

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

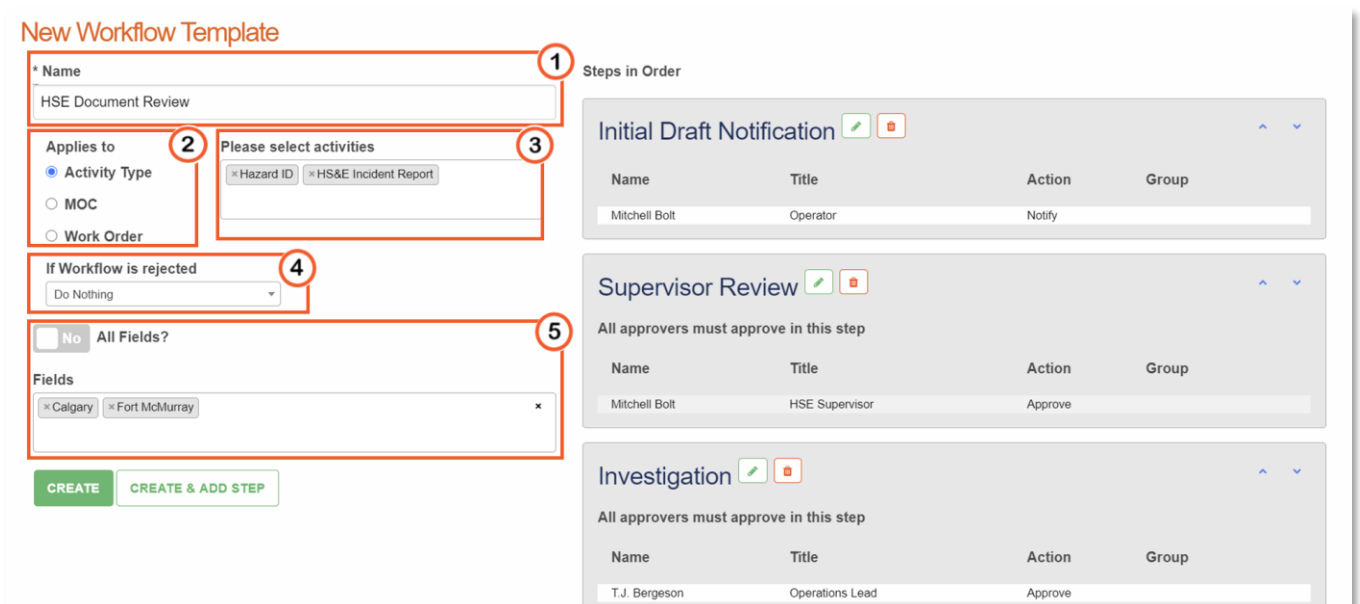
Workflow Templates can be applied to Work Orders, Activities, and MOC's within MBO.

- 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
 Activity Type
 MOC
 Work Order

Please select activities 3
 Hazard ID HS&E Incident Report



If Workflow is rejected 4
 No All Fields?
 Do Nothing

No All Fields? 5
 Fields
 Calgary Fort McMurray

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 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  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.

Edit Supervisor Review

* Name 1
Supervisor Review

Description 2
Review the HSE Report and ensure all details of the Incident / Hazard has been correctly provided.

Actions 3 +


Group/Individual Name 4

Action 6
Approve

Existing Users 7

Name	Title	Action	Group
Mitchell Bolt	HSE Supervisor	Approve	

UPDATE

- 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

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	

UPDATE **UPDATE & ADD STEP**

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

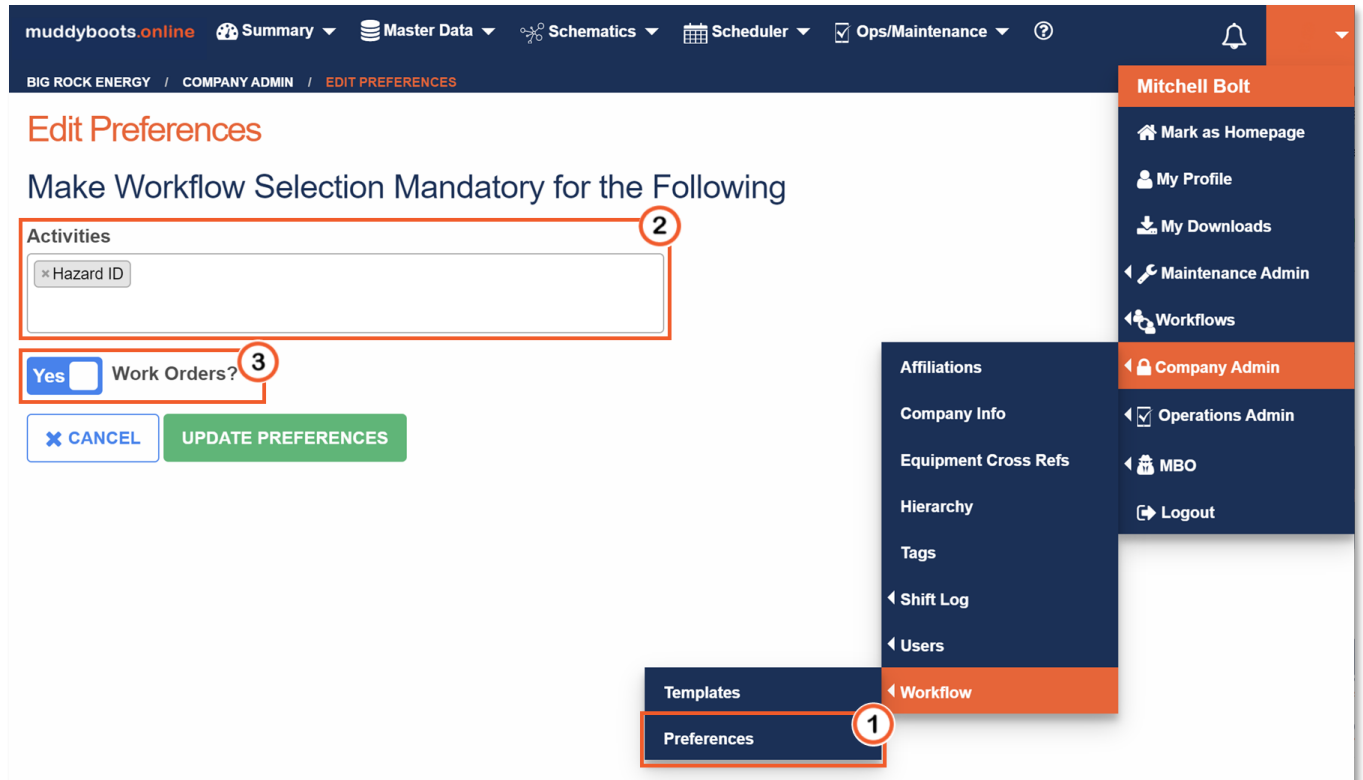
- **1** To reorder the workflow steps, use the blue arrows.
- Click the edit button to edit an existing template step.
- Click the delete button an existing template step.
- To finalize any changes, click **UPDATE**.

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.

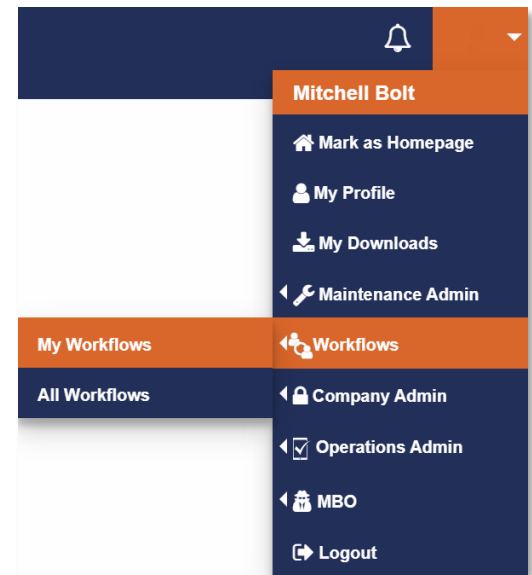


- **1** Navigate to Workflow Preferences under the Company Admin menu within the personal dropdown.
- **2** Select the activities that require mandatory Workflow selections.
- **3** Select if Work Orders require mandatory Workflows.
- Click **UPDATE PREFERENCES** to save the changes. Click Cancel to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

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	Pending Approval	2024-08-23 08:54:25	-
Rick Tessner	-	Pending Approval	2024-08-23 08:54:25	-
Tara Sweet	tara@muddyboots.online	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 		
<div style="display: flex; justify-content: space-between;"> APPROVE REJECT  </div>		

- 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.