

## 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 need 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

**Cost** 0

Is cost poorly defined  
Will this project/MOC require additional budget funding

will likely require a supplemental budget approval

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**Personnel Required to Complete** 27

Who or what resources are necessary to complete  
(Eg. Operations, engineering, third party, etc)

requires engineering review/signoff

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**Priority Matrix**

140	147	154	161	168+
105	112	119	126	133
70	77	84	91	98

- Checklist

**Training & Competency Closure**

**Procedure Update**

N/A     Required     Complete

**Training Manual Update**

(c) MOC Workflow Capability

Muddyboots recommends 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 status 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 editability 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.

The screenshot shows the 'All Areas MOCs' page in the Muddy Boots Online system. The navigation bar at the top includes 'Summary', 'Master Data', 'Schematics', 'Scheduler', and 'Ops/Maintenance' (1). A '+ MOC' button (2) is located in the top right corner. Below the navigation bar is a search bar (3) with a 'FILTERS' dropdown and a 'CLEAR' button. The main content area displays a table of MOCs with the following columns: 'Initiated', 'Site Name', 'Title', 'All Approvals Required By', 'Status', and 'Workflow Status'. The first row of the table has the title 'Demo For Client' highlighted (4).

Initiated	Site Name	Title	All Approvals Required By	Status	Workflow Status
2019-10-08	Gas to Compressor Station	Demo For Client	2019-10-12	Draft	
2019-10-21	Multi Gas Well Group and Test 1	example	2019-10-30	Draft	

- (1) Use the Ops/Maintenance dropdown to access the system MOCs, below the Maintenance heading.
- (2) The + MOC 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 accurately 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  button.

#### Add MOC

The 'Add MOC' form contains the following fields and sections:

- 1** \* Title
- 2** Ref #  
Create MOC First
- 3** \* Status  
Draft
- 4** \* Choose a Site  
Search
- 5** \* MOC Type
- 6** Workflow Template  
Please Select Site First
- Choose an Equipment  
Please Select Site First
- \* Equipment Description
- \* Description of Change
- \* Reason for Change
- Impact of Change
- \* Temporary Change?  
No
- Revert Back Date 📅
- \* Training Required?  
No
- 7** \* All Approvals Required By 📅
- Required Date of Change 📅
- Estimated Cost (\$)
- Notes

- 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.
- ③ 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.
- ④ Select the site that this MOC pertains too.
- ⑤ Select an MOC type. Default MOC types are applied but can be modified by Maintenance Administrators.
- ⑥ Select a workflow template. The templates available are location specific.  
**Note:** Draft Status MOCs will not allow the application of Workflows.
- ⑦ **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.