

## AD08 – Releasing Scheduled and As Required Deliverables

### A. Purpose:

This document explains the process for releasing “scheduled” deliverable instances and for releasing “as required” deliverable instances in the RMS system to SMEs or to RMC members. This document shows the actions the RM PM must take to direct deliverable instances to their respective responsible owners.

### B. Who can do this procedure:

The RM PM (or the RMS administrator) who receives the initial deliverable instances in the “verify” step.

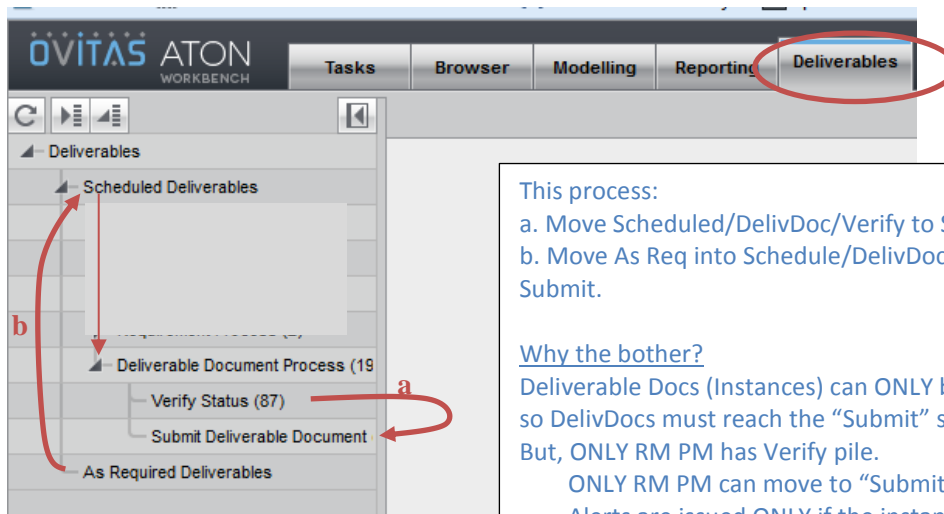
### C. Background

As described in the overview on deliverables (LBNL Doc # 04.04.001.403-AD00), the multi-step flow to distribute the deliverable instances to the rightful RMC representative or Lab SME is a direct result of requiring the ability to maintain in the system the record of any cancelled deliverable requirement. The Overview (AD00) explains in further detail.

When deliverable instances are generated per How-to # AD06, upon closure of the workflow, the RMS places the generated instances in one of two piles:

- a. If a scheduled deliverable, the RMS puts the instance into the RM PM’s Deliverables/ScheduledDeliverables/DeliverableDoc/VerifyStatus folder
- b. If it is an “as required” deliverable, the RMS puts the instance in the Deliverables/AsRequiredDeliv folder under the Deliverable tab. The Deliverable tab can be viewed by persons with Admin, Editor, or Casual Deliverable level of access.

The deliverable document (instance) is actionable for closure ONLY if it is in the “Submit” step. Also, alerts are issued ONLY if an instance is in the “Submit” step. Hence, the goal is to move deliverable instances toward the “Submit” step and Inboxes of SMEs, RMC members or the RM PM.



#### **D. Process**

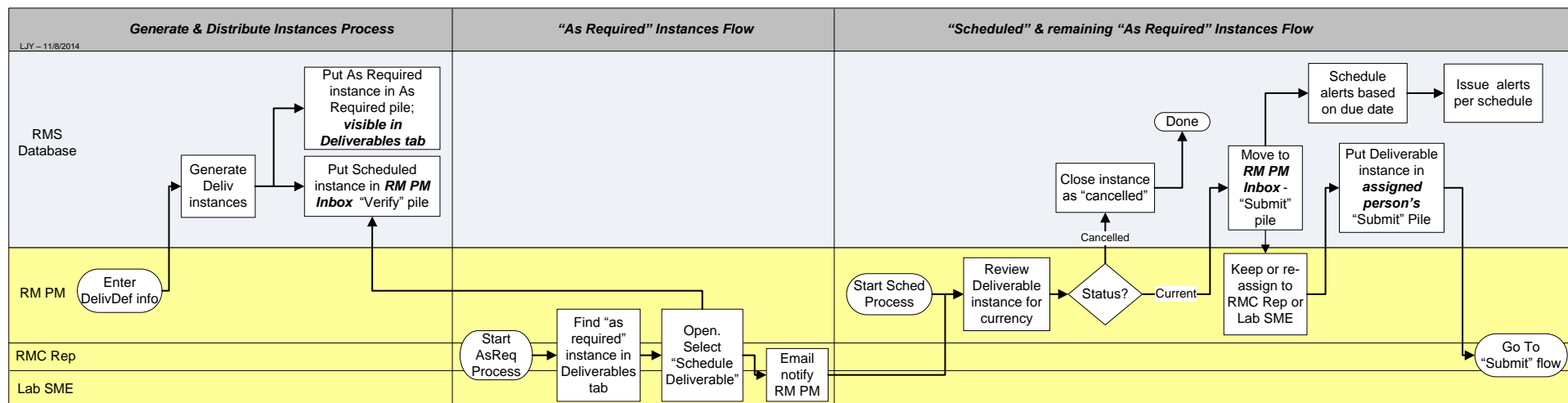
The swim-lane diagram describes the process flow in detail.

##### **Additional Notes:**

- a. ONLY the RM PM can shift deliverable instances from the Verify folder to the Submit folder.
- b. Notifications (60, 30 pre-due) are initiated **only if** the instance is in a Submit folder. Thus, RM PM must make sure to execute (a) above well before the 60 day mark.
- c. Any person who can view “as required” may schedule an instance. “Scheduling” here means releasing an instance for the submittal of the particular deliverable. However, when the “schedule” action is selected, the generated instance goes to the **RM PM**’s\_Scheduled Deliverables/DeliverableDoc/Verify folder. The RM PM then must take action to shift it to the owner’s Inbox Deliverable/Submit folder.

**It is vital** that the SME or RMC member tell the RM PM that he/she has scheduled an “as-required” deliverable. The action of scheduling an “as required” item does NOT send an automatic alert.
- d. Once the deliverable instance reaches its destination (someone’s Submit folder), then the Submit Process (described in How-to DE05, LBNL doc #04.04.001.403-DE05) describes how to submit and close the deliverable.

Swim-lane Process Flow:



**E. Related How-to's**

- A00 Overview of Deliverables
- A06 Adding a Deliverable Requirement
- DE03 Selecting a Deliverable Document with Scheduled Due Date
- DE04 Selecting an As Required Deliverable Instance
- DE05 Closing a Submitted Deliverable in RMS

**F. Revision History**

Revision	Date	Who	Description
0	11-08-2014	L.J. Young	Initial
0.1	11-28-2014	L.J.Young	Change to Word doc, elaborate explanations.