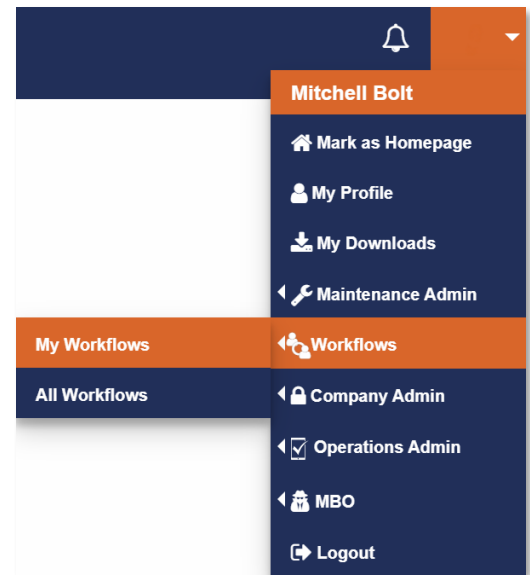
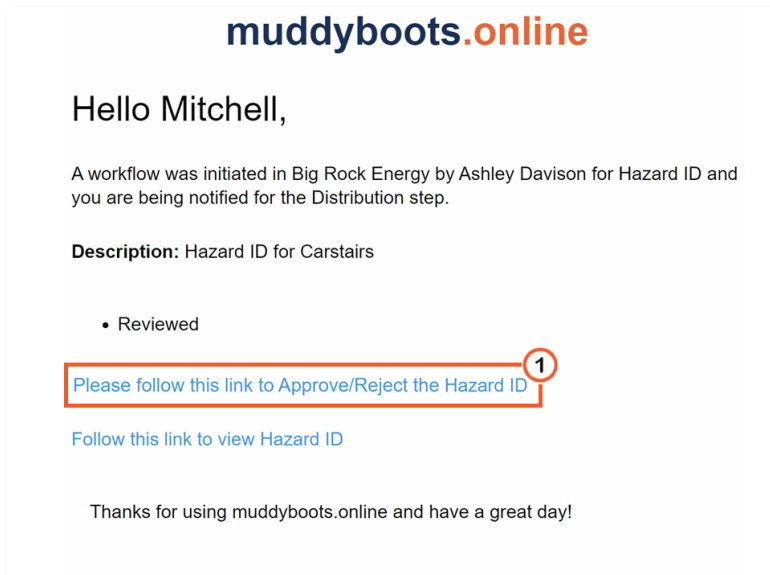


Workflow: Handling Workflows

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

Workflow Tracking - Open




Workflow Template: Customer Request

Created from Customer Request on Aug 23, 2024 08:54 by Mitchell Bolt

| | Title | Status | Date Sent | Date Actioned |
|--|---------------|------------------|---------------------|---------------------|
| Initial Review  | | | | |
| Only 1 approval required in this step | | | | |
| | Adlai Brown | Pending Approval | 2024-08-23 08:54:25 | - |
| | David Wakely | Pending Approval | 2024-08-23 08:54:25 | - |
| | Glenn Kelley | Pending Review | 2024-08-23 08:54:25 | - |
| | Mario Novello | Pending Approval | 2024-08-23 08:54:25 | - |
| | Mitchell Bolt | Implementations | 2024-08-23 08:54:25 | - |
| | Rick Tessner | Pending Approval | 2024-08-23 08:54:25 | - |
| | Tara Sweet | Notified | 2024-08-23 08:54:25 | 2024-08-23 08:54:24 |
| | TJ Bergeson | Notified | 2024-08-23 08:54:25 | 2024-08-23 08:54:24 |



- Work has been completed! 

Only 1 approval required in this step

- **1** To generate the Workflow pdf, click 
- **2** Click to Approve/Reject or Review the active workflow step.
- These actionable items require the *Workflow Editor* security role
 - **3** To edit a workflow step, click  to modify the step.
 - **4** Option to remove users from both the active and inactive steps within a workflow.
Note: This actionable item is also available for users with the *Workflow Editor User* security role
 - **5** To delete a workflow step or workflow, click  to delete.

(iii) Approve/Reject and Review of Activity Workflow

Risk Assessment

| | | |
|---|----------------------|-------------------|
| Impact Category | Severity (potential) | Severity (actual) |
| -- | -- | -- |
| Probability/Likelihood Assessment | Risk Rating | |
| -- | -- | |
| Corrective Action Required? | Notes | |
| N/A | - | |
| Workflow Note  | | |
| APPROVE REJECT  | | |

- 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.