

## Workflow: 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.

**Edit Supervisor Review**

\* Name: Supervisor Review

When Step is Active

When Step is Complete

Group/Individual Name

Existing Users

Name	Title	Action	Group
Mitchell Bolt	HSE Supervisor	Approve	

UPDATE

- 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.

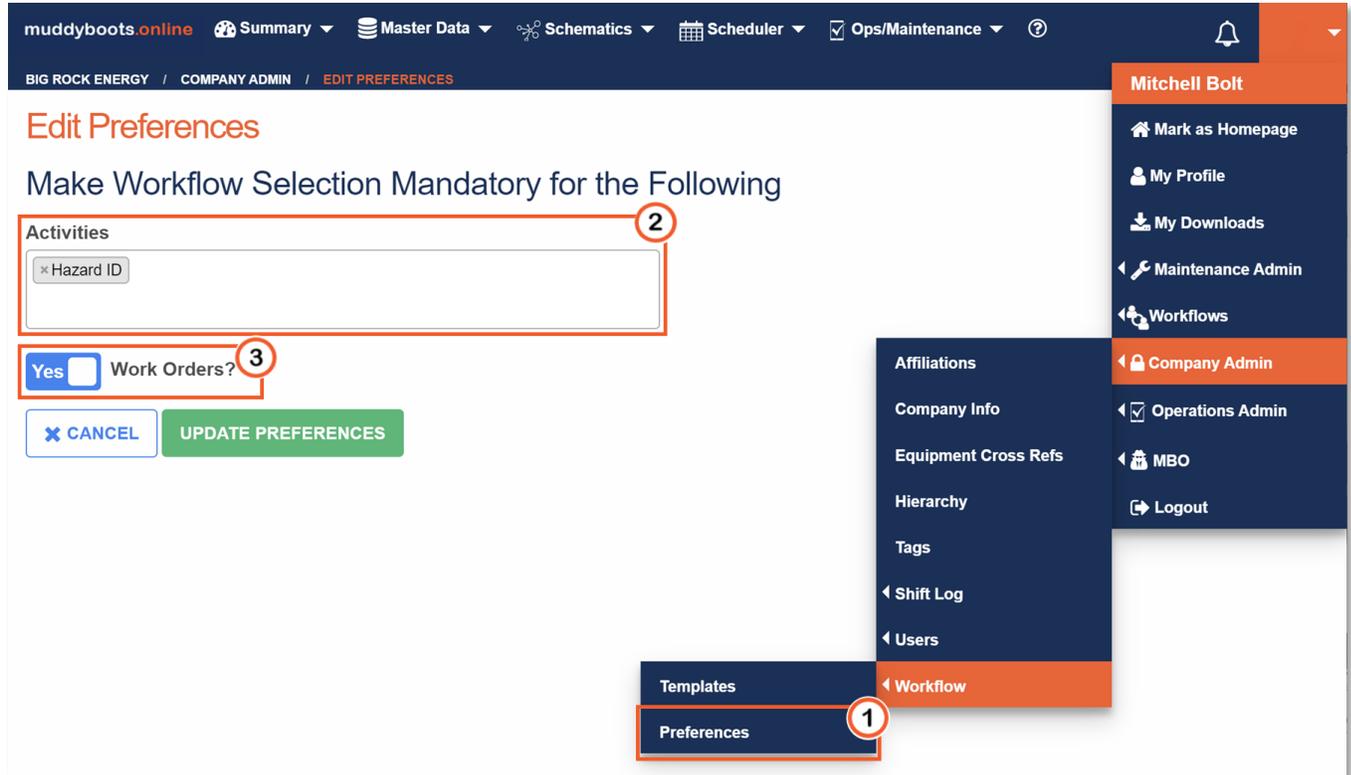
- **1** To reorder the workflow steps, use the blue arrows.
- Click the  edit button to edit an existing template step.
- Click the  delete button an existing template step.
- To finalize any changes, click .

**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.

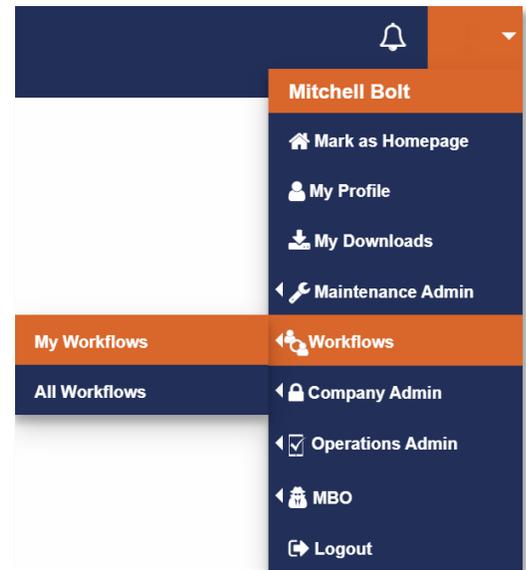
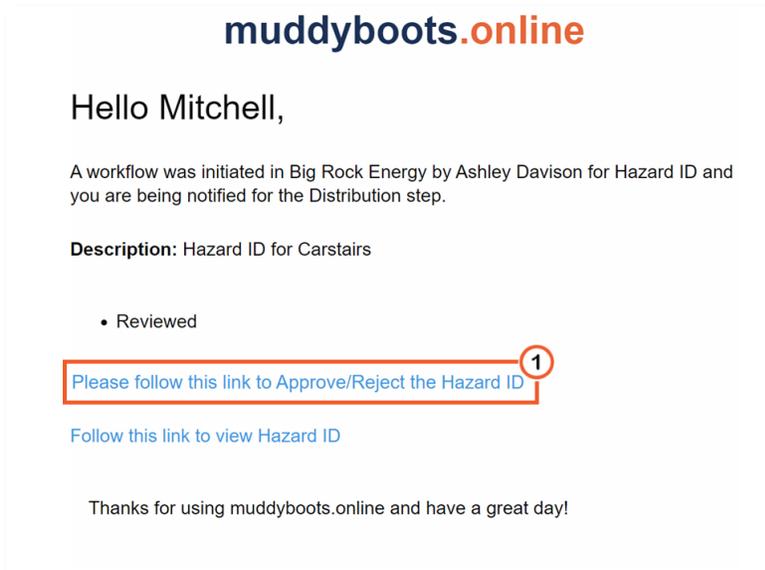


- **1** Navigate to Workflow Preferences under the Company Admin menu within the personal dropdown.
- **2** Select the activities that require mandatory Workflow selections.
- **3** Select if Work Orders require mandatory Workflows.
- Click **UPDATE PREFERENCES** to save the changes. Click Cancel to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

## 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	Pending Approval	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
  - 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

(iii) Approve/Reject and Review of Activity Workflow

Risk Assessment

Impact Category	Severity (potential)	Severity (actual)
--	--	--
Probability/Likelihood Assessment	Risk Rating	
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Corrective Action Required?	Notes	
N/A	-	
Workflow Note		
<input type="text"/>		
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.