AD10 Setting Up Deliverables Common to 2 or More Requirements

I. Purpose:

This document describes the procedure for setting up in RMS a deliverable that satisfies two or more requirements.

II. Who Can Do This:

Only persons with RMS administrator permissions may perform this procedure.

III. Prerequisites

The user is expected to be fully knowledgeable and very practiced in the following and their prerequisites:

- AD00 Overview of Deliverables
- DC01 Data Entry Naming Convention
- DC07 Setting Up Associations
- AD06 Adding a scheduled deliverable
- AD07 Modifying a scheduled deliverable

IV. Procedure Objective and Definitions:

This procedure describes the data entry steps to tie together two (or more) requirements that are satisfied by a common deliverable. For example, submission of Report A on a given date satisfies both Requirement B and Requirement C.

Definitions:

Generator – the parent requirement that generates the Deliverable Document (DelivDoc) instances
Dependent requirement – the requirement that will rely on the Generator's DelivDocs
DelivDef – "Deliverable definition" group of fields within a requirement's record
DelivDoc – A workflow instance of the specific deliverable, defined by the DelivDef representing a specific due date. This document may use "DelivDoc" and "instance" interchangeably.

Figure 1

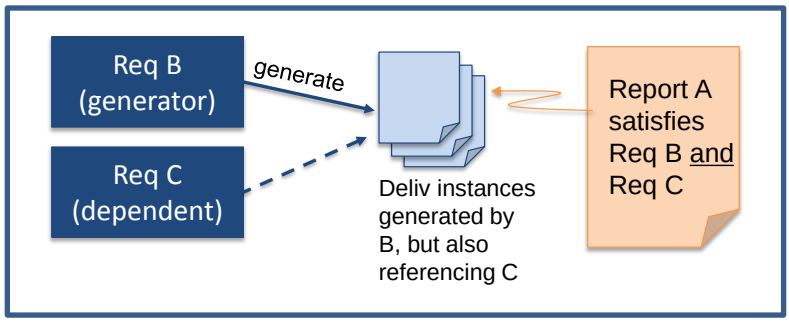

Figure 1above illustrates the overall objective of this procedure.

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V. Procedure:

Before setting up the association between the Generator and the Dependent requirements, the Generator information and generated DelivDocs **must** be in the system **prior to** entering the Dependent information.

Either of two starting circumstances may be present:

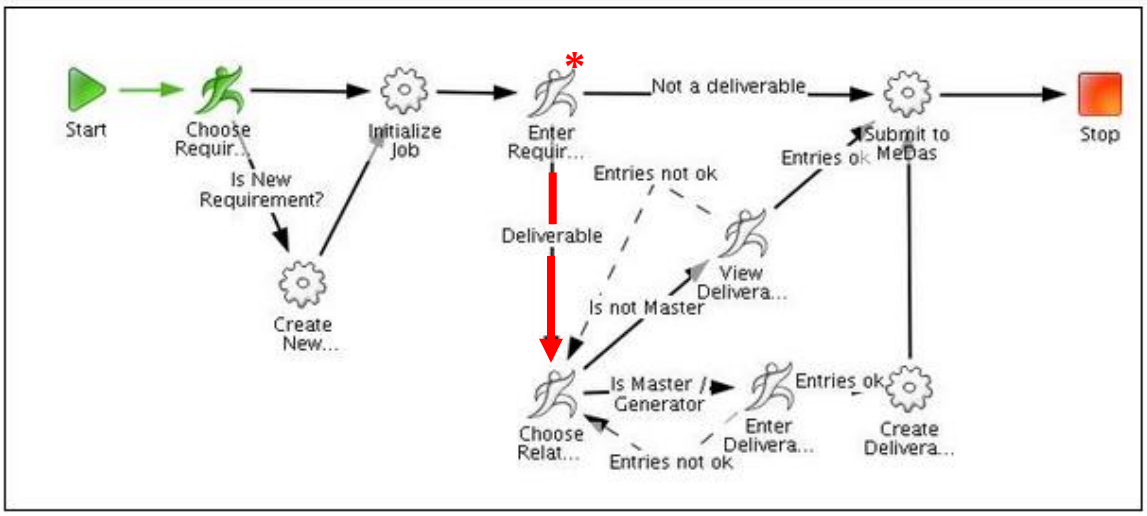
1. The Generator information is new AND it is known that it will be sharing its deliverables with another requirement, OR
2. The Generator information is already in the system, its DelivDocs have been generated, and perhaps some of its DelivDocs have already been closed. At a later time, the RM PM and SME decide to tie a second requirement to the Generator.

The procedures for these are slightly different, but each is comprised of TWO requirements workflows: one for the Generator and one for the Dependent.

> ***Note:*** *The procedures are only difficult in that they are tedious. They must be done in the right sequence to achieve the correct associations and generated DelivDocs. Always do a thorough verification by browsing in multiple ways.*

Figure 2 is the RMS Requirements workflow diagram. The procedures reference the several step names. From "Enter Requirement" step (*), the Deliverable path will be followed (arrow)

Figure 2 – RMS Requirements Workflow Diagram



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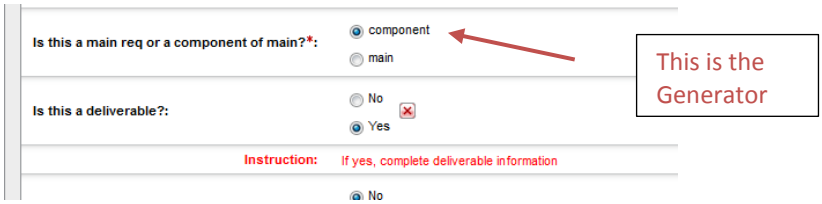
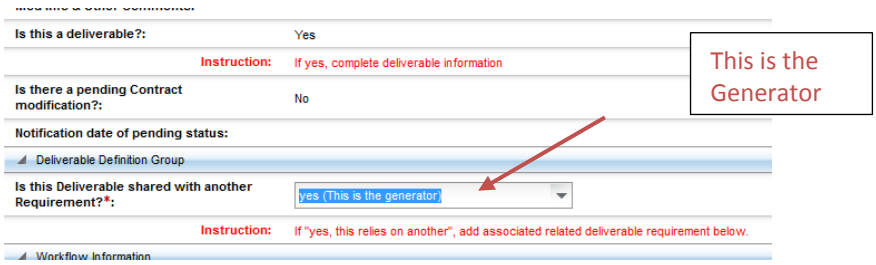
***Circumstance 1*:** Generator info is to be newly entered knowing it will be sharing with another requirement.

The two workflow sequence is: First, the (new) Generator requirement is entered, and then the (new) Dependent requirement is entered and the association to the Generator is made.

a. Open Case
b. Open Generator Requirement workflow (wf) within the Case ("Start Associated Workflow")
    i. *Choose Requirement* step:
        1. Hit "complete task" to enter new requirement. System proceeds to next step.
    ii. *Enter Requirement* step:
        1. Enter Generator's data per usual. See How-to AD06 for assistance on selections for values for the several fields.
            - Note - usually deliverables are a paragraph/section of a requirement, so usually "component" applies
            - Select "Yes this is a deliverable", which will continue the wf. (See RMS flow diagram below.)
        2. Hit "Complete Task" when ready and RMS proceeds to next step.



    iii. *Choose Related Deliverable* step
        1. To the question "Is this Deliverable shared?" select "Yes, this is the generator."
        2. Hit "Complete Task" and RMS proceeds to next step.



    iv. *Enter Deliverable Definition* step:
        1. Enter the data per usual See How-to AD06 for assistance on selections for values for the several fields.
            - Enter the date range, frequency, LBNL ID number
            - Optional useful feature is "additional names for notifications"
            - Optionally, can indicate if deliverable is an on-line submission (type of deliverable). Could add under "title" the name of the on-line system.
        2. When ready, Check "yes" to "Review Deliverable Definition info. Is it OK?"

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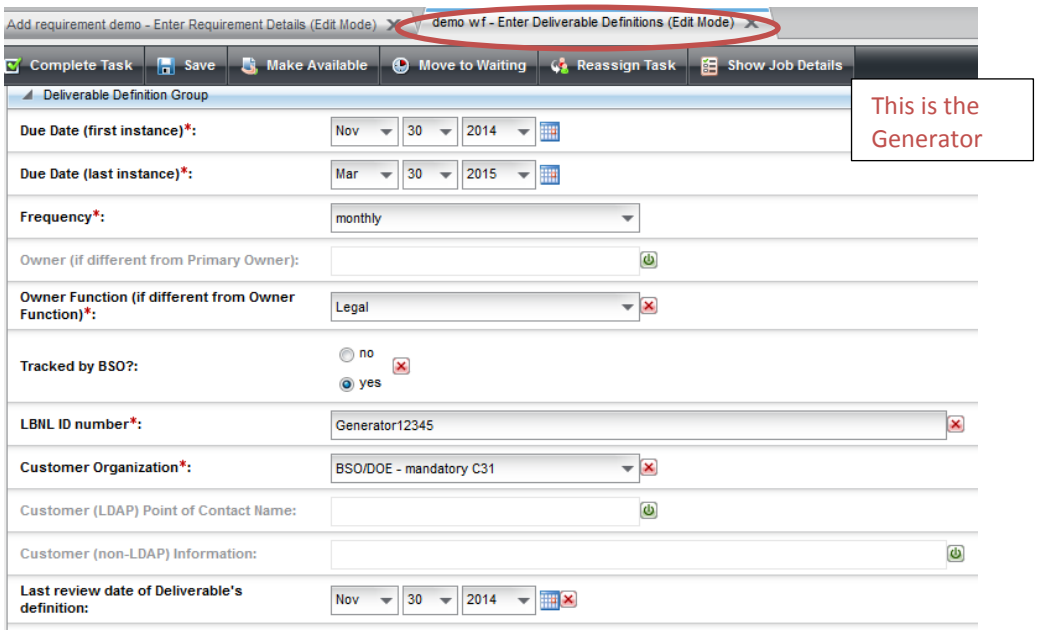
3. Hit "Complete Task", and then RMS will generate the DelivDocs. See How-to AD06 explanation to monitor generation of the DelivDocs. It will take about 15 to 30 minutes (time depends on connection to server, busy-ness of the server, etc.)



c. Open Dependent Requirement workflow within the Case ("Start Associated Workflow")
   i. *Choose Requirement* step:
      1. Hit "complete task" to enter new requirement. System proceeds to next step.
   ii. *Enter Requirement Details* step:
      1. Enter Generator's data per usual. See How-to AD06 for assistance on selections for values for the several fields.
         - Note - usually deliverables are a paragraph/section of a requirement, so usually "component" applies
         - Select "Yes this is a deliverable", which will continue the wf. (See RMS flow diagram below.)
      2. Hit "Complete Task" when ready and RMS proceeds to next step.

   iii. *Choose related deliverable* step:
      1. To the question "Is this Deliverable shared?" select "Yes, this relies on another."
      2. Below under Associations, search and then add the Generator requirement.
      3. Hit "Complete Task", and RMS proceeds to next step.

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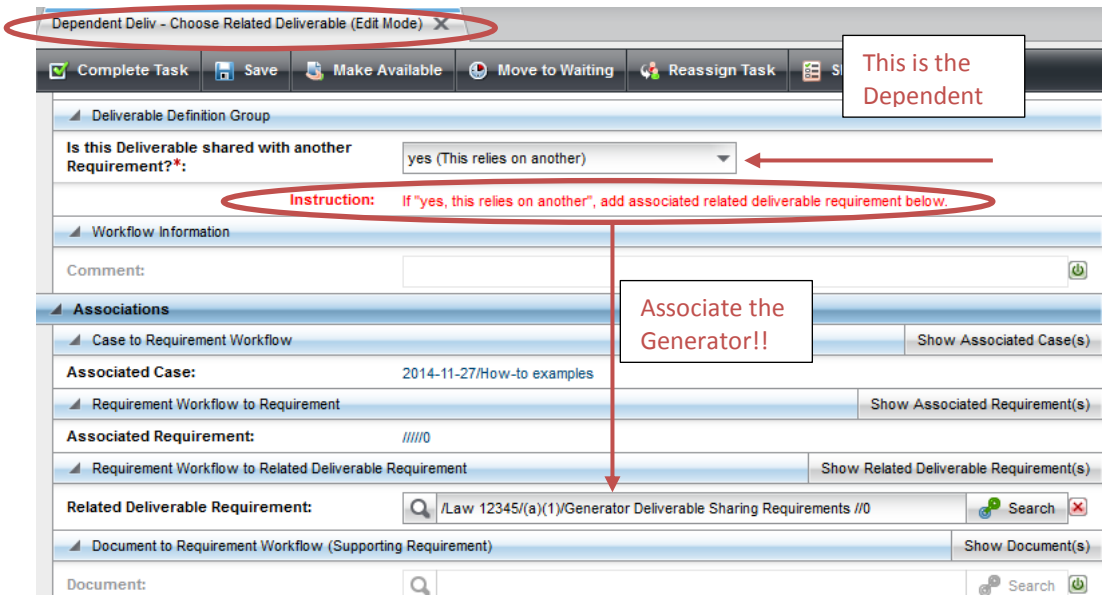

iv. *View Deliverable definitions* step:

1. Review the pre-populated data, which comes from the Generator. Note that the same LBNL ID number is assigned.
2. Hit "Complete Task", and then the Dependent Requirement wf will close.

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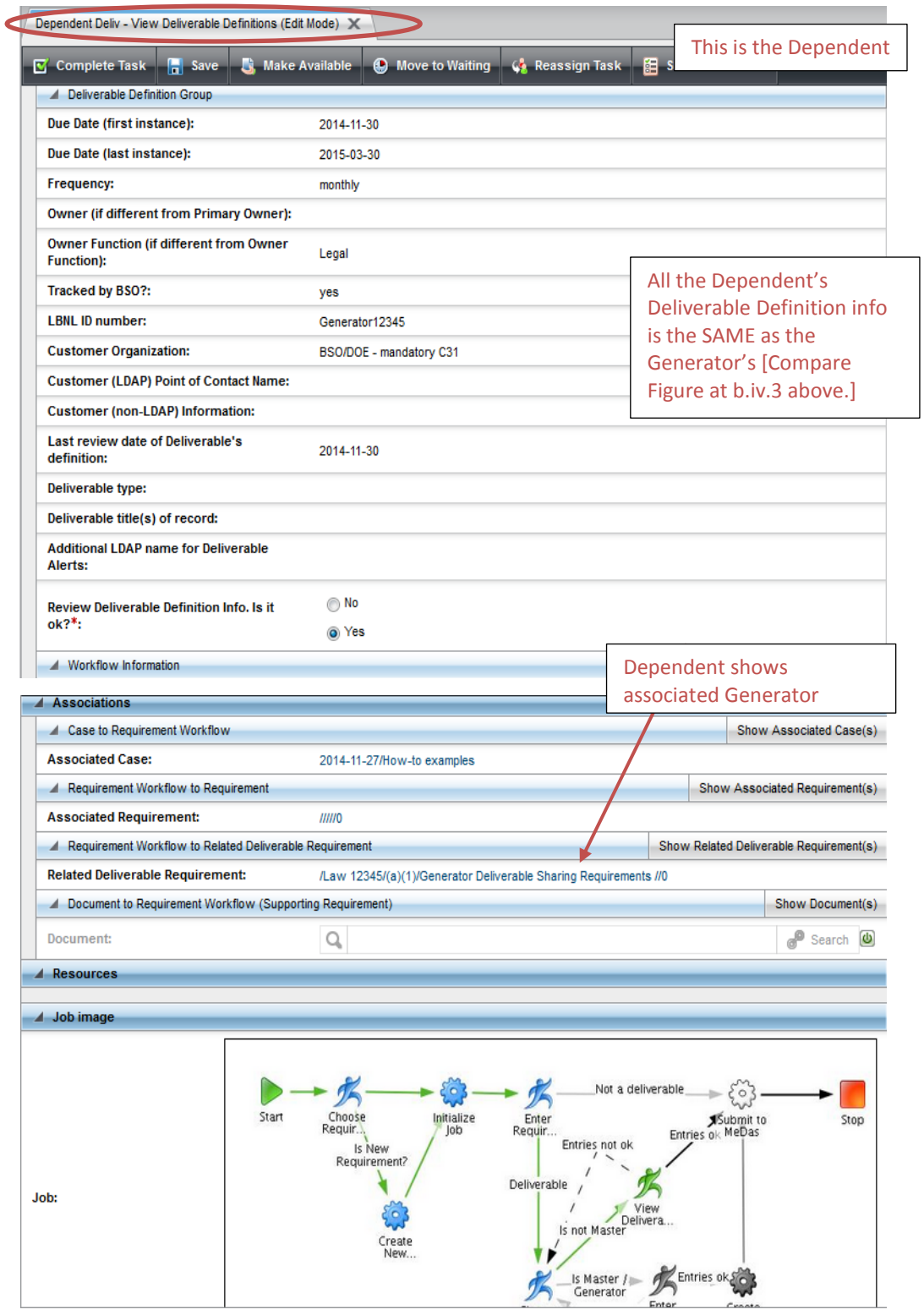

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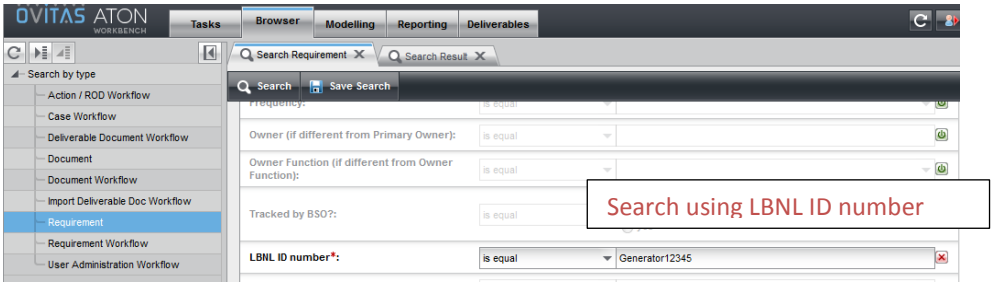
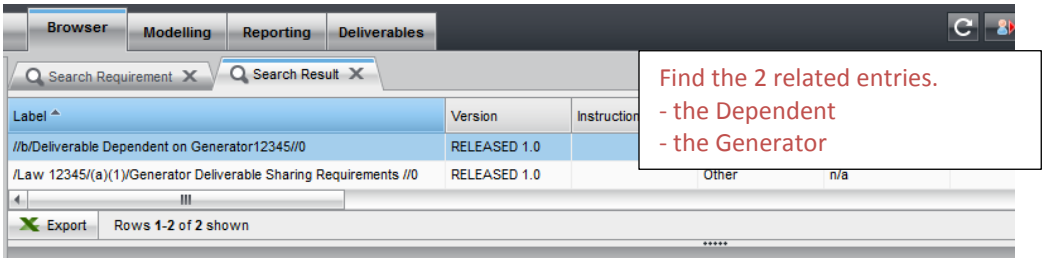
d. Verify that the association between the Generator and the Dependent has been established.
   i. Search: Browse/Requirement/(Generator info) and Browse/Requirement/(Dependent info)
      1. Can use LBNL ID # as filter and both Generator and Dependent should result.
      2. Check each req's Associations list: They should be listed in each other's.
      3. Check that each "knows" about the other (Yes, this relies on another and Yes , this is the generator).
   ii. Browse/Open Deliverables:
      1. Search by LBNL ID number. Open any of the Generator DelivDocs
         - Make sure the Dependent Req appears as an association





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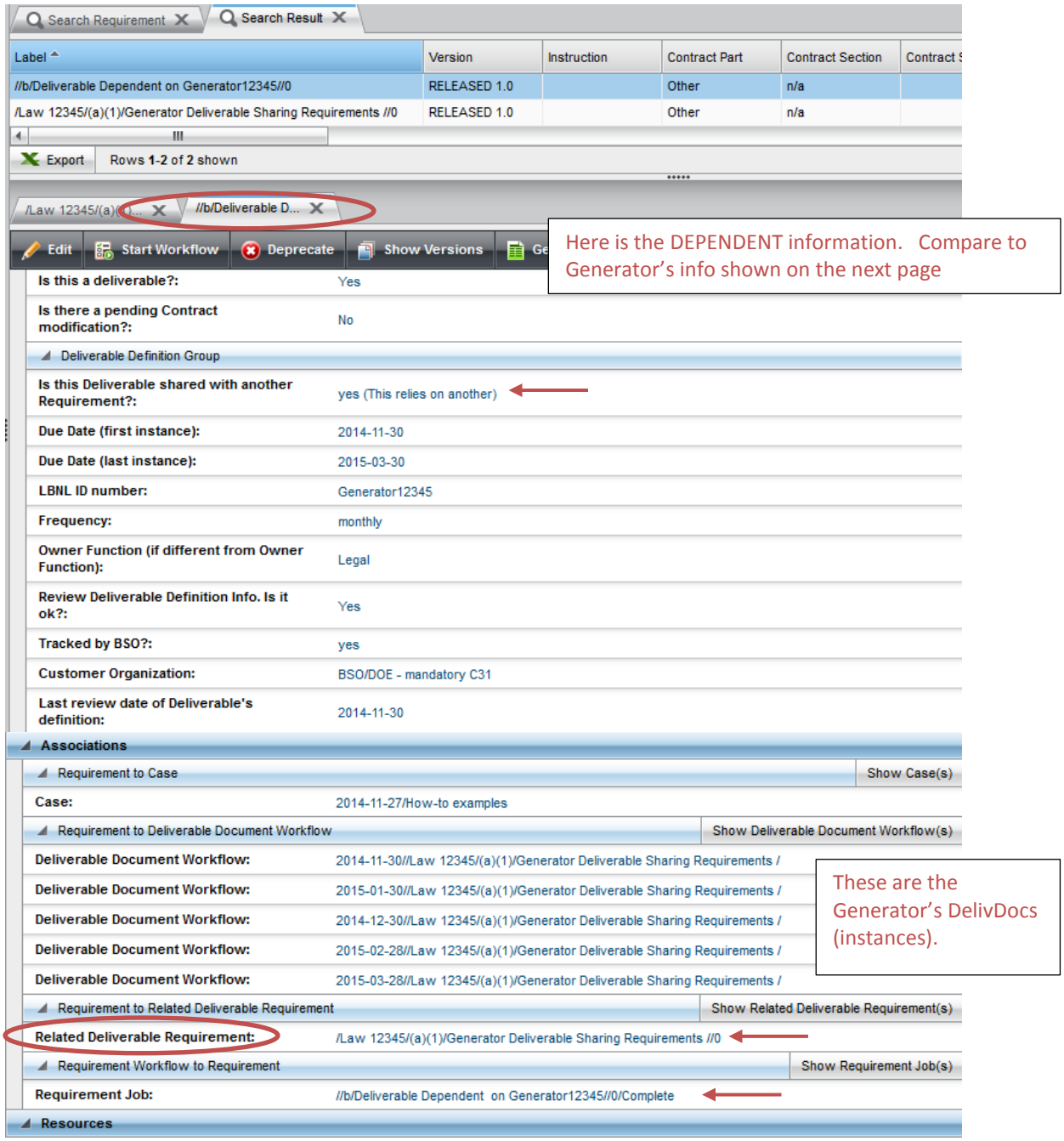

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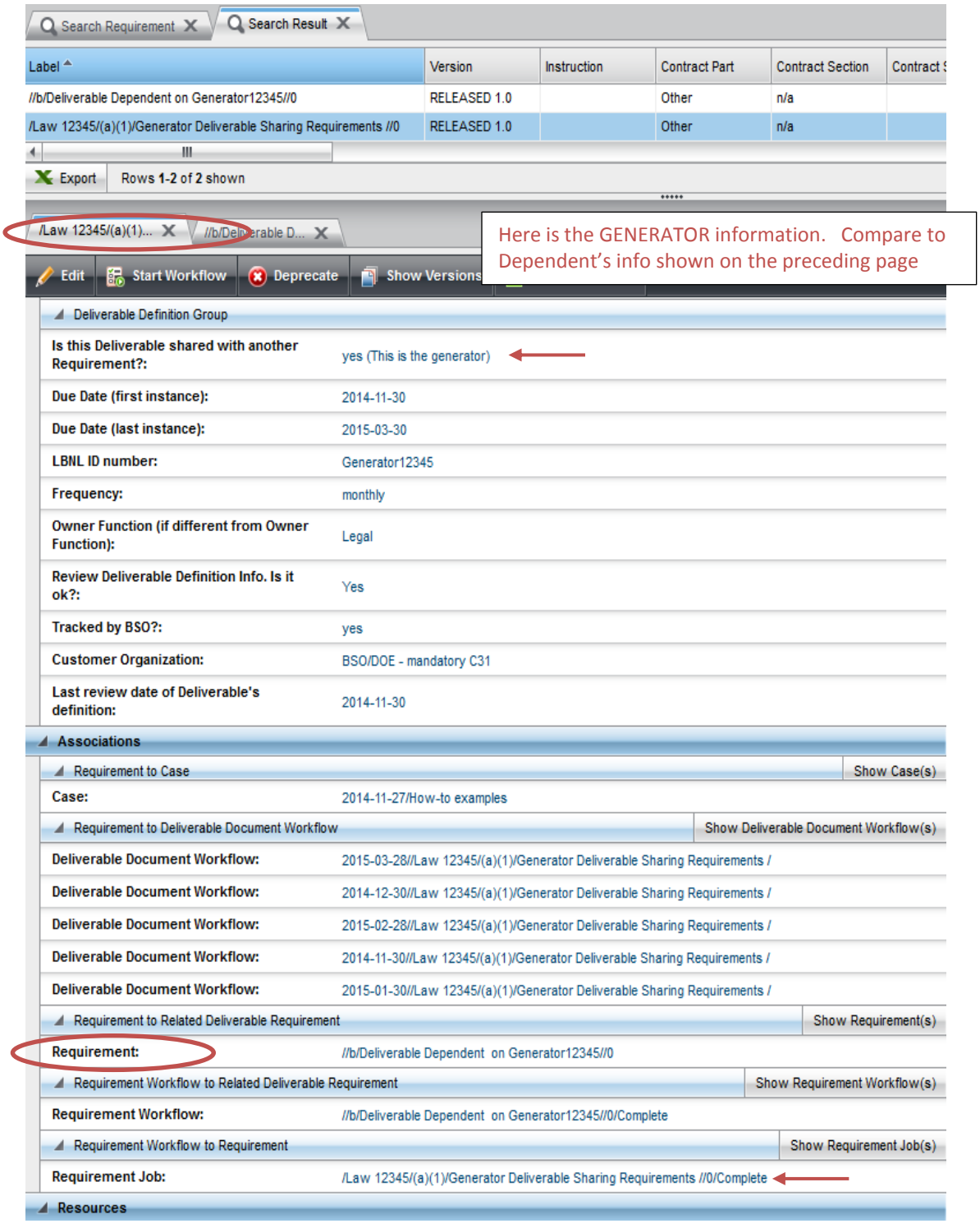

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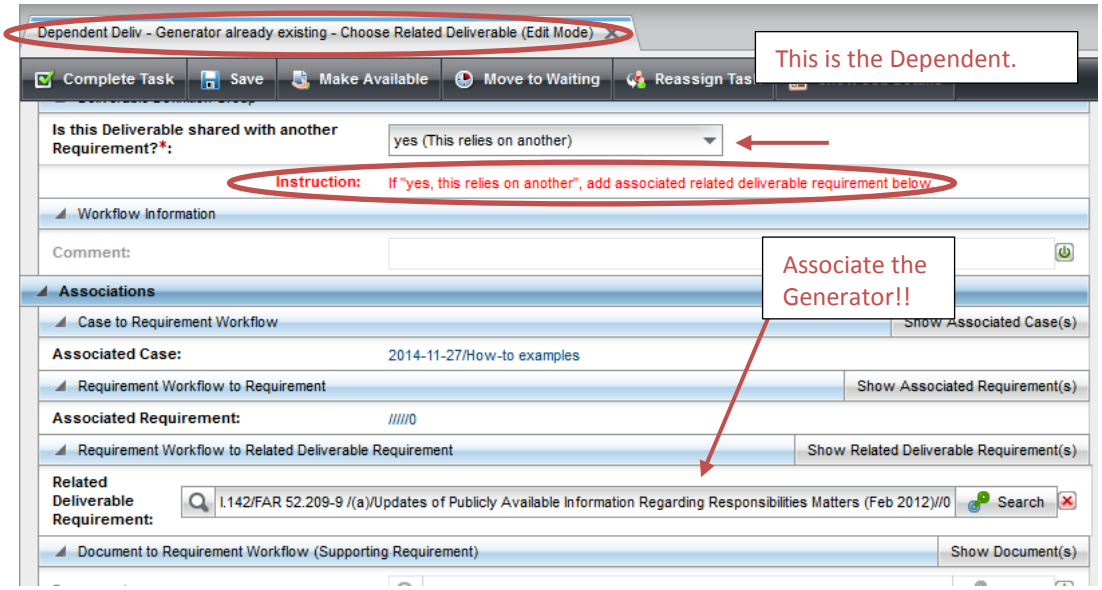
***Circumstance 2*:** The Generator information is already in the system, its DelivDocs have been generated, and perhaps some of its DelivDocs have already been closed. At a later time, the RM PM and SME decide to tie a second requirement to the Generator.

The two workflow sequence is: First, the (new) Dependent requirement is entered and it makes the association to the existing Generator. Then the existing Generator is modified (including due date range, if needed).

a. Open Case
b. Open Dependent Requirement workflow within the Case ("Start Associated Workflow")
    i. *Choose Requirement* step:
        1. Hit "complete task" to enter new requirement. System proceeds to next step.
    ii. *Enter Requirement* step:
        1. Enter Generator's data per usual. See How-to AD06 for assistance on selections for values for the several fields.
            - Note - usually deliverables are a paragraph/section of a requirement, so usually "component" applies
            - Select "Yes this is a deliverable", which will continue the wf. (See RMS flow diagram below.)
        2. Hit "Complete Task" when ready and RMS proceeds to next step.
    iii. *Choose related deliverable* step:
        1. To the question "Is this Deliverable shared?" select "Yes, this relies on another."
        2. Below under Associations, search and then add the Generator requirement.
        3. Hit "Complete Task", and system proceeds to next step.



    iv. *View Deliverable definition* step:
        1. Review the pre-populated data, which comes from the Generator. Note that the same LBNL ID number is assigned.

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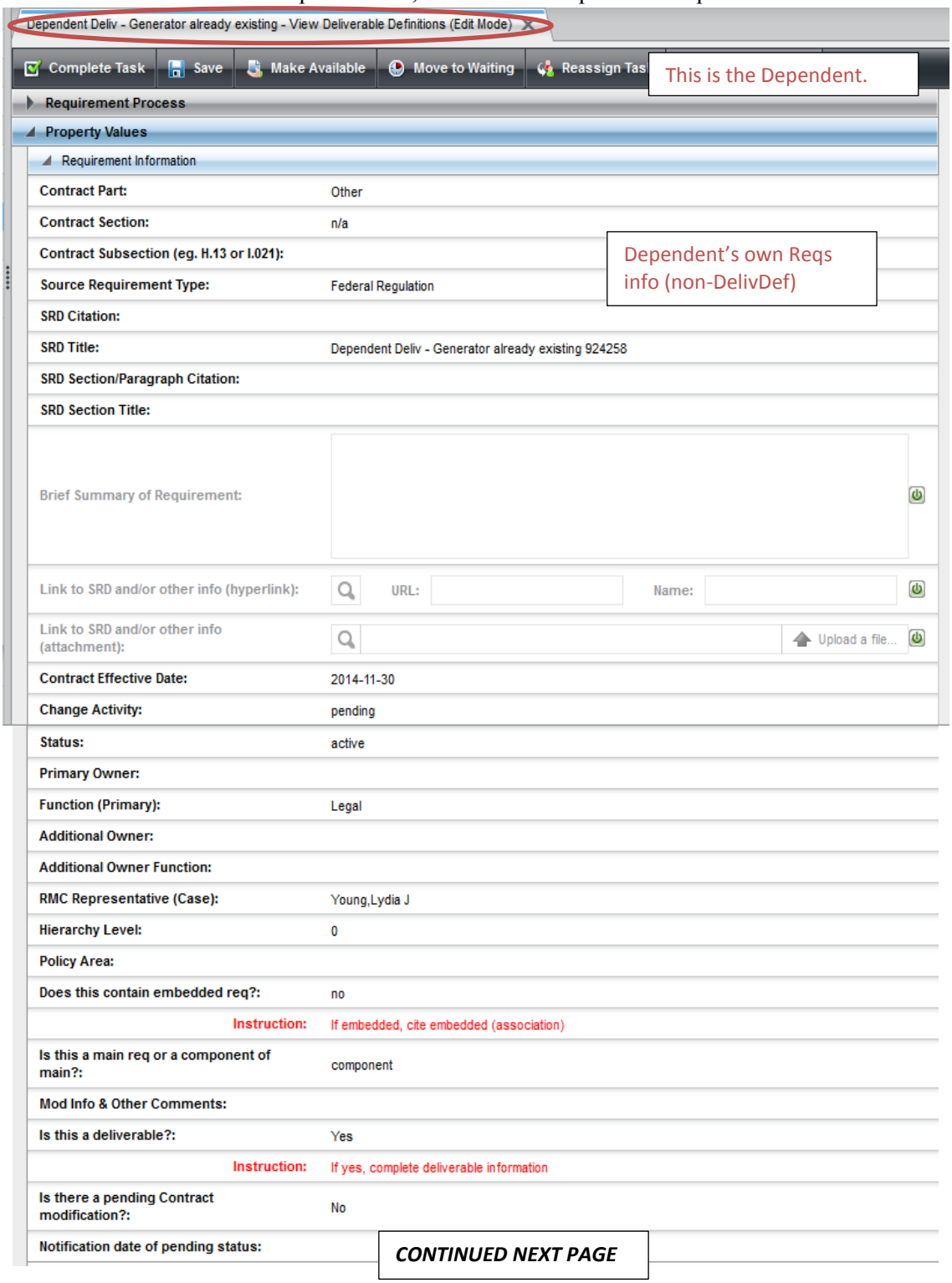
2. Hit "Complete Task", and then the Dependent Requirement wf will close.



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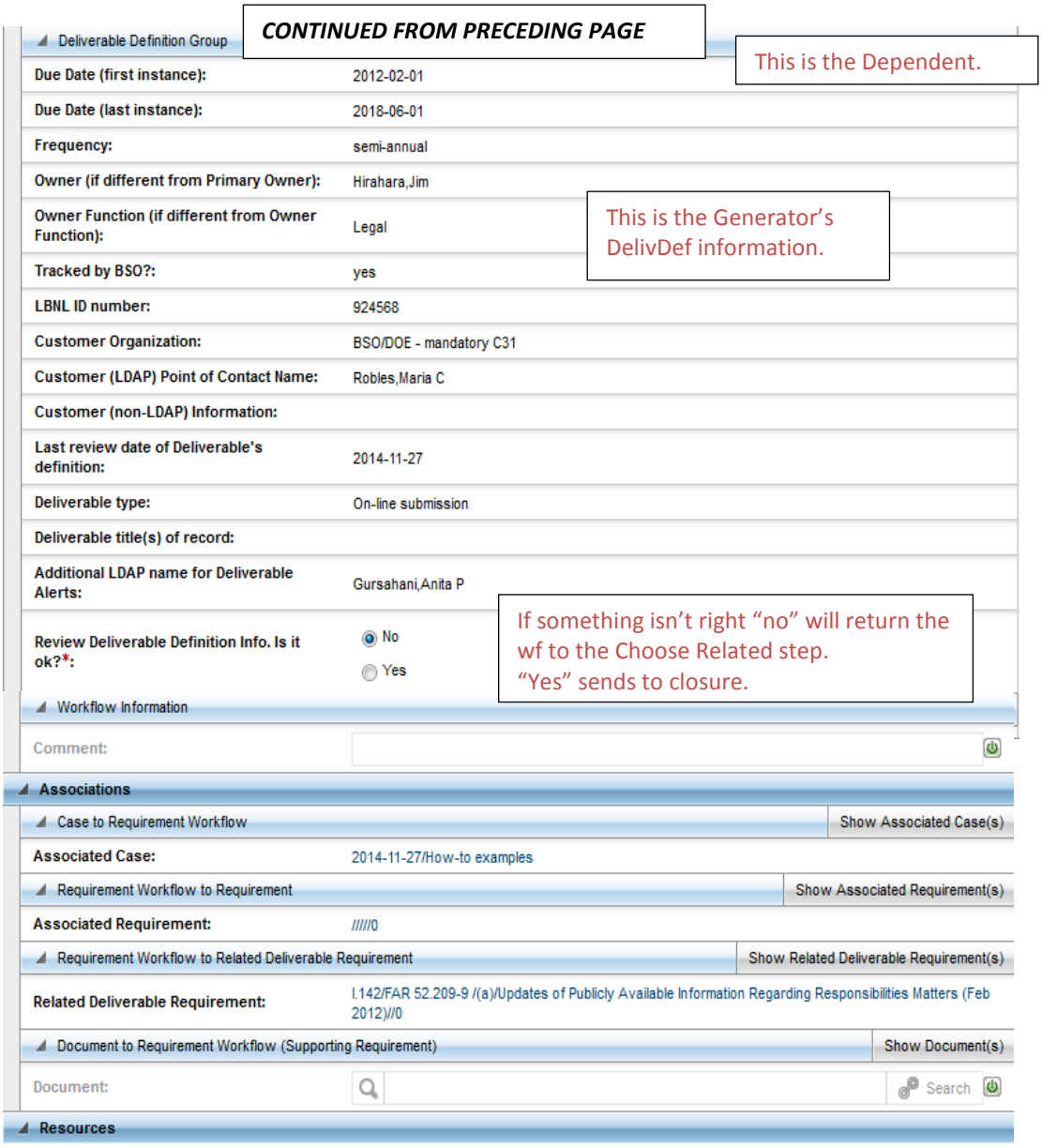

c. Open Requirement wf within the Case to "renew" the Generator ("Start Associated Workflow")
   i. *Choose Requirement* Step: Search and add Generator association to modify it.
   ii. *Enter Requirement Details* Step:
      1. (Optional) Review/update any requirement info.
      2. (Mandatory) Check "Yes" to "Is this a deliverable?"
      3. Hit "Complete Task", and system proceeds to next step.
   iii. *Choose Related Deliverable* step: Select "Yes, this is the generator." Do NOT add association!!

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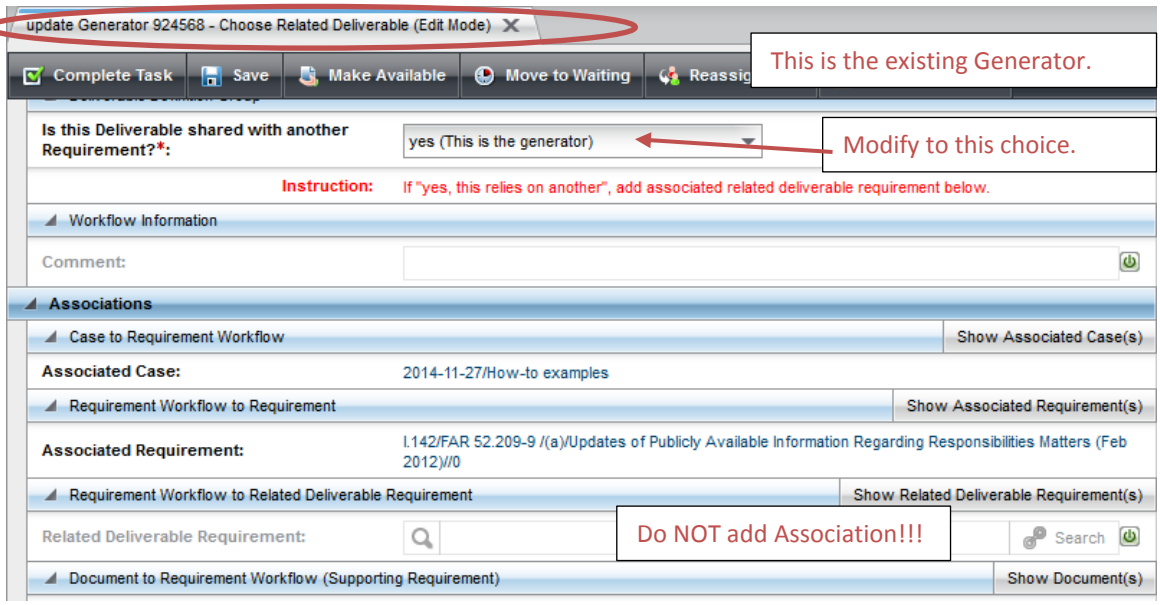
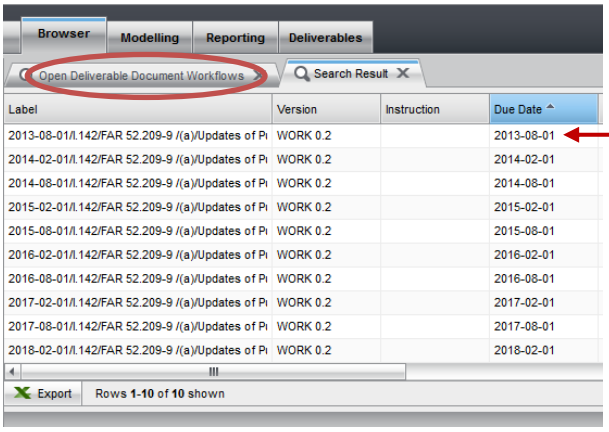


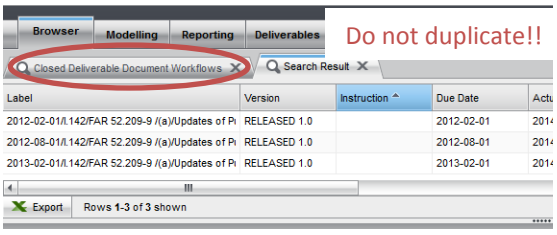
iv. *Enter Deliverable Details* step:

1. Set the date range for the DelivDocs to be generated:
   - If there are DelivDocs already closed, **MUST** change the "first instance date" to start with the earliest date of the remaining open DelivDoc wfs. If the date range is not adjusted, duplicates of the closed DelivDocs will be generated. See How-to #A06 for details on modifying a DelivDefinition.
   - If there are no DelivDocs closed, then the "first instance date" could remain the same as indicated.
   - CHECK and DOUBLE CHECK whether or not there are closed DelivDocs. CHECK and DOUBLE CHECK the date of the next open instance.



Search Open and Closed #924568

Reset "first due date" to this.



2. Update any of the fields other fields (optional). Verify the LBNL ID#.
3. Note that the related Dependent requirement will likely NOT be displayed under Associations. Don't panic - the Deliv Requirement "knows" and associated the Generated, but the reverse is not yet saved in the system.

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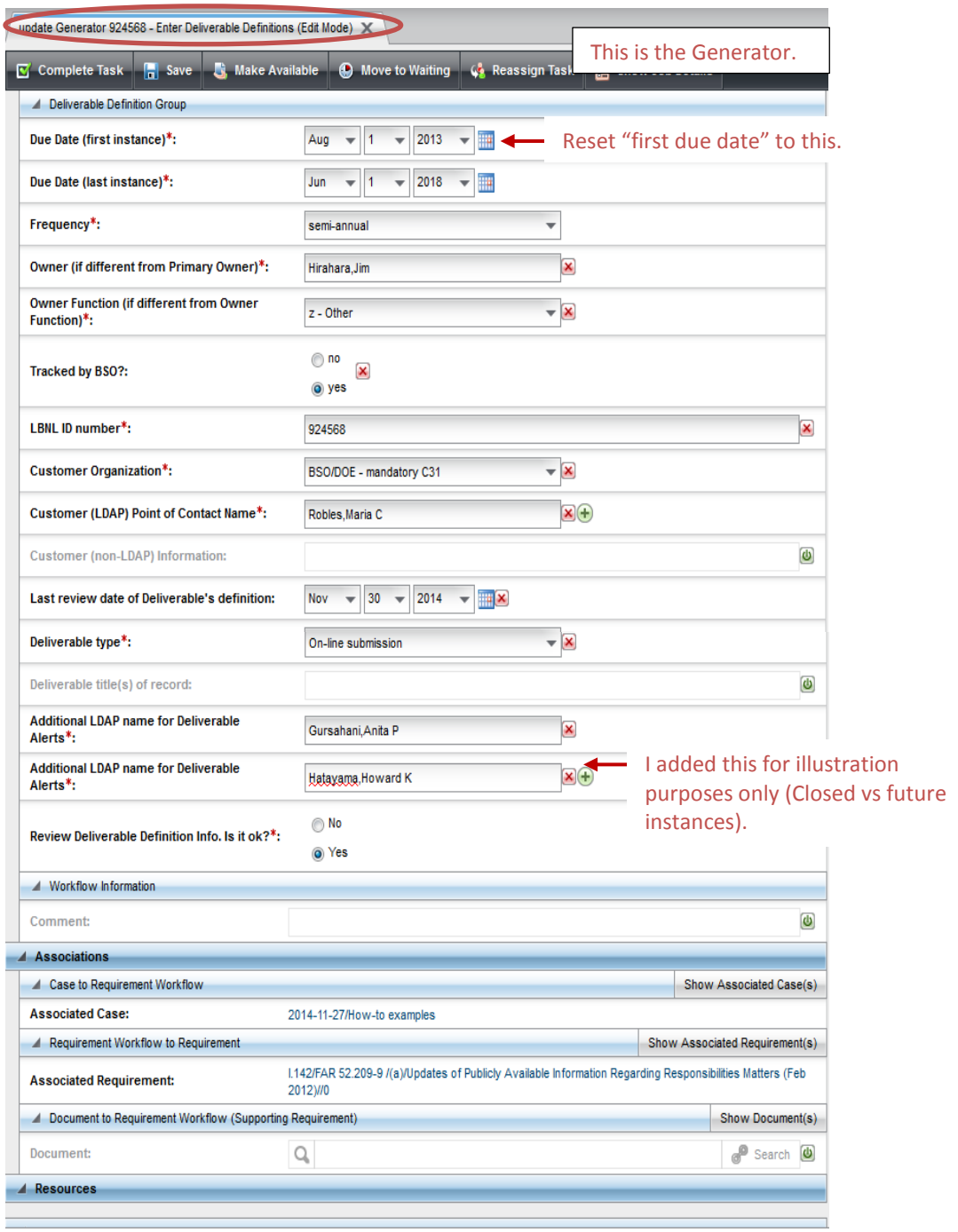
4. Hit "Complete Task" when ready, and then RMS will generate a new set of DelivDocs. The difference between these and the previous will be the added "Yes, this is the generator" to the question "Is this deliverable shared?"
    - See How-to AD06 explanation to monitor generation of the DelivDocs. It will take about 15 to 30 minutes (time depends on connection to server, busy-ness of the server, etc.)



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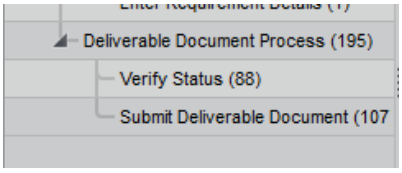
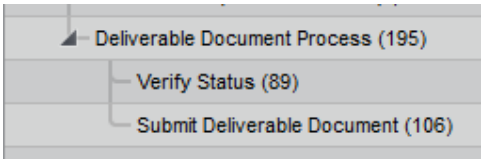
         - Make sure the Dependent Req appears as an association

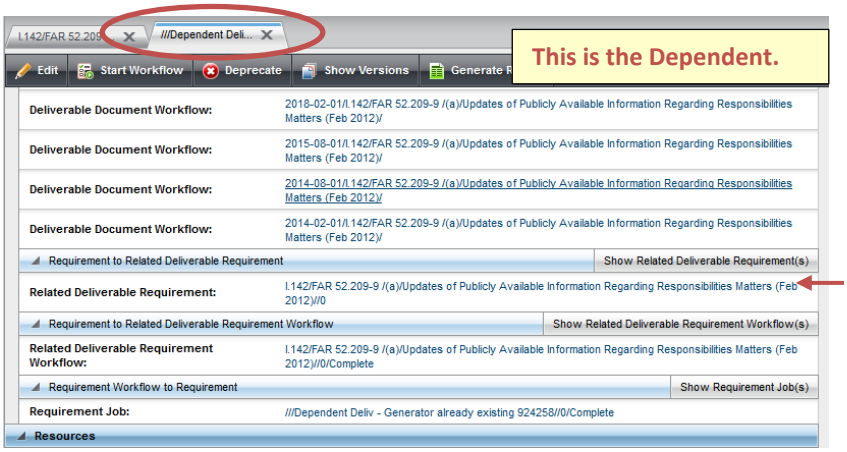
Before regeneration

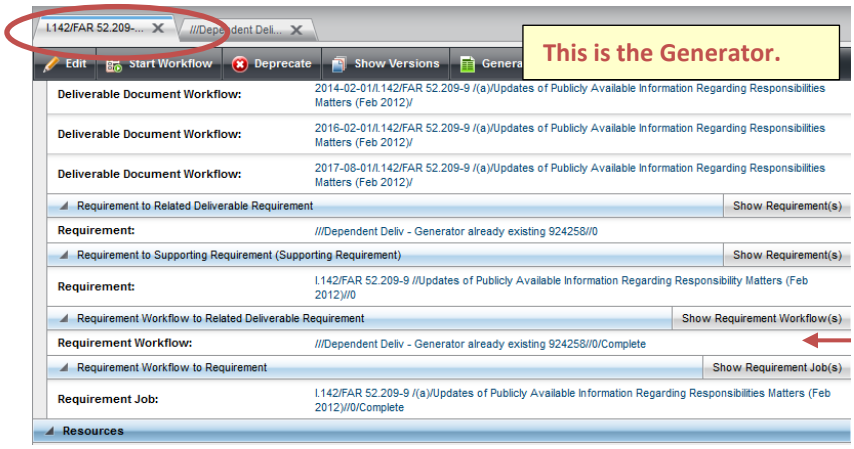


After regeneration



(For this example, I had moved one DelivDoc from Verify to Submit before regeneration. During regeneration, the system pulled ALL the impacted open DelivDocs from both Verify and Submit piles, and replaced them with regenerated DelivDocs in the RM PM's Verify pile.)





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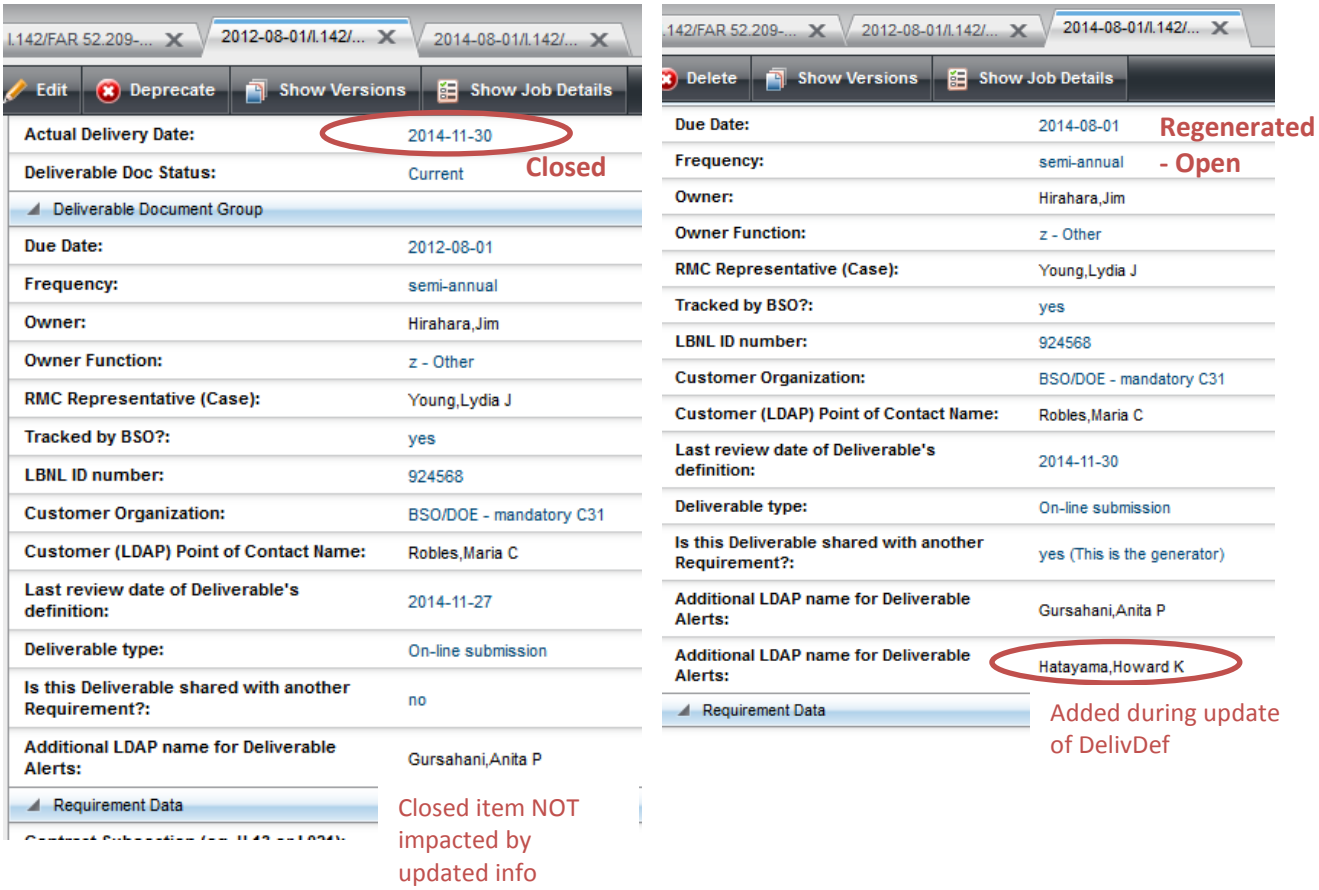

Technical/Historical Comment: This particular feature was set up after some of the association definitions were established. The Dependent is a child of the Generator parent. A "Generate Report" will show this hierarchical relationship. However, the association process is unique from all other association set-ups. The user sets up the association in the Dependent/child workflow, under the label "related Requirement". All other processes set up associations within the parent, bringing in the child under the category "related". The Comment is merely for the record – ok to ignore – just follow the procedure as stated and you'll be successful.

Revision History

Revision	Date	Who	Description
0	1/13/2014	L.J. Young	Initial
0.1	11/30/2014	L.J.Young	Formalize; add figures

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