# **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 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)





*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")
  - *Choose Requirement* step: i.
    - 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.

	component					
is this a main reg or a component of main ?":	💿 main	Tł	nis is the			
Is this a deliverable?:	© No	G	enerator			
	Yes					
Instruction:	If yes, complete deliverable information					
	No					

- 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.

Is this a deliverable?:	Yes	
Instruction:	If yes, complete deliverable information	This is the
Is there a pending Contract modification?:	No	Generator
Notification date of pending status:		
▲ Deliverable Definition Group		
Is this Deliverable shared with another Requirement?*:	yes (This is the generator)	

- 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?"

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.)

Add requirement demo - Enter Requirement Details (Edit Mode)							
🗹 Complete Task 📙 Save 🧕 Make Av	ailable 😧 Move to Waiting 📫 Reassign Task 🛿 🗄 Show Job Details						
Deliverable Definition Group		This is the					
Due Date (first instance)*:	Nov 🔻 30 👻 2014 🐨	Generator					
Due Date (last instance)*:	Mar 🕶 30 💌 2015 💌 🏢						
Frequency*:	monthly						
Owner (if different from Primary Owner):	۵						
Owner Function (if different from Owner Function)*:	Legal 🗸						
Tracked by BSO?:	<ul> <li>□ no</li> <li>i yes</li> </ul>						
LBNL ID number*:	Generator12345	×					
Customer Organization*:	BSO/DOE - mandatory C31						
Customer (LDAP) Point of Contact Name:	۵						
Customer (non-LDAP) Information:		۵					
Last review date of Deliverable's definition:	Nov 🔻 30 🐨 2014 🐨						

- 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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Complete Task 📑 Save 💐 Make	Available 🕒 Move to Waitin	g 🤹 Reassign Task	In this is the second seco
Deliverable Definition Group  Is this Deliverable shared with another Requirement?*:	yes (This relies on another)	•	
Instruction:	If "yes, this relies on another", a	dd associated related delivera	ble requirement below.
Morkflow Information			
Comment:			۵
Associations		Associate the	
Case to Requirement Workflow		Generator!!	Show Associated Case(s
Associated Case:	2014-11-27/How-to examples		
A Requirement Workflow to Requirement			Show Associated Requirement(s
Associated Requirement:	////0		
Requirement Workflow to Related Deliverable	e Requirement		Show Related Deliverable Requirement(s)
Related Deliverable Requirement:	Q /Law 12345/(a)(1)/Generation	ator Deliverable Sharing Requir	rements //0 🔗 Search 🔀
▲ Document to Requirement Workflow (Support	ting Requirement)		Show Document(s)
	0		

- 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.

pendent Deliv - View Deliverable Definitions (Ed	t Mode) X		This is the Depende
Complete Task 🔚 Save 🤳 Make	Available 🔮 Move to Waiting 📢	Reassign Task 📒 🗄	S
Deliverable Definition Group			
Due Date (first instance):	2014-11-30		
Due Date (last instance):	2015-03-30		
Frequency:	monthly		
Owner (if different from Primary Owner):			
Owner Function (if different from Owner Function):	Legal		
Tracked by BSO?:	yes	All	the Dependent's
LBNL ID number:	Generator12345	De	the SAME as the
Customer Organization:	BSO/DOE - mandatory C31	IS I	anerator's [Compare
Customer (LDAP) Point of Contact Name:		Fic	aure at h iv 3 above 1
Customer (non-LDAP) Information:		118	
Last review date of Deliverable's definition:	2014-11-30		
Deliverable type:			
Deliverable title(s) of record:			
Additional LDAP name for Deliverable Alerts:			
Review Deliverable Definition Info. Is it ok?*:	○ No ③ Yes		
Morkflow Information		Depe	ndent shows
Associations		assoc	ciated Generator
Case to Requirement Workflow			Show Associated Case
Associated Case:	2014_11_27/How_to examples	/	
Requirement Workflow to Requirement			Show Associated Requirement
Associated Requirement:	/////0		
Requirement Workflow to Related Deliverable	e Requirement	SI	now Related Deliverable Requirement
Related Deliverable Requirement:	/l aw 123/5/(a)(1)/Generator Deliverab	le Sharing Requirements //0	
Document to Requirement Workflow (Support	rting Requirement)	ie onanny requirements //o	Show Document
Document:	Q		d <sup>er</sup> Search (
Resources			
Job image			
-	Choose Initialize	Not a deliveral	ble کری الم المالی المالی
Start	Requir Job Rr Is New Requirement? De	iverable / View biverable / View biverable / View bis not Master	

- 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

Search by type	Search Result	~				
Action / ROD Workflow	🔍 Search 🔚 Save Search					
- Case Workflow	Frequency:	is equal	×			
- Deliverable Document Workflow	Owner (if different from Primary Owner):	is equal	-	۵		
- Document	Owner Function (if different from Owner			- (b)		
- Document Workflow	Function):					
- Import Deliverable Doc Workflow			Search using I BNI ID number			
	Tracked by BSO?:			E ID Humber		
- Requirement Workflow						
User Administration Workflow	LBNL ID number*:	is equal	<ul> <li>Generator12345</li> </ul>	×		

Browser Modelling Reporting Deliverable	es		C 8	
Q Search Requirement X Q Search Result X		Find the 2 related entr		
Label A	Version	Instruction	- the Dependent	
//b/Deliverable Dependent on Generator12345//0	RELEASED 1.0		- the Generator	
/Law 12345/(a)(1)/Generator Deliverable Sharing Requirements //	0 RELEASED 1.0	l	Other n/a	
<b>∢</b>				
X Export Rows 1-2 of 2 shown				

Q Search Requirement X Q Search Result	×					
abel ^		Version	Instruction	Contract Part	Contract Section	Contract
b/Deliverable Dependent on Generator12345//0		RELEASED 1.0		Other	n/a	
aw 12345/(a)(1)/Generator Deliverable Sharing Requi	rements //0	RELEASED 1.0		Other	n/a	
III		1				
Export Rows 1-2 of 2 shown				****		
aw 12345/(a)(0 X //b/Deliverable D X						
neprecate 🔀 Start Workflow 🔞 Deprecate	Show	Versions 📑	<sub>Ge</sub> Here is t	he DEPENDEN	NT informatio	n. Com
Is this a deliverable?:	Yes		Generat	or's info show	n on the nex	t page
Is there a pending Contract modification?:	No					
Deliverable Definition Group						
Is this Deliverable shared with another Requirement?:	yes (This relie	s on another) 🗲				
Due Date (first instance):	e (first instance): 2014-11-30					
Due Date (last instance):	2015-03-30					
LBNL ID number:	Generator12345					
Frequency:	monthly					
Owner Function (if different from Owner Function):	Legal					
Review Deliverable Definition Info. Is it ok?:	Yes					
Tracked by BSO?:	yes					
Customer Organization:	BSO/DOE - ma	indatory C31				
Last review date of Deliverable's definition:	2014-11-30					
Associations						
▲ Requirement to Case					Sh	ow Case(s)
Case:	2014-11-27/Ho	w-to examples				
A Requirement to Deliverable Document Workflow				Show De	liverable Document	Workflow(s)
Deliverable Document Workflow:	2014-11-30//La	aw 12345/(a)(1)/Ge	nerator Deliverable	Sharing Requirement	s/	
Deliverable Document Workflow:	2015-01-30//L	aw 12345/(a)(1)/Ge	nerator Deliverable	Sharing Requirement	ts / These	e are the
Deliverable Document Workflow:	2014-12-30//L	aw 12345/(a)(1)/Ge	nerator Deliverable	Sharing Requirement	Gene	rator's D
Deliverable Document Workflow:	2015-02-28//L	aw 12345/(a)(1)/Ge	nerator Deliverable	Sharing Requirement	insta	nces).
Deliverable Document Workflow:	2015-03-28//L	aw 12345/(a)(1)/Ge	nerator Deliverable	Sharing Requirement	ts /	
A Requirement to Related Deliverable Requirement				Show Re	lated Deliverable Re	quirement(s)
Related Deliverable Requirement:	/Law 12345/(a	i)(1)/Generator Deliv	verable Sharing Re	quirements //0		
Requirement Workflow to Requirement			-		Show Require	ment Job(s)
Requirement Job:	//b/Deliverable	Dependent on Gen	erator12345//0/Cor	mplete	_	
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bel 📤		Version	Instruction	Contract Part	Contract Se	ection Contrac					
/Deliverable Dependent on Generator12345//0		RELEASED 1.0		Other	n/a						
aw 12345/(a)(1)/Generator Deliverable Sharing Re	quirements //0	RELEASED 1.0		Other	n/a						
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Export Rows 1-2 of 2 shown				*****							
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Law 12345/(a)(1) X //b/Derrable D )	×	H	ere is the GEI	NERATOR info	ormation.	Compare t					
🖉 Edit 🛛 🔚 Start Workflow 🔞 Deprec	ate 📑 Shov	v Versions	ependent's ir –	ifo shown on	the preced	ling page					
Deliverable Definition Group											
Is this Deliverable shared with another Requirement?:	yes (This is t	he generator) 🖪									
Due Date (first instance):	2014-11-30										
Due Date (last instance):	2015-03-30										
LBNL ID number:	Generator12	345									
Frequency:	monthly	monthly									
Owner Function (if different from Owner Function):	Legal	Legal									
Review Deliverable Definition Info. Is it ok?:	Yes										
Tracked by BSO?:	yes										
Customer Organization:	BSO/DOE - m	andatory C31									
Last review date of Deliverable's definition:	2014-11-30										
Associations											
Requirement to Case						Show Case(s					
Case:	2014-11-27/H	low-to examples									
A Requirement to Deliverable Document Workf	ow			Show	Deliverable Docun	nent Workflow(s					
Deliverable Document Workflow:	2015-03-28//	Law 12345/(a)(1)	Generator Deliverab	le Sharing Requireme	ents /						
Deliverable Document Workflow:	2014-12-30//	Law 12345/(a)(1)	Generator Deliverab	le Sharing Requireme	ents /						
Deliverable Document Workflow:	2015-02-28//	Law 12345/(a)(1)	Generator Deliverab	le Sharing Requireme	ents /						
Deliverable Document Workflow:	2014-11-30//	Law 12345/(a)(1)/	Generator Deliverab	le Sharing Requireme	ents /						
Deliverable Document Workflow:	2015-01-30//	Law 12345/(a)(1)	Generator Deliverab	le Sharing Requireme	ents /						
A Requirement to Related Deliverable Requirem	nent				Show	v Requirement(s					
Requirement:	//b/Deliverabl	e Dependent on G	enerator12345//0								
Requirement Workflow to Related Deliverabl	e Requirement				Show Requiren	nent Workflow(s					
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					Show Re	auirement.lob(s					
Requirement Workflow to Requirement					0.1011110	dan ennenn een (e					

<u>Circumstance 2</u>: 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.

" Complete Task 📑 Save 📑 N	lake Available   Move to Waiting 🍕 Re	This is the Dependent.
Is this Deliverable shared with anothe Requirement?*:	yes (This relies on another)	• •
Instruc	tion: If "yes, this relies on another", add associate	ed related deliverable requirement below.
Workflow Information		
Comment: Associations		Associate the
Case to Requirement Workflow		Snow Associated Cas
Associated Case:	2014-11-27/How-to examples	
A Requirement Workflow to Requirement		Show Associated Requirement
Associated Requirement:	////0	
A Requirement Workflow to Related Deliv	erable Requirement	Show Related Deliverable Requirement
Related Deliverable Requirement:	-9 /(a)/Updates of Publicly Available Information Rega	rding Responsibilities Matters (Feb 2012)//0 🥜 Search
Document to Requirement Workflow (S)	upporting Requirement)	Show Documer

- 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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4	Dependent Deliv - Generator already existing - View	Dependent Deliv - Generator already existing - View Deliverable Definitions (Edit Mode)							
k	🗹 Complete Task 🛛 🔒 Save 📑 Make A	vailable	Move to	Waiting 🍕 Reass	ign Tasl	This is the	he Dependent		
E	Requirement Process				_		ne Dependent.		
	Property Values								
F	Requirement Information								
L	Contract Part:	Other							
L	Contract Section:	n/a							
L	Contract Subsection (eg. H.13 or I.021):				Dep	pendent's	own Reqs		
••••	Source Requirement Type:	Federal	Regulation		info	o (non-De	livDef)		
L	SRD Citation:								
L	SRD Title:	Depende	ent Deliv - Gene	rator already existing 92	4258				
L	SRD Section/Paragraph Citation:								
	SRD Section Title:								
	Brief Summary of Requirement:							۵	
l	Link to SRD and/or other info (hyperlink):	Q,	URL:			Name:		۵	
	Link to SRD and/or other info (attachment):	Q,					🔺 Upload a file	۵	
L	Contract Effective Date:	2014-11	-30						
	Change Activity:	pending							
	Status:	active							
	Primary Owner:								
	Function (Primary):	Legal							
	Additional Owner:								
	Additional Owner Function:								
	RMC Representative (Case):	Young,L	ydia J						
	Hierarchy Level:	0							
	Policy Area:								
	Does this contain embedded req?:	no							
	Instruction:	If embed	ided, cite embed	dded (association)					
	Is this a main req or a component of main?:	compone	ent						
	Mod Info & Other Comments:								
	Is this a deliverable?:	Yes							
	Instruction:	If yes, c	omplete delivera	able information					
	Is there a pending Contract modification?:	No							
	Notification date of pending status:		CONTIN	IUED NEXT PAG	GE				

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

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Deliverable Definition Group	NUED FROM PRI	ECEDING				
Due Date (first instance):	2012-02-01			Th	s is the [	Dependent.
Due Date (last instance):	2018-06-01					
Frequency:	semi-annual					
Owner (if different from Primary Owner):	Hirahara, Jim	-				
Owner Function (if different from Owner Function):	Legal This is the		Genera	Generator's		
Tracked by BSO?:	yes		Denvbern	norma		
LBNL ID number:	924568					
Customer Organization:	BSO/DOE - mandatory	C31				
Customer (LDAP) Point of Contact Name:	Robles,Maria C					
Customer (non-LDAP) Information:						
Last review date of Deliverable's definition:	2014-11-27					
Deliverable type:	On-line submission					
Deliverable title(s) of record:						
Additional LDAP name for Deliverable Alerts:	Gursahani,Anita P					
Review Deliverable Definition Info. Is it ok?*:	<ul> <li>No</li> <li>Yes</li> <li>If something isn't right "no" will return the wf to the Choose Related step.</li> <li>Yes</li> </ul>					turn the
▲ Workflow Information		103 30		urc.		
Comment:						۵
Associations						
Case to Requirement Workflow					Show	v Associated Case(s)
Associated Case:	2014-11-27/How-to exa	amples				
Requirement Workflow to Requirement					Show Asso	ciated Requirement(s)
Associated Requirement:	////0					
Requirement Workflow to Related Deliverable	Requirement			Show	Related Deliv	erable Requirement(s)
Related Deliverable Requirement:	I.142/FAR 52.209-9 /(a) 2012)//0	/Updates of Pub	licly Available Infor	mation Rega	rding Respons	ibilities Matters (Feb
Document to Requirement Workflow (Support	ting Requirement)					Show Document(s)
Document:	Q,					💣 Search 🕲
Resources						

- 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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update Generator 924568 - Choose Related Deliverable (Edit Mode) X								
🗹 Complete Task 🔒 Save 💐 Make Av	vailable 🔮 Move to Waitir	ng 📢 Reassig This is	the existi	ng Generator.				
	P.	-						
Is this Deliverable shared with another Requirement?*:	yes (This is the generator)	Modify to this choice.						
Instruction:	If "yes, this relies on another",	add associated related deliverab	le requirement l	below.				
Workflow Information	Workflow Information							
Comment:				۵				
Associations								
Case to Requirement Workflow				Show Associated Case(s)				
Associated Case:	2014-11-27/How-to examples							
Requirement Workflow to Requirement			Show	Associated Requirement(s)				
Associated Requirement: L142/FAR 52.209-9 /(a)/Updates of Publicly Available Information Regarding Responsibilities Matters (Feb 2012)//0								
Requirement Workflow to Related Deliverable R	Requirement		Show Related	Deliverable Requirement(s)				
Related Deliverable Requirement:	Q	Do NOT add Associ	ation!!!	💣 Search 😃				
Document to Requirement Workflow (Supporting Requirement)     Show Document(s)								

- iv. Enter Deliverable Details step:
  - 1. Set the date range for the DelivDocs to be generated:
    - If there are DelivDocs already closed, <u>MUST</u> 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.

Browser Modelling Reporting	Deliverables			Search Open and Closed #924568
Open Deliverable Document Workflows	Q Search Resu	ut X		
Label	Version	Instruction	Due Date 🔷	
2013-08-01/I.142/FAR 52.209-9 /(a)/Updates of Pi	WORK 0.2		2013-08-01 🗲	Reset "first due date" to this.
2014-02-01/I.142/FAR 52.209-9 /(a)/Updates of Pr	WORK 0.2		2014-02-01	
2014-08-01/I.142/FAR 52.209-9 /(a)/Updates of Pr	WORK 0.2		2014-08-01	
2015-02-01/I.142/FAR 52.209-9 /(a)/Updates of Pr	WORK 0.2		2015-02-01	
2015-08-01/I.142/FAR 52.209-9 /(a)/Updates of Pr	WORK 0.2		2015-08-01	Browser Modelling Reporting Deliverables Do not duplicate!!
2016-02-01/I.142/FAR 52.209-9 /(a)/Updates of Pr	WORK 0.2		2016-02-01	
2016-08-01/I.142/FAR 52.209-9 /(a)/Updates of Pi	WORK 0.2		2016-08-01	Closed Deliverable Document Workflows XV C Search Result X
2017-02-01/I.142/FAR 52.209-9 /(a)/Updates of Pr	WORK 0.2		2017-02-01	Label Version Instruction Due Date Actu
2017-08-01/I.142/FAR 52.209-9 /(a)/Updates of Pr	WORK 0.2		2017-08-01	2012-02-01/L142/FAR 52:209-9 /(a)/Updates of Pi RELEASED 1.0 2012-02-01 2014
2018-02-01/I.142/FAR 52.209-9 /(a)/Updates of Pr	WORK 0.2		2018-02-01	2012-08-01/l.142/FAR 52.209-9 /(a)/Updates of Pi RELEASED 1.0 2012-08-01 2014
٠ III				2013-02-01/l.142/FAR 52.209-9 /(a)/Updates of Pi RELEASED 1.0 2013-02-01 2014
X Export Rows 1-10 of 10 shown				Export Rows 1-3 of 3 shown

- 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.

- 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.)

4	pdate Generator 924568 - Enter Deliverable Definitions	(Edit Mode) X					5
	Complete Task 📕 Save 💄 Make Availa	able 🚯 Move to Waiting 🔥 Reassign 1	Ta	This i	is the Ge	nerator.	
	Deliverable Definition Group			-			
	Due Date (first instance)*:	Aug 🔻 1 👻 2013 👻 🎆 🗲		Reset "f	irst due	date" to th	is.
	Due Date (last instance)*:	Jun 👻 1 👻 2018 👻					1
	Frequency*:	semi-annual 🔹	v				1
	Owner (if different from Primary Owner)*:	Hirahara,Jim		×			1
	Owner Function (if different from Owner Function)*:	z - Other	•	×			]
	Tracked by BSO?:	○ no					
	LBNL ID number*:	924568				×	
	Customer Organization*:	BSO/DOE - mandatory C31	•	×			]
	Customer (LDAP) Point of Contact Name*:	Robles,Maria C		×+			]
	Customer (non-LDAP) Information:					۵	
	Last review date of Deliverable's definition:	Nov 🔻 30 💌 2014 👻 🎫					
	Deliverable type*:	On-line submission	Ŧ	×			]
	Deliverable title(s) of record:					۵	
	Additional LDAP name for Deliverable Alerts*:	Gursahani,Anita P		×			1
	Additional LDAP name for Deliverable Alerts*:	Hatayama, Howard K		×+	I added	this for illu	istration
	Review Deliverable Definition Info. Is it ok?*:	No			instance	es).	
	▲ Workflow Information						
	Comment:					۵	
-4	Associations				1		
	Case to Requirement Workflow				Show	Associated Case(s)	
	Associated Case: 20	114-11-27/How-to examples					
	Requirement Workflow to Requirement     Show Associated Requirement(s)						
	Associated Requirement: L142/FAR 52.209-9 /(a)/Updates of Publicly Available Information Regarding Responsibilities Matters (Feb 2012)//0						
	Document to Requirement Workflow (Supporting R	equirement)				Show Document(s)	
	Document:	2				e Search	
4	Resources						

#### LBNL # 04.04.001.403-AD10

30 November 2014

The official or current version is located in the repository for Institutional Documents, accessible via OCA's website. Printed or electronically transmitted copies are not official. Users are responsible for working with the latest approved revision.

- d. Verify that the association between the Generator and the Dependent has been established.
  - 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:

i.

- 1. Search by LBNL ID number. Open any of the Generator DelivDocs
  - Make sure the Dependent Req appears as an association



(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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142/FAR 52.209 🗙 🗸 2012-08-01/l.142/ 🕽	× 2014-08-0	01/1.142/ 🗙	.142/FAR 52.209 🗙 🗸 2012-08-01/l.142/ :	× 2014-08-0	1/l.142/ 🗙	
🖉 Edit 🔞 Deprecate 📋 Show Versio	ons 📒 Sho	w Job Details	3 Delete 📑 Show Versions 🗮 Show	w Job Details		
Actual Delivery Date:	2014-11-30		Due Date:	2014-08-01	Regenerate	
Deliverable Doc Status:	Current	Closed	Frequency:	semi-annual	- Open	
▲ Deliverable Document Group			Owner:	Hirahara,Jim		
Due Date:	2012-08-01		Owner Function:	z - Other		
Frequency:			RMC Representative (Case):	Young,Lydia J		
Owner	sem-annuar		Tracked by BSO?:	yes	yes	
	Hirahara,Jim		LBNL ID number:	924568		
Owner Function:	z - Other		Customer Organization:	BSO/DOE - mandatory C31		
RMC Representative (Case):	Young,Lydia J		Customer (LDAP) Point of Contact Name:	Robles,Maria C		
Tracked by BSO?:	yes		Last review date of Deliverable's	2014 41 20		
LBNL ID number:	924568		definition:	2014-11-30		
Customer Organization:	BSO/DOE - mandatory C31		Deliverable type:	On-line submission		
ustomer (LDAP) Point of Contact Name: Robles, Maria C		Is this Deliverable shared with another Requirement?:	e shared with another yes (This is the generator)			
Last review date of Deliverable's 2014-11-27		Additional LDAP name for Deliverable Alerts:	dditional LDAP name for Deliverable Gursahani,Anita P			
Deliverable type:	On-line submission		Additional LDAP name for Deliverable	Hatayama, Howard K		
Is this Deliverable shared with another Requirement?:	no		Alerts:	Added during update		
dditional LDAP name for Deliverable Ierts: Gursahani,Anita P			of Deliv	Def		
A Requirement Data	Closed ite	m NOT				
Contract Sub-contine (cm 1142 1024).	impacted	by				
	updated i	nfo				

<u>Technical/Historical Comment:</u> 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