

# **TrainingMine Management of Change (MOC) Overview**

Frontline Data Solutions

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# Basic Concepts

Any MOC is processed through a sequence of stages:

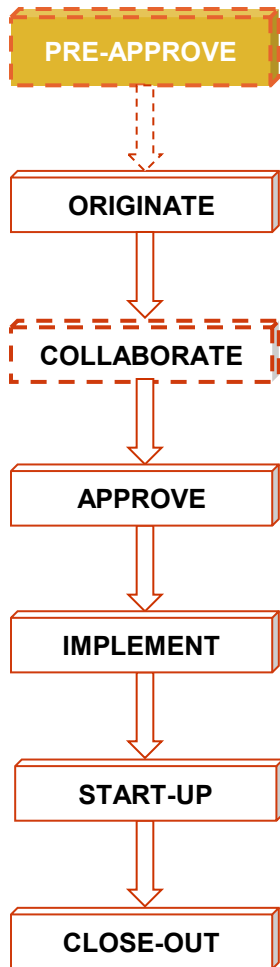
- **Pre-Approve\***
- **Originate**
- **Collaborate\***
- **Approve**
- **Implement**
- **Start-up**
- **Close-out (Complete)**

Above workflow and process at each stage is explained next.

\*Optional Stage

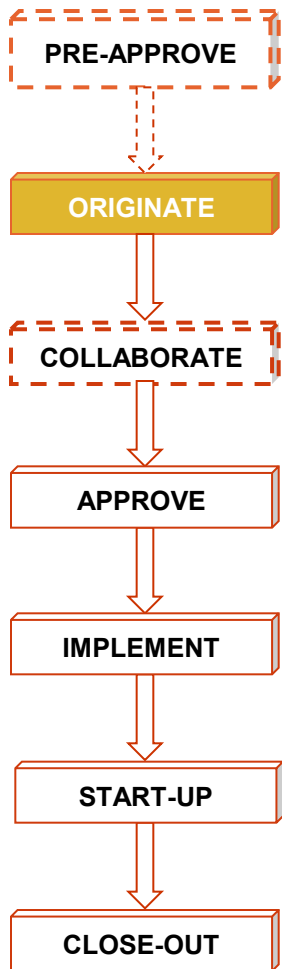


# Stage – Pre-Approve



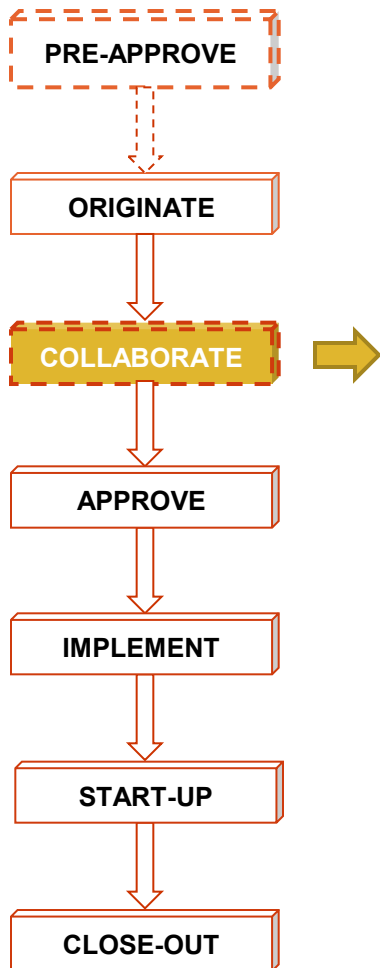
- First workflow stage that begins with submittal of an MOC by a person logging in and filling in a simple MOC request form
- Pre-Approvers designated for this form are notified; they log in, approve or disapprove the MOC request
- If approved, they select an Originator who scopes out and oversees the MOC through rest of the workflow

# Stage – Originate



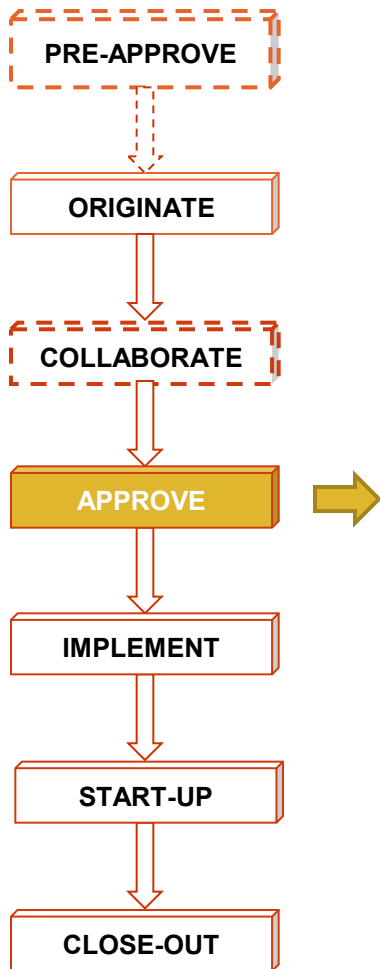
- In this stage, Originator processes the pre-approved MOC request, OR creates a new MOC by filling in a form (if Pre-Approval not used)
- Enter/update MOC title, Technical Basis, HES impact, MOC type (Routine or Temporary), and MOC Profile (an important feature that selects Collaborators, Approvers, Implementers, etc. for the MOC)

# Stage – Collaborate



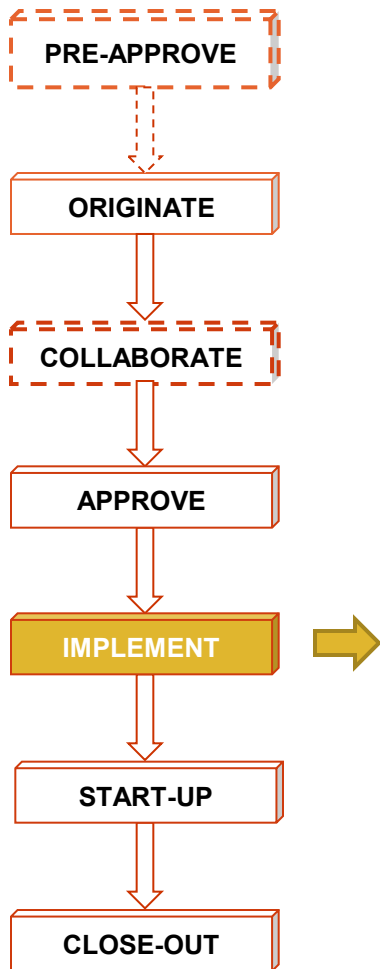
- Collaborators are SMEs and/or final MOC approvers who discuss MOC on-line and seek clarifications or provide comments to Originator
- Originator revises MOC details and submits for approval (next stage)
- Collaboration is optional and can be skipped for simple MOCs, or when MOC scope has been previously agreed to

# Stage – Approve



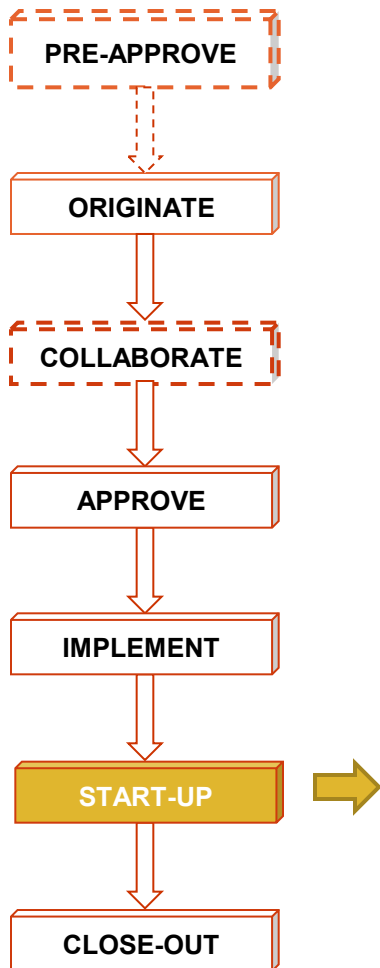
- One or more Approvers (Names or Positions) approve, disapprove or hold MOC (Approval pending)
- Disapproval or Hold comments e-mailed to Originator
- Disapproved MOC is placed in Voided folder for later retrieval
- Approvers can be in any order and can be pre-defined for a given type of MOC via a “Profile”

# Stage – Implement



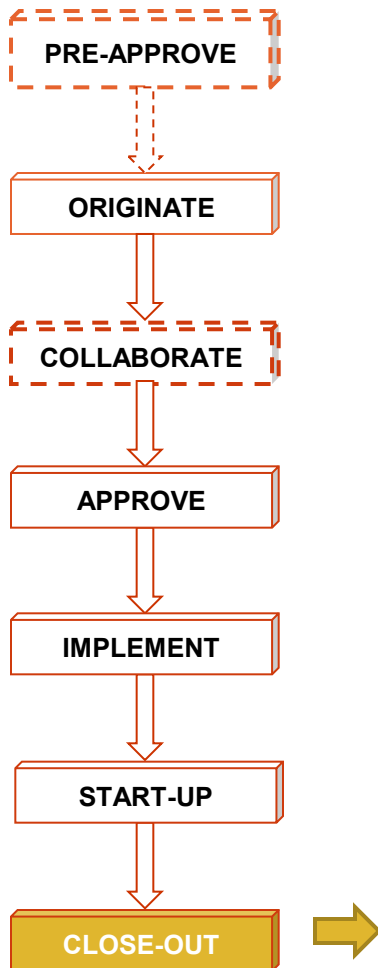
- Very important stage that tracks MOC implementation, to the detail desired
- Tracked using standard pre-defined tasks (“Requirements”) such as Doc updates, Engg/Const, PSSR, training
- Requirements can be critical or non-critical, attached to checklists, and assigned to people in any order
- Can be pre-defined for a given type of MOC via a “Profile”

# Stage – Start-up



- Final Review by an experienced “Implementation Manager” before giving permission to start up or put in use the MOC
- Reviews to ensure all Pre-Approver, Collaborator, Approver and Implementer comments are properly addressed, and remaining incomplete non-critical Implementation Requirements are inconsequential

# Stage – Close-out



- All remaining non-critical Implementation Requirements must be completed at this stage
- People notified about MOC must acknowledge awareness via sign-off
- MOC, along with completed Implementation checklists, moved to Completed folder for future review and retrieval

# Workflow Participants

- Whenever an MOC task is assigned (such as Pre-Approve, Collaborate, Approve, Implement, Start-up or Close-out), person assigned gets an e-mail
- Log-in to review the assigned task and follow instructions to complete assigned task
- Upon completion, task is removed from the work area (MOC tab)
- Process repeats when new MOC task assigned
- Follow e-mail reminders about incomplete tasks and workflow status updates on completed tasks

# Features to Note

- Workflow participants can be any number and any order (series/parallel or combination)
- Pre-Approvers and Approvers can be Job titles
- Implementation can be broken down into as many tasks as required, each task aided by a checklist
- Notify (affected) People is a mandatory task
- Start-up allowed after “Critical” tasks complete
- Profiles pre-define implementation tasks and workflow participants for a given type of MOC; simplifies creating new MOCs

# Administrators

People granted administrative and/or reporting access to MOC system can:

- Create a New MOC
- Review and edit In-Process MOCs within the allowed organization level
- Configure MOC Elements (“System Parameters”) such as Profiles and Templates (checklists)
- Create reports to track In-Process MOCs
- Control access permissions of other users