

Workflow Quick Start: 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.



The screenshot shows the 'New Workflow Template' form. It includes a 'Name' field (1), an 'Applies to' section with radio buttons for 'Activity Type' (2), 'MOC', and 'Work Order', a 'Please select activities' section (3) with tags for 'Hazard ID' and 'HS&E Incident Report', an 'If Workflow is rejected' dropdown (4) set to 'Do Nothing', and an 'All Fields?' checkbox (5) set to 'No'. Below these are 'Fields' with tags for 'Calgary' and 'Fort McMurray', and 'CREATE' and 'CREATE & ADD STEP' buttons. To the right, the 'Steps in Order' section shows three steps: 'Initial Draft Notification', 'Supervisor Review', and 'Investigation', each with a table of approvers.

Name	Title	Action	Group
Mitchell Bolt	Operator	Notify	

Name	Title	Action	Group
Mitchell Bolt	HSE Supervisor	Approve	

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

1

* Name
Supervisor Review

2

When Step is Active

3

Group/Individual Name

4

☒ All approvers must approve
☐ Only one approval required

5

When Step is Complete

6


Action

Approve
Approve
Review
Notify

7

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

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BIG ROCK ENERGY / COMPANY ADMIN / WORKFLOW TEMPLATES / HSE DOCUMENT REVIEW / EDIT HSE DOCUMENT REVIEW

Edit Workflow Template

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

Yes ☐ 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.

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BIG ROCK ENERGY / COMPANY ADMIN / EDIT PREFERENCES

Edit Preferences

Make Workflow Selection Mandatory for the Following

Activities

× Hazard ID

Yes ☐ Work Orders?

Mitchell Bolt

- Mark as Homepage
- My Profile
- My Downloads
- Maintenance Admin
- Workflows
- Company Admin
- Operations Admin
- MBO
- Logout

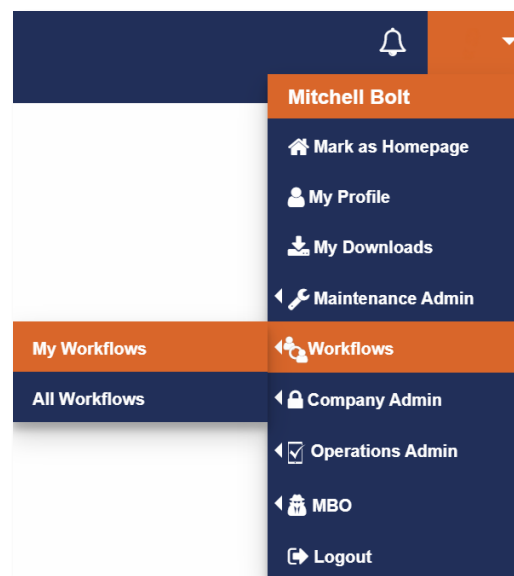
- Affiliations
- Company Info
- Equipment Cross Refs
- Hierarchy
- Tags
- Shift Log
- Users
- Workflow
- Templates
- Preferences

- 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 to save the changes. Click Cancel to cancel any changes.

Workflow Quick Start: 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

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ALL AREAS / BIG ROCK ENERGY / WORKFLOWS / WORKFLOW TRACKING

Workflow Tracking - Open

Created from Hazard ID on Nov 11, 2020 12:44 by

Title	Status	Date Sent	Date Actioned
Supervisor Review			APPROVE/REJECT
All approvers must approve in this step			
Mitchell Bolt HSE Supervisor	Pending Approval	2020-11-11 12:44:03	-
- Investigation			
All approvers must approve in this step			
T.J. Bergeson Operations Lead	Not Yet Started		
- General Distribution			

- **1** To generate the Workflow pdf, click
- **2** Click to Approve/Reject or Review the active workflow step.
- **3** To edit a workflow step, click to modify the step.
Note: The option may not be available.
- **4** To delete a workflow step or workflow, click to delete.
Note: The option may not be available.

(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.