

AD17 – Backdoor Editing

I. Purpose:

This document explains how to do “backdoor editing” of the RMS.

II. Who can do this procedure:

Persons who are RMS administrators.

III. WARNINGS!

1. *This capability is not intended to replace the workflows.* There are NO records of workflows using this process. The main objective of the RMS is to capture a traceable history of record changes, including “why” as well as “what”. Backdoor editing only captures the “what”.
 - For example, if a requirement is formally modified by Contract Mod, its metadata could be updated via the backdoor editing, but there would be no requirement workflow captured that will reflect the formal Mod.
2. *This capability will not generate deliverable instances!!!*
 - If the deliverable definition (the parent requirement) is changed using this backdoor, it will indeed be updated as a requirement. But the process will NOT cause the RMS to generate new deliverable instances. So the end result will be a mismatch between the deliverable definition (requirement) and the instances.
3. *The procedure does not work on in-process workflows.*
4. *Use this process as seldom as possible.* Do not use it as a crutch for sloppiness.
 - a. Always maintain as high accuracy as possible when doing standard workflows (cases, requirements, docs, RODS). Strive to “get it right the first time...”.
 - Always check entries before hitting “complete task”
 - Always check associations before hitting “complete task”
 - Remember to enter docs or reqs children first. Then when entering parent data, you can associate the children.
 - b. If an association or a field entry error is made, the preferred approach is to open another workflow.
5. This procedure is best on completed (released) records or completed (released workflows for the following situations:
 - Editorial errors (typos) that do not need to be historically retained.
 - Updating only “Next Review” dates and doc revision. [If any other information needs to be updated, go through the full doc wf.]
 - Fixing records by other users (usually RMC members). Most often this will be adding associations.
6. It is very easy to mess up the integrity of the RMS database. Always exercise caution when using this process, and double check your work.

IV. Pre-requisites

- User must know the RM process very well so as to judge whether the desired change is low impact (no history record needed).
- User must be well practiced in the standard workflow process.
- User must know which fields establish parent associations and which ones establish children associations (see How-to #DC07 – Setting up Associations).

V. Procedure:

1. In Browser tab, search for the concept of interest (requirement, document, case, ROD, etc.).
 - In the Example, note the Version = “Released 1.0”
2. Open detailed window.
 - In the Example, note that only fields with values are displayed. For example, there are 3 associations.
3. Select “Edit”.

The screenshot shows the Ovitás ATON Workbench interface. The 'Browser' tab is active, displaying a search result for 'Personal Protective Equipment' with a version of 'RELEASED 1.0'. A red box highlights the search result table. Below the table, the 'Edit' button is highlighted with a red box and an arrow pointing to it. The detailed view of the document is shown, with a red box highlighting the 'Version Information' section, which includes fields like 'Document Number', 'Document Title', 'Revision Number', and 'Document type'. Red arrows point from callout boxes to these elements.

1. Browse and select to open detailed window.
Note that Version is “Released 1.0”

2. Note that only fields with values are displayed.

3. Hit “Edit” when ready.

Label	Version	Instruction	Document Number	Document Title	Revision Number
Program/Personal Protective I	RELEASED 1.0		07.07.024.001	Personal Protective Equipment	1
Program/LBNL Operations an	RELEASED 1.0			LBNL Operations and Quality Management Progr	

Version Information

Property Values

Document Information

Document Number (xx.yy.zzz.aaa): 07.07.024.001

Document Title: Personal Protective Equipment

Revision Number: 1

Pre-2012 Document Number (if any): PUB-3000, Ch. 19

Document type: Program

Document level (hierarchical relationship; SRD = 0): 2

Policy Area: Industrial Hygiene and Safety

Rev. 0 Publication Date: 2011-03-02

Latest Publication Date: 2012-01-02

Effective Date: 2011-03-02

RMC Representative (Doc) approval: Approved

Associations

Document to Document (Related Documents)

Related Document: Work Process/A - General PPE Requirements/PUB-3000, Ch. 19/07.07.024.002/3

Related Document: Work Process/B - Procurement of PPE /PUB-3000, Ch. 19/07.07.024.003/3

Document to Document (Related Documents)

Document: Policy/Personal Protective Equipment (PPE) - Selection, Use, and Maintenance/07.07.024.000/1

4. Selecting “Edit” results in the following display –

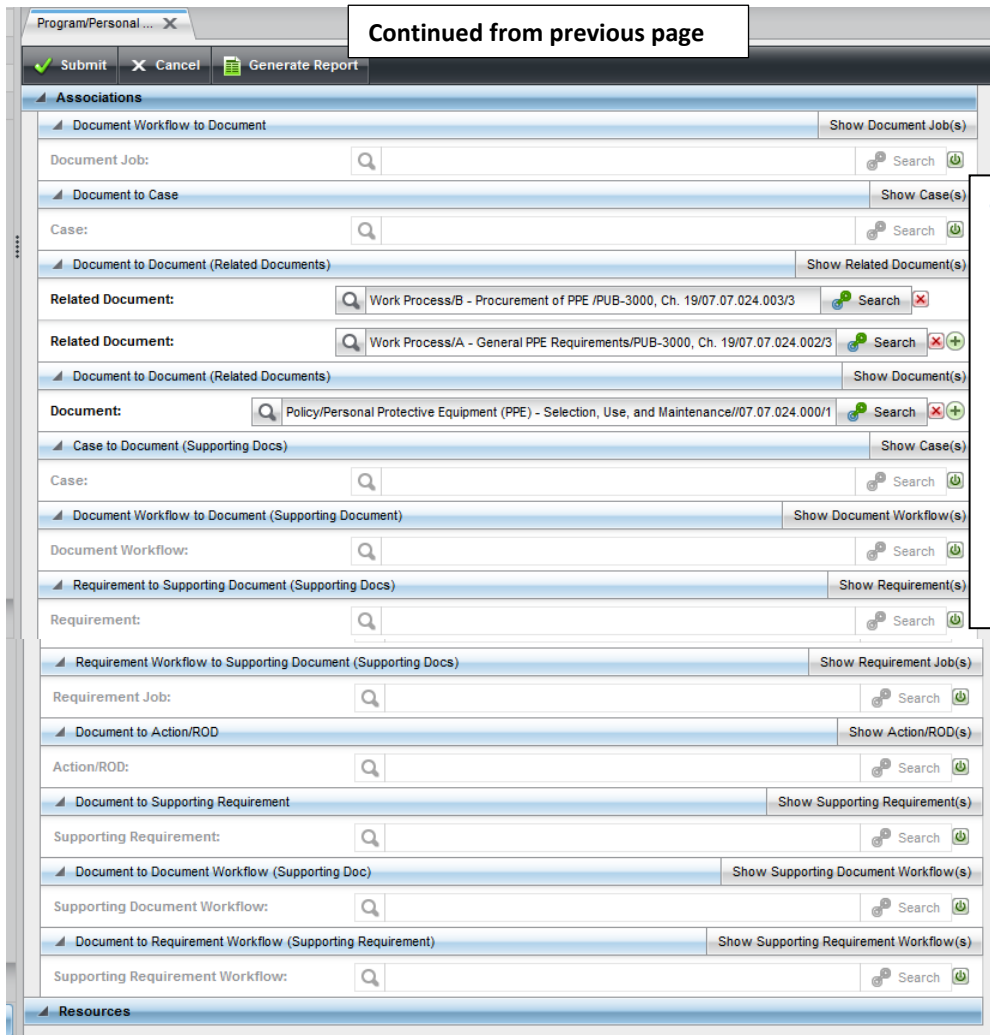
- **ALL** possible fields are displayed and **ALL** are editable.
 - Note in particular the long list of possible associations. If you want to add associations (parent or child relative to this particular concept), you **MUST** know what label goes with what level (parent or child).
 - For example, entering data in Document to Supporting Document/Document will set up a parent document to this one, while entering data in Document to Supporting Document/Related Document will set up a child document to this one.
 - Unfortunately, the Ovitás designers were not self-consistent. Sometimes they applied “supporting” and sometimes “related” to indicate child.
 - Recommend **NOT** associating workflows/jobs, because then you must also associate the concept version that was created/amended under that workflow. [If you have no idea what this statement means, then just remember: don’t make edits that associate workflows/jobs.]
 - The list of associations for a requirement being edited is far longer and more complicated than the example here (document).

5. Edit what you want. In the example, we will change dates.

The screenshot shows the Ovitás ATON Workbench interface. At the top, there are tabs for Tasks, Browser, Modelling, Reporting, and Deliverables. Below the tabs is a search bar and a table of document entries. The table has columns for Label, Version, Instruction, Document Number, Document Title, Revision Number, Lab PUB Number, Pre-2012 Document, Document type, Document level, and Policy Area. One row is highlighted, showing details for 'Program/Personal Protective I'.

Below the table, there is a 'Property Values' section with various fields for editing document information. A callout box with a red arrow points to this section, containing the text: "4. What's nice is you can edit what you like. What's dangerous is that you can edit everything, if you like." The fields in the 'Property Values' section include: Document Number (xx.yy.zzz.aaa)*, Document Title*, Revision Number*, Lab PUB Number (if applicable), Pre-2012 Document Number (if any)*, Document type*, Document level (hierarchical relationship; SRD = 0)*, Policy Area*, Rev. 0 Publication Date, Latest Publication Date*, Effective Date*, Next Review Date*, and Primary Document Owner*.

At the bottom right of the screenshot, there is a box that says "Continued next page".

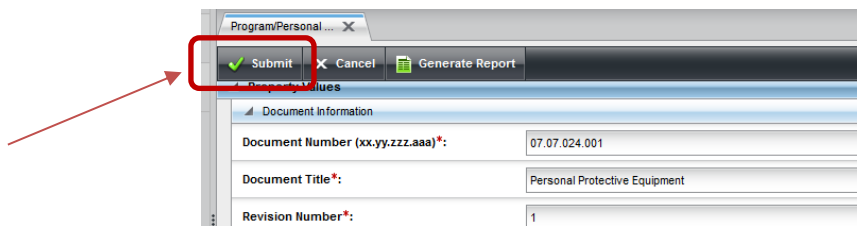


4 (continued). ALL the possible associations are listed, too.

Notes:

- Be sure to know the difference between what's a child and what's a parent.
- Strongly recommend NOT associating workflows/jobs (see text explanation).
- A requirement that is being edited will have a longer list of associations.

6. When editing is complete, hit Submit button.



- The system returns a display with locked fields, including the changes made during editing. Note that the list indicates that the concept Version is in a “Work” state.

Label	Version	Instruction	Document Number	Document Title	Revision Number	Lab PUB Number (i)	Pre-2012 C
Program/Personal Protective I	WORK 1.1		07.07.024.001	Personal Protective	2		PUB-3000
Program/LBNL Operations an	RELEASED 1.0			LBNL Operations a		PUB-3111	

Concept Smart label (en_US): Program/Personal Protective Equipment /PUB-3000, Ch. 19/07.07.024.001/2

Concept Version Set: 20120625_doc_PPEprog

Concept Type: Document

Version Information

Property Values

Document Information

Document Number (xx.yy.zzz.aaa): 07.07.024.001

Document Title: Personal Protective Equipment

Revision Number: 2

Pre-2012 Document Number (if any): PUB-3000, Ch. 19

Document type: Program

Document level (hierarchical relationship; SRD = 0): 2

Policy Area: Industrial Hygiene and Safety

Rev. 0 Publication Date: 2011-03-02

Latest Publication Date: 2015-01-31

Effective Date: 2011-03-02

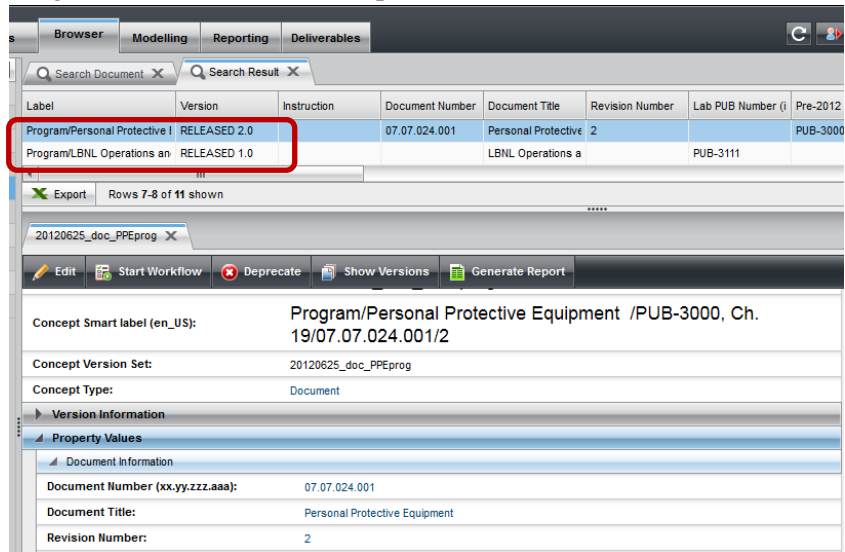
Next Review Date: 2018-01-31

Primary Document Owner *: Wisherop,Michael Paul

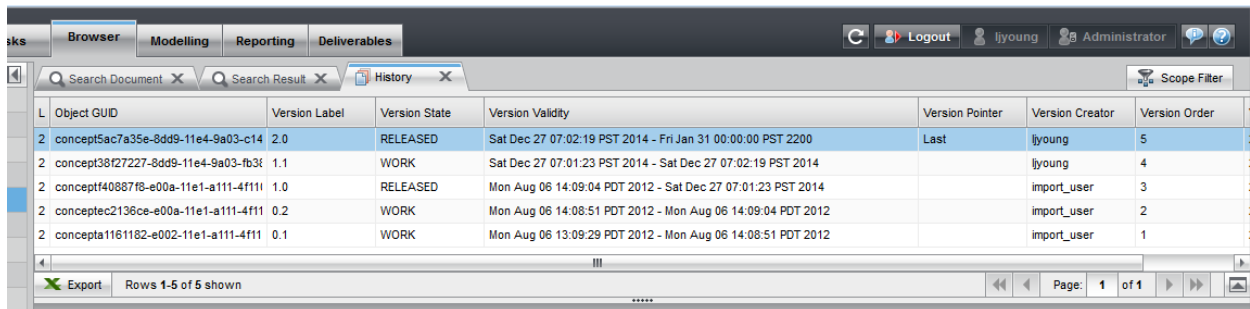
- Review the changes.
 - If the changes are not ok, then select “Edit” and fix whatever needs fixing.
 - If the changes are correct, then select “Release”. ***This is a VERY IMPORTANT step!!!!*** All records must be in the “Released” state.

8. Review changes. When ready, select “Release”.

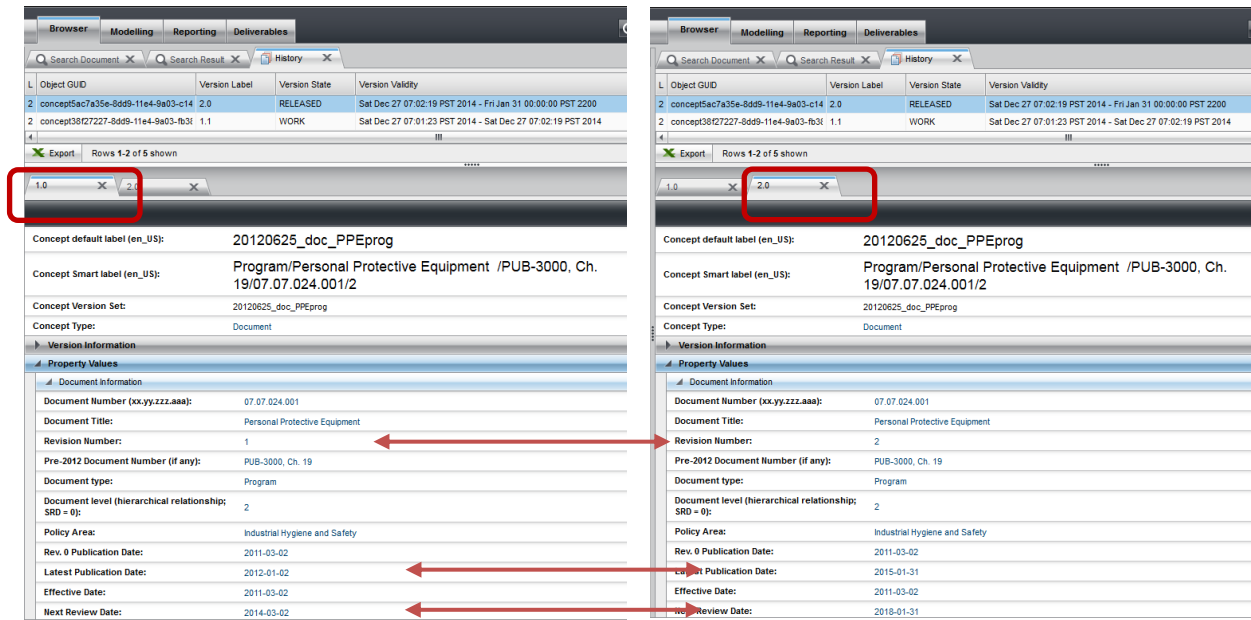
9. The following screen results. Note the update of the Version.



10. There is no record of the changes via Case, because a Case was not created. The only record that a change was made is through the RMS system versions. To verify that the change was captured, select “Show Versions” (above screenshot) to obtain the history list of the concept. The history list provides the dates of change and who did it, etc.



11. Open details for the “released” version states. In the above example, there are 2: 1.0 and 2.0. Compare the detailed information.



12. Recommendation: Perform QA of RMS data (requirements and documents) periodically. Search all. Get the list, and sort the list by Version. If a concept (requirement, document) is found to be in the “work” state, then check first that it is not being amended by an in-process workflow/job. If it was an edited item and was inadvertently left in the “work” state, then open the item and release it.

VI. Revision History

Revision	Date	Who	Description
0	12-26-2014	L.J. Young	Initial