

## DE03 Select and Submit a Deliverable Doc with Scheduled Due Date

### A. Purpose:

This document provides definitions important for Deliverable Owners

### B. Who this document is for:

Persons with RMS permissions to close deliverable instances in RMS.

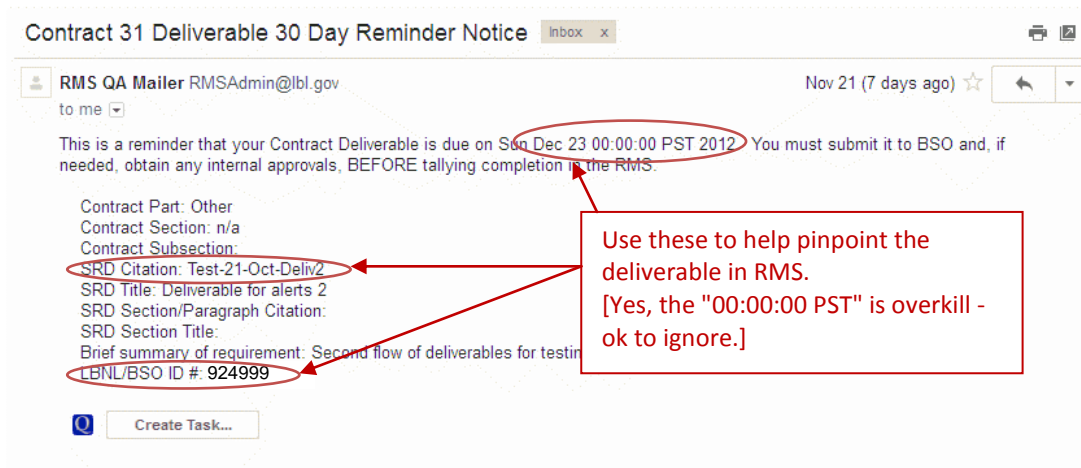
### C. Prerequisites:

Users of this procedure should know also:

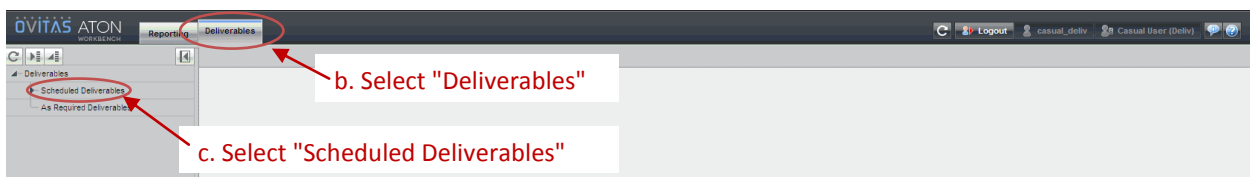
- Basic RMS definitions (How-to V01, V02)
- How to search the RMS (V03, V03A)
- Definitions specific to deliverables (DE01)
- Screen layout specific to deliverables (DE02)
- Closing a Submitted Deliverable in RMS (DE05 – video)

### D. Procedure

1. Selecting the correct deliverable instance for closure.
  - a. Look at the reminder/alert that you receive.
  - b. Find the SRD citation, the due date and the LBNL ID#.



2. Close a submitted deliverable instance
  - a. Log into database with LDAP info.
  - b. Go to "Deliverables Tab".
  - c. Select "Scheduled Deliverables"



## DE03 Selecting a Deliverable Instance with a Scheduled Due Date

- d. A list of the Scheduled Deliverables that are in your Inbox results.
- e. Using the info from the Alert, identify the Deliverable of interest.
  - i. Look for columns "LBNL/BSO ID Number" and "Due Date". You may have to shuffle them to appear at towards the left of the table.
  - ii. Step through the list to find the number and due date. Note you can re-order any column (ascending, descending).
- f. Find the correct deliverable instance in the list. Select it.

e. Scroll to right to find these 2 columns - drag each to the left so you can see them

Activity	Job ID	Job Name	LBNL/BSO ID Number	Def Summary of Requirement	Due Date	Attach Deliverable	Link to Deliverable	Contract Part	Does this deliverab	RMC Representativ	Co
Submit Deliverable	486-WPDS	Test-21 Oct - Deliv for alerts_2_2012-09-23	924999	Second flow of de...	2012-09-23			Other	no	025210	n/a
Submit Deliverable	487-WPDS	Test-21 Oct - Deliv for alerts_2_2012-10-23	924999	Second flow of de...	2012-10-23			Other	no	025210	n/a
Submit Deliverable	488-WPDS	Test-21 Oct - Deliv for alerts_2_2012-11-23	924999	Second flow of de...	2012-11-23			Other	no	025210	n/a
Submit Deliverable	488-WPDS	Test-21 Oct - Deliv for alerts_2_2012-12-23	924999	Second flow of de...	2012-12-23			Other	no	025210	n/a
Submit Deliverable	489-WPDS	Test-21 Oct - Deliv for alerts_2_2012-12-23	924999	Second flow of de...	2012-12-23			Other	no	025210	n/a
Submit Deliverable	481-WPDS	Test-21Oct-1-deliv for alerts_2012-09-21	924901	Set up for severa...	2012-09-21			Other	no	025210	n/a
Submit Deliverable	482-WPDS	Test-21Oct-1-deliv for alerts_2012-10-21	924901	Set up for severa...	2012-10-21			Other	no	025210	n/a

f. This line matches the Alert info. Select it.

- g. Details of the line item appear as shown. Review the info to make sure it is indeed the one of interest. If it is, select "Open" to continue. If it is not the right one, then go back to step (e).
- h. Enter Delivery Date (hit green button to activate)
- i. (Optional) Add comments (activate by clicking green button). 450 character limit.
- j. (Optional) Link and/or attach items (activate by clicking green buttons). 3MB file limit to attach.
- k. (Optional) Change RMC representative if not current.
- l. Select "Complete Task" when information is entered. Deliverable instance is now closed. Owner, persons named as "additional", the RMC rep, and the RM PM will receive notification of completion.

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The screenshot displays a software interface for managing deliverables. At the top, there is a search bar and a table with the following columns: Activity, Job ID, Job Name, LBNL/BSO ID numb, Brief Summary of Requirement, and Due Date. Two rows are visible in the table, both for 'Submit Deliverable' with Job ID '489:WPDS' and Job Name 'Test-21 Oct - Deliv for alerts 2\_2012-12-23'. The LBNL/BSO ID number is '924999' and the Due Date is '2012-12-23'. Below the table, there is an 'Export' button and a note 'Rows 3-4 of 39 shown'. The main area shows a detailed view of a deliverable instance, titled 'Test-21 Oct - Deliv for alerts 2\_2012-12-23 - Submit Deliverable Document'. The 'Open' button is highlighted with a red arrow. The detailed view includes sections for 'Notes', 'Version Information', 'Property Values', 'Requirement Data', 'Associations', and 'Resources'. The 'Property Values' section contains fields such as 'Due Date: 2012-12-23', 'Frequency: monthly', 'Owner: Young, Lydia J', 'Owner Function: OIA/OCA', 'LBNL/BSO ID number: 924999', 'Delivery type: Report', 'Does this deliverable satisfy another deliverable requirement?: no', 'RMC Representative (Case): Young, Lydia J', 'Contract Part: Other', 'Contract Section: n/a', 'Source Requirement Type: z - Other', 'SRD Citation: Test-21-Oct-Deliv2', 'SRD Title: Deliverable for alerts 2', and 'Brief Summary of Requirement: Second flow of deliverables for testing alerts'. The 'Associations' section shows a 'Requirement to Deliverable Document Workflow' with a 'Show Requirement(s)' button. The 'Resources' section is empty. The 'Job image' section shows a workflow diagram with the following steps: Start (green play button), Initialize Deliverable (blue gear), Submit Deliverable (red gear with green arrow), Submit to MeDas (grey gear), and Stop (red square). A red arrow points from the 'Open' button to a text box, and another red arrow points from the 'Requirement' field in the 'Associations' section to another text box.

Activity	Job ID	Job Name	LBNL/BSO ID numb	Brief Summary of Requirement	Due Date
Submit Deliverable	488:WPDS	Test-21 Oct - Deliv for alerts 2_2012-11-23	924999	Second flow of de...	2012-11-23
Submit Deliverable	489:WPDS	Test-21 Oct - Deliv for alerts 2_2012-12-23	924999	Second flow of de...	2012-12-23

g. Detail Panel opens.  
Review info – is this the one of interest?  
Yes – Select “Open”  
No – scroll through Job List again (Step c)

Note:  
Full Requirement detail can be viewed by selecting the Associated Req here.

## DE03 Selecting a Deliverable Instance with a Scheduled Due Date

import\_2009-11-15 - Submit Deliverable Document X

Complete Task Save Make Available Move to Waiting

**"Open" results in WF Detail (shown)**

**Deliverable Document Process**

**Property Values**

**Submit Data**

Instruction: Enter date, add link or attachments or comments (optional), select "Complete Task" above

Actual Delivery Date: Dec 7 2014

Comments:

Link to Deliverables: URL: Name:

Attach Deliverable: Upload a file...

**Deliverable Document Group**

Due Date: 2009-11-15

Frequency: annual

Owner: Young, Lydia J

Owner Function: OIA/OCA

RMC Representative (Case)\*: Young, Lydia J

Tracked by BSO?:

LBNL ID number: 924033

Customer Organization:

Customer (LDAP) Point of Contact Name: Richards, Aundra

Customer (non-LDAP) Information:

Last review date of Deliverable's definition:

Deliverable type:

Deliverable title(s) of record:

Is this Deliverable shared with another Requirement?: no

Additional LDAP name for Deliverable Alerts:

**Requirement Data**

Contract Part: Contract Section

Contract Section: H

Contract Subsection (eg. H.13 or L021): H.14

Source Requirement Type: Contract Section

SRD Citation: H.14

SRD Title: STANDARDS OF CONTRACTOR PERFORMANCE EVALUATION

SRD Section/Paragraph Citation: H.14 (a)(4)-3

SRD Section Title: Year-End Self Evaluation Report

Brief Summary of Requirement: The Contractors shall provide a formal self-evaluation report at year end. (Standards of Contractor Performance Evaluation). It must provide: (i) an overall summary of performance for the performance period (ii) performance ratings for each PEMP element and the Laboratory overall, and (iii) a summary of key strengths and opportunities for improvement.

**Calculated Data**

**Associations**

Requirement to Deliverable Document Workflow Show Requirement(s)

Requirement: J.02/J.02. Appendix B/J.02/FY 2014 PERFORMANCE EVALUATION AND MEASUREMENT PLAN/Goal 2.0/0

**Resources**

**Job image**

Job:

```

graph LR
    Start[Start] --> Init[Initialize Delivera...]
    Init --> Submit[Submit Delivera...]
    Submit -- yes --> MeDas[Submit to MeDas]
    MeDas --> Stop[Stop]
  
```

**h. Hit the green button to activate this (it turns grey to black). Fill in the submit date.**

**i. (Optional): Add comments by enabling by hitting green button. (450 character limit)**

**j. (Optional): Add link or attach item by enabling by hitting green button. (3MB file size limit)**

**k. (Optional): Update RMC Rep name. (Recommend leaving it as is)**

**l. Complete Task when all is ok.**

**E. Revision History**

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