

# **MOC** within muddyboots.online

muddyboots.online (MBO) has Management of Change (MOC) function. The MOC format is customizable and can be formatted to meet different requirements.

The MOC module can be enabled by contacting your muddyboots representative for those system users with a current Operate Module license. Once enabled, review your MOC requirements with your representative as required.

# MOC Setup, Workflows, and Customization

All muddyboots users with the Operations system access role can create MOCs and are limited to adding / removing their own attachments. Only muddyboots users with the Company Admin system access role can edit the static information on an MOC that has moved past the 'Pending' status.

#### (a) MOC Initial Setup

Once MOC's have been enabled, initial setup is a simple process:

- 1. Setup MOC Types via the MOC Options
- 2. Customize the MOC to meet the needs of your organization
- 3. Setup MOC Workflow templates as required by your organization
- 4. Develop a new or modify your existing MOC management process and train users on the process.

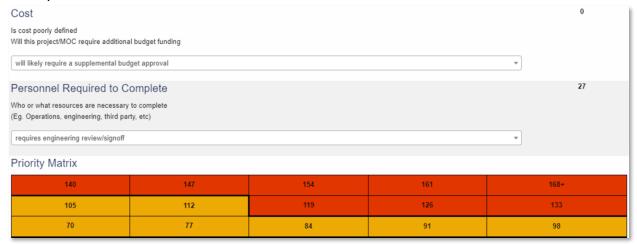
### (b) MOC Customization

 MOC's can be customized to suit the neesd of your organization. These changes should be discussed with your muddyboots representative as they require formatting to initially setup depending on requirements.



## (i) Completed custom MOC examples below:

• Priority Calculation and Matrix Table



#### Checklist

		Training & Competency Closure
Procedure Update	○ Required	○ Complete
Training Manual Update		

## (c) MOC Workflow Capability

Muddyboots reccomends each MOC beyond the drafting stage should have an associated workflow template. In Muddy Boots users have the ability to create workflow templates to be attached to any document. Workflow templates can vary in terms complexity (i.e., number of steps, individual, etc. involved). Basic workflow path functions in an MOC application are as follows:

1. Upon MOC creation with a workflow, an initial email is sent to all the individuals in the first workflow step.

**Note:** The MOC in question has to be moved out of a Draft sattus to apply a Workflow. Traditionally the MOC will be updated or created with a Pending status to meet this requirement.

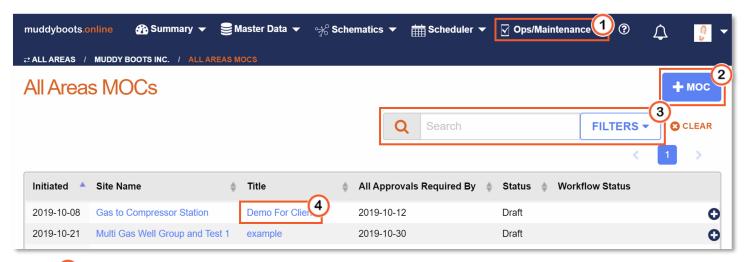
- 2. User must approve, review, or are notified on the document as per the action setup in the template. Each user can add communication notes to the workflow.
- 3. Each step can modify the status and editablity of the MOC depending on workflow preferences.
- 4. When all users in a step have completed their action, emails are sent initiating the next step.
- 5. When all steps are completed the workflow is closed.

**Note:** For more information on workflows, review the Workflow Quickstart training documentation.



#### **MOC Data Table**

The MOC Data Table can be found under the Ops/Maintenance Dropdown below the Maintenance heading. This is where a the MBO user will add new MOC's along with reviewing and editing existing MOC's if applicable.

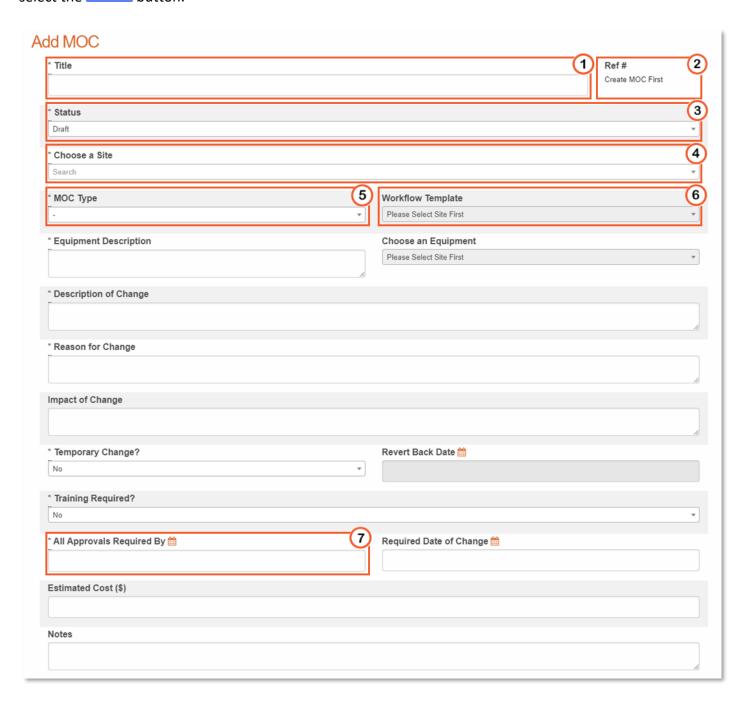


- Use the Ops/Maintenance dropdown to access the system MOCs, below the Maintenance heading.
- The two button allows users to create new MOCs.
   Note: See the Standard MOC section below to review the general MOC fields available.
- 3 The search box allows you to search by any information presented in the data table. Filter chips can also be applied to reduce the list accuurately and efficiently.
- 4 Click the Title of the MOC for viewing or editing.



## Standard MOC

MOC's are customizable, but the standard fields exist on all muddyboots MOCs, to view or create a new MOC, select the thoc button.





- 1 Enter a title for the MOC. The title appears in the search list.

  Note: All fields that contain an asterisk are required to be populated.
- 2 The Reference Number will be available once the MOC has been created.
- Status is a manually controlled setting and can be modified via workflow or date limitations within the MOC. The following MOC statuses are available:
  - Draft, Pending, Approved, Overdue, Complete, Closed, Rejected, Shelved
     Note: Draft Status MOCs do not allow the application of a workflow.
- Select the site that this MOC pertains too.
- Select an MOC type. Default MOC types are applied but can be modified by Maintenance Administrators.
- Select a workflow template. The templates available are location specific. **Note:** Draft Status MOCs will not allow the application of Workflows.
- All Approvals Required By date includes a secondary control. If the applied MOC approval has not been responded to via completed workflow response or manual MOC status update, the MOC will be marked overdue once the date has passed.