

DE02 Screen Orientation (Deliverable Owners)

A. Purpose:

This document describes RMS screen and buttons that are important for Deliverable Owners

B. Who this document is for:

Persons with RMS permissions to close deliverable instances in RMS.

C. Pre-Requisites

Users of this document should know:

- Basic definitions to use and search the RMS (How-to Procedure #V01, V02)
- How to search the RMS (How-to Procedure V03A)

DE02 – Orientation: Deliverables Screen Layout

- Deliverable Owners have two Main Activities Tabs: Reporting and Deliverables. "Reporting" is identical to the one described in Read-Only How-To instructions (V02). For either tab, the screen is divided into three areas of increasing levels of detail: from Inbox to List Panel and finally to Detail Panel (clockwise pattern). Most actions will move from Inbox to List to Detail.
- It is possible to have several tabs open in Detail Panel.

Main Activities Tabs

List Panel

Activity	Job ID	Job Name	Attach Deliverable	Brief Summary of Req	Link to Deliverable	Contract Part	Does this deliverab	Workflow Status	LBNL/BSO ID numb	Frequency	Instruction	Due D
Submit Deliverable	368:WPDS	import_2012-10-21		The Contractor sh...		Contract Section	no	Active	924904	semi-annual		2012-
Submit Deliverable	369:WPDS	import_2013-04-21		The Contractor sh...		Contract Section	no	Active	924904	semi-annual		2013...
Submit Deliverable	357:WPDS	import_2010-09-30		The HR Strategic ...		Contract Appendix	no	Active	924902	annual		2010-09-30
Submit Deliverable	358:WPDS	import_2011-09-30		The HR Strategic ...		Contract Appendix	no	Active	924902	annual		2011-09-30
Submit Deliverable	359:WPDS	import_2012-09-30		The HR Strategic ...		Contract Appendix	no	Active	924902	annual		2012-09-30
Submit Deliverable	360:WPDS	import_2013-09-30		The HR Strategic ...		Contract Appendix	no	Active	924902	annual		2013-09-30

Detail Panel

“Inbox” or Available Concepts Tree

Action Button

- List Panel displays concept property info horizontally for the list of concepts resulting from a search.
- Detailed Panel displays property and association info for a single selected concept.

DE02 – Orientation: Deliverables Screen Layout

Action Buttons (Deliverable Owners)

(See How-to V02 for Reports buttons)

Exports tabularized property data for each concept listed. Output form is Excel table. See "How-to" Topic #V06, "Exporting data"

Activity	Job ID	Job Name	Attach Deliverable	Brief Summary of Reqr	Link to Deliverable	Contract Part	Does this deliverab	Workflow Status	LBNL/BSO ID numb	Frequency	Instruction	Due Date	Source Requirem
Submit Deliverable	368:WPDS	import_2012-10-21		The Contractor sh...		Contract Section	no	Active	924904	semi-annual		2012-10-21	Contract Section
Submit Deliverable	369:WPDS	import_2013-04-21		The Contractor sh...		Contract Section	no	Active	924904	semi-annual		2013-04-21	Contract Section
Submit Deliverable	357:WPDS	import_2010-09-30		The HR Strategic ...		Contract Appendix	no	Active	924902	annual		2010-09-30	Contract Append
Submit Deliverable	358:WPDS	import_2011-09-30		The HR Strategic ...		Contract Appendix	no	Active	924902	annual		2011-09-30	Contract Append
Submit Deliverable	359:WPDS	import_2012-09-30		The HR Strategic ...		Contract Appendix	no	Active	924902	annual		2012-09-30	Contract Append
Submit Deliverable	360:WPDS	import_2013-09-30		The HR Strategic ...		Contract Appendix	no	Active	924902	annual		2013-09-30	Contract Append

Export Rows 7-12 of 42 shown

import_2011-09-30 - Submit Deliverable Document

- Complete Task
- Save
- Make Available
- Move to Waiting
- Reassign Task
- Show Job Details

These Action Buttons appear at the top of a Deliverable Document workflow.

- "Complete Task" - Saves and closes task.
- "Save" - Saves info, task remains open for additional changes.
- "Make Available" - Shares with others Deliverable Owners
- "Move to Waiting" - not useful for a 1-step process.
- "Re-assign Task" - Allows user to send to another specific person (who has same or higher access level) for completion.
- "Show Job Details" - disabled for Deliv. owners

Adjusting Screen Views

SORT: Hover over right side of column label to obtain dropdown list of sort options.

Label	Version	Instruction	Contract Part
H.14/H.14(a)(4)-3/STANDARDS OF CONTRACTOR PERFORMANCE EVALU...	RELEASED 2.0		
H.27/H.27//IMPLEMENTATION PLAN FOR CONTRACTOR-FUNDED INSTITUTIO	RELEASED 2.0		
H.027/H.27//Contractor-funded Institutional Supporting R&D//0	RELEASED 1.0		
H.30/H.30//Contractor Assurance System//0	RELEASED 2.0		
H.999/H.999//Special Provisions Relating to Work Funded Under ARRA of 20	RELEASED 3.0		
/O 2110.1A, Ch. 2 //Pricing of Departmental Materials and Services//0	RELEASED 2.0		

HIDE/SHOW COLUMNS: Select "Columns" - Check = Show; Uncheck = Hide

- Label
- Version
- Instruction
- Contract Part
- Contract Section
- Contract Subsection (eg. H.13 or I.21)
- Source Requirement Type
- SRD Citation
- SRD Title
- SRD Section/Paragraph Citation
- SRD Section Title
- Brief Summary of Requirement
- Primary Owner
- Function (Primary)
- Does this contain embedded req?
- Is this a main req or a component of main?
- Is this a Contract deliverable?
- Is there a pending Contract modification?
- Frequency
- Owner (if different from Primary Owner)
- Owner Function (if different from Owner Function)
- BSODOE Point of Contact Name

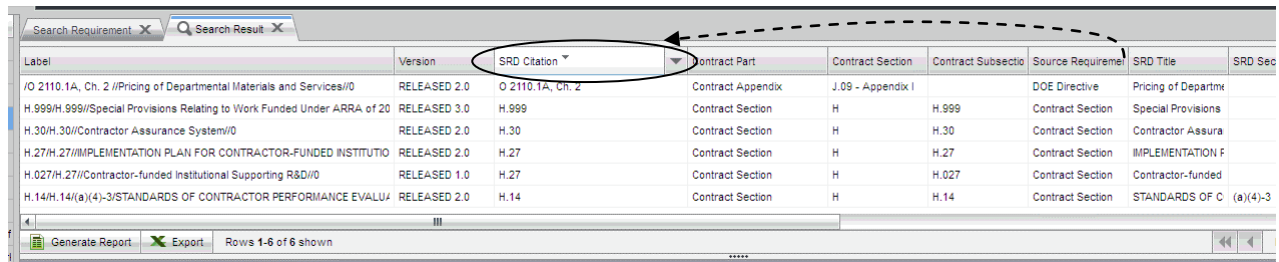
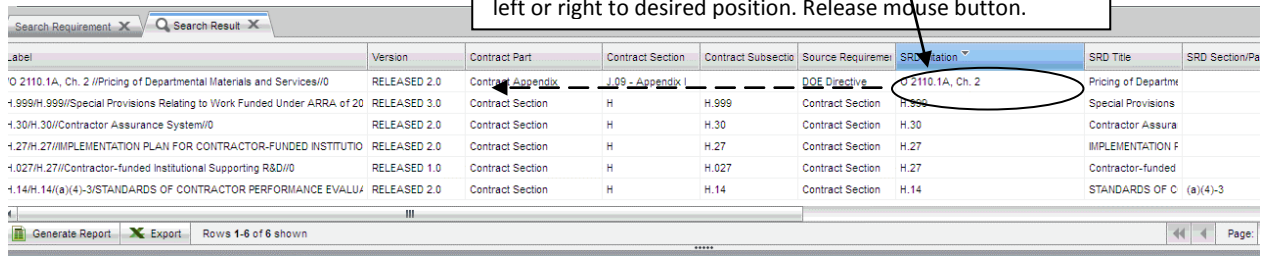
ADJUST COLUMN WIDTH: Hover over column right boundary, click, hold and drag to desired width..

ADJUST COLUMN WIDTH: Hover over column right boundary, click, hold and drag to desired width..

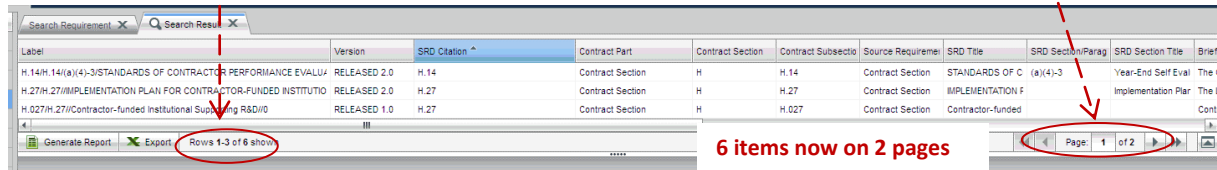
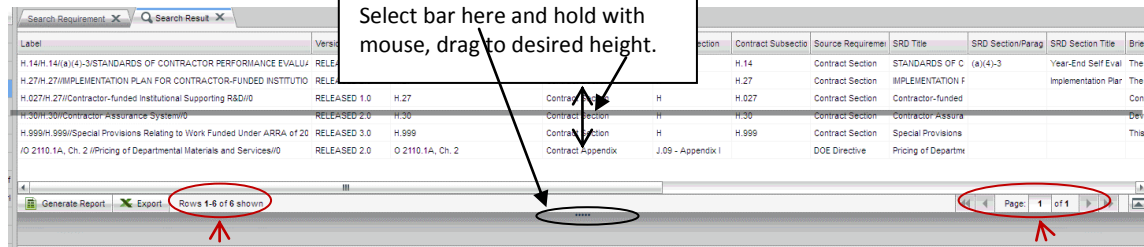
Label	Version	SRD Citation ^	Contract Part	Contract Section	Contract Subsecto	Source Requireme	SRD Title	SRD Section/Parag	SRD Section Title	Brief
H.14/H.14(a)(4)-3/STANDARDS OF CONTRACTOR PERFORMANCE EVALU...	RELEASED 2.0	H.14	Contract Section	H	H.14	Contract Section	STANDARDS OF C	(a)(4)-3	Year-End Self Eval	The
H.27/H.27//IMPLEMENTATION PLAN FOR CONTRACTOR-FUNDED INSTITUTIO	RELEASED 2.0	H.27	Contract Section	H	H.27	Contract Section	IMPLEMENTATION F		Implementation Plan	The
H.027/H.27//Contractor-funded Institutional Supporting R&D//0	RELEASED 1.0	H.27	Contract Section	H	H.027	Contract Section	Contractor-funded			Cont

Adjusting Screen Views(2)

CHANGE COLUMN ORDER: Left click, hold and move mouse left or right to desired position. Release mouse button.



CHANGE WINDOW HEIGHT: Select bar here and hold with mouse, drag to desired height.



G. Revision History

Revision	Date	Who	Description
0	12-3-2012	L.J.Young	Initial
0.1	12-7-2014	L.J.Young	Formalize, format