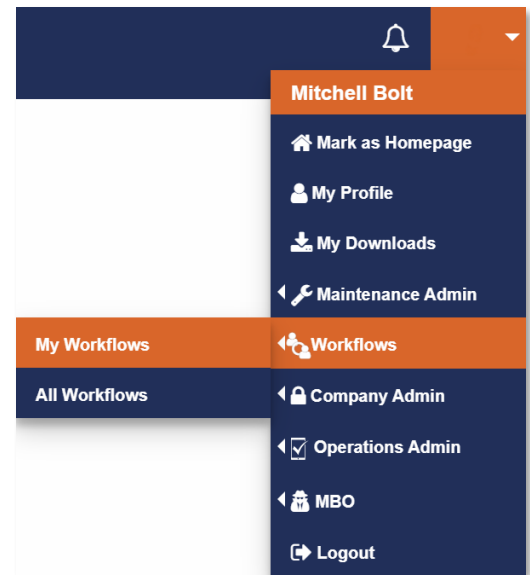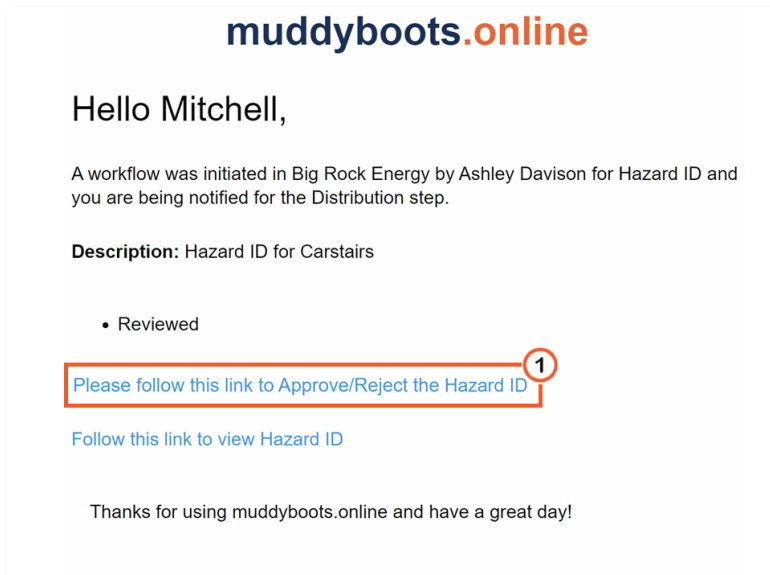## Workflow: Handling Workflows

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

- ①To generate the Workflow pdf, click [PDF icon]
- ②Click to Approve/Reject or Review the active workflow step.
- These actionable items require the *Workflow Editor* security role
  - ○ ③To edit a workflow step, click [pencil icon] to modify the step.
    - ④Option 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
  - ○ ⑤To delete a workflow step or workflow, click [trash icon] to delete.

(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.
- ①Add workflow notes at the bottoms of the activity review.
- ②Approve, Reject, or Review the workflow.