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 <u>not intended</u> 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 <u>not</u> 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 <u>NOT</u> 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 <u>not</u> work on <u>in-process</u> 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 <u>preferred</u> 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.

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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".



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26 December 2014

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- 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 Ovitas designers were not self-consistent. Sometimes they applied "supporting" and sometimes "related" to indicate child.
 - Recommend NOT associating <u>workflows/jobs</u>, 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.

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| - Action / ROD Workflow | Program/Personal Protective I | DELEASED 1.0 | and detion | 07.07.024.001 | Personal Protective | 4 | cab r ob Hamber (| BUB 3000 Ch 19 | Brogram | 2 | Industrial litera | | |
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| | Program/Personal 🗙 | Cor | ntinued from previous page | | | | | |
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| | Associations | | | | | | | |
| | Document Workflow to Docum | nent | | | Show Document Job(s) | | | |
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| : | Document to Document (Relate | ed Documents) | | Sh | ow Related Document(s) | | | |
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| | Resources | | | | | | | |

6. When editing is complete, hit Submit button.



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7. 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.

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| Pre-2012 Document Number (if any): | PUB-3000, Ch. | 19 | | | | | |
| Document type: | Program | | / | | | | |
| Document level (hierarchical relationship; SRD = 0): | 2 | | | | | | |
| Policy Area: | Industrial Hygier | ne 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, Micha | el Paul | | | | | |

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

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

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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.

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| 2 | concept5ac7a35e-8dd9-11e4 | 9a03-c14 | 2.0 | RELEASED | Sat Dec 27 07:02:19 PST 2014 - Fri Jan 31 00:00:00 PST 2200 | Last | ljyoung | 5 | | |
| 2 | concept38f27227-8dd9-11e4- | 9a03-fb38 | 1.1 | WORK | Sat Dec 27 07:01:23 PST 2014 - Sat Dec 27 07:02:19 PST 2014 | | ljyoung | 4 | | |
| 2 | conceptf40887f8-e00a-11e1- | 111-4f11 | 1.0 | RELEASED | Mon Aug 06 14:09:04 PDT 2012 - Sat Dec 27 07:01:23 PST 2014 | | import_user | 3 | | |
| 2 | conceptec2136ce-e00a-11e1 | a111-4f11 | 0.2 | WORK | Mon Aug 06 14:08:51 PDT 2012 - Mon Aug 06 14:09:04 PDT 2012 | | import_user | 2 | | |
| 2 | concepta1161182-e002-11e1- | a111-4f11 | 0.1 | WORK | Mon Aug 06 13:09:29 PDT 2012 - Mon Aug 06 14:08:51 PDT 2012 | | import_user | 1 | | |
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11. Open details for the "released" version states. In the above example, there are 2: 1.0 and 2.0. Compare the detailed information.

| Browser Modelling Reporting | Deliverables | | ¢ | Browser Modelling Rep | orting Deliv | erables | C | | |
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| Concept Smart label (en_US): | Program/Persor 19/07.07.024.00 | al Protective Equipment /PUB-3000, Ch. 1/2 | | Concept Smart label (en_US): | t Smart label (en_US): Program/Personal Protective Equipment /PL 19/07.07.024.001/2 | | | | |
| Concept Version Set: | 20120625_doc_PPEprog | | | Concept Version Set: | 20120 | | | | |
| Concept Type: | Concept Type: Document | | | | Concept Type: Document | | | | |
| Version Information | | | | Version Information | | | | | |
| Property Values | | | _ | A Property Values | | | | | |
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| Document Number (xx.yy.zzz.aaa): | 07.07.024.001 | | | Document Number (xx.yy.zzz.aaa): | 07. | 07.024.001 | | | |
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| Revision Number: | 1 | • | _ | Revision Number: | 2 | | | | |
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| Document type: | Program | | | Document type: Program | | | | | |
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| Policy Area: | Industrial Hygiene and Safety | | _ | Policy Area: | | ustrial Hygiene and Saf | lety | | |
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| Latest Publication Date: | 2012-01-02 | | _ | canat Publication Date: | 201 | 15-01-31 | | | |
| Effective Date: | 2011-03-02 | | _ | Effective Date: | 20 | 11-03-02 | | | |
| Next Review Date: | 2014-03-02 | | | Review Date: | 201 | 18-01-31 | | | |

12. <u>Recommendation</u>: 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 |
| | | | |

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