

Case Study: Management of Change for Chemoxy International

CLIENT TESTIMONIAL

"MOC is a key risk-control system for Chemoxy. Given our unique requirements FoCul very quickly got a sound understanding of our needs and have delivered a system that has exceeded our expectations. We now have a system that is robust and transparent that is key when demonstrating compliance with managing control of changes with key stakeholders such as regulators and customers".

Andrew Purvis - Quality & Training Manager

1. The Challenge

Chemoxy International is one of the largest independent contract manufacturers in Europe. Their sites in the North East of England are Upper Tier COMAH¹ sites.

As a responsible operator Chemoxy already had a well-established Management of Change for Process Safety process but wanted to improve the efficiency, robustness and transparency of that process.

The existing Chemoxy MOC process had developed over time to suit their specific business requirements and there was real benefit in continuing to use the core principles of that process.

2. The Solution

Chemoxy and FoCul worked together to identify areas where the best practices of the Chemoxy MOC process and the existing FoCul MOC application could be combined to create an improved process.

FoCul then enhanced the MOC application to include the Chemoxy best practices and deployed it as a secure cloud based solution.

FoCul continued to work with Chemoxy throughout the deployment providing close support and training.

The application has now been in full use for 10 months and is making a valuable contribution to the business.

3. Chemoxy Best Practices added to FoCul MOC

The following new configurable features were added to the FoCul MOC application and are now available to all customers.

3.1. Specialist Risk Reviews / Technical Authorities

The existing version of the FoCul application was based around the notion of a single Risk Assessment that is compiled and approved collectively by a group of people. There are individual auditable signatures but it is a collective approval.

The Chemoxy scheme is more akin to the model of “Technical Authorities” who prepare and approve specific Specialist Risk Reviews (SRRs). There are 15 – 20 such SRRs and each has a detailed topic specific form with questions and action tracking.

There is a Change Impact Matrix which maps the type of change to the mandated SRRs.

Most changes require 4 or more SRRs. The application automatically generates the mandated Specialist Risk Reviews and assigns them to a default owner (Technical Authority). The Technical Authority, or one of their deputies, then completes and approves the SRR.

“The Specialist Risk Review application developed by FoCul has made it much easier for us to manage our MOC process”

Andrew Purvis

Quality & Training Manager, Chemoxy

“Adding the best practices from the established Chemoxy MOC process into our MOC software solution has given us a great opportunity to give our users even richer functionality”

Sean Cull, MD, FoCul Ltd

¹ Control of Major Accident Hazards - <http://www.hse.gov.uk/comah/>

Specialist Risk Review	Status
00. Common	Complete
01. Personal Safety & Health	Complete
02. Environmental	Complete
04. Reactive Chemicals	In Progress
06. Maintenance & Reliability	Complete
08. I&E & Process Control	In Progress
09. Operations/Operability	In Progress
10. Process Safety & Loss Prevention	Complete
11. Product Quality Assurance	Complete
13. Quality Systems Documentation	Complete
16. Human Factors	Complete
17. Training	Complete

Above : An example of the SRRs for a MOC document.

3.2. SharePoint Integration – Project Documents

Chemoxy have a well-established SharePoint implementation that is used for document management. While SharePoint was unable to provide the required MOC workflow functionality it is still a good way to manage the project documents associated with each MOC.

FoCul provided additional SharePoint integration that provided users with easy access to MOC specific SharePoint folders directly from each MOC document.

3.3. Personal Acknowledgment Actions

The Chemoxy best practices included a requirement that all of the relevant members of the organisation should receive a personal action to familiarise themselves with the change and its impact. The MOC application automatically generates these trackable actions across different teams depending on the nature of the change.

The MOC cannot be completed until all of the actions and acknowledgements have been completed.

3.4. SharePoint Integration – Personal Dashboards

Chemoxy already had SharePoint based personal activity dashboards in place for every user. FoCul added SharePoint integration that allowed activities from MOC to seamlessly appear in these dashboards.

“The SharePoint integration in MOC helps us to easily integrate the MOC actions into our existing personal dashboards.”

Andrew Purvis - Quality & Training Manager

4. The Chemoxy Management of Change Workflow

The Chemoxy MOC deployment uses the following stage gate process. Note that other configurations are also supported.

4.1. MOC Initiation

The initiation step allows the MOC owner to capture information about the MOC including target beneficial operational dates and costs.

The owner also identifies which operations groups need to be made aware of the change via the automated acknowledgement activities process.

4.2. Change Impact.

The Change Impact Matrix is used to identify the Specialist Risk Reviews that are required.

The MOC owner identifies the type of change from a tiered list of MOC types that are in turn mapped to a matrix of mandatory Specialist Risk Reviews.

4.3. Specialist Risk Reviews

The Specialist Risk Reviews are automatically created and assigned to the Technical

Authorities. When the last SRR is completed the Risk Assessment Completion stage gate is triggered.

The Specialist Risk Reviews also include a review of records that need to be updated so the existing FoCul Records Review stage gate has been suppressed.

4.4. Risk Assessment Completion Stage Gate

The stage gate approval at the end of Risk Assessment phase lies with a senior manager but is an administrative stage gate rather than a technical approval stage gate.

4.5. Action Completion

Trackable actions can be created at any point in the process including from within Specialist Risk Reviews.

The MOC specific acknowledgment actions are also tracked via this process.

4.6. Review & Closure

The review stage can only be started after all of the actions have been completed and a period of time, typically 3 months, has passed.

Temporary changes need to be re-approved every 3 months.

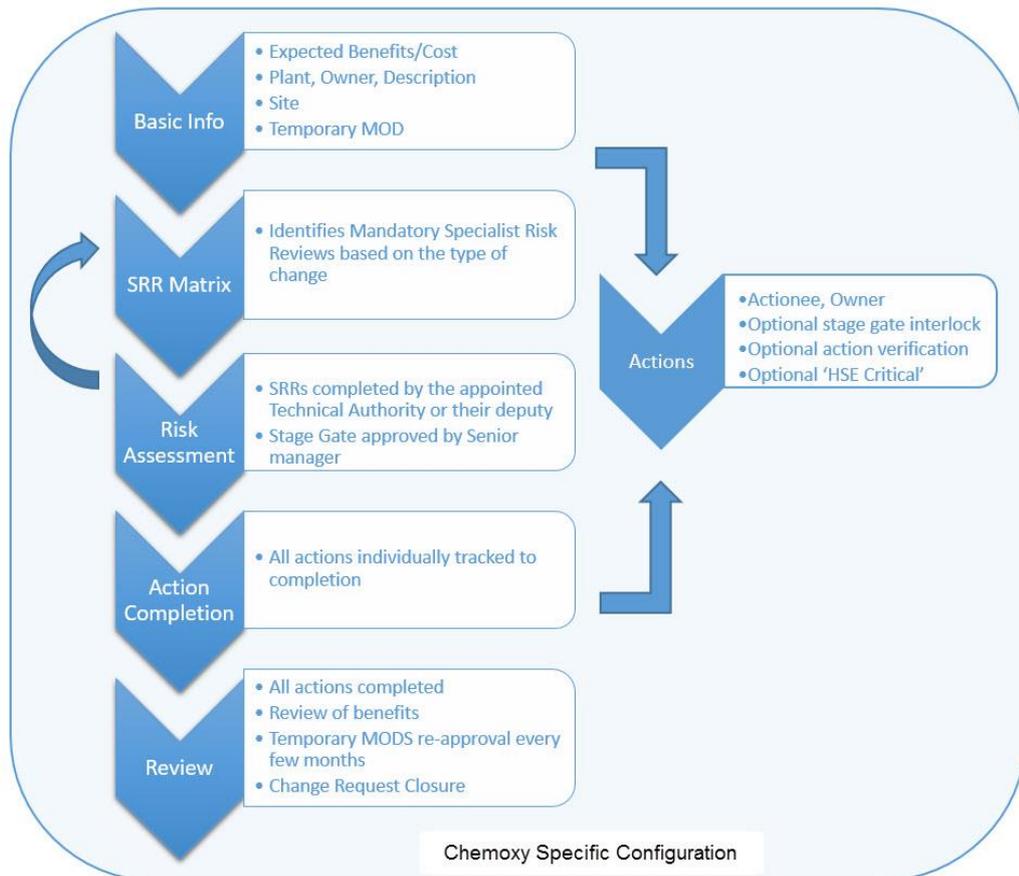
5. Reporting

Change requests and actions can be viewed and interrogated via graphical dashboards.

Actions are trackable by change request, actionee and owner. Change requests are trackable by status, plant, owner and who the request is currently with.

Data can be exported to Excel for further analysis or management reporting.

Email reminders can be configured to alert users of outstanding actions and stage gate approvals.



6. Deployment & Security

The application was deployed as a secure cloud based application.

User credentials are managed within the application with users having Administration, User or Read Access.

The stage gate processes are secured and an audit history is available for each document.

7. How we delivered the solution

We used a 7 step agile methodology to deliver the solution.

An agile methodology is an iterative approach that starts with really understanding the business needs and then using “wire frame” screen mock-ups to fine tune the proposed design.

As the functionality is then configured and developed we use regular reviews with key stake holders to make sure that what we deliver works as well as it can.

We understand the realities of working within busy manufacturing organisations and are well practiced at delivering these types of collaborative projects with as little disruption as possible.

For more information on our project processes please see our website at www.focul.net/process

8. Demonstrated Benefits

The FoCul MOC solution for Chemoxy has improved the efficiency, control and transparency of the existing MOC process.

Changes are now managed more efficiently by allowing users to access the information much more quickly and by allowing users to approve the stage gates electronically.

The risk assessment processes are applied more consistently and the workflow configuration of the application ensures that

the appropriate level of rigour is applied to all changes.

All of these benefits have been achieved while still retaining the Best Practices developed in-house by Chemoxy.

9. About FoCul

FoCul is a specialist consultancy helping organisations to find better ways to manage processes and knowledge to improve efficiency and profitability.

Our team is unusual in that it includes both software developers and professional engineers with in-depth experience of the manufacturing and process sectors.

We help our clients by helping them to understand their requirements and then helping them to deploy a solution. These solutions can be FoCul Products (<http://www.focul.net/products>) , Bespoke Solutions (<http://www.focul.net/bespoke>) or 3rd Party Solutions.

We always put our clients first and we understand how to work with you to deliver successful projects whilst you continue to deal with your operational plants.

10. Further Information

There is a live demo of the MOC application at <http://focul.net/moc-demo> . Note that different schemes can be configured.

More information on MOC is available at <http://www.focul.net/moc>

FoCul also provides other applications in areas such as Shift Logs, Asset Management, Document Management, Action Tracking etc.

<http://focul.net/products>

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