



# Implementing Maximo MOC in a Pipeline Culture

---

Jimmy Kilgore

Supervisor - Maintenance  
Planning

07 June 2012



# Growth by Acquisition

---

- Collection of assets from many Corporate Cultures
- ExxonMobil, BP(Amoco), just to name a couple



# New MOC Process Must Work for All

---

- Maximo will automate MOC process mandated by Corporate HES
- We were using MS Word software solutions & manual processing



# MOC Procedure Overview

---

- Work flow- MOC's will be routed through the system to Reviewers, Approvers, Action Takers and Authorizers
- MOC Level Classification Wizard to guide users through the determination of the Degree of Hazard and Significance of Change
  - This was a big change for us, we went from 29 questions to 11.



# MOC Procedure Overview

---

- Required documentation for regulatory and internal audit scrutiny will be linked to the MOC Record using Attached Documents
  - PHA's, Engineering Drawings, P & ID's, etc
- Action tracking can be used to track non work related MOC Events

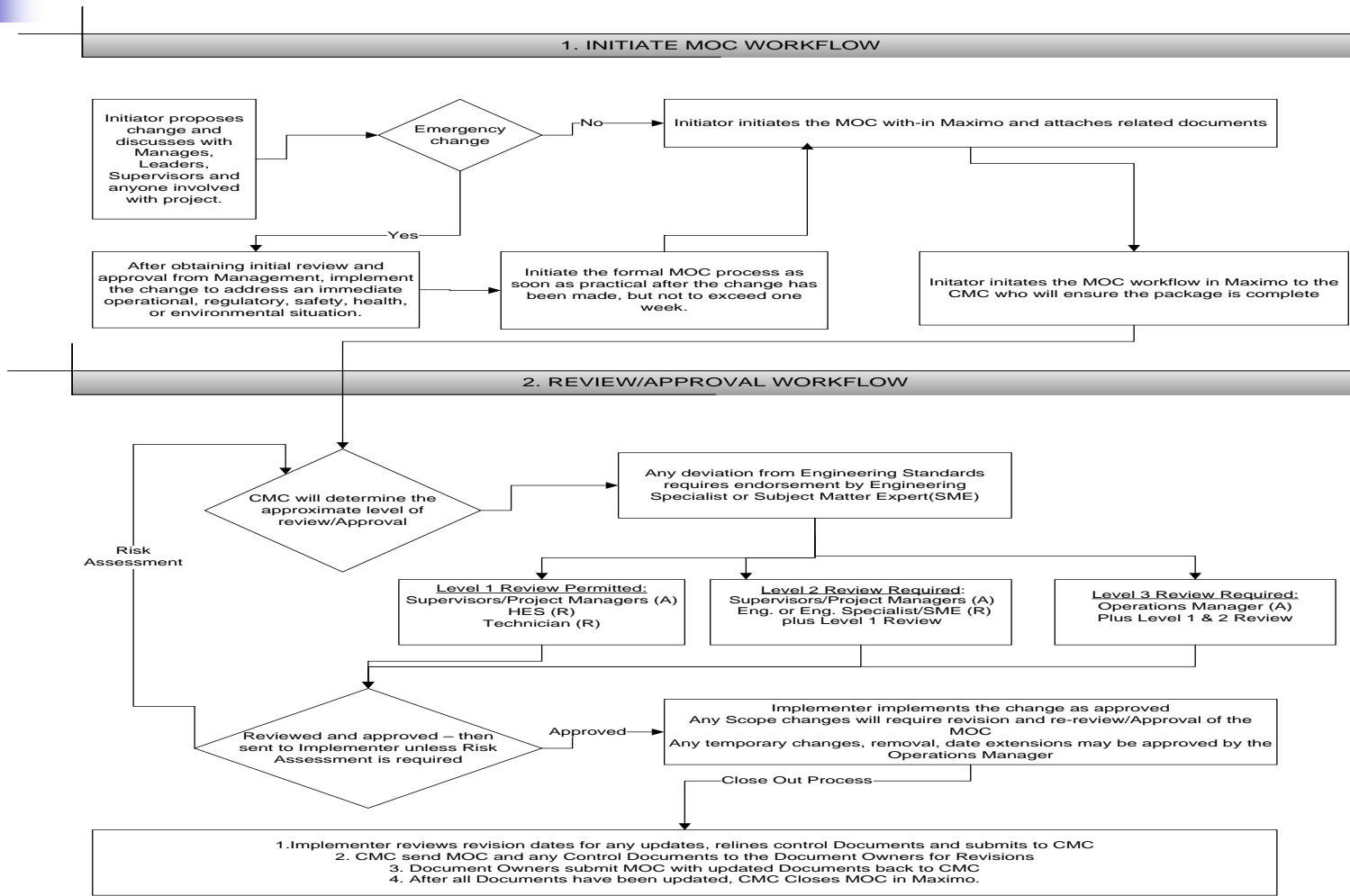


# MOC Process in Maximo

---

- Request for Change
- Details – Classification Level
- Review and Approve
- Pre-Start Actions
- Authorization
- Post Start Actions
- Closure

# MOC Process in Maximo



# MOC Screen – MOC Header

MOC (Oil) - Windows Internet Explorer

http://ohowmaxd:8080/maximo/ui/?event=loadapp&value=PLUSGMOC&additionalEvent=inboxwf&uniqueid=2211616&uisessionid=219

Search: MOC (Oil)

MOC (Oil)

Find: Select Action

IBM

List MOC Review and Approve Pre-Start Post-Start Closure Related Records Log Specifications

MOC CPM10007 Reconned to new meter skt

Status INPRG Site CP Attachments

MOC Type MOC Area CPL-LEV

User information

Entered By MCNEILLA

Name AISLINN MCNEILL

On Behalf Of Wade Sands

Coordinator CP MOC Coordinator

Redirected Coordinator

Name JIMMY KILGORE

MOC Details

Location TX\_GSEG222 Levelland 10 GS

Asset

PM Reference

Job Plan

Scope Build new piping for meter to pump

Justification Dry put in new meter

Safety & Environment impact

Classification

Class Description

Finance Project 1024224

Finance Task 01010107

Cost Center 54208235

MOC or Deferral ID

Reason for Change

Priority 4

MOC Level 1 Low Degree of Hazard, Low Significance of Change

Estimated Duration 0:00

Temporary?

Risk Assessment?

Multiple Assets, Locations and CIs Filter 0/0 0-0 of 0

| Asset                    | Location | Configuration Item | Target Description | Sequence | Progress | Site |
|--------------------------|----------|--------------------|--------------------|----------|----------|------|
| ...No rows to display... |          |                    |                    |          |          |      |

Select Clear All New Row

Dates

Requested Date 4/20/12 12:52 PM

Required Date 4/27/12 5:00 PM

Target Finish 4/27/12 5:00 PM

Deferral Until

Temporary Until

Actual Start 5/1/12 8:58 AM

Actual Finish

Changed By SANDSW

Changed Date 5/1/12 9:08 AM

Local intranet | Protected Mode: Off 75%

9:19 AM 06/03/2012



# MOC Screen – Level Classification

- 11 Questions - Degree of Hazard & Significance of Change
- System calculated MOC Level (1-4)
- Question & Responses displayed on screen

The screenshot displays the MOC (Oil) system interface. The top navigation bar includes "Bulletins: (0)", "Go To", "Reports", "Start Center", "Profile", "Sign Out", and "Help". Below this is a toolbar with various icons, including a "Workflow" icon circled in red. The main content area features a tabbed interface with "MOC Level Questions" selected and highlighted by a red box. A message box states: "When you have completed the questions, please click the **MOC Level Questionnaire** button again to close the Questionnaire **before you save the MOC, submit the MOC to workflow, or leave this MOC record.** Your answers will be processed and the MOC Level will be calculated as the Questionnaire closes." Below this, a bold instruction reads: "A 'Yes' response to any of the questions below shall constitute a High Degree of Hazard". The first question is "Does the change result in a potential PII consequence?" with radio buttons for "Yes" (selected) and "No".

# MOC Screen – Review & Approve

- MOC Approval Email Notification & Approval Assignment Link
- Approval Assignments locked to assigned approvers (secured approval)
- Enforced Attached Documents
- Enforced minimum Approvers by MOC Level

The screenshot displays the MOC (Oil) software interface. At the top, there is a window titled "Inbox / Assignments" showing a list of MOCs. The list includes:

| Description   | Due Date         | Last Memo | Priority | Route |
|---|------------------|-----------|----------|-------|
| MOC # VM11461222 adrian testing VMOC status and locking - Please assign Pre-start Actions | 8/12/11 5:12 PM  |           |          |       |
| MOC # VM11461234 Installation of two steam generators - Requires your approval            | 8/17/11 3:50 PM  |           |          |       |
| MOC # VM11461223 Change out valve - Requires your approval                                | 8/16/11 11:42 AM |           |          |       |

The main window shows the details for MOC # VM11461233, "Installation of two steam generators". It includes fields for Status (PLAN), Site (VT), Area (VC), and MOC Type (MOC). A warning message states: "This MOC requires PHA document attached before it can be approved. Please scan and attach document in the PHA folder." Below this, there is a table of approvers:

| Approver | Name              | Person's Location | Person's Site | Status | Approved                 | Sign Off Date |
|----------|-------------------|-------------------|---------------|--------|--------------------------|---------------|
| GALARZAF | GALARZA, FERNANDO |                   | VT            | ACTIVE | <input type="checkbox"/> |               |
| XPETERSA | Scott Peters      |                   |               | ACTIVE | <input type="checkbox"/> |               |

At the bottom, there is a section for the selected approver, GALARZAF, with a "Comments" field and a "Sign Off Date" field. The interface also includes a navigation bar with tabs like "List", "MOC", "Review and Approve", "Pre-Start", "Post-Start", "Closure", "Related Records", "Log", and "Specifications".

# MOC Screen – Pre-Start/Post-Start Actions

- Assignment Email Notification (optional) & Start Center Assignment Link
- Action Assignments locked to Action owners (secured sign-off)
- Enforced Attached Documents
- Approaching assignment due date reminders

**Inbox / Assignments**

Next Assignment Due: 8/22/11 2:35 PM [Refresh](#)

| Description  | Due Date         | Last Memo | Priority | Route |
|--|------------------|-----------|----------|-------|
| <a href="#">MOC # VM11461223 Change out valve - Requires your approval.</a>                                      | 8/16/11 11:42 AM |           |          |       |
| <a href="#">MOC # VM11461234 Installation of two steam generators - Please select Approvers.</a>                 | 8/22/11 2:11 PM  | WFACCEPT  |          |       |
| <a href="#">MOC # VM11461222 adrian testing WMOOC status and locking - Please perform the Pre-start Actions.</a> | 8/22/11 2:35 PM  |           |          |       |

1 - 3 of 3

**MOC (Oil)** Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Find:  Select Action

List MOC Review and Approve **Pre-Start** Post-Start Closure Related Records Log Specifications

MOC VM11461222 adrian testing WMOOC status and locking

Status INPRG Site VT  
MOC Type MOC Owner  Area VC

This MOC has been assigned to the Owners of Pre-start Actions and is waiting for sign-offs for the completion of works.  
If you want to revoke the assignments, please tick the checkbox below and save the record. The assignments will be removed from the current assignee's inboxes in 5 minutes and the workflow will come back to Coordinator's control.  
If you want to change the Action List or assignees, you can revoke the current assignments, wait for the workflow control to come back, edit the List, and then route workflow again to re-assign.

Revoke Workflow Assignment?

**Pre-Start Actions** Filter  1 - 1 of 1 [Download](#)

| MOC Action | Description                            | Action By | Name          | Due Date             | Completed                | Sign Off Date        |
|------------|--|-----------|---------------|----------------------|--------------------------|----------------------|
| 1008       | New Chemical Hazard Review/Update MSDS | XJOHNSTS  | Erin Johnston | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> |

MOC Action 1008 New Chemical Hazard Review/Update MSDS

MOC Action Group

Action By XJOHNSTS Erin Johnston

Action Category REVIEW

Due Date

Reminder Date

Timing PRE START

Document Attached?

Completed?

Sign Off Date

Select MOC Actions Select MOC Action Group **New Row**

# MOC Screen – Closure

- MOC Record read-only 120 days post-completion

The screenshot displays the MOC (Oil) system interface. The top navigation bar includes "MOC (Oil)", "Bulletins: (0)", "Go To", "Reports", "Start Center", "Profile", "Sign Out", and "Help". Below this is a search bar with "Find:" and a "Select Action" dropdown. A menu bar contains "List", "MOC", "Review and Approve", "Pre-Start", "Post-Start", "Closure" (highlighted), "Related Records", "Log", and "Specifications".

The main content area shows the following details:

- MOC: VM11461214
- Description: Change relief valve for control valve
- Status: COMP
- Site: VT
- MOC Type: MOC
- Owner: [Redacted]
- Area: VC

**Closure Details**

- Post MOC Actions Completed?
- Documentation Attached?
- Closure Comments: MOC complete

**Review Details**

- Closure Reviewed By: XPETERSA
- Reviewed Date: 7/6/11 12:20 PM



# Conclusion

---

- We Believe that due to the flexibility of the Maximo MOC platform and the current way it is configured, we should be able to handle the Cultural Diversities as we move to Maximo MOC across the Company in pipeline and E&P.



# Thanks to:

---

- OnTracks Consulting
  - Erin Johnston
  - Tom Peterson
  - Trish Gosch