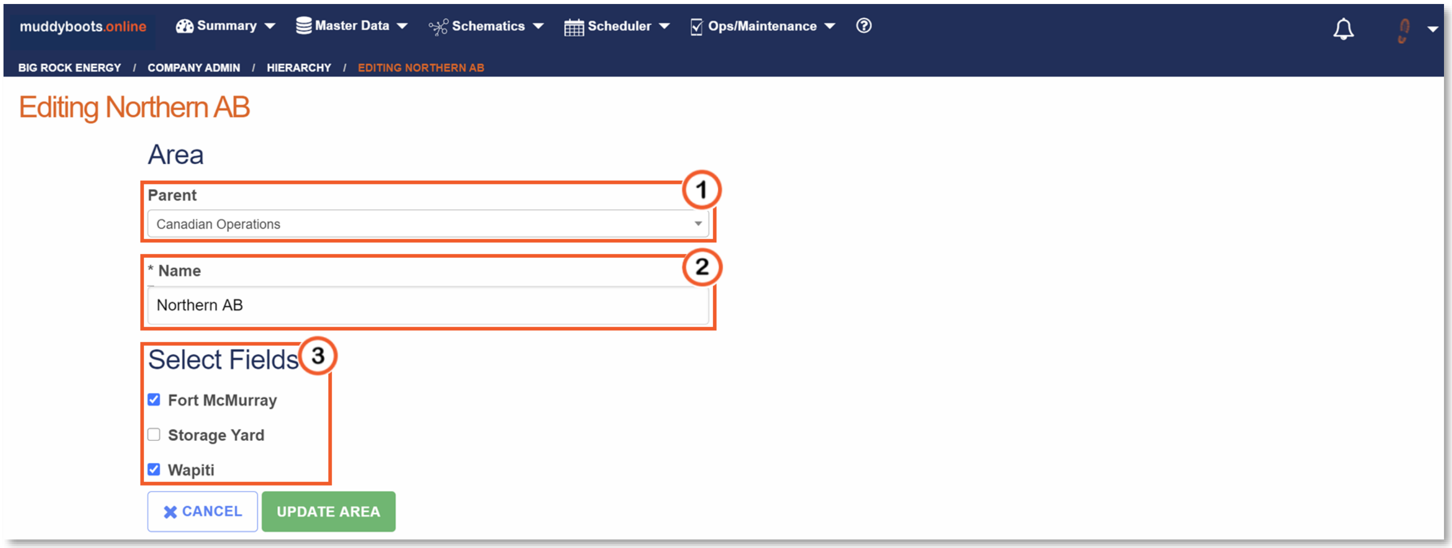
- 1 Set the desired Group name.
- 2 Select the Users for the Group.
- 3 Create the User Group.

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 **+AREA** 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.

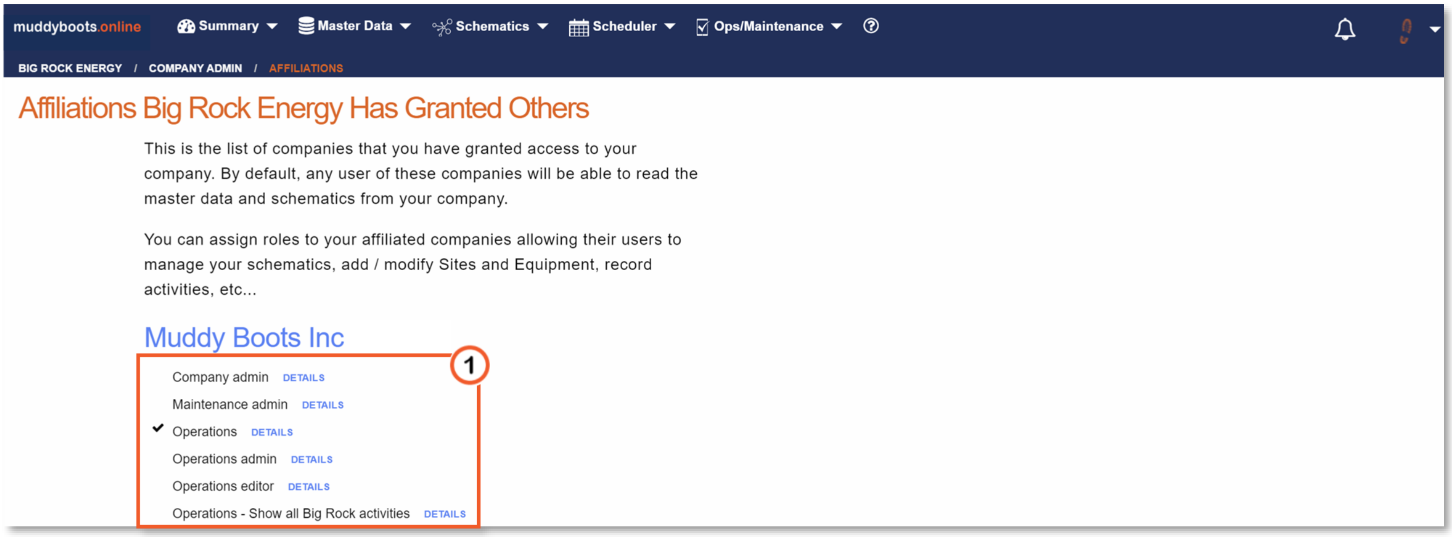


Note: The edit and new hierarchy screens function very similarly. The window used for the example is the edit window, follow the same steps listed below for adding a new area to the hierarchy.

- 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:

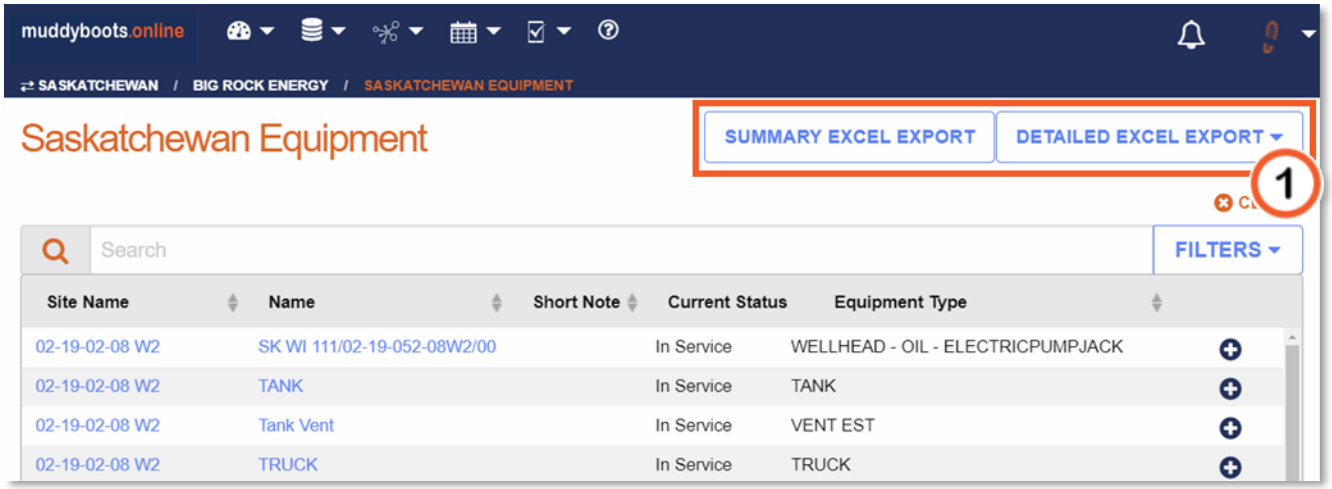
1. Import new equipment or update equipment details
    a. Import equipment details, including details displayed on equipment present on schematics

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

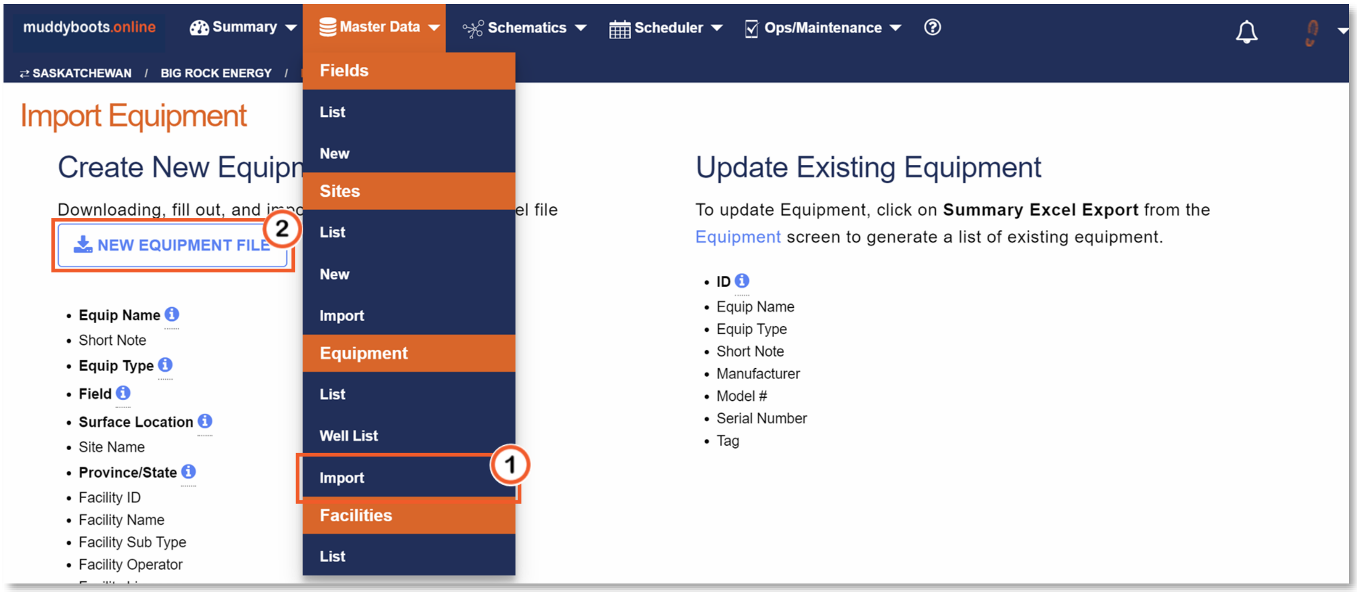
(i) Exporting an existing equipment list (Full detail Excel Export)



- 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

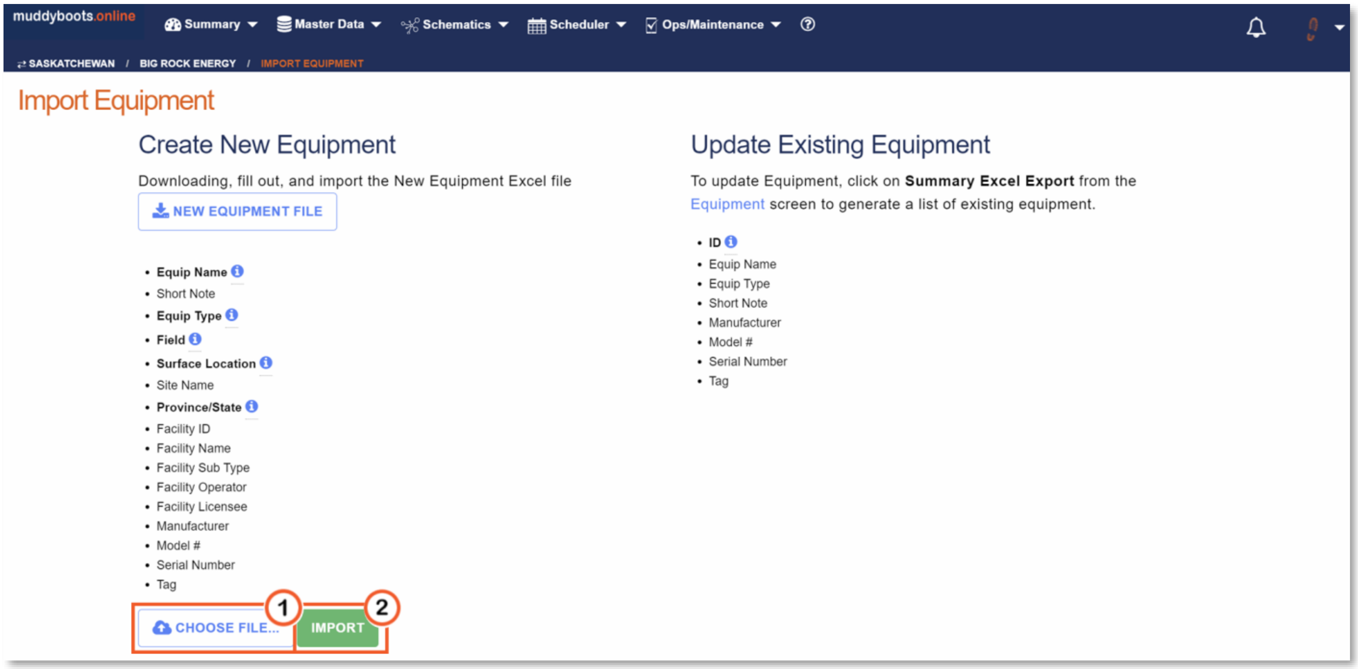
(ii) Exporting an empty equipment file



- 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

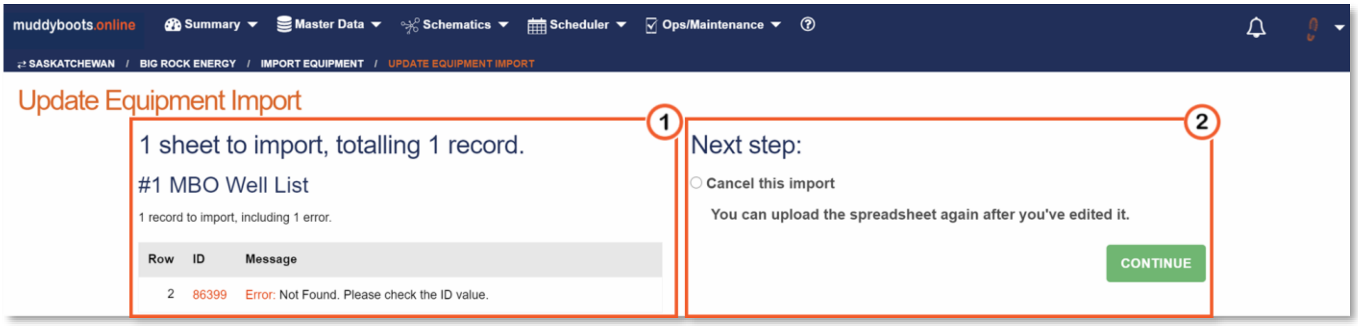
(b) How to Import Equipment Excel Files

- 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***

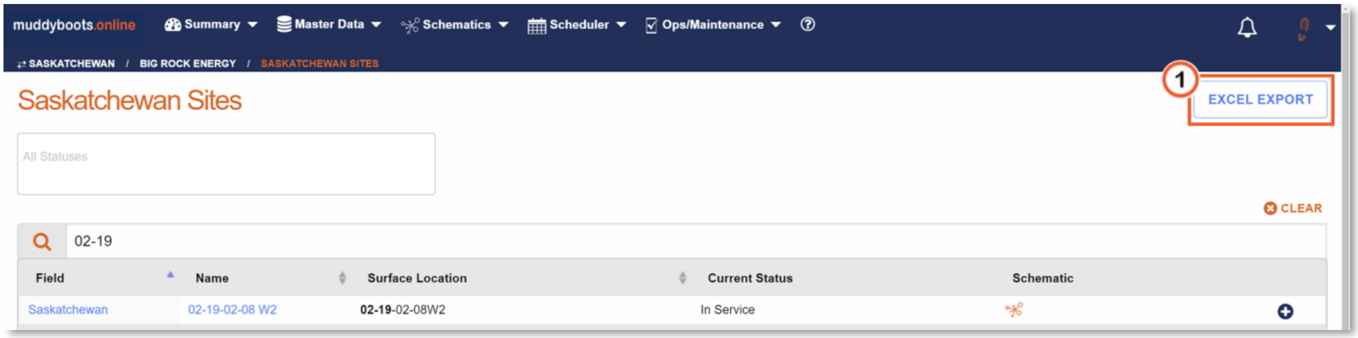


- Once Import has been selected, 1 muddyboots.online will check the file for errors prior to uploading and both note where the error(s) and give an error description.
- 2 Once this check has been completed, you can continue to complete your import or cancel and review the file prior to another upload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

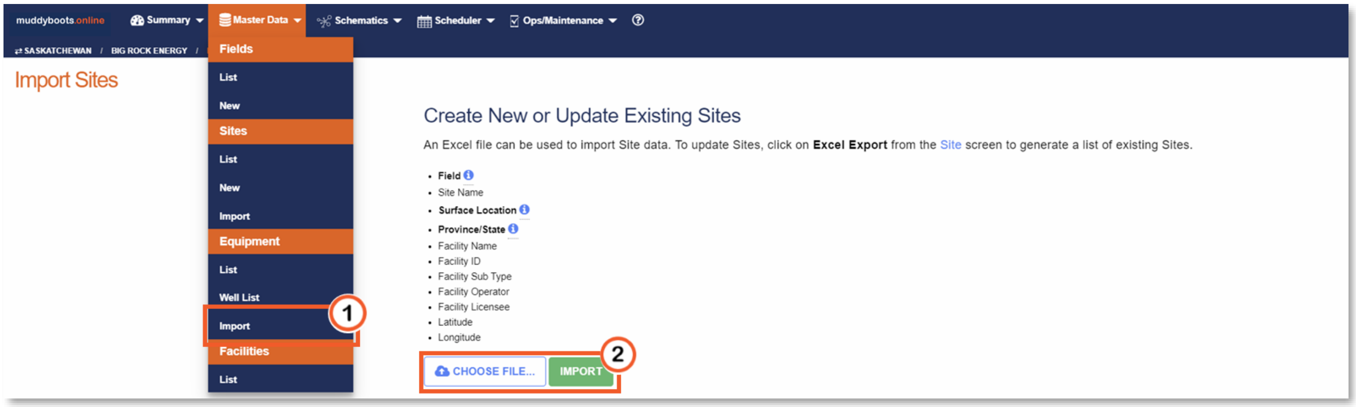
Note: Equipment imports over 200 records may time out during the import process. To prevent timeouts, split the import file to keep the number of updating records below 200. For large imports please contact your MBO representative.
Note: New equipment imported to muddyboots will not be added to schematics. 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.

Workflow Quick Start: Templates and Preferences

muddyboots.online (MBO) is set up to accommodate diverse workflow. This document will cover how to create a workflow template, how to create a user group and how to manage workflow requests.

(a) Workflow Templates

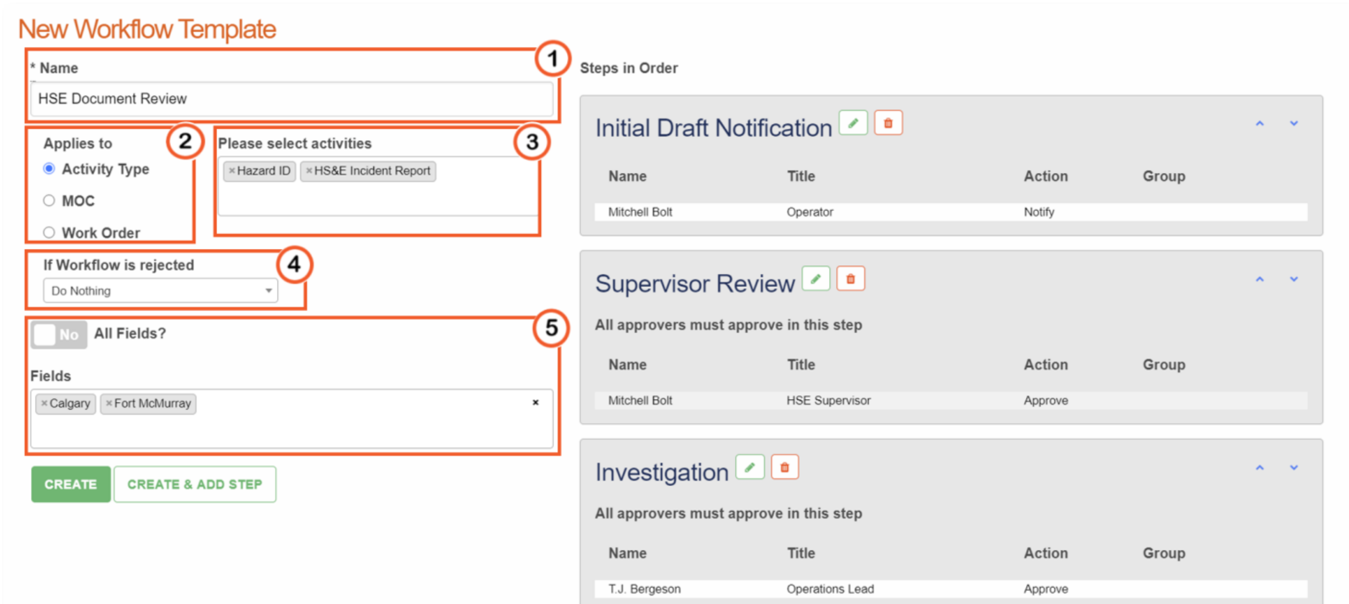
Workflow Templates can be applied to Work Orders, Activities, and MOC's within MBO.

- Select Workflow Templates from "Company Admin" in the personal drop down.

(i) Creating a New Workflow Template

- Click **+ WORKFLOW TEMPLATE** to create a new Workflow Template

Note: Changes to a Workflow Template will not affect existing Workflows, however once saved, those changes will apply to any new Workflows.



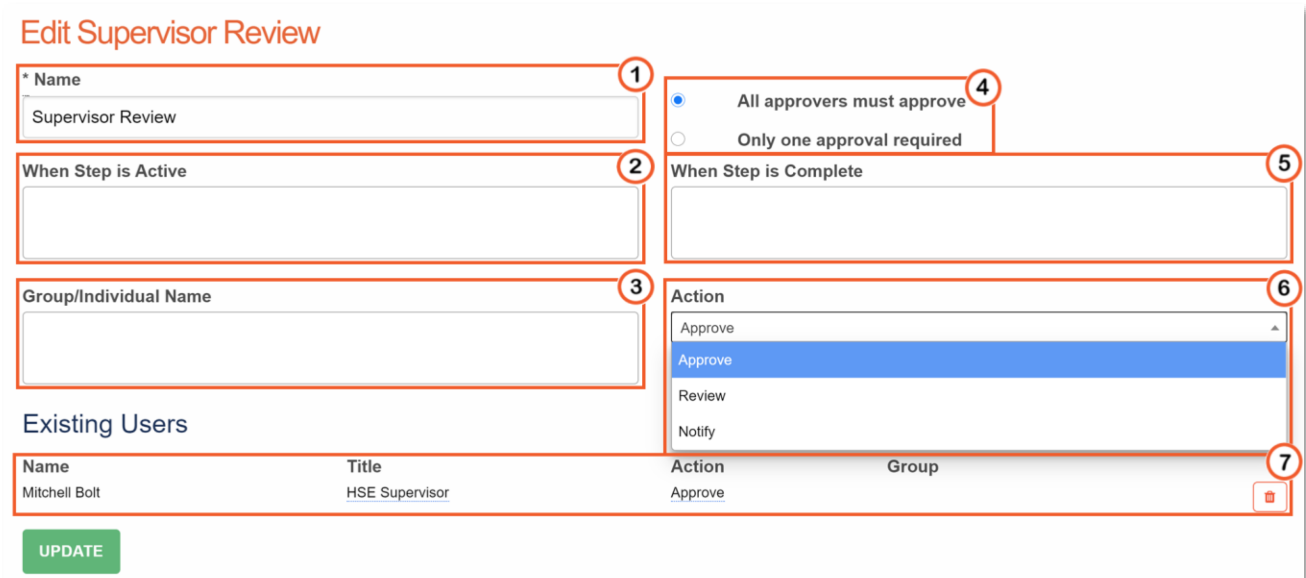
- 1 Name the Workflow Template.
- 2 Select the function of the workflow: Activity Type, MOC, Work Order, or Schematic.
  Note: If a Schematic Workflow Template is created, Schematic flow diagrams will only allow for verification via the workflow functionality as the manual VERIFY entry by schematic verifier users is replaced by the workflows.
- 3 If the Workflow applies to Activity Types, select the activities for the workflow template being created.

- 4 Determine what happens to a Workflow if a user rejects it:
  - **Do Nothing** – No change the work workflow if rejected.
    Note: This option is not available for Schematic Workflows
  - **Restart Workflow** – Workflow starts over, and the workflow email(s) are sent to those associated to the initial step
  - **Restart Step** – This will restart the current workflow step, re-sending workflow emails to those on the current step with any new notes included
  - **Close Workflow** – If the workflow is rejected, the workflow will close
    Note: This option is not available for Schematic Workflows
- 5 Select one or more, or all fields for this Workflow Template to apply to.
- Click CREATE & ADD STEP to create the template and setup the initial workflow template step.

Note: This can be completed later if you select CREATE.

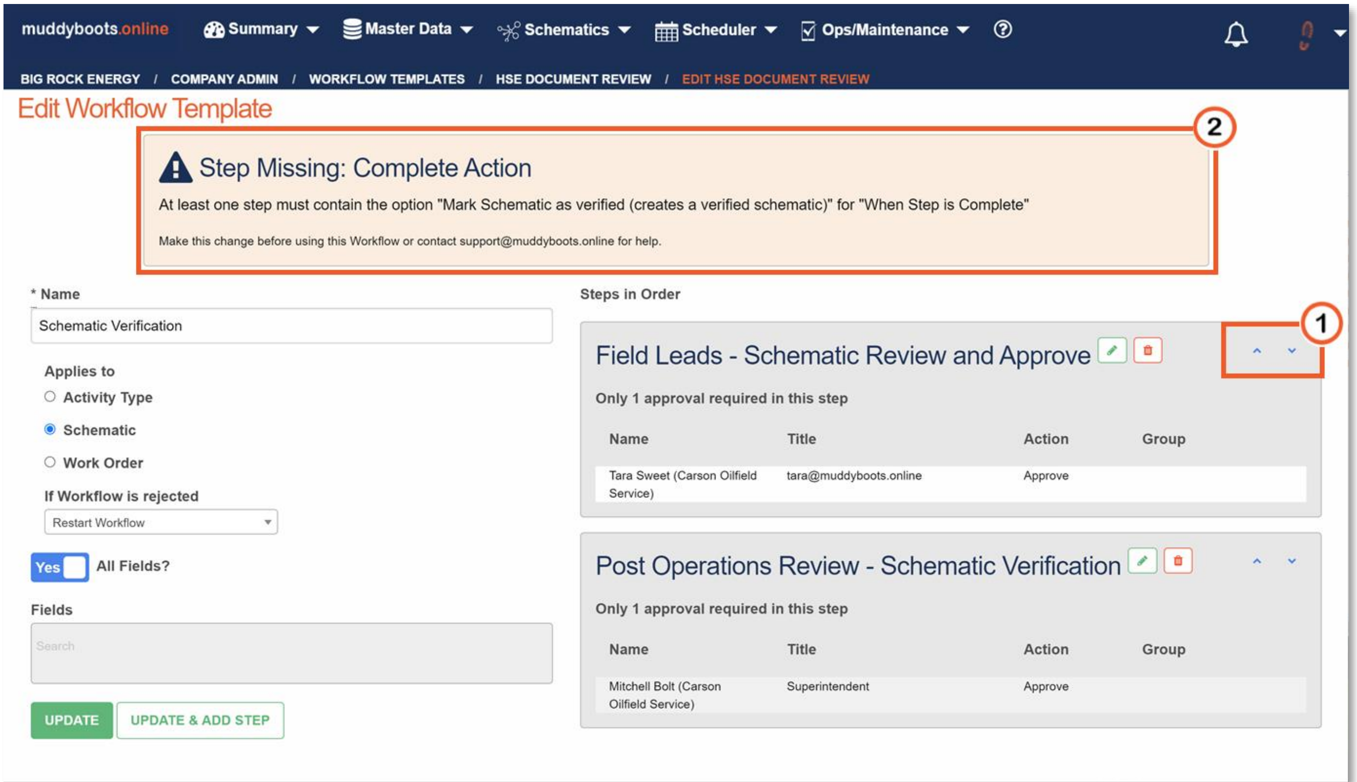
(ii) Creating a New Workflow Step

Multiple Workflow steps can be created to create a complex workflow allowing notifications across an organization.



- 1 Name the Workflow Step.
- 2 Select if the Activity/Work Order is to be locked for editing while the workflow step is active.
- 3 Select the Group(s) / Individual(s) to be notified during this step.
- 4 Select the review requirements for the Workflow Step.
- 5 Select if the Workflowed item is to be locked for editing, have the review status updated, or verify once the Workflow Step is complete.
  Note: Schematic Workflows will require the final step to *Mark Schematic as verified (creates a verified schematic)* otherwise the workflows will not action the schematics they are applied to.
- 6 Select the required action from the Group(s) / Individual(s) selected for the Workflow Step.
- 7 If the Workflow Step is being edited after initial creation, the Users Title and Actions can be manually updated. Users can also be removed from the Workflow Step using the button.
- Click CREATE STEP / UPDATE to complete the step or
- Click CREATE & ADD STEP to create an additional Workflow Step.

(iii) Editing a Current Workflow Template and Layout



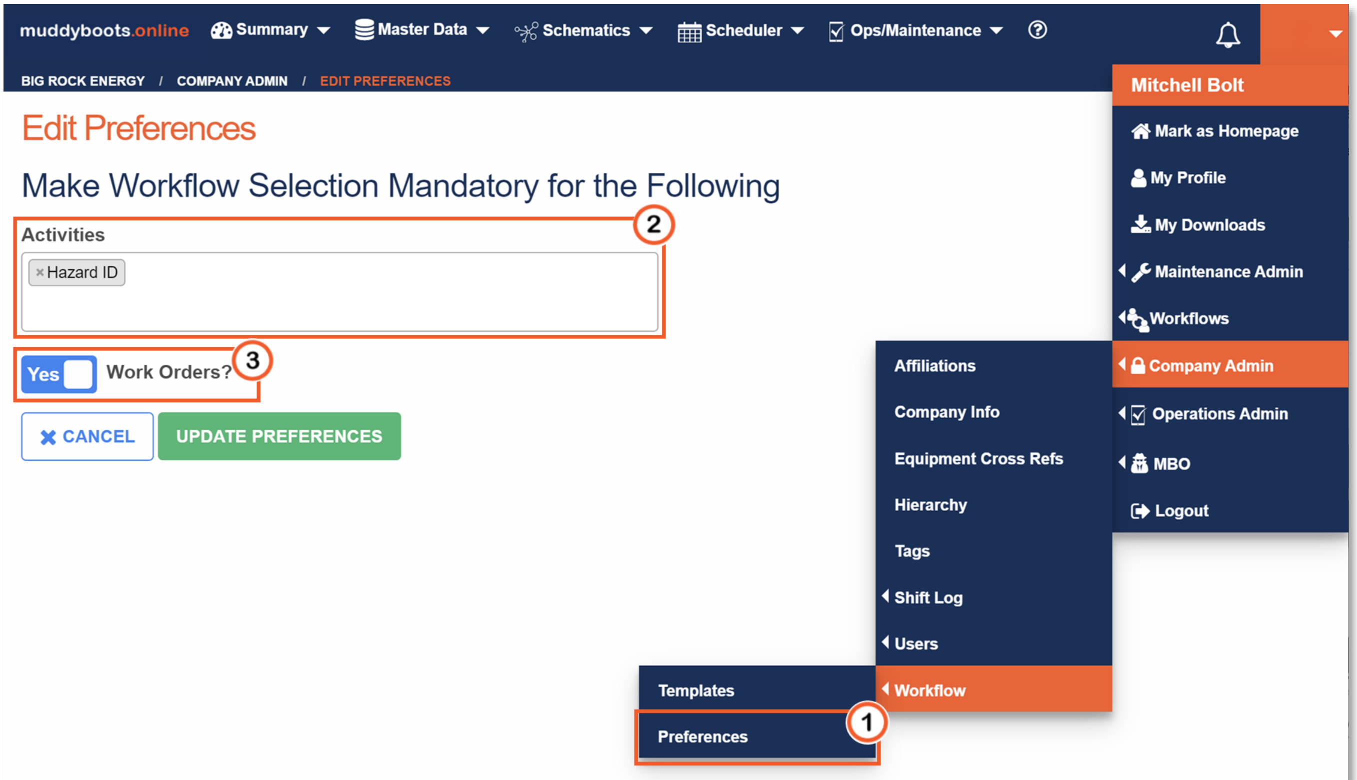
When editing a previously created Workflow Template, all fields are available to reconfigure.

- 1 To reorder the workflow steps, use the blue arrows.
- Click the edit button to edit an existing template step.
- Click the delete button an existing template step.
- To finalize any changes, click UPDATE.

Note: 2 Critical Errors in your workflow template will appear in the application and inform the editor / creator of the incorrect components and a brief description on how to rectify.

(b) Workflow Preferences

Workflow Preferences dictate mandatory assignment of Workflows for Activities and Work Orders. **Note:** This is a global setting that will apply to all Fields within a company.

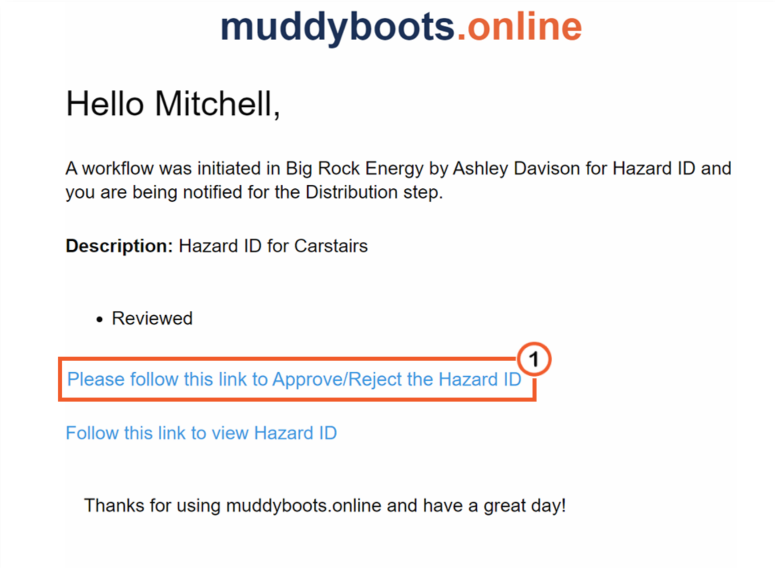


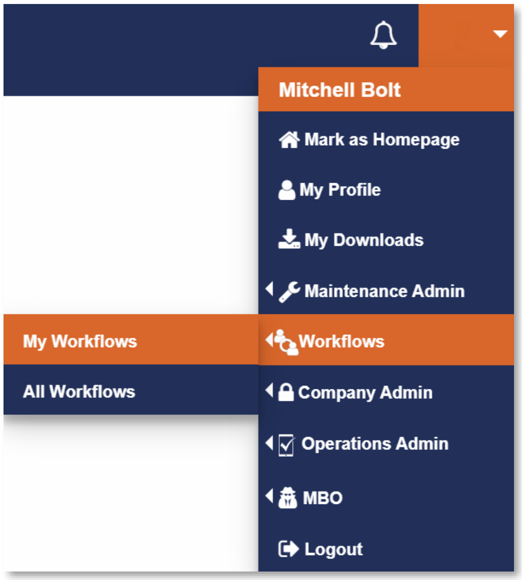
- 1 Navigate to Workflow Preferences under the Company Admin menu within the personal dropdown.
- 2 Select the activities that require mandatory Workflow selections.
- 3 Select if Work Orders require mandatory Workflows.
- Click UPDATE PREFERENCES to save the changes. Click Cancel to cancel any changes.

(c) Handling Workflows

Once an Activity / Work Order / MOC tied to a Workflow Template is recorded in the field specified in that template, a Workflow will be initiated and users in the first step will be notified via email.

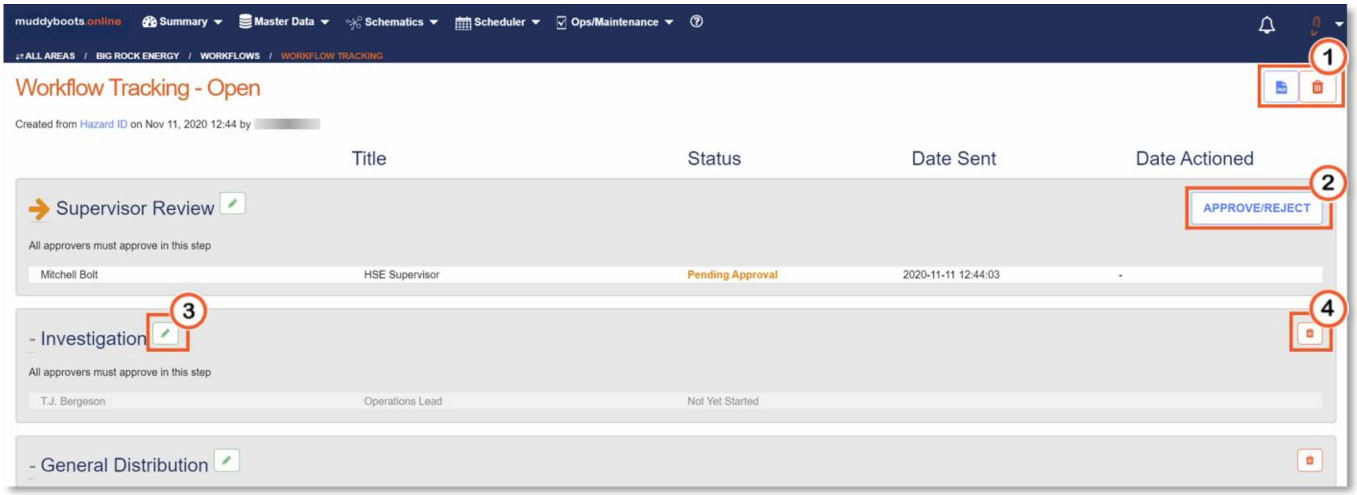
(i) Workflow Emails





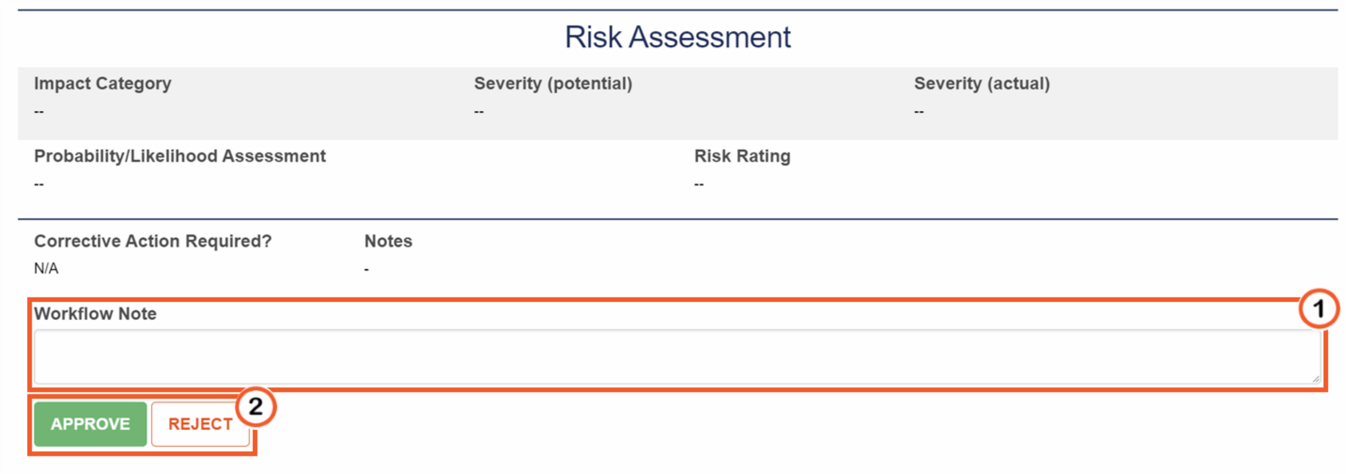
- 1 A user will receive an email when their step has been reached and can use the link to perform the requested action. Separate emails are sent out for every step.
  Note: Users can also login to muddyboots.online and go to 'My Workflows' to view all outstanding workflows.

(ii) Approve/Reject and Review Workflow



- (1) To generate the Workflow pdf, click
- (2) Click to Approve/Reject or Review the active workflow step.
- (3) To edit a workflow step, click to modify the step.
  Note: The option may not be available.
- (4) To delete a workflow step or workflow, click to delete.
  Note: The option may not be available.

(iii) Approve/Reject and Review of Activity Workflow



- After following the email workflow link or the button from the active workflow, the activity review will be initiated. Review the Activity or MOC.
- (1) Add workflow notes at the bottoms of the activity review.
- (2) Approve, Reject, or Review the workflow.

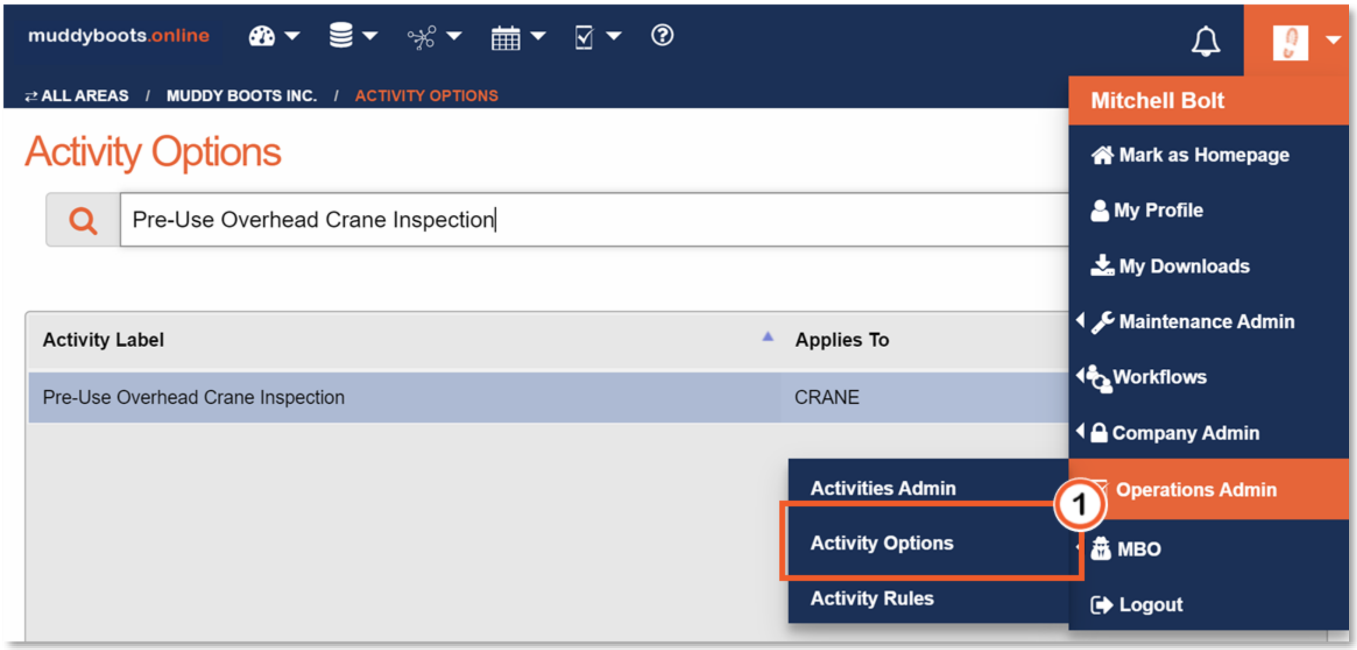
Email Notifications for External Acceptance

This document will cover how to activate external acceptance email notifications, generating these notifications, along with a short instruction for external stakeholder navigation of this feature.

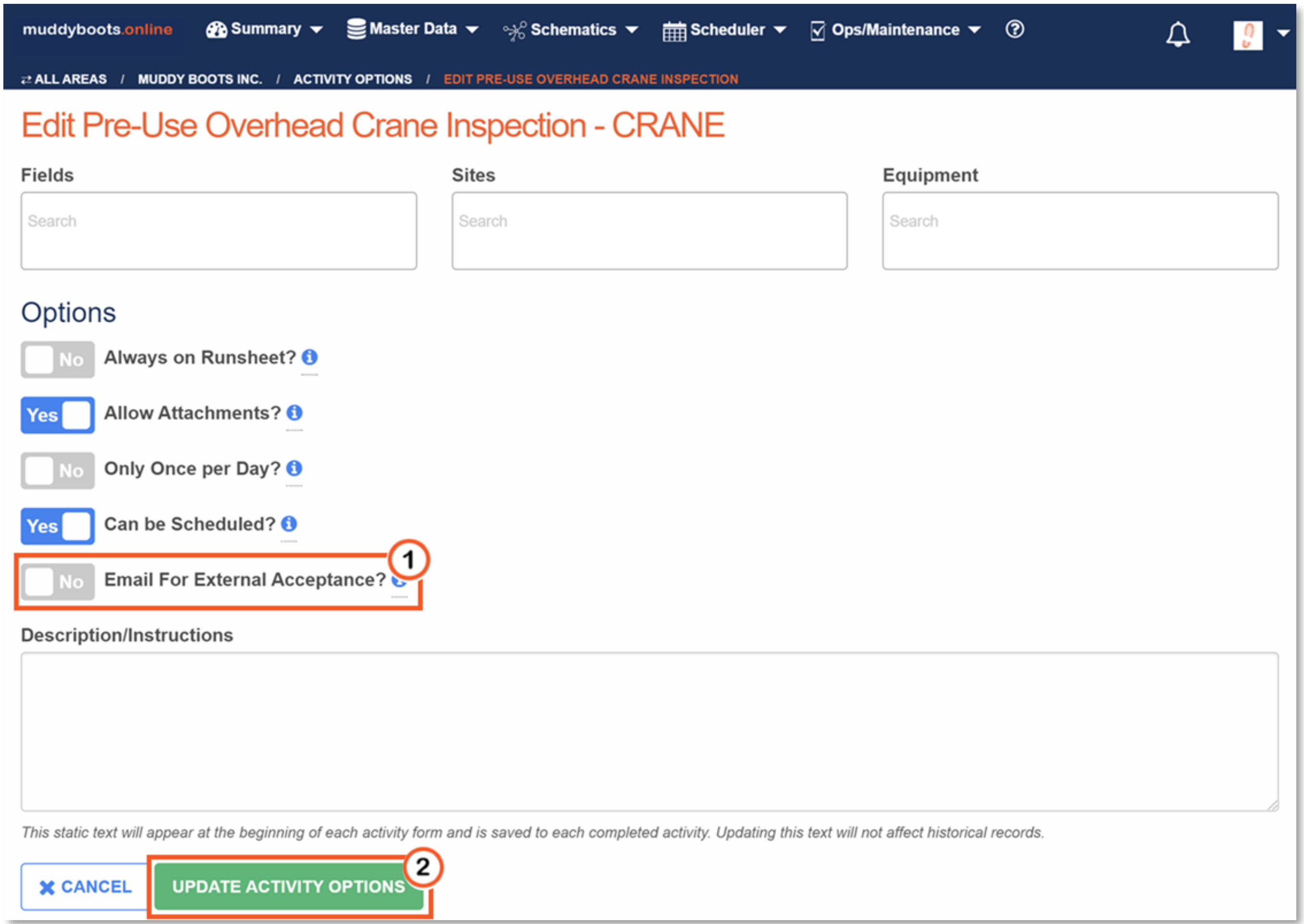
(a) External Acceptance Email Activation

Emailed notifications for acceptance can be sent to external stakeholders who are not users of the MBO platform. These can be especially useful for ensuring external stakeholders are informed, and for receiving their digital signature for safety, permitting, and other reporting purposes.

External stakeholders will receive an email with a PDF copy of the activity report from Muddy Boots, along with a link to mark the report as accepted or rejected. The Acceptance Summary section of the record in Muddy Boots will display one of the following statuses: pending, accepted, or rejected.

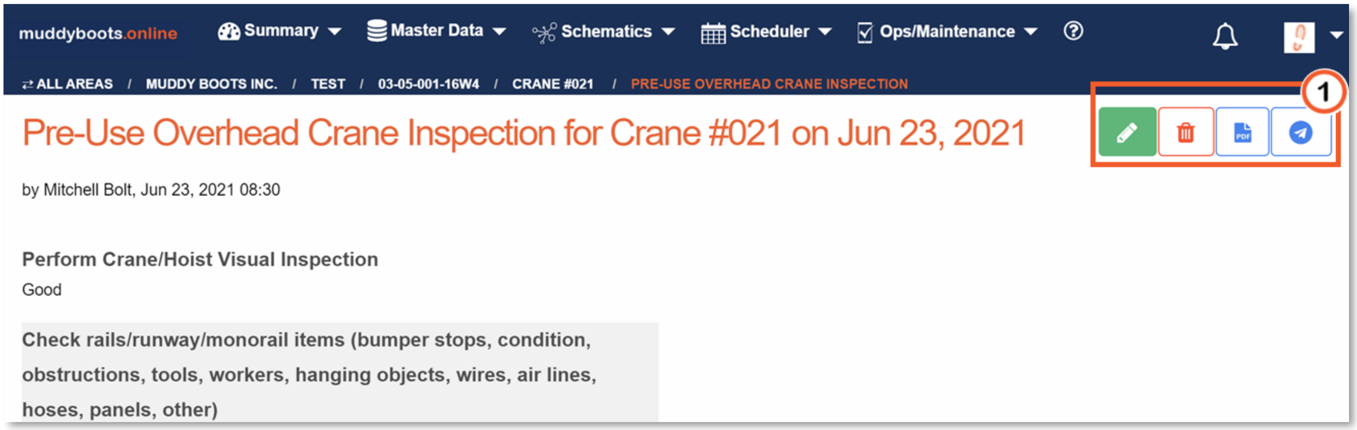


- 1 To activate this functionality on specific reports, navigate to Activity Options under the Operations Admin heading.
- Search for and accept the activity type for enabling this functionality and click .

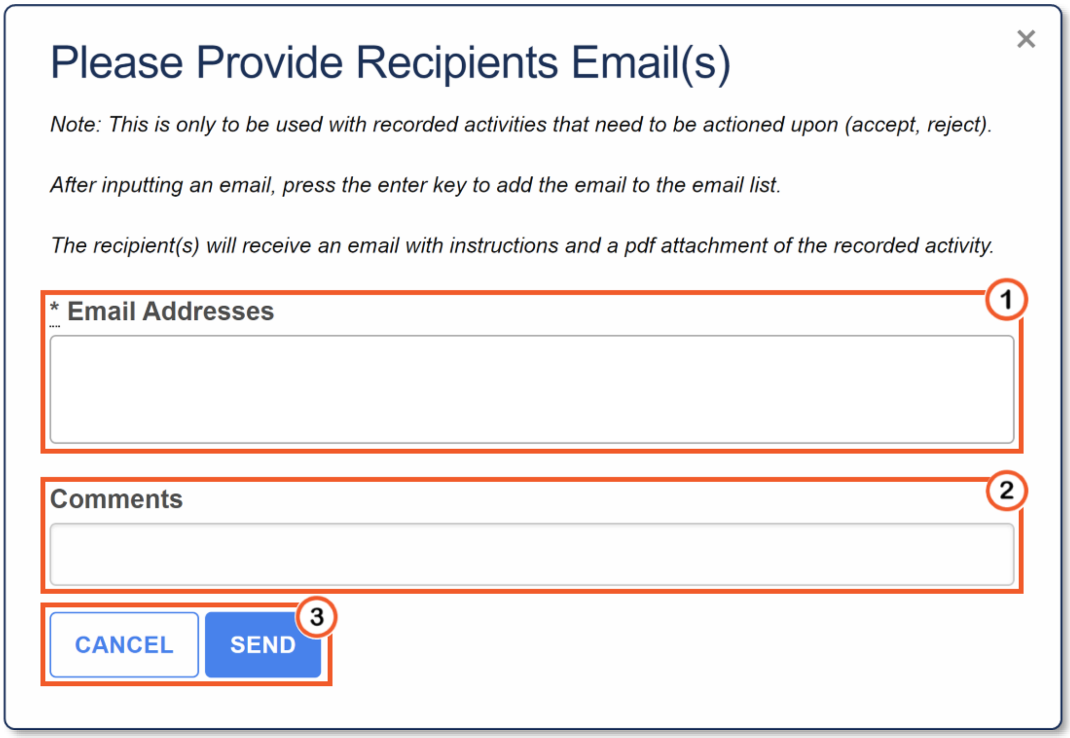


- ① Click the **Email For External Acceptance?** Toggle to Yes.
- ② Click UPDATE ACTIVITY OPTIONS. The functionality has now been enabled for the specific report selected.

(b) External Acceptance Email MBO User Initiation

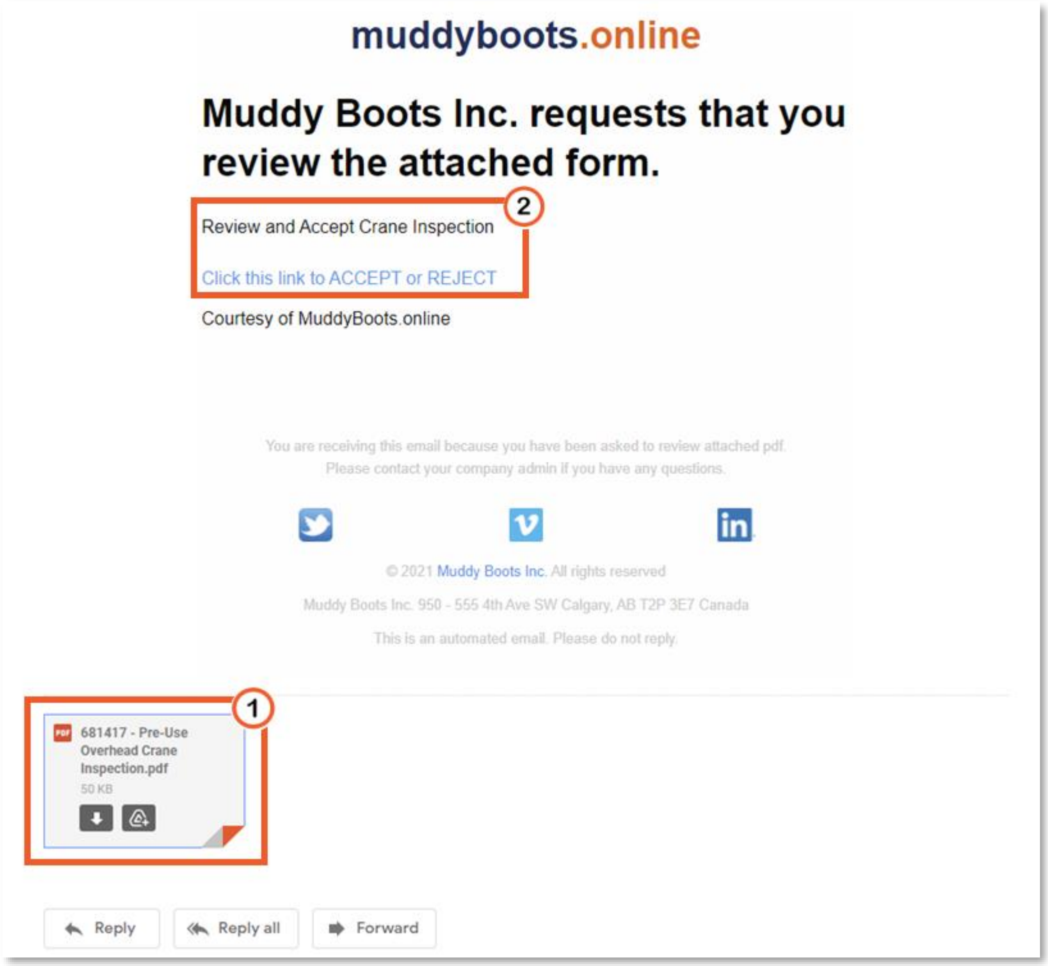


- (1) When viewing completed reports, click the button to enter the external email addresses. Once selected, a pop-up window will appear.



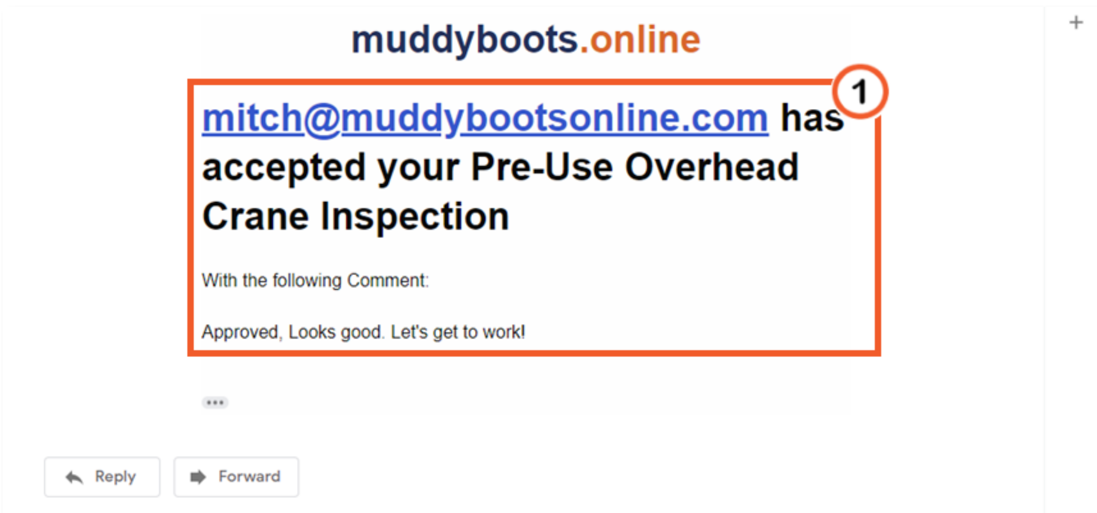
- (1) Enter the email addresses of individuals that are required to accept the report.
- (2) Add any comments necessary for communication of this request.
- (3) Click SEND. The external stakeholder will now receive an email to accept or reject the pdf report received.

(c) External User Instruction for Accepting / Rejecting Emailed Forms



- Open the email received from muddyboots.online.
- 1 Review the pdf report received via email.
- 2 Read the included email comment and click the link to Accept or Reject the attached report. This will open a webpage where an acceptance or rejection can be completed.

- 1 Accept or reject the report and include any relevant comments or rejection reasons.



- 1 The person who initiated the email will receive a response with the acceptance or rejection comment, this will also be visible at the bottom of the report in the Acceptance Summary (shown below).