

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

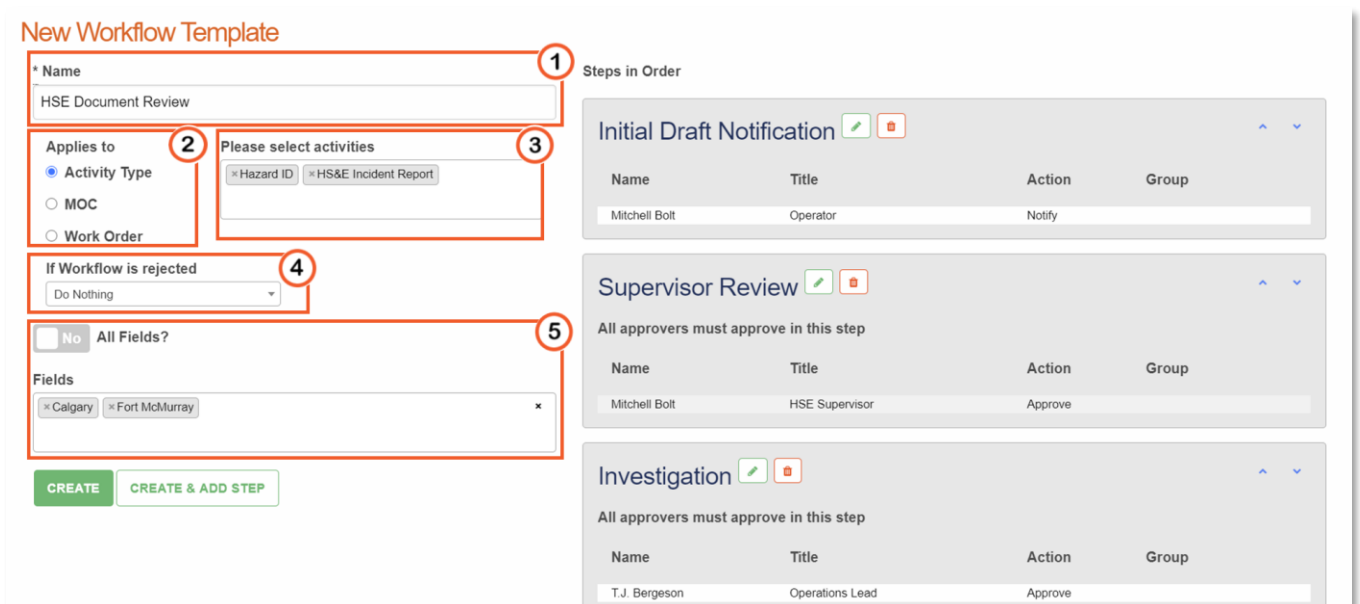
Workflow Templates can be applied to Work Orders, Activities, and MOC's within MBO.

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

(i) Creating a New Workflow Template

- Click  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.



New Workflow Template



* Name 1
 HSE Document Review

Applies to 2 Please select activities 3
 Activity Type
 MOC
 Work Order



If Workflow is rejected 4
 Do Nothing

No All Fields? 5
 Fields

Steps in Order



Initial Draft Notification  

Name	Title	Action	Group
Mitchell Bolt	Operator	Notify	

Supervisor Review  

All approvers must approve in this step



Name	Title	Action	Group
Mitchell Bolt	HSE Supervisor	Approve	

Investigation  

All approvers must approve in this step


Name	Title	Action	Group
T.J. Bergeson	Operations Lead	Approve	

- 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 when rejected:
 - **Do Nothing** – No change to the workflow if rejected. Only noted for the user who rejected. Process continues.
Note: This option is not available for Schematic Workflows
 - **Restart Workflow** – Workflow is paused prior to the first workflow step. A Rejection Notice *email* and *in-app notification* are returned to the creator that includes the workflow notes. The Creator of the entry must action the entry to resume the workflow.
 - **Restart Step** – This will restart the current workflow step, re-sending workflow emails to All those on the current step with any new notes included, and all users on the current step will be required to re-action the workflow
 - **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  to create the template and setup the initial workflow template step.
Note: This can be completed later if you select .

(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 Description for the Workflow Step
- ③ Add Actions to the Workflow Step. Each Action is configured by Workflow Step ‘Status’, and each *Status* and *Workflow Type* (*Activity, MOC, Work Order, or Schematic*) has a unique set of available Actions. **Action Table: Next Page**
 - **Note:** Schematic Workflows will require the final step to have an Action of: *Mark Schematic as verified (creates a verified schematic)* otherwise the workflows will not action the schematics they are applied to.
- ④ Select the Group(s) / Individual(s) to be notified during this step.
- ⑤ Select if one or all of the users within the workflow step are required to complete the action.
- ⑥ Select the required action available for 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) Workflow Step Action Table

Table of all available Actions that can be optionally added to individual Workflow Steps.

Note: Some workflow types require Actions to function appropriately

	Activity	Work Order	MOC	Schematic
Requirements	N/A	N/A	<i>Actions required to drive the status of the MOC</i>	<i>Action required to Verify Schematic on Final Workflow Step</i>
Step Status:				
Active	<ul style="list-style-type: none"> Disable Editing 	<ul style="list-style-type: none"> Disable Editing 	<ul style="list-style-type: none"> Disable Editing Select Users on subsequent steps 	<ul style="list-style-type: none"> N/A
Complete	<ul style="list-style-type: none"> Mark Activity as Accepted Closed or Reviewed Disable Editing 	<ul style="list-style-type: none"> Mark Work Order as Approved or Closed Disable Editing 	<ul style="list-style-type: none"> Mark MOC as Approved, Closed or Complete Disable Editing 	<ul style="list-style-type: none"> Mark Schematic as Verified
Stagnant	<ul style="list-style-type: none"> Email pending users 	<ul style="list-style-type: none"> Email pending users 	<ul style="list-style-type: none"> Email Pending Users Mark MOC as Overdue Auto-approve step 	<ul style="list-style-type: none"> Email pending users
Approved	<ul style="list-style-type: none"> Mark Activity as Accepted, Closed or Reviewed Disable Editing 	<ul style="list-style-type: none"> Mark Work Order as Approved or Closed Disable Editing 	<ul style="list-style-type: none"> Mark MOC as Approved, Closed or Complete Disable Editing 	<ul style="list-style-type: none"> Mark Schematic as Verified
Reviewed	<ul style="list-style-type: none"> Mark Activity as Accepted, Closed or Reviewed Disable Editing 	<ul style="list-style-type: none"> Mark Work Order as Approved or Closed Disable Editing 	<ul style="list-style-type: none"> Mark MOC as Approved, Closed or Complete Disable Editing 	<ul style="list-style-type: none"> Mark Schematic as Verified
Rejected	<ul style="list-style-type: none"> Mark Activity as Accepted, Closed, Reviewed or Rejected 	<ul style="list-style-type: none"> Mark Work Order as Approved, Closed, Canceled or Completed 	<ul style="list-style-type: none"> Mark MOC as Approved, Closed, Complete, Shelved, or Rejected 	<ul style="list-style-type: none"> Mark Schematic as Verified

(iv) Editing a Current Workflow Template and Layout

Step Missing: Complete Action
At least one step must contain the option "Mark Schematic as verified (creates a verified schematic)" for "When Step is Complete"
Make this change before using this Workflow or contact support@muddyboots.online for help.

* Name
Schematic Verification

Applies to
 Activity Type
 Schematic
 Work Order

If Workflow is rejected
Restart Workflow

All Fields?

Fields
Search

UPDATE UPDATE & ADD STEP

Steps in Order

Field Leads - Schematic Review and Approve
Only 1 approval required in this step

Name	Title	Action	Group
Tara Sweet (Carson Oilfield Service)	tara@muddyboots.online	Approve	

Post Operations Review - Schematic Verification
Only 1 approval required in this step

Name	Title	Action	Group
Mitchell Bolt (Carson Oilfield Service)	Superintendent	Approve	

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

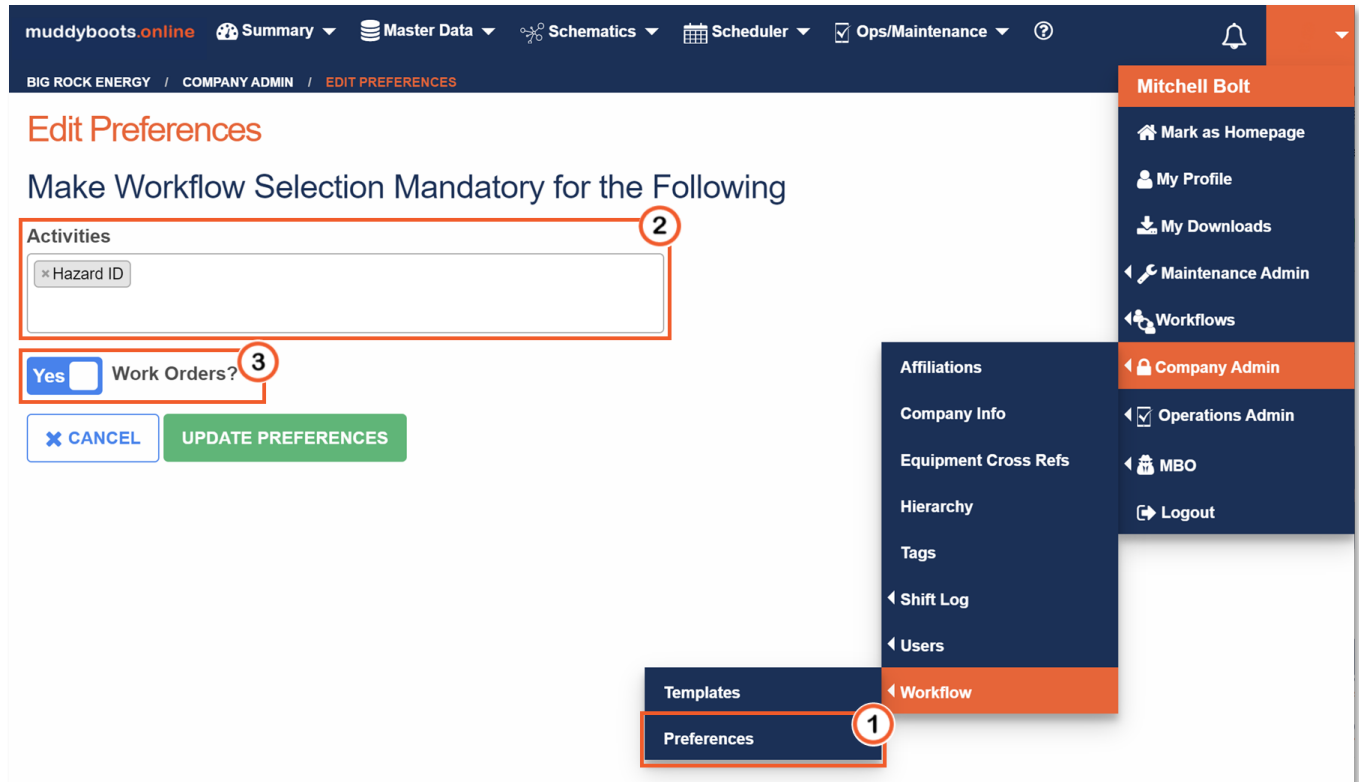
- **1** To reorder the workflow steps, use the blue arrows.
- Click the edit button to edit an existing template step.
- Click the delete button an existing template step.
- To finalize any changes, click **UPDATE**.

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.