Contract 31 Deliverables
- New RM Process Overview

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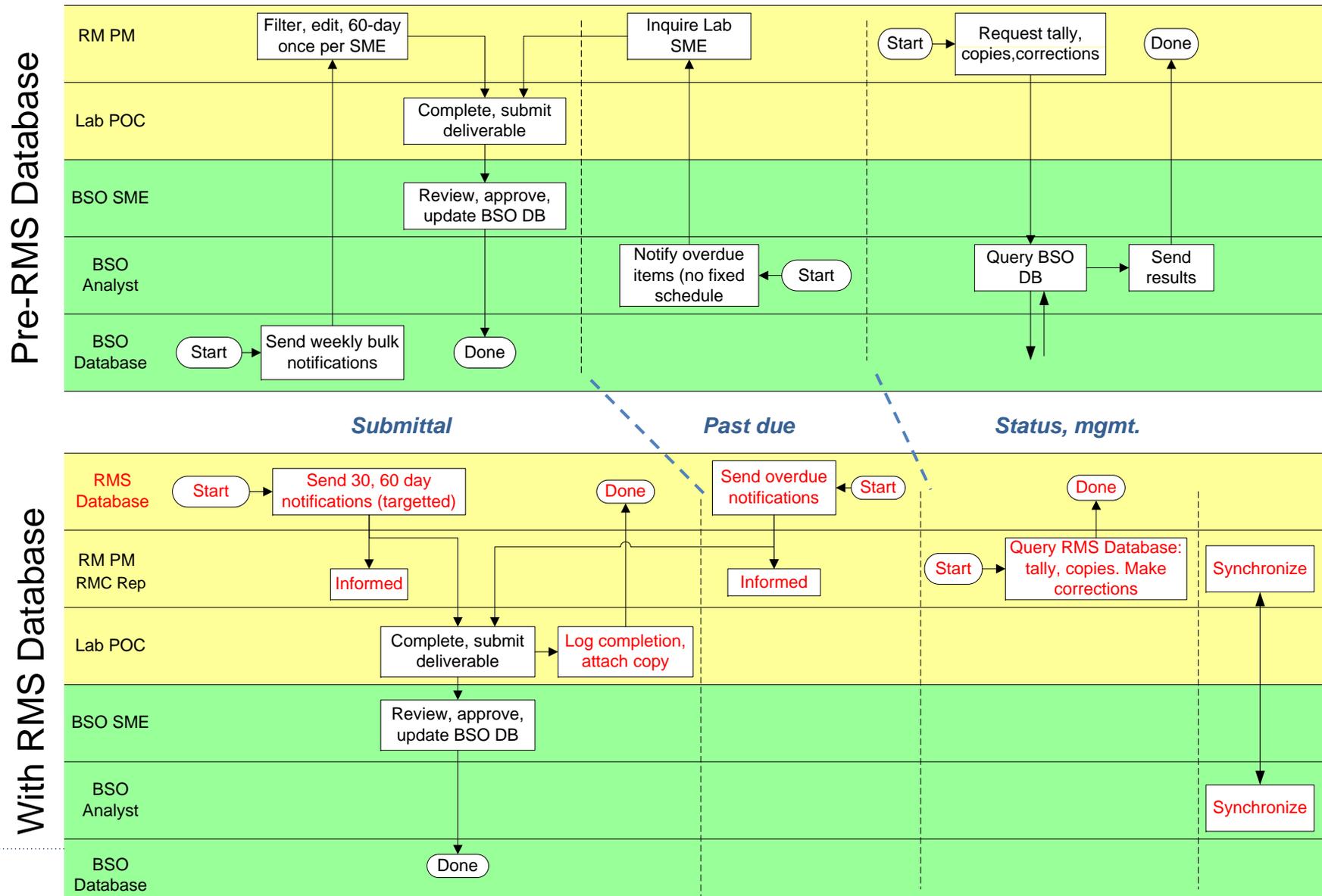
13 November 2012

Purpose of Training

- New Requirements Management database (RMS) will "go live" November 19.

- RMS main purpose: capture flow-down relationships between Contract 31 requirements and Lab policies/documents

- RMS includes a means for the Lab to manage C31 Deliverables, rather than rely solely on BSO.

- Objectives of this Training:
  - Explain differences in Deliverables Submission Process
  - Provide overview of RMS Deliverables Process
  - Provide resources for RMS how-to's
  - Demo, if time permits.

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Definitions

- "Scheduled" deliverable:
  - A Contract 31 deliverable that has a specific due date.
  - Due dates are typically set. Changes require approval by BSO Contracting Officer.
- "As Required" deliverable:
  - A Contract 31 deliverable that is submitted only if triggered by the circumstances as defined by the specific requirement.
- RMS = Requirements Management System database
- Lab POC
  - The person assigned responsibility for a particular Contract 31 deliverable.
  - Lab POC must notify RMC Rep and/or RM PM of changes.
- RMC = Requirements Management Committee
  - See roster http://www.lbl.gov/DIR/OIA/OCA/reqs-mgmt-prog-members.html

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Deliverables Processes: Pre-RMS vs RMS

Pre-RMS Database

| RM PM | Filter, edit, 60-day once per SME | | Inquire Lab SME | | Start → Request tally, copies,corrections | Done |

- RM PM: Filter, edit, 60-day once per SME
- Lab POC: Complete, submit deliverable
- BSO SME: Review, approve, update BSO DB
- BSO Analyst: Notify overdue items (no fixed schedule) ← Start ; Query BSO DB → Send results
- BSO Database: Start → Send weekly bulk notifications ; Done

With RMS Database

Submittal   *Past due*   *Status, mgmt.*

- RMS Database: Start → Send 30, 60 day notifications (targetted) ; Done ; Send overdue notifications ← Start ; Done
- RM PM / RMC Rep: Informed ; Informed ; Start → Query RMS Database: tally, copies. Make corrections ; Synchronize
- Lab POC: Complete, submit deliverable → Log completion, attach copy
- BSO SME: Review, approve, update BSO DB
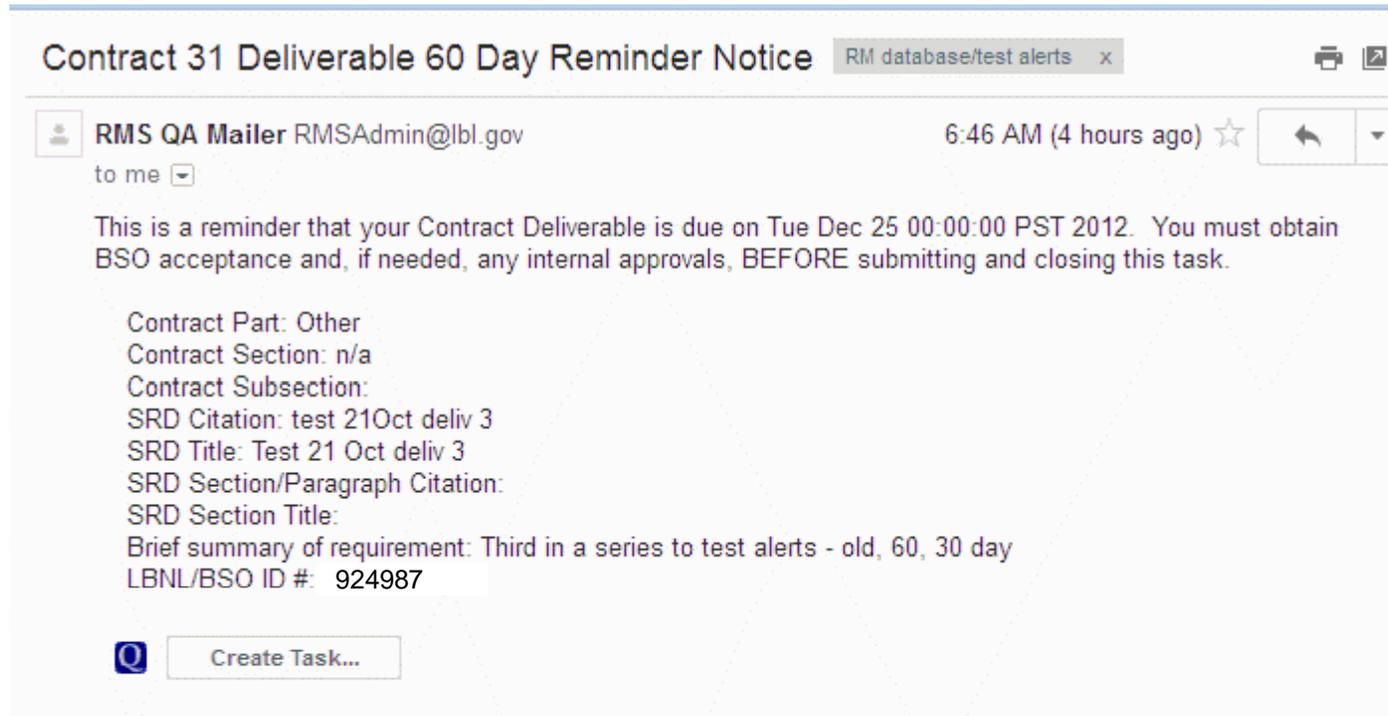- BSO Analyst: Synchronize
- BSO Database: Done

Note: These processes are for Deliverables due on specified schedules. "As Required" Deliverables have no notifications.

4

Deliverables Process with RMS Database: +/-

- Upside using RMS:
  - Lab can take full responsibility for managing its C31 deliverables.
  - For scheduled Deliverables, RMS sends automatic notifications directly to Lab POC
    - 2 pre-due alerts (30 day, 60 day)
    - 1 verification of submittal
    - 1 overdue alert (30 day)
    - Copies to RM PM, RMC Rep, Lab POC
  - Lab POC/SME can find details about the Deliverable via links within RMS.
  - Non-confidential items may be stored in RMS repository.
  - RM PM manages role/name changes, status queries, etc.
- Downside using RMS:
  - Lab POC must do 2 steps rather than 1 (or ask assistance of RMC Rep for 1 of the 2 steps)

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Deliverable Reminder Notice Example:

Contract 31 Deliverable 60 Day Reminder Notice RM database/test alerts x

RMS QA Mailer RMSAdmin@lbl.gov   6:46 AM (4 hours ago)
to me

This is a reminder that your Contract Deliverable is due on Tue Dec 25 00:00:00 PST 2012. You must obtain BSO acceptance and, if needed, any internal approvals, BEFORE submitting and closing this task.

Contract Part: Other
Contract Section: n/a
Contract Subsection:
SRD Citation: test 21Oct deliv 3
SRD Title: Test 21 Oct deliv 3
SRD Section/Paragraph Citation:
SRD Section Title:
Brief summary of requirement: Third in a series to test alerts - old, 60, 30 day
LBNL/BSO ID #: 924987

Q Create Task...

- Lab POCs receive a 60 day reminder and a 30 day reminder for scheduled Deliverables.
- RMC Reps and RM PM get copies of the reminders.

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Submission of Deliverables (1)

- Lab POC:
  - Works with BSO counterpart as required before completing deliverable (no change).
  - Submits completed deliverable to BSO counterpart (no change).
  - Marks all correspondence with Contract 31 citation information (no change).
  - Works with BSO counterpart as required if deliverable is not satisfactory (no change).
  - Once deliverable is approved, closes item in RMS (**new** – see next slides).

- These steps apply for "scheduled" and "as required" Deliverables

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Submission of Deliverables (2)

After selecting the specific deliverable workflow from your Inbox:

1. Enter Actual Delivery Date.
2. Answer question.
3. Comments, linking are optional.
4. Hit "Complete"

Specific training on how to use RMS:
- JIT
- Open sessions starting Dec.

Submission of Deliverables (2.5):
- Logging completion in RMS

- Log into RMS

- Find & select Workflow (WF) associated with the particular Deliverable
    - Review data to make sure it is the right one to close.
    - Hit "Open" WF.

- Workflow (<u>Fixed Frequency </u>Deliverables) [see screenshot slide]:
    - Enter completion date. (Mandatory)
    - Check "yes" if BSO has approved. (Mandatory)
    - (Optional) Add any additional comments, if applicable
    - (Optional) Attach <u>non</u>-confidential deliverable.
    - Hit "Complete task".
    - Done!!

- Workflow (<u>"As Required" </u>Deliverable): See RM PM.

- RMS will send email to you, BSO counterpart, RM PM, RMC Rep document completion.

- Access RMS at RM Program Website http://www.lbl.gov/DIR/OIA/OCA/reqs-mgmt-prog.html

- RMS How-to's at http://www.lbl.gov/DIR/OIA/OCA/RMSdatabase.html

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Submission of Deliverables (3) - Past Due

- If (scheduled Deliv) RMS item is not closed out within 30 days of due date, RMS will send a Past Due notice.
- Close the item, or notify RMC Rep and RM PM why the item cannot be closed yet.
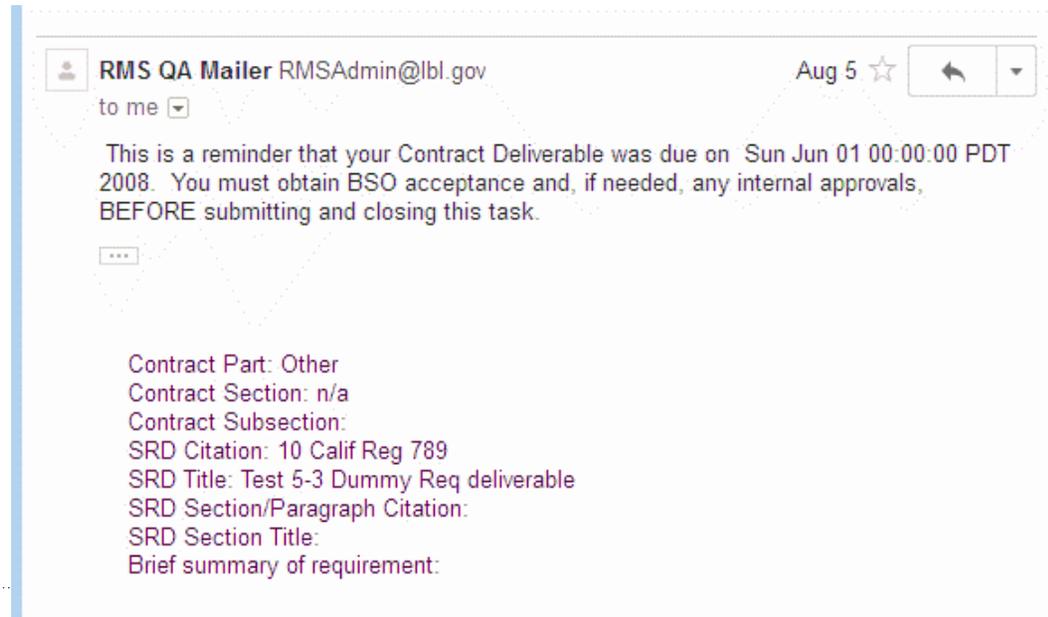
Submission of Deliverables (4) - As Required Deliverables

- No notifications
- See RM PM for assistance.

How-to RMS Details

- Just-in-time training by RM PM (L. J. Young) and RMC Reps

- RM Program training sessions on general RMS use.

- How-to use RMS (text/video) found in RM Program webpage:
    - http://www.lbl.gov/DIR/OIA/OCA/RMSdatabase.html

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Summary: C31 Deliverables Process & RMS

- New Requirements Management database (RMS) on line Nov. 19.
- RMS includes a means for the Lab to manage C31 Deliverables, rather than rely solely on BSO.

- C31 Deliverables Process for scheduled deliverables:
  - RMS sends out notifications
  - Lab POC does 2 steps:
    - [99.9%] Works with BSO counterpart and submits completed item (no change)
    - [0.1%] Enters completion in RMS
- How-to RMS details
  - Just-in-time training by RM PM or RMC representative.
  - RM general training on RMS (to be scheduled)
  - RM web page for how-to written/video info

THANKS FOR YOUR ATTENTION……QUESTIONS?

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