



Database Administrator Reference Guide

Software Version v5.2

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1 Introduction

Welcome to the iRIS Digital Engineering (DE) platform. In addition to providing project setup instructions, this document provides many useful tips and information regarding iRIS maintenance and support. Please contact iRIS technical support for assistance with any of the procedures described in this document: 800-656-0670, Ext.704 or techsupport@celeris-systems.com.

2 Prerequisites

Users of this guide should be familiar with the fundamentals of systems engineering as well as the basic principles of the Event Based Planning (EBP). Database administrators must have a working knowledge of Microsoft Office products as well as Microsoft Project.

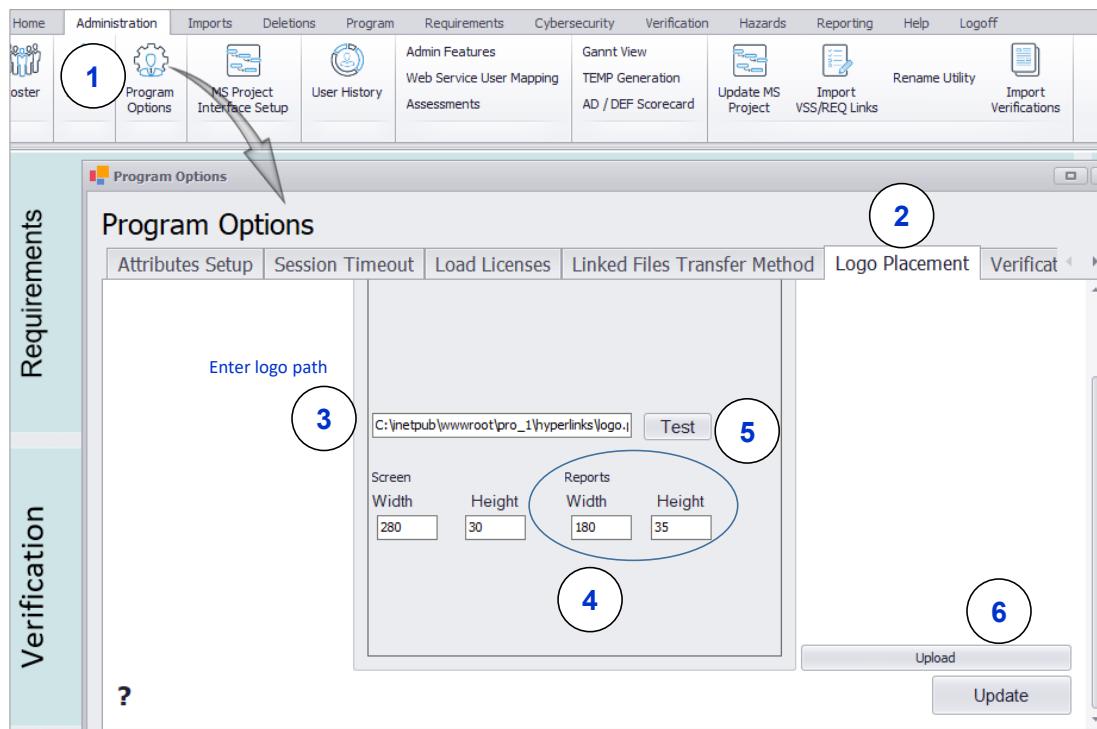
In addition, the following database setup procedures must be completed before the project setup process can begin:

- Microsoft SQL Server Database instance has been installed
- Microsoft Internet Information Services (IIS) have been configured
- iRIS database has been attached to the SQL Server instance
- iRIS client has been installed

Please refer to the [iRIS software installation guide](#) to complete these procedures if they have not yet been completed.

2.1 Company Logo Installation

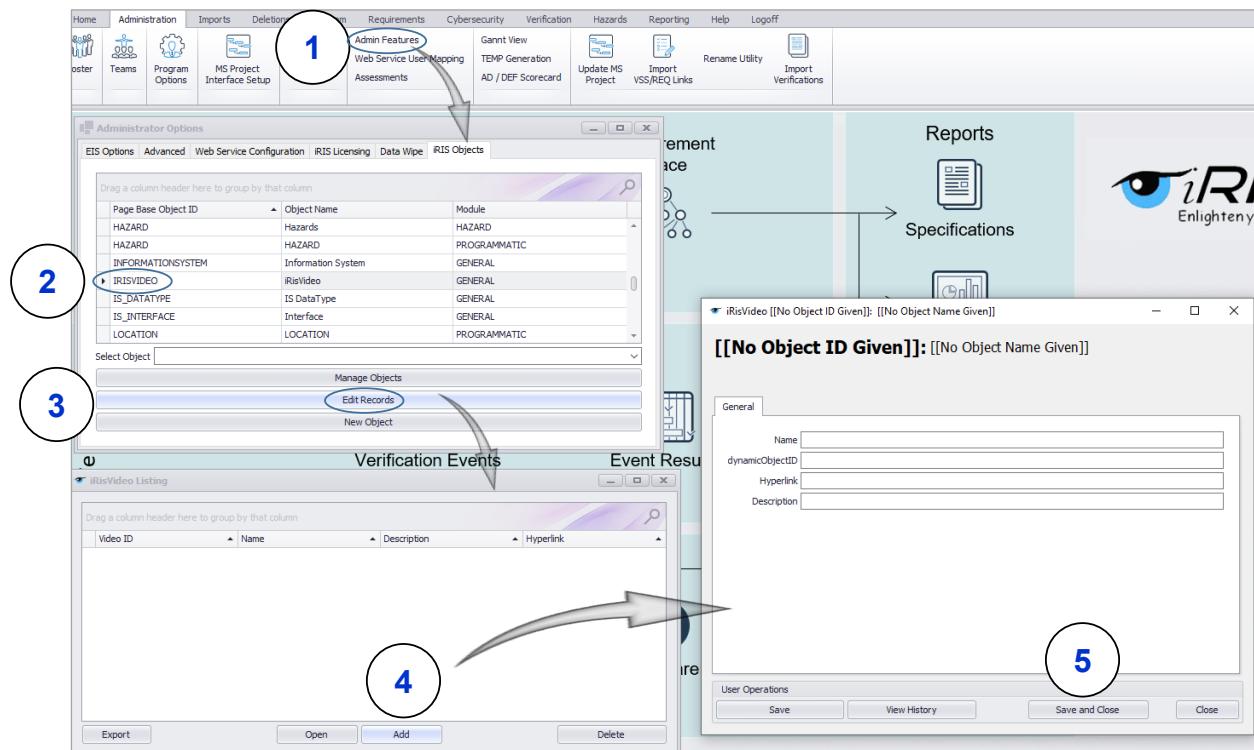
To get started, place your company logo (JPG or PNG format) in an accessible location and perform the steps outlined below:



Note: The entries in step 4 are the logo pixel dimensions which may need to be adjusted based on the logo appearance on reports which can be published once the appropriate data is entered into the database.

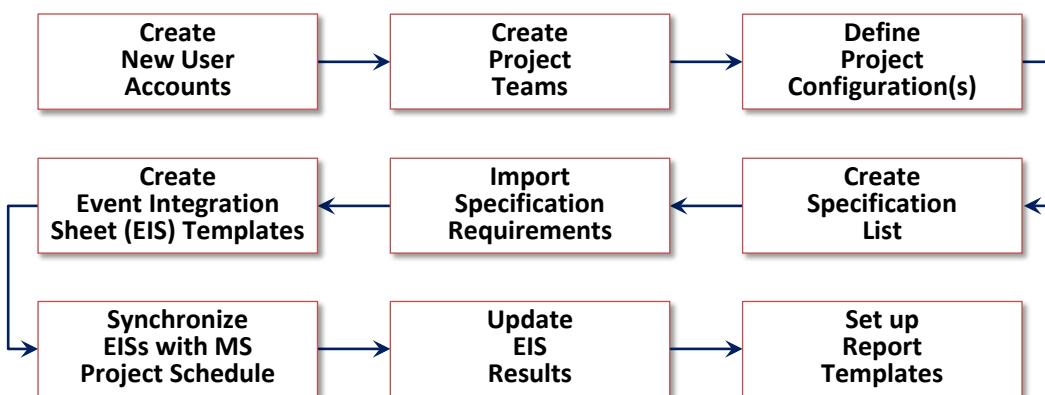
2.2 Resource Center Links

Hyperlinks can be created to enable users to access to helpful information such as training material, videos, or project-related information. Follow the steps below to insert hyperlinks which can be accessed by users via the **Help** tab once these steps are complete:



3 Project Setup Workflow

The project setup workflow shown below is recommended since it supports many of the hierarchical data relationships within iRIS:



It should be noted that iRIS can support a wide variety of setup workflows since many database administration tasks can be performed either in parallel or alternate sequences, depending on the needs of the project.

4 User Accounts

4.1 New User Account Creation

The iRIS database administrator assigns access privileges and database read/write capability for requirements, verification plans, verification results, and several other functions for each user in the database. There should be a

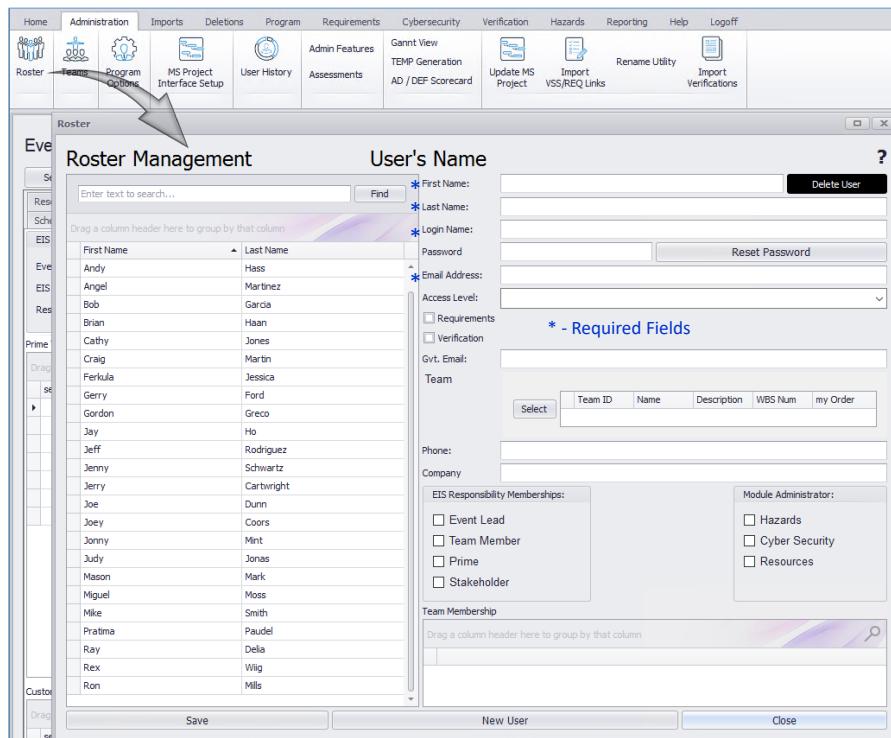
clear understanding of user roles, responsibilities, and access privileges prior to the creation of new user accounts and user roles and responsibilities can be modified at any point in the project life cycle. Additionally, administrators should maintain documentation of access approvals and periodically perform an audit of accounts to prevent unauthorized access (at a minimum, a review twice year based on last login should be performed). Inactive accounts should be deleted to ensure licenses are available for other users.

iRIS has the following 5 levels of user roles, each with customizable user access levels and read/write privileges:

1. **Database Administrator:** Has access to all database content and the ability to add/edit/delete all content.
2. **Team Lead:** With exception of the administrative functions, has access to requirements or verification data as assigned by the administrator and is granted the ability to add/edit/delete specific data products as assigned by the administrator.
3. **User:** With exception of the administrative and team-lead related functions, has access to requirements or verification data as assigned by the administrator is granted the ability to add/edit/delete specific data products as assigned by the administrator.
4. **Configuration Manager:** With exception of the administrative and team-lead related functions, has access to requirements or verification data as assigned by the administrator and is granted the ability to modify specification requirements as assigned by the database administrator.
5. **Customer:** With exception of the administrative and team-lead related functions, has “read” access to requirements or verification data as assigned by the administrator.

All users in the database have “read” access to the reports in iRIS.

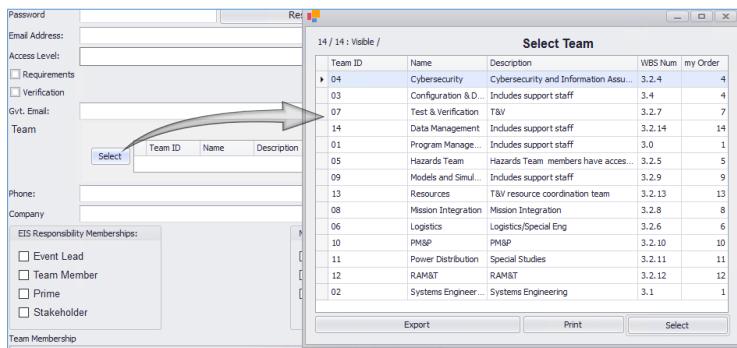
To add a new user to the database...from the home page, click the **Administration** tab then click the Roster button as shown:



Enter the required fields shown and select the user access level from the **Access Level** drop-down menu. Select the **Requirements** and **Verification** check boxes to give users access to those workspaces. Select the **Event Lead** check box if the user will be required to update verification event plans and associated results.

Select **Team Member**, **Prime**, and **Stakeholder** check boxes if you'd like the associated user to be selectable within those sections of the Event Integration Sheet (EIS). To grant a new user the ability to administer the Hazard, Cybersecurity, or Resource module, simply click the corresponding check box. Click **Save** when the data entry is complete, and the new user account has been created.

To assign the new roster entry to a team, click the **Select** button then click on the desired team as shown:



Please refer to paragraph 5 below to add/edit team entries.

Note: iRIS can segment programs/organizations into separate databases. If you have a need to partition data between programs due to separate management of the data or for security purposes, then it is best to contact Celeris Systems Tech Support for assistance. Otherwise, separate projects can be created within iRIS following the Project Setup section below. Users can then be assigned based on program or organization affiliation.

4.2 Edit Users

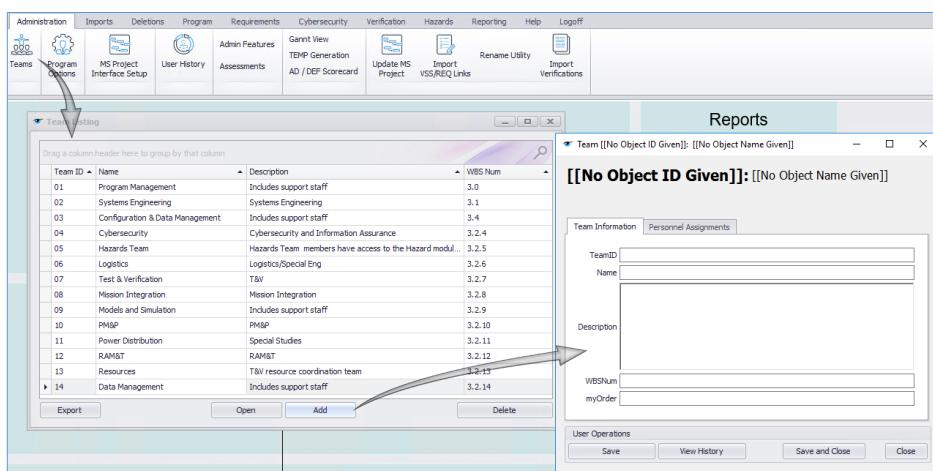
To edit an existing user, double-click on the username, make changes, and click **Save**.

4.3 User Password Reset

Users will be required to change their password upon first login. To reset a password, select the requesting users name from the roster then click **Reset Password**. The password will be reset to the password entered when the user account was initially created. A specific password can be specified when performing a user edit.

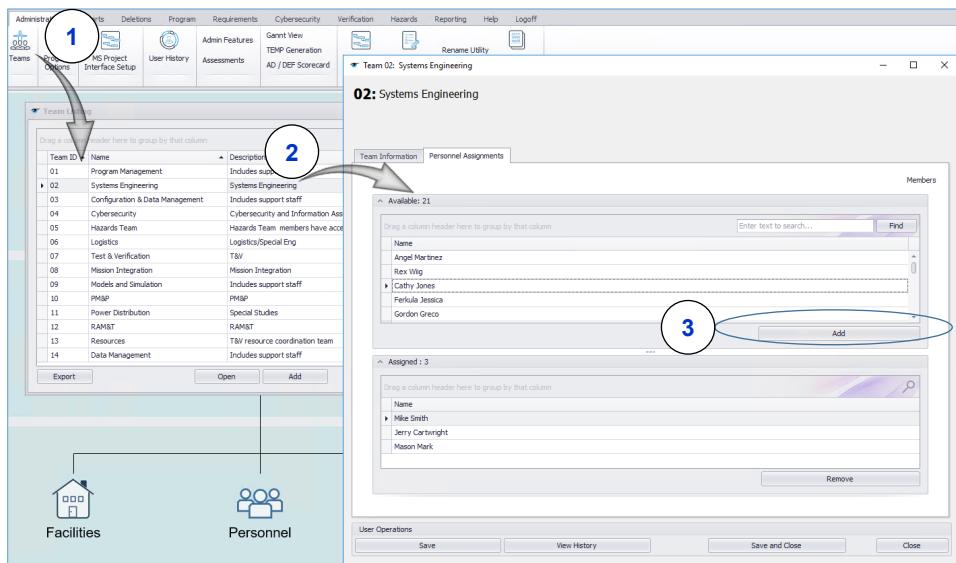
5 Project Teams Setup

The teams module is intended to reflect those teams within an organization that will be supporting requirement verification planning and execution. Once a list of teams is created, personnel can then be assigned to any number of teams to help manage and coordinate activities as well as generate metrics or reports that will provide visibility into team progress. To add or edit teams...click the Teams icon from the admin tab and enter team data as shown:



5.1 Assigning Personnel to a Team

Personnel that have been added to the roster can be assigned to a team (or teams). To assign roster personnel to a team...click on the Teams icon, select a team, then select a name from the personnel list as shown and click Add:

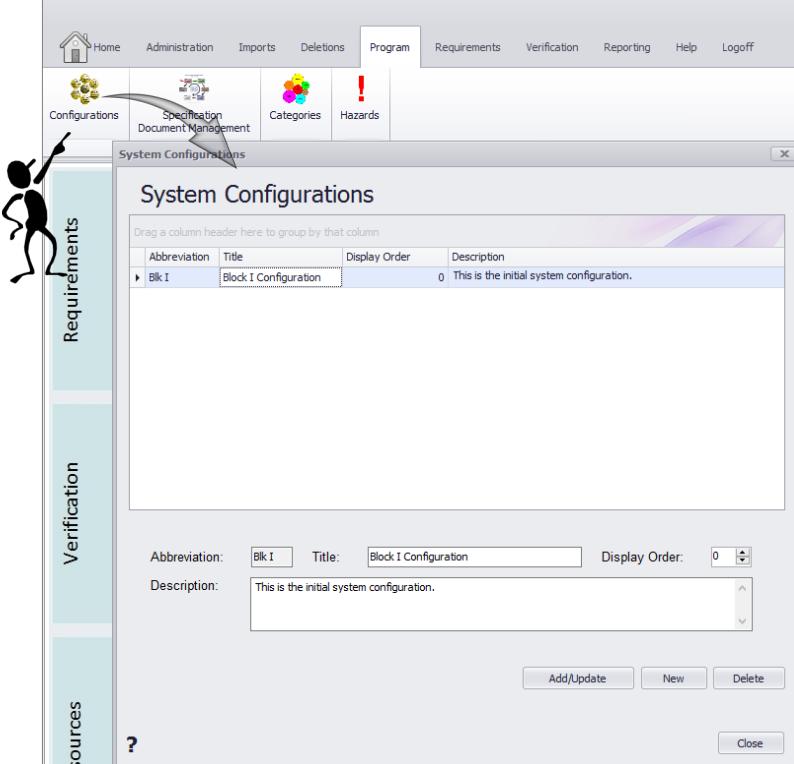


6 Project Setup

6.1 Project Configuration

iRIS is a scalable system designed to support both large and small projects that potentially have single or multiple system configurations. To get started, a top-level configuration must be defined which will be used to associate system configurations with specifications and requirements verification activities as well as reports and metrics.

To define project Configuration(s):

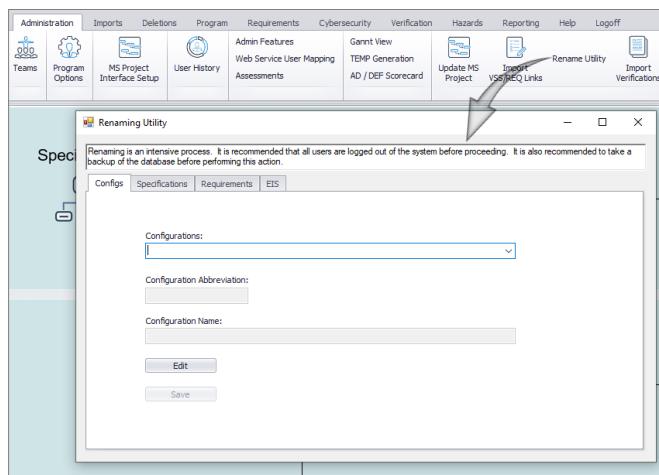


- Click the **Program** tab, select **Configurations**
- Select **New**
- Enter the configuration abbreviation (6 characters, max)
- Enter the Title and the order that you'd like the configuration to appear
- Enter a description (optional)
- Click **Add/Update**

In deciding how best to set up the project configuration, it may be helpful to ask what product or system is ultimately being delivered to the customer and what will be audited upon delivery. Using a “begin with the end in mind” philosophy will culminate in the delivery of a data package that provides consistent, clear traceability from baseline requirements to compliance artifacts for a given configuration. This is a critical first step that must be thoroughly understood since the configuration definition serves as the foundation for many of the features and capabilities of iRIS.

6.1.1 Project Configuration Re-naming

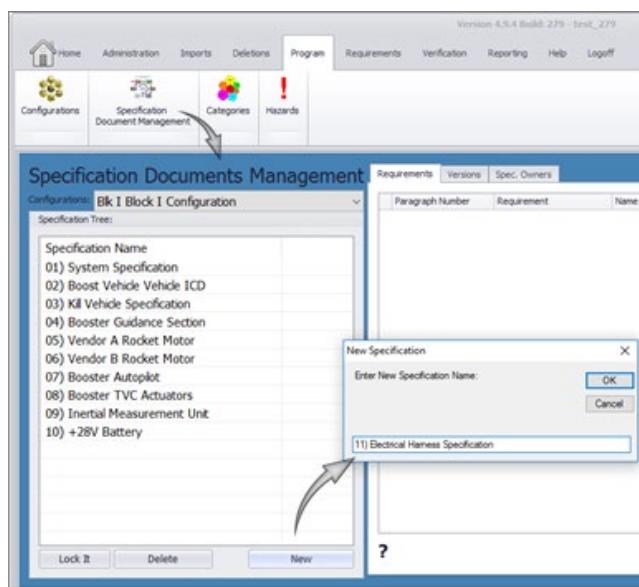
In the event a configuration must be renamed after it is created, select the **Rename** button from the administrator’s tab as shown:



Click the **Save** button after re-naming is complete.

6.2 Project Specification List Creation

The term ‘specification’ as applied to this section refers to the requirement set you’d like to manage, track, and verify using iRIS. iRIS can manage requirements for all levels of project specifications and the “specification tree” can be created in a document list format. **To create the Specification List:**

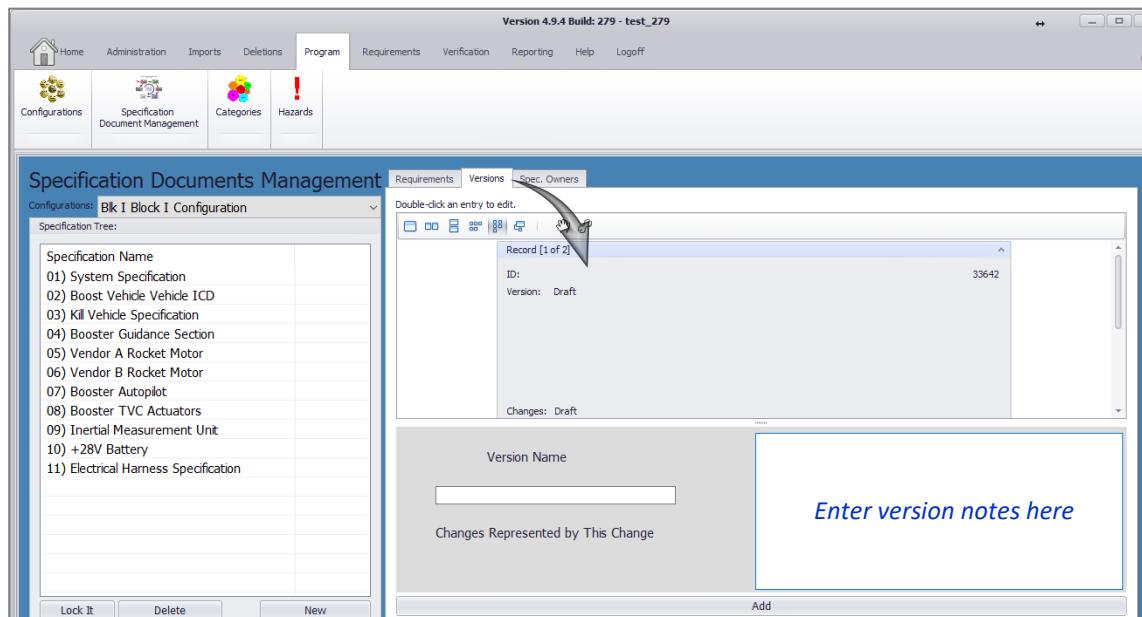


1. Click the Program tab, select Specification Document Management

2. Select the configuration to which the specification applies using the Configurations drop-down menu
3. Click New, enter the specification name and click OK and the specification name has been added to the specification list associated with that configuration.

Helpful Hint: iRIS will sort specifications in an ascending order (smallest to largest). Keep this in mind when entering the name of your specification and pad (with leading 0) specification names if you'd like your list to reflect a hierarchical order as shown in the above example. This convention is followed throughout the application so keep this in mind when creating lists in the subsequent sections of this document.

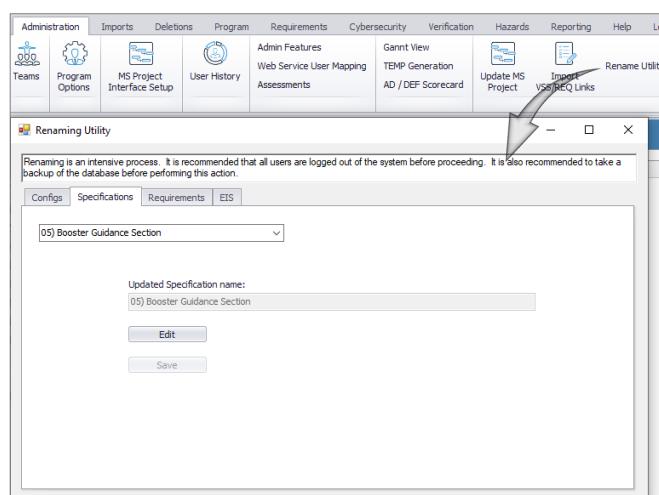
Notes for the specification version can be entered by clicking the **Version** tab as shown:



“Specification Owners” can be assigned by double-clicking names in the list of available personnel. Personnel assigned as specification owners are granted full “write” access to their associated specification.

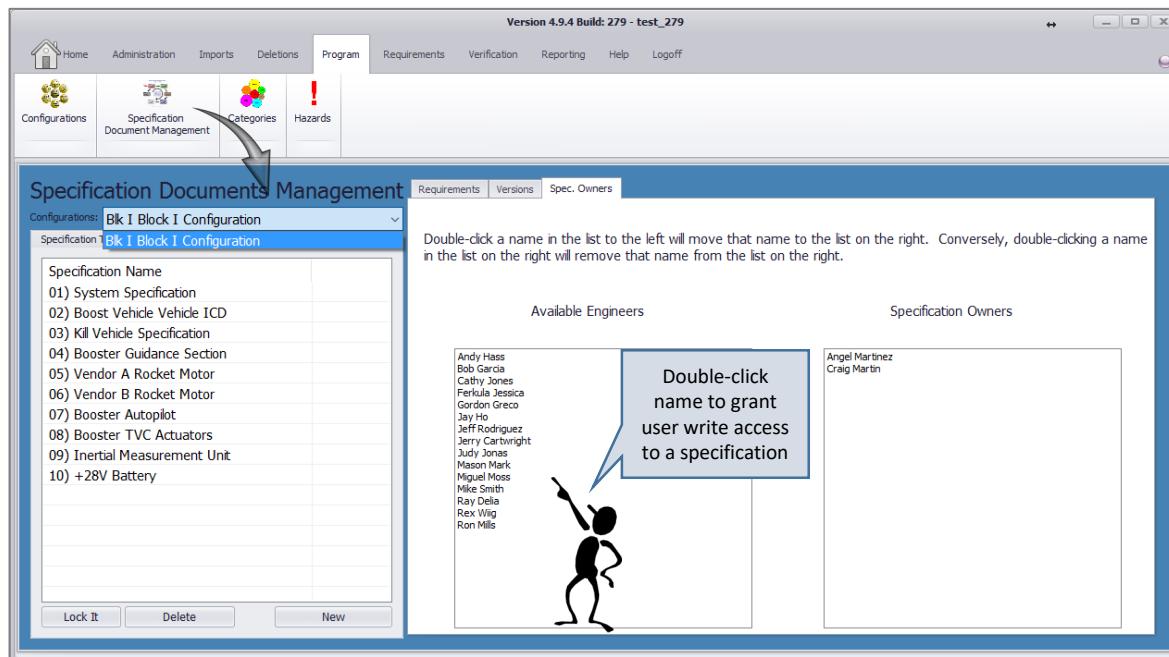
6.2.1 Specification Re-naming

In the event a specification must be renamed after it is created, select the Rename button from the administrator's tab as shown:



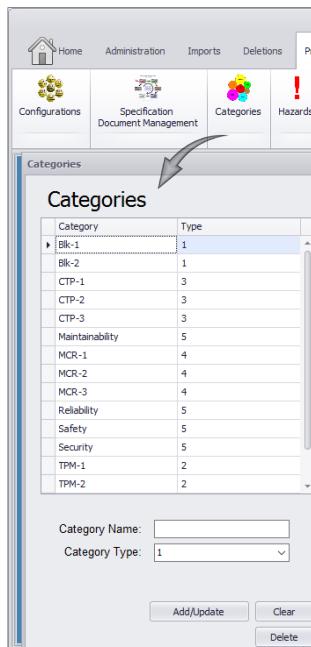
Click the **Save** button after re-naming is complete.

To assign users with “write access” to a specification:

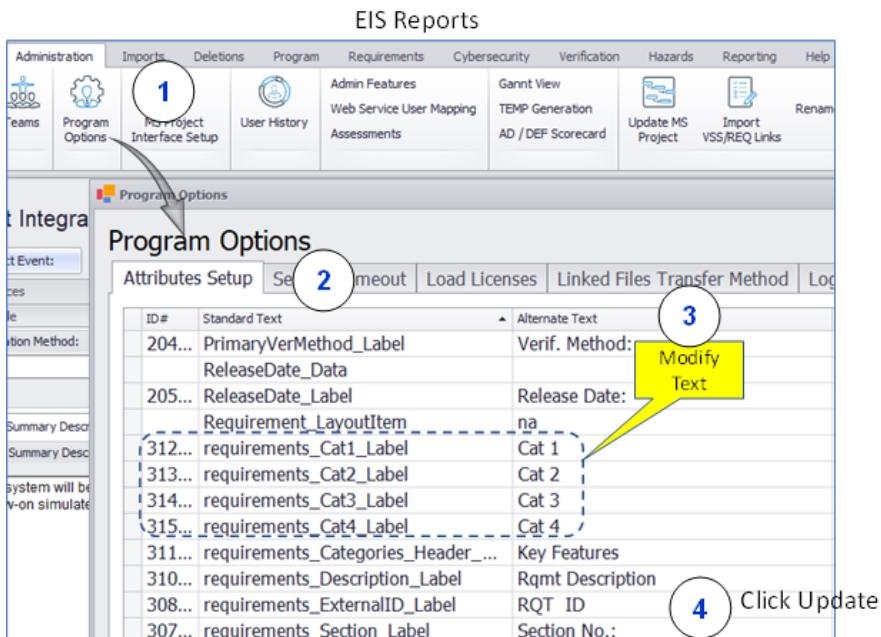
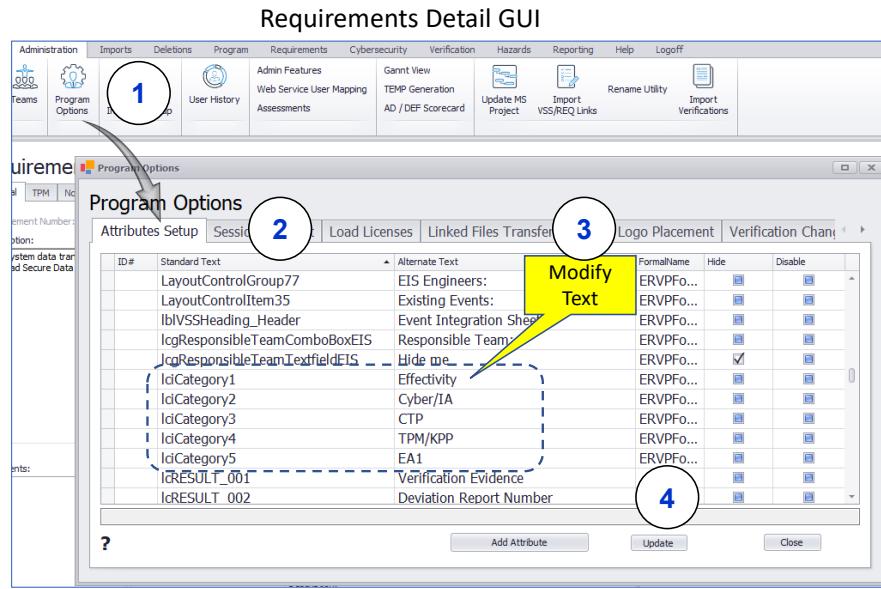


6.3 Requirement Categories (Optional)

IRIS provides the ability to designate 5 unique categories which can be assigned to tag specific requirements. Categories are user-defined and may consist of items such as Technical Performance Measures (TPMs), Safety, Security etc. which can be sorted and filtered within the database Graphical User Interface (GUI) and reports.



Once the categories have been created, Administrators must then update the corresponding fields in the iRIS GUIs and reports for consistency. To do this, refer to the following steps:



7 Requirements Management

The requirements management workspace is the environment for viewing requirements, analyzing traceability, proposing requirement changes, and viewing attributes such as requirement verification methods. Operations such as key word search, data sorting, filtering, and exporting are also performed in this section.

7.1 Requirements Data Entry

Individual requirements can be entered manually by the iRIS administrator or the specification owners using the requirements list view shown below:

The screenshot shows the IRIS software interface. At the top, there's a navigation bar with tabs: Home, Administration, Imports, Deletions, Program, Requirements, Verification, and Reporting. The Requirements tab is selected. Below the navigation bar is a toolbar with icons for Requirements, Requirement Detail, Requirement Context Search, Flowdown, and Flow V2 Test.

The main area is titled "Requirements". It displays a list of requirements under a specification named "01 System Specification". The list includes items like SYS-001 through SYS-007, each with a brief description. A tooltip for "SYS-007" says: "Seeker Cooldown Time The seeker shall have a cool down time of not less than XX seconds." Another tooltip for "SYS-007" says: "System Probability of Acquisition The system shall have a Probability of Acquisition (Pac) of >X.XXX".

A large window titled "Requirement: New" is open on the right side. It contains fields for "Requirement Number", "Requirement Name", "Description", "Type", "Effectivity", "Specification", "Paragraph Number", "Specification Owners", and "Events". There are also sections for "Parents", "Children", and "Name". At the bottom of this window are buttons for "Save Entry", "Comment", "Propose Change", "Columns", "Go to Detail Form", and "Close".

To add a new requirement to a specification, select the **Requirements** tab then select the applicable specification in the drop-down list as shown. Click the **New Requirement** button and complete the data entry form and click **Save Entry** when complete.

7.1.1 Requirement Importing

IRIS also offers the ability to perform bulk import of requirements into a specification using Microsoft Excel as the delivery mechanism ([click here to download the required import template](#)). Field labels and definitions are shown below:

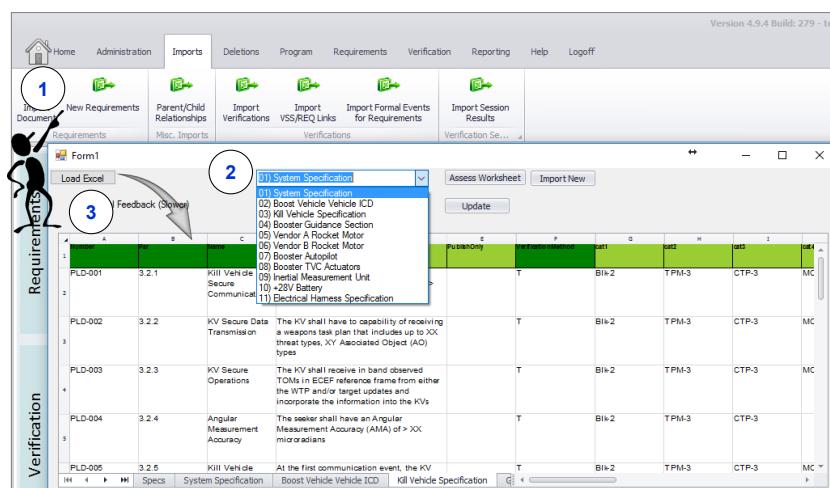
Field Label	Field Definition
Number (*)	Unique alphanumeric identifier for each requirement
Par (*)	Requirement paragraph number
Name (*)	Requirement name
Description (*)	Requirement text
PublishOnly (*)	"Y" or "N" value. "N" designation will not include requirement in verification metrics
VerificationMethod (*)	Analysis, Inspection, Demonstration or Test
cat1	Requirement tag defined in paragraph 6.0
cat2	
cat3	
cat4	
cat5	
Type	Requirement Type: R=Requirement, I=Interface, DC=Design Constraint, ?=Unknown type
Source	Requirement source
Note	Arbitrary note
Functions	Functions related to the requirement
ExternalID	External database alphanumeric identifier
TPMData	Alphanumeric identifier for Technical Performance Measure
RelCIS	Critical issue related to requirement
RelRiskItem	Risk item associated with the requirement
PerformanceAssessmentApproach	Brief paragraph describing the verification assessment approach

RVP	Requirement Verification Plan (RVP) number
VerificationApproach	Brief paragraph describing the verification approach
RVPDate	Date RVP was last updated or approved
Critical_To_System_Verification	Tag that indicates requirement is critical to system verification
Measure	Specific part of the requirement to be measured
Capability	System capability that requirement supports
Capability_Increments	System capability increment that requirement supports

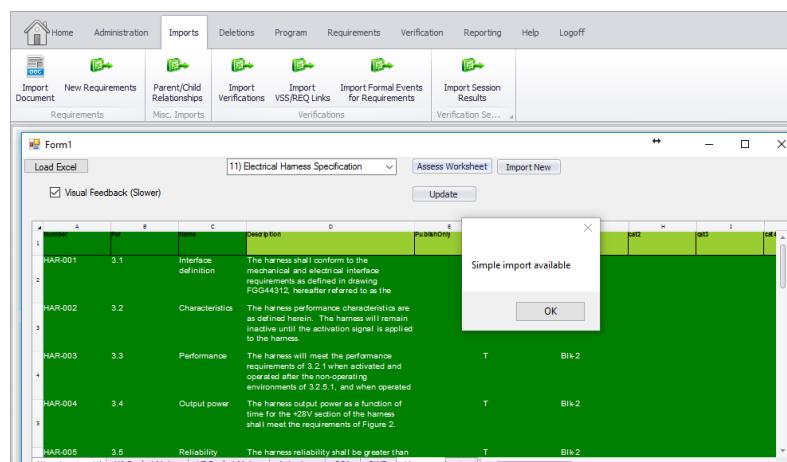
* - Required Field

The import module accepts both upper- and lower-case font for the column headings but the text string must be entered exactly as shown for the import module to perform the import function.

After the Excel worksheet has been created and saved to the local computer, click the **Imports** tab then **New Requirements** as shown below. Then select the target specification in the drop-down menu as shown and click **Load Excel**. Navigate to the worksheet you'd like to import and click **Open**. The import module will then display the contents of your Excel worksheet with column headings shaded green as shown below. In the event the Excel worksheet column headings do not match the required heading names from import, the import module will shade these headings grey indicating that these headings must be corrected to conduct a successful import of the data in the associated column.

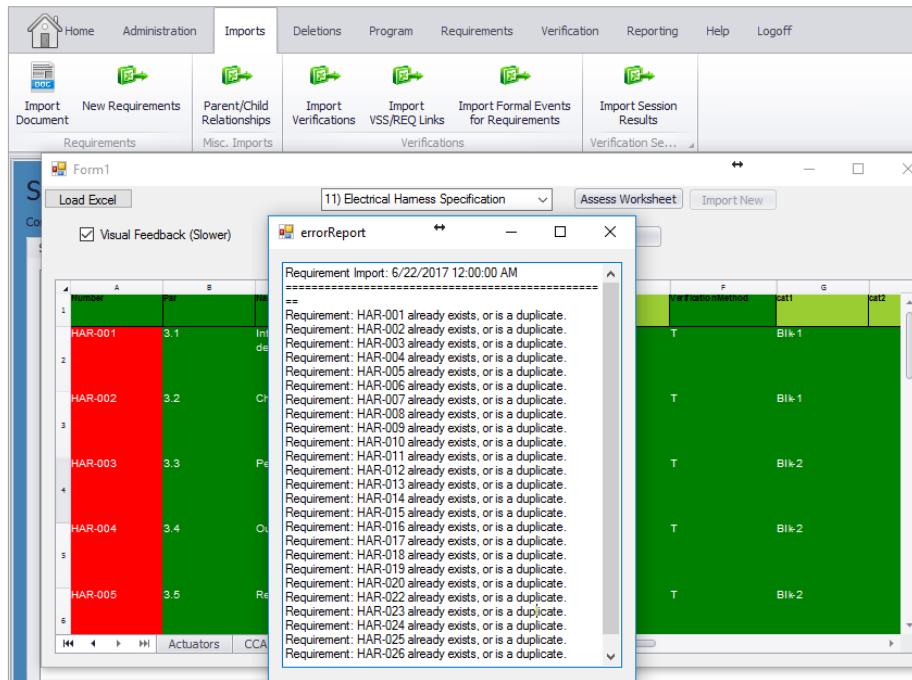


Next, click **Assess Worksheet** and the import module will go through a series of data integrity checks to ensure the import worksheet does not violate any internal business rules (to be discussed on the next page). If the worksheet passes these checks, you will be given the feedback shown below:



Once the “**Simple Import Available**” message is displayed you can close that acknowledgement and click the **Import New** button to begin the import process, and you will be notified when the import is complete.

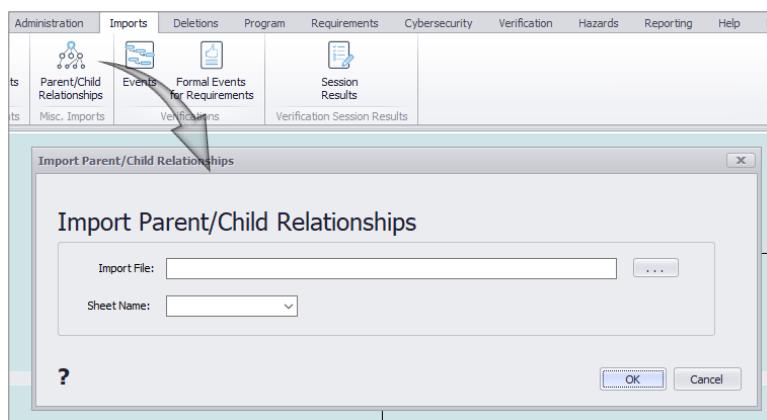
Requirement Import Business Rules: The minimum fields listed in the requirement import table must be completed to import new requirements. In addition, the import worksheet cannot contain duplicate requirement ID numbers. An error report will be generated to direct your attention to items that need to be resolved prior to import if these business rules are violated. The example below shows a duplicate requirement ID issue that must be resolved.



7.1.2 Requirement Parent/Child Relationship Import

In addition to manually creating requirement parent/child links in the requirements section of the database, administrators and specification owners also can perform bulk imports of these relationships ([click here to download the required import template](#)).

To perform the requirement Parent/Child import operation, click the **Parent/Child Relationships** button as shown and a form will open, requesting the location of the import file. Select the import file and the appropriate Excel worksheet and click **OK**. You will receive acknowledgement that the relationships have been added to the database.

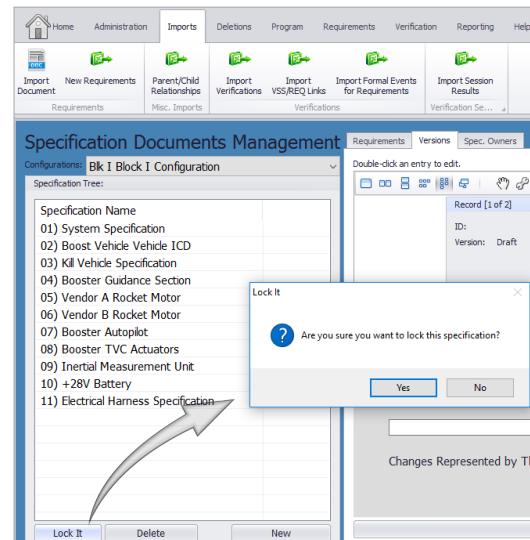


7.2 Specification Locking

Users that have write access to a given specification can perform requirement updates directly in the requirements detail form. To formally control requirement updates, a specification can be locked and put under configuration control at any point in time.

To lock a specification, select the specification from the Specification Documents Management form and click the **Lock It** button as shown. Enter the version name and revision notes if desired in the **Version** tab, then click **Add**.

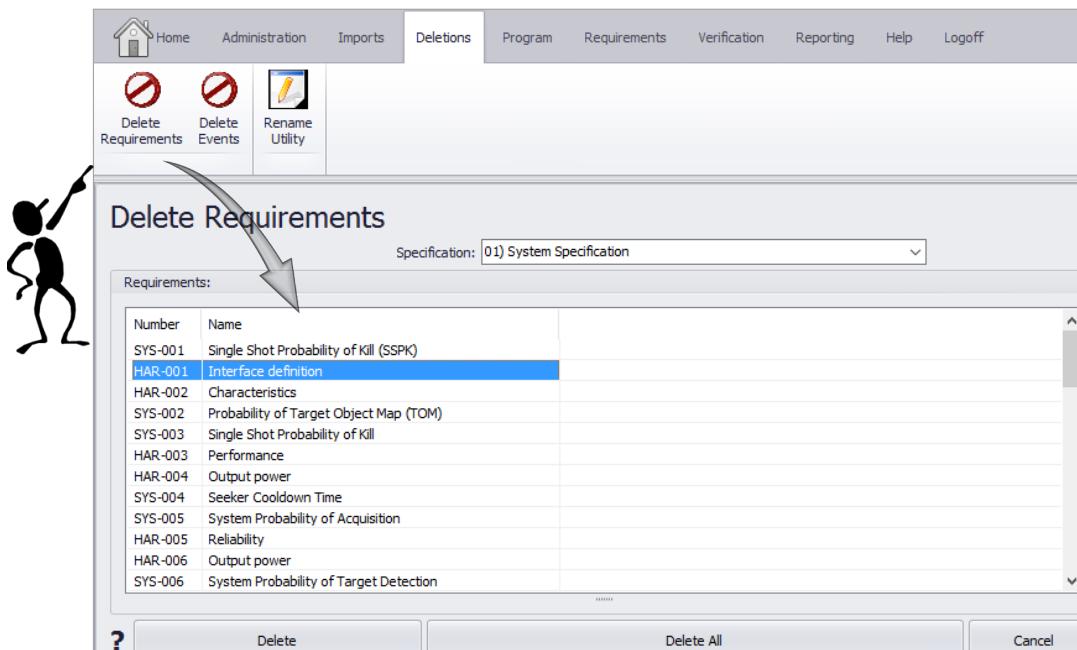
Once the specification is locked, change requests are required to be submitted prior to implementing a modification to the locked specification. This specification must be unlocked to implement those approved change requests.



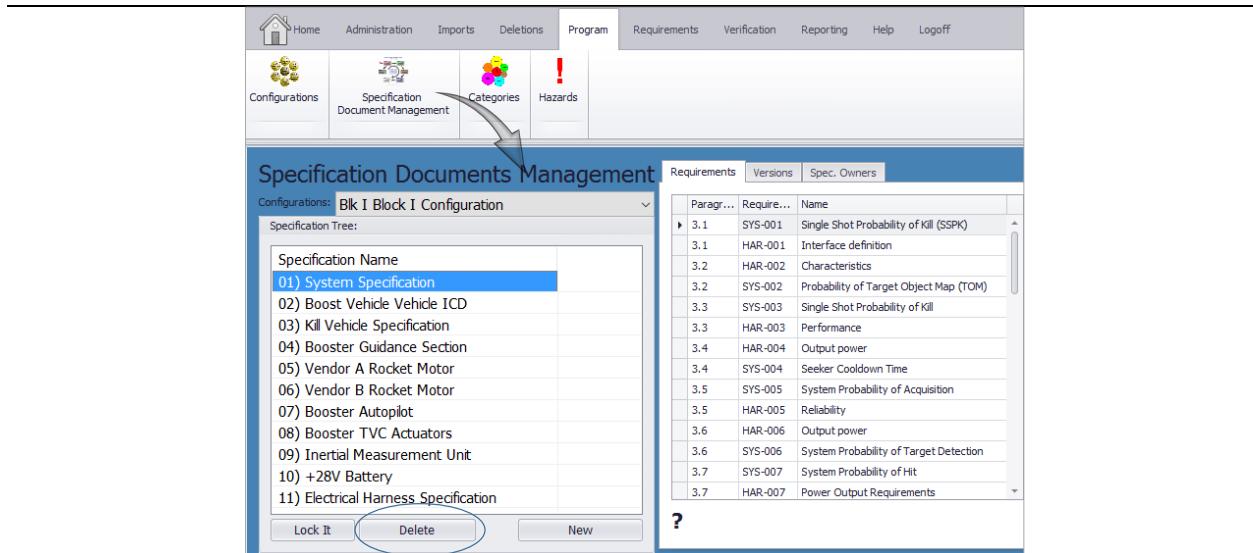
7.3 Requirement and Specification Deleting

Only the iRIS database administrator can delete requirements or specifications. All requirements must be deleted from the specification before the specification can be deleted. **Caution should be taken during this process as there is not an "Undo" button for this operation.**

To delete requirements, select the **Deletions** tab, then click the **Delete Requirements** button and select specification from the drop-down menu as shown below. To delete an individual requirement, select the requirement then click the **Delete** button. “Shift-click” can be used to select and delete groups of requirements. Click the **Delete All** button to delete all the requirements in the specification.



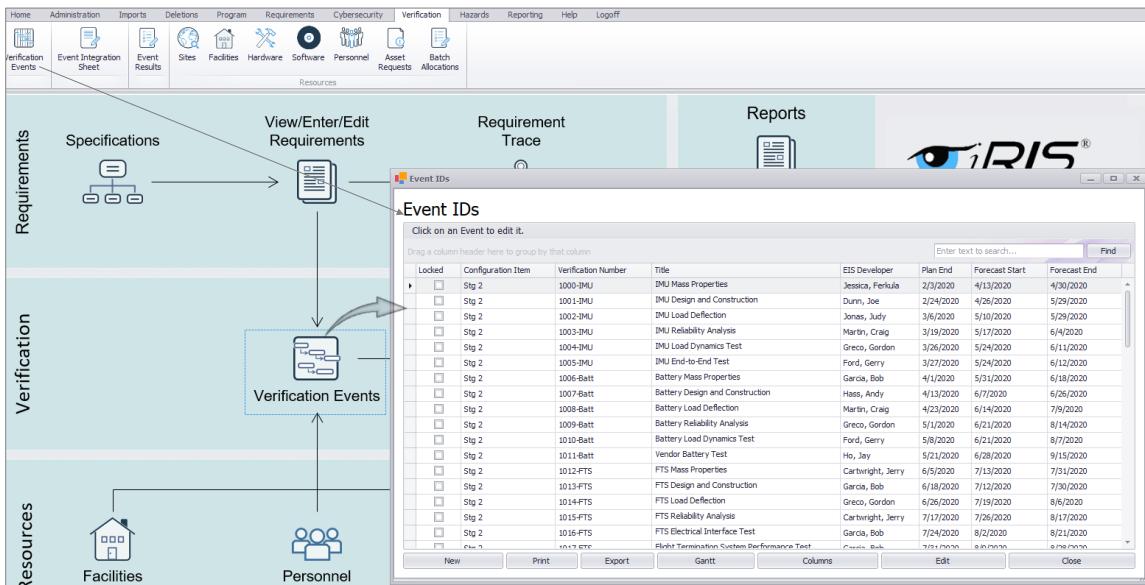
To delete a specification template, click on the **Program** tab then click **Specification Document Management** and select the desired configuration from the Configuration drop-down menu. Select the specification template to be deleted then click **Delete**.



8 Event Integration Sheet (EIS) Template Creation

The EIS is the requirement verification planning product used for both risk reduction as well as formal requirement verification. Blank EIS templates are created directly from the EIS list form. Each EIS is uniquely identified using an alphanumeric number and for this reason duplicate EIS numbers are not permitted.

To create a new EIS template, click on the **Verification** tab then click the **EIS Numbers** button as shown below. Click the **New** button at the bottom of the form then enter the EIS number, title and select the applicable configuration from the drop-down menu. Click **Add/Update** when complete and the new EIS template will appear in the EIS list and is now ready to update.



Helpful Hint: iRIS will sort EISs in an ascending order (smallest to largest). Please keep this in mind when entering the EIS numbers if you'd like your list to sort in a specific manner (i.e., lowest level of assembly to highest level of integration or test). This convention is followed throughout the application and may be helpful when displaying various metrics and reports.

8.1.1 EIS Importing

iRIS also offers the ability to perform bulk import of EIS data using Microsoft Excel as the delivery mechanism ([click here to download the required import template](#)). Field labels and definitions are shown below:

Field Label	Field Definition
VerificationNumber (*)	Unique alpha/numeric identifier to track the event through its life cycle. A/N identifier shall identify program designation, responsible org/seg, product, verification methodology (A, I, T, D, M, or etc.), type of verification (development, acceptance, other), formality level, unique number, and output product type. Once assigned, it is locked.
Title (*)	Event title that usually includes the type of verification activity (ie, Inspection or Test).
VerificationMethod	Type of V&V to be performed: Analysis, Evaluation, Inspection, Demonstration, Test, Certification, Accreditation Special Method, Risk Reduction, Multiple, or Other.
Objectives	Primary event objectives that are to be accomplished, taking into consideration the requirements that are to be verified during the event.
SecondaryObjectives	Secondary event objectives derived from the imposed primary objective(s) (parent) and taking into consideration the requirements that are to be verified during the event.
Description	Description of the configuration to be run in the event, includes environment, H/W, S/W, com connectivity, data acquisition, and other attributes. Attach schematics or diagrams, if required to communicate the information.
SuccessCriteria	Summary description of the event pass/fail criteria including any specific data or results that will be required to interpret the data or results. Any conclusions required to verify the objectives/ requirements have been fully satisfied.
DetailedDescription	Detailed description of what is to occur in the execution of the event. Includes descriptions of run sequences, set-ups, and nominal/ off nominal, if required. This is a key data field to ensure there is clarity of what is to be accomplished and ensure stakeholder buy-in. Also helps the venue/tool developers a clear understanding of what the venue/ tool set has to support/ enable.
Location	Main physical event location.
Configurations	Brief description of the lab/facility as-run configuration. Hyperlink approved layouts/diagrams as needed.
DataAcqRqmts	Description of data acquisition requirements needed in event. Includes the Mission Data Lists (MDLs), Telemetry Measurement Lists (TML), Telemetry Measurement Map (TMM)/ extraction maps (or equivalent) environment unique as well as definition of the data acquisition system. Define the "pedigree" required for the data acquisition and data handling to assure the validity of the data.
DataRedRqmts	Specific tools or capabilities needed to reduce test data into meaningful information that could be documented in reports.
Reports	Any report(s) planned to be generated to summarize the event.
CommentsSupportingInfo	Free text field to capture planning or execution notes as well as the summary information at event closeout.
ModelingSimAnalytical	Specify models, simulations or analytical tools required to support the event. Also includes any analytical results required to anchor/ validate the event results.
ScenarioRunConditions	Listing of scenarios and/ or run condition suite required to execute the event. Used to help correlate this event to other events in order to correlate data results and help ID potential anomalies.
TechnicalAssumptions	Listing of any technical assumptions required in order to execute the events.
ClassificationSecurity	Summary description of the classification/ security constraints which may affect the execution of event. Such constraints may relate to classification level of data, environment event is executed in, and data results from event

	execution. May need to consult with Security for final determination of classification.
SwUseRestrictions	Any restriction or constraint regarding the software used during event execution (ie, code inspection or formal qualification required).
ExecutionInfo	Any restriction or constraint regarding event execution entrance.
EntranceInfo	Any restriction or constraint regarding event execution exit.
SupportingLocation	Any physical location other than the primary location used to support event execution.

* - Required Field

8.2 Granting Write Access to an EIS

An EIS can be updated by each of the following user types:

1. Event Conductor: Engineer overseeing event execution
2. EIS Developer: Engineer responsible for EIS development
3. Responsible Systems Engineer (SE): Systems engineer supporting the event

When an EIS is initially created, the personnel assigned to these EIS lead roles can continuously update the EIS until it reaches a level of maturity where it needs to be placed under configuration control and locked.

To grant write access to an EIS, double-click on the subject EIS in the list view and the EIS data entry form will appear as shown on the next page.

Event Integration Sheet
1070-SYS VAFB Launch Vehicle Power-up Test

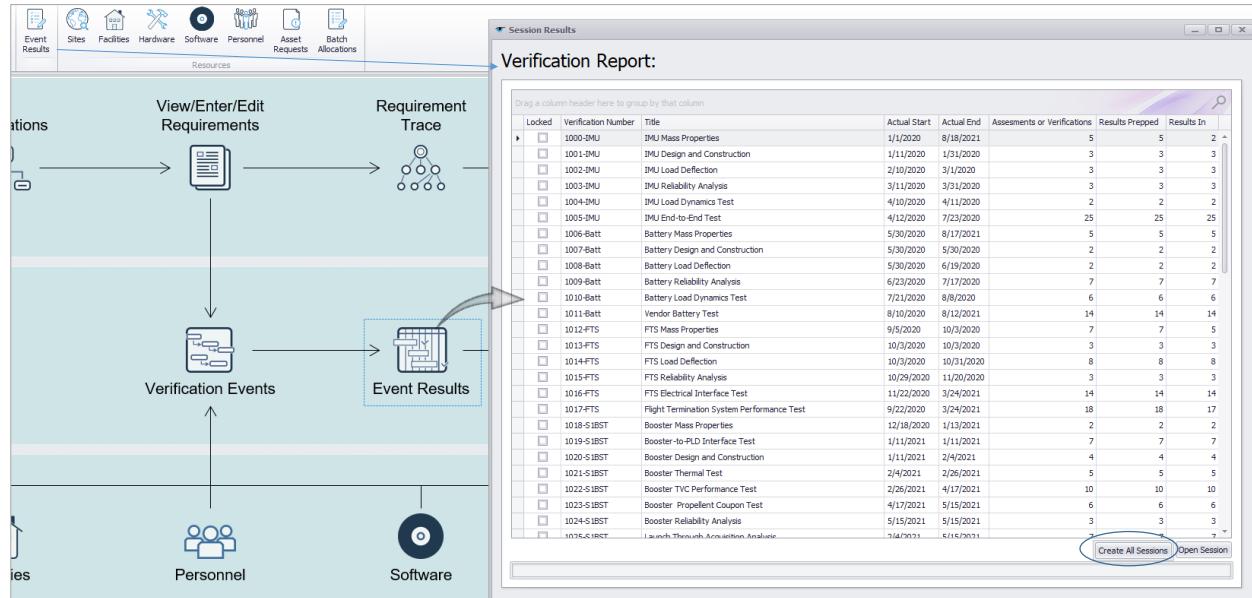
Select Event:																																																																																																			
Resources	Technical Assumptions	Data Acquisition Requirements	Models And Simulations	Evidence For Closure	Hyperlinks	Comments / Supporting Information	Changes to Draft	Personnel / Location Reservations	Hardware / Software Reservations																																																																																										
Schedule	Objectives	Description	Responsibility Coordination			Requirements	Success Criteria	Constraints	Open Items	Predecessors / Successors																																																																																									
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EIS Developer:	Hass, Andy																																																																																																		
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Select personnel for their appropriate role in the 3 drop-down menus as shown, select the responsible team, then click the **Update Changes** button when complete. **Note that the usernames will not appear in the drop-down menu if the Event Lead check box has not been selected during the user account creation step (paragraph 4.0 above).** At this point, Prime Team Members and Customer/Stakeholders can also be assigned to the EIS (read only access).

8.3 EIS Requirement Migration and Results Update

At the core of the EBP process is the allocation of requirements to verification events. Changes in the program verification strategy may drive the need to migrate requirements from one event to another. In these instances, the administrator must actively update the EIS results template and “accept” requirement migrations to enable updates to the results module. This process was put in place to ensure requirement/event results stay aligned as requirements migrate and safeguards against the possibility of inadvertently deleting valid results during the

requirement migration process. **To process requirement migration in the results module, click the *Event Results* icon then click *Create All Sessions* as shown:**



Since requirement allocation data in the results module drives what gets displayed in the metrics and results reports, it is imperative to keep the results module current to provide the project with an accurate representation of actual verification progress against plans.

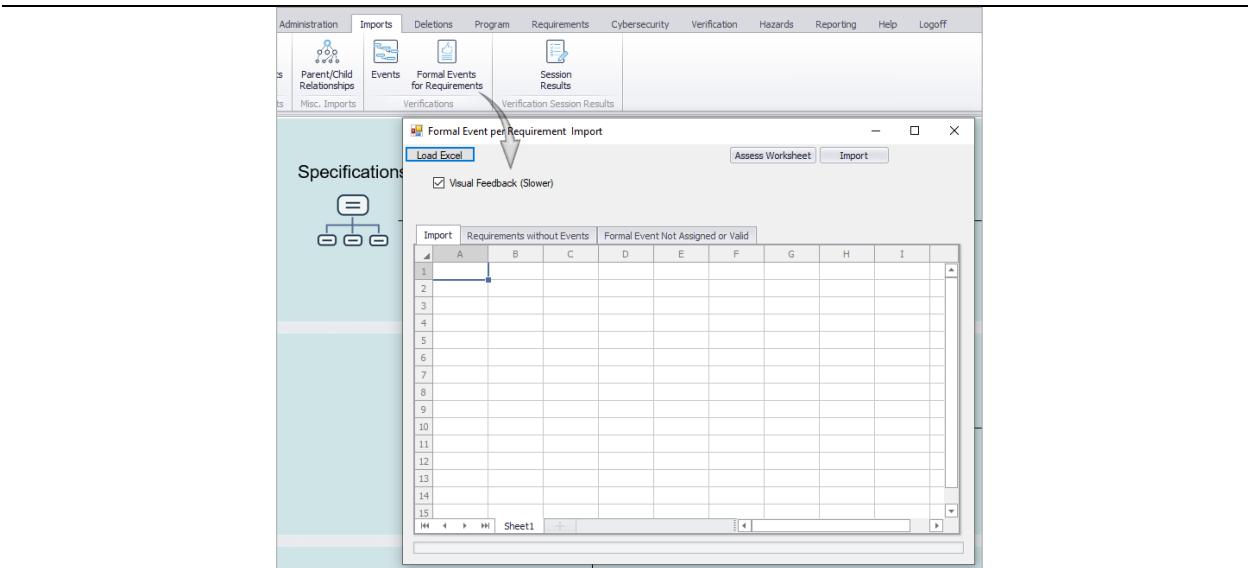
8.4 Requirement/EIS Formal Tag Importing

In addition to manually assigning formal EIS tags in the requirements section of the database, administrators also can perform bulk imports of these relationships.

To perform the formal EIS/requirement tag import operation, create a 2-column spreadsheet with the column titles as shown below ([click here to download the required import template](#)):

Requirement	Formal Event
AP-001	1052-PLD
AP-002	1052-PLD
AP-003	1052-PLD
AP-004	1052-PLD
AP-005	1052-PLD
AP-007	1053-PLD
AP-008	1053-PLD
AP-009	1053-PLD

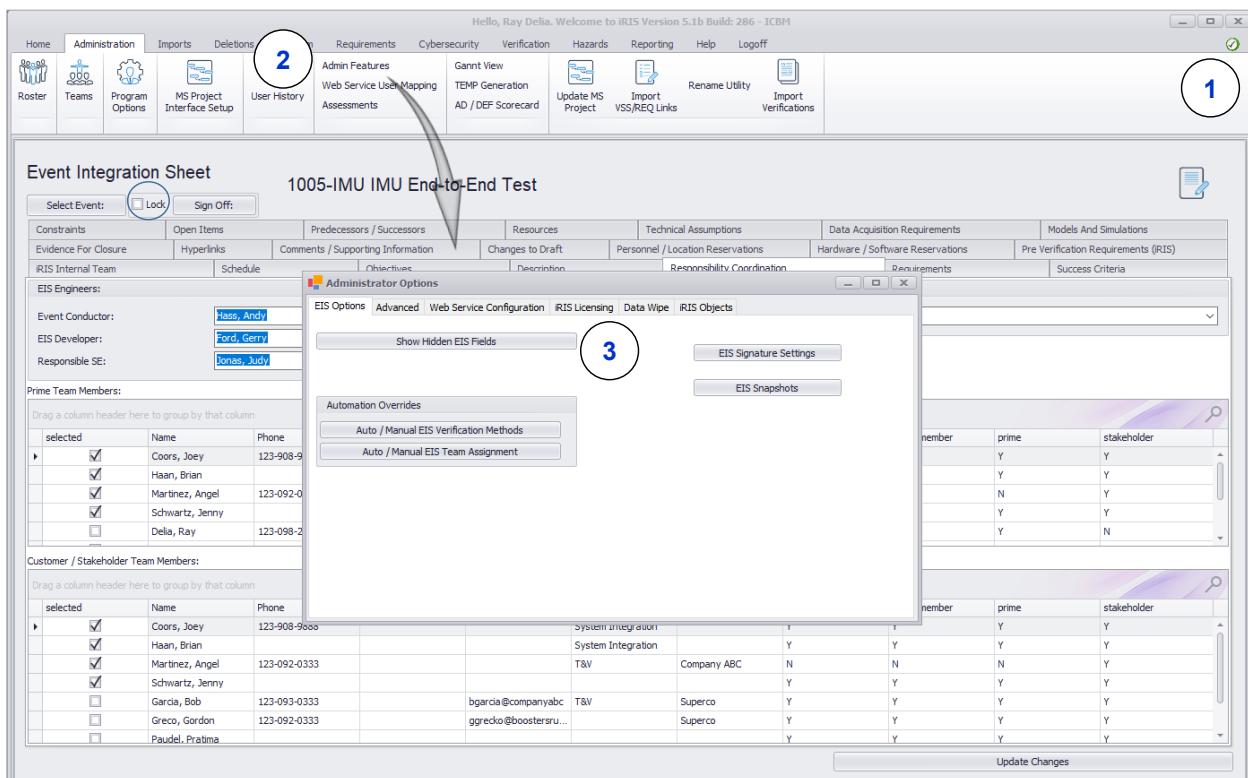
Next, click the **Import Formal Events for Requirements** button as shown and a form will open, requesting the location of the import file created in the previous step. Click **OK** and you will receive acknowledgement that the relationships have been added to the database.



8.5 EIS Locking

An EIS can be placed under configuration control and locked at any point in the project life cycle.

To lock an EIS, click on the padlock icon in the upper-right portion of the iRIS header (will become a green check mark), then select the **Administration** tab, then **Admin Features** and click **Show Hidden EIS Fields** as shown:

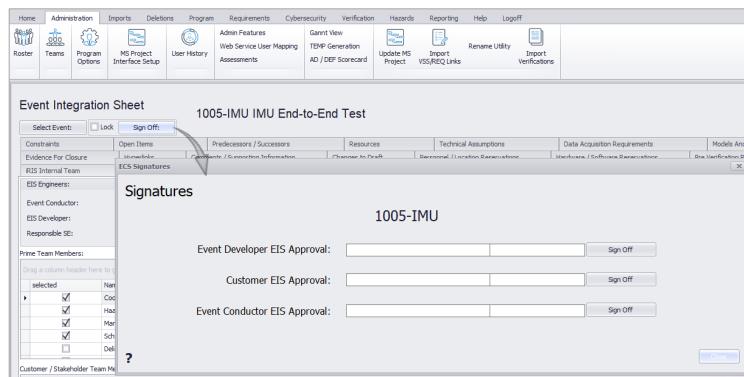


Navigate to the subject EIS and a lock check box will then become visible near the top of the EIS. Once the check box is selected, the EIS will be locked and not editable. The **Update** button on the lower-right portion of the form will change from **Update** to **Create a Change Request**. When clicked, this button will open a change request form.

As changes are proposed and get approved for an EIS, administrators must uncheck the lock, incorporate the changes, then re-check the lock.

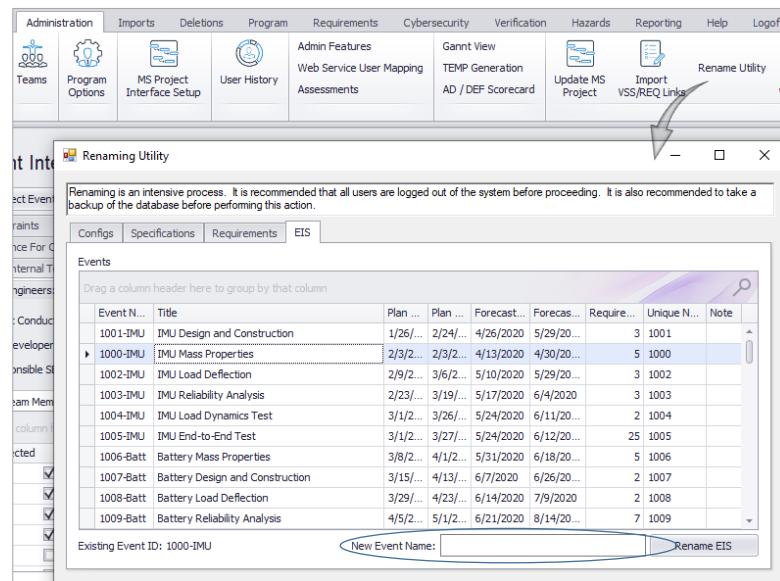
8.6 EIS Electronic Signature

The EIS electronic signature feature enables 2 project members as well as a customer to electronically sign (approve) the EIS. To **electronically sign an EIS**, follow the same steps described in paragraph 7.4 and click the **Sign Off** button. EIS signatories (the engineers granted write access) now can access the EIS and click the **Sign Off** button at which point their names as well as a date and time stamp will appear in the form and as well as in the signature block of the EIS report.



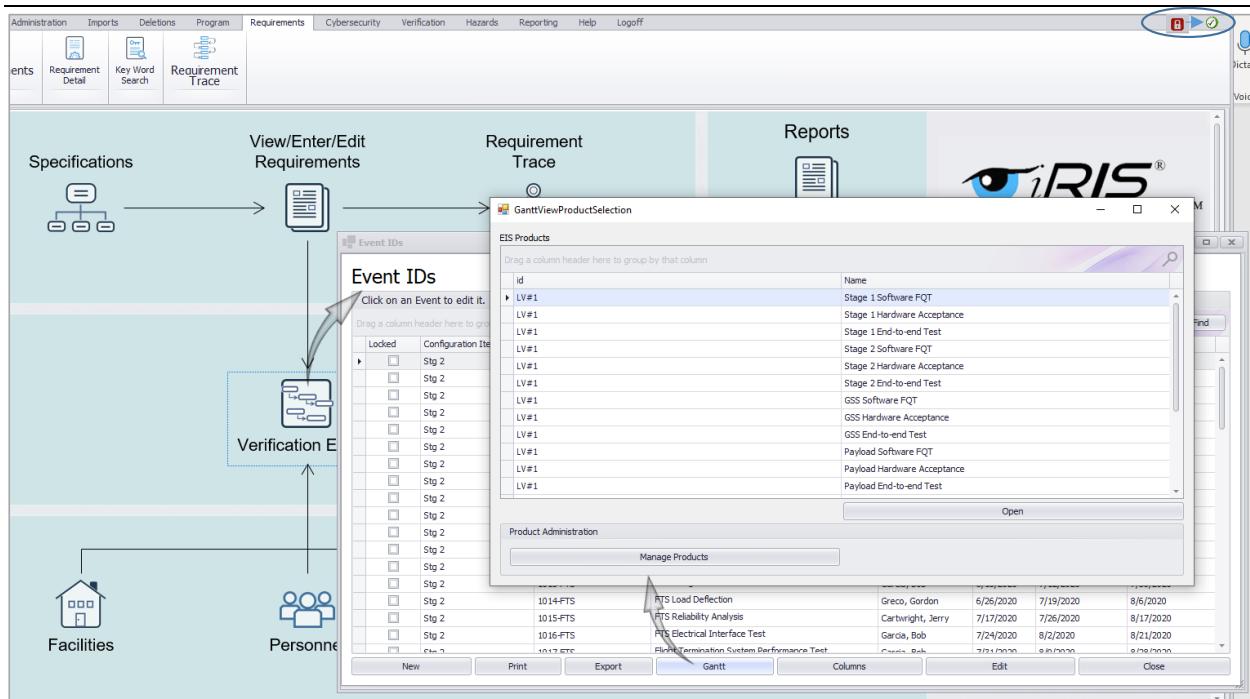
8.7 EIS Re-numbering

In the event an EIS must be re-numbered after it has been created, from the **Administration** tab, select the rename utility, then the EIS you'd like to change and enter the new EIS number in the lower window as shown. Click the **Rename EIS** button after re-numbering is complete.

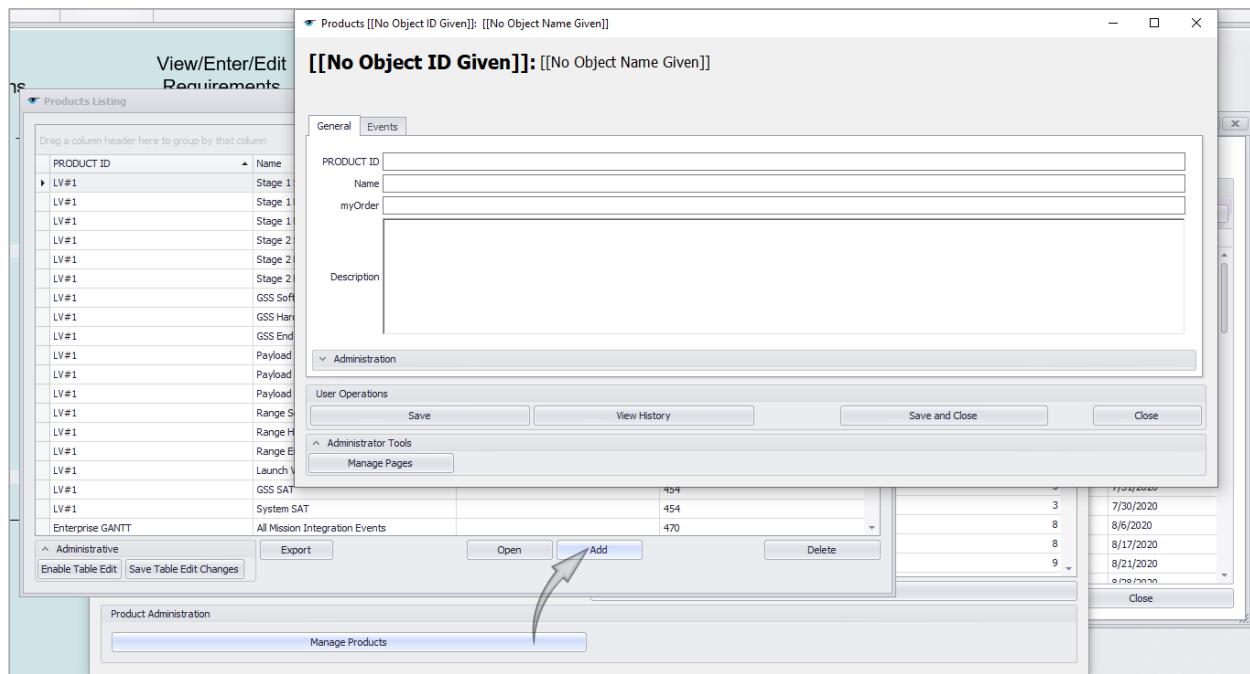


9 EIS GANTT Views

EISs can be grouped and displayed in Gantt views to provide quick and easy display of forecasted event completion for any desired set of events. To create a Gantt view, click first the padlock icon on the upper-right portion of the iRIS home page to unlock the admin Gantt features, then select the **Verification Events** icon and click the **Gantt** button:



Next, click the **Manage Products** button then the **Add** button:



Enter the Gantt (PRODUCT) ID, the name, and the order you'd like the Gantt to appear in the selection list and click **Save**. Click the Event tab and select the EISs you'd like to have displayed in the Gantt as shown:

EIS	Title	Requirements	Forecast Date
1005-IMU	IMU End-to-End Test		25 5/24/2020
1006-Batt	Battery Mass Properties		5 5/31/2020
1007-Batt	Battery Design and Construction		2 6/7/2020
1008-Batt	Battery Load Deflection		2 6/14/2020
1009-Batt	Battery Reliability Analysis		7 6/21/2020
1010-Batt	Battery Load Dynamics Test		6 6/21/2020

EIS	Title	Requirements	Forecast Date
1000-IMU	IMU Mass Properties		5 4/13/2020
1001-IMU	IMU Design and Construction		3 4/26/2020
1002-IMU	IMU Load Deflection		3 5/10/2020
1003-IMU	IMU Reliability Analysis		3 5/17/2020
1004-IMU	IMU Load Dynamics Test		2 5/24/2020

Administration

User Operations

Save View History Save and Close Close

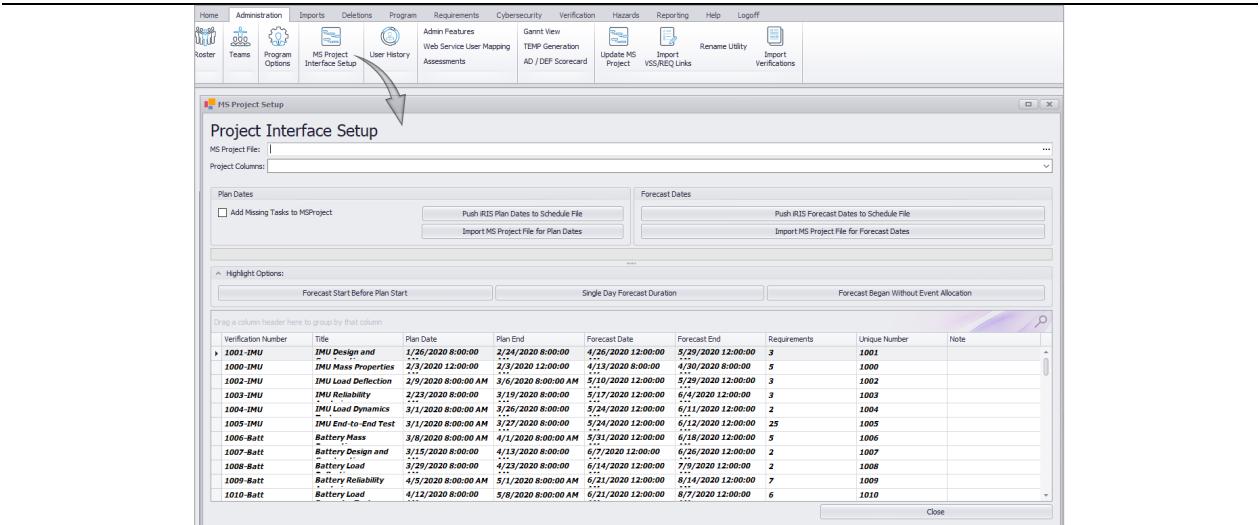
9.1 EIS Synchronization with Microsoft (MS) Project Schedules

A key feature of iRIS is its ability to synchronize project EISs with a MS Project schedule. The EIS contains start and stop dates for both the **plan** and **forecast** dates for a project. The EIS plan date is the date the event was originally planned in the project baseline schedule. These dates usually remain fixed unless the project schedule is “re-baselined”, or “re-planned” based on project dynamics. The forecast dates will typically change with a higher frequency since this is the “living” schedule, intended to convey the most up-to-date project schedule information available.

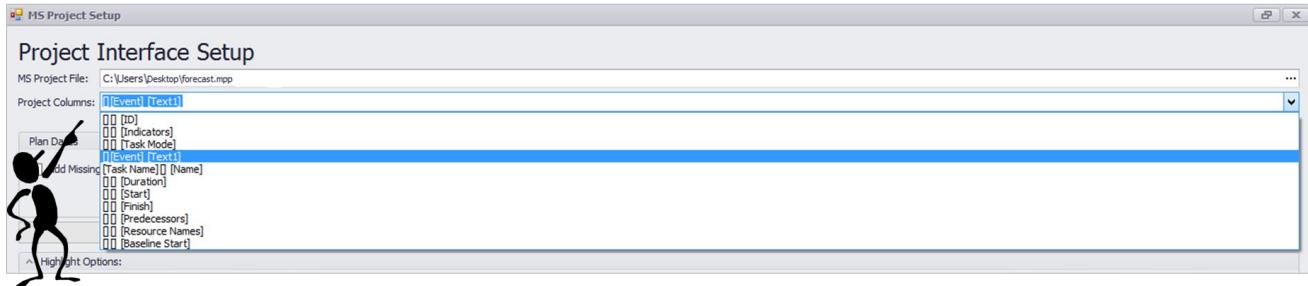
iRIS can be updated to reflect either plan or forecast schedule changes as often as required. It is important to note that the EIS plan and forecast start/end dates drive the time-dependent reports in iRIS such as the requirement verification “burn-up” plots so synchronizing iRIS with the project schedule is critical to generating meaningful reports.

The schedule synchronization process requires one MS Project schedule for **Plan** updates and one for **Forecast** updates. Each MS Project file must also use a column heading named “**Event**” that contains the unique EIS number used to identify the events in iRIS. The file must also have columns labeled “**Start**” and “**Finish**” which iRIS uses to insert the corresponding dates for each event. The update procedure can be a “pull”, where iRIS imports EIS start and end dates from a schedule or a “push”, where iRIS exports this data to the MS Project file.

To import “Forecast” schedule dates from an MS Project File first create schedule file in the required format ([click here to download the required import template](#)). Next, from the **Administration** tab, click on the **MS Project Interface Setup** button to launch the schedule synchronization GUI:

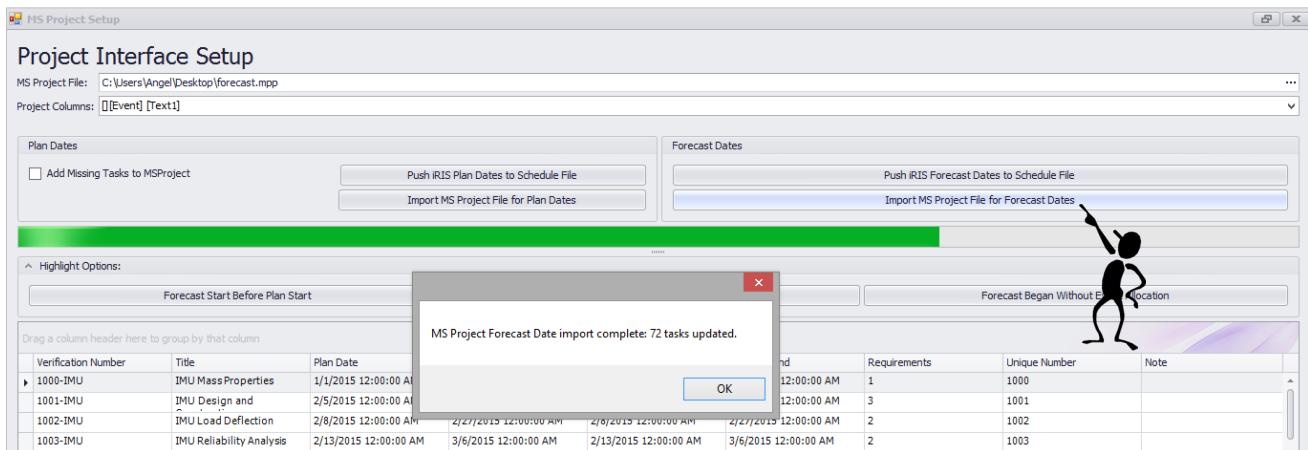


Next, establish a connection with the MS Project file by navigating to the file and clicking **OK**. The connection is verified by selecting the **Project Columns** drop-down which will show the columns of the MS Project file as shown below:

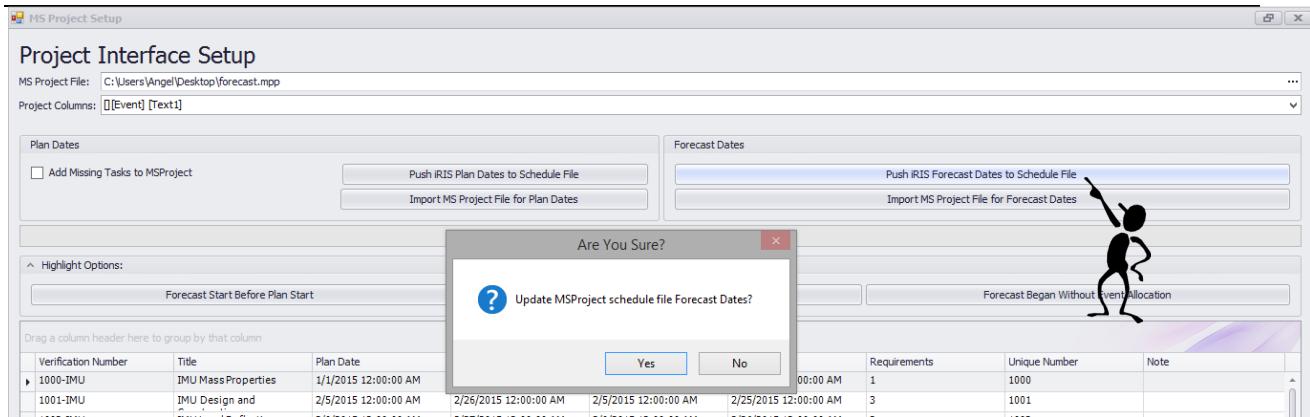


At this point verify that your MS project file contains the fields required for synchronization as discussed above (**Event, Start, Finish**).

To initiate the import, click the **Import MS Project File Forecast Dates** button and you will receive an acknowledgment that your import is complete:

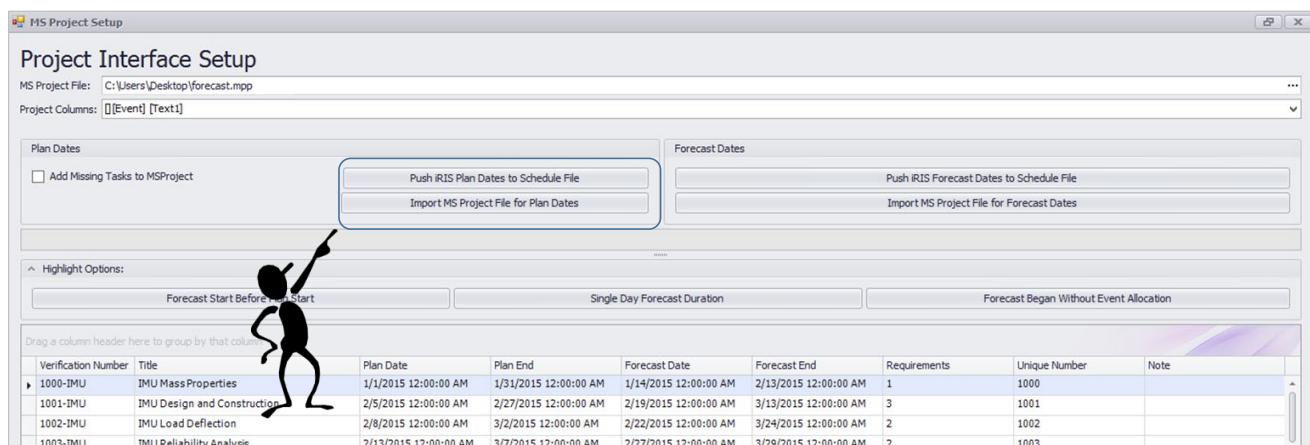


To export “Forecast” schedule dates to an MS Project File, navigate to your MS project file as described above and click the **Push iRIS Forecast Dates to Schedule** Button as shown:

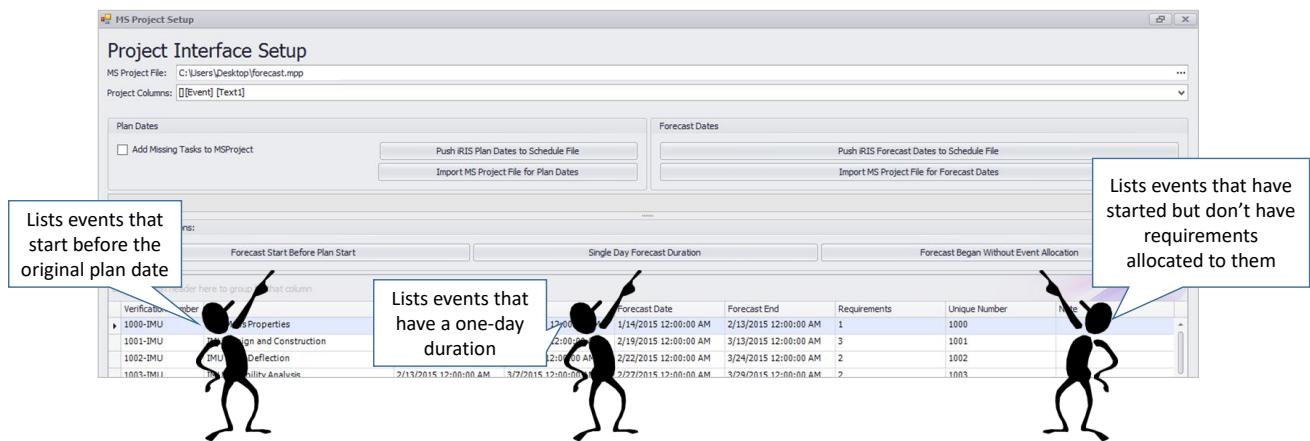


Click **Yes** and you will receive an acknowledgment that your MS Project file forecast dates have been updated with the corresponding dates in iRIS.

Follow these same steps to synchronize the Plan dates except click the buttons associated with the schedule plan data shown below:



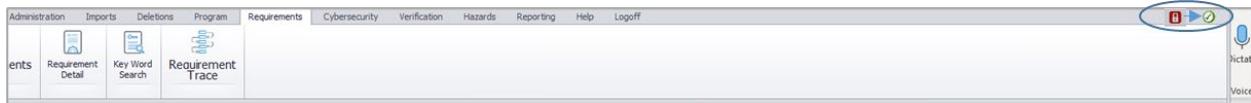
The iRIS schedule synchronization module also has built-in logic to support identification of schedule peculiarities or inconsistencies. This information may not necessarily reflect a problem but is provided to ensure the data being processed is consistent with the project execution plans. The graphic on the next page provides a brief explanation of these features which generate reports in the lower data grid when activated:



10 EIS Requirement Verification Results

Once an EIS has been executed and verification results become available, engineers that have been granted write access to the EIS can enter these results directly into iRIS via the requirement verification results GUI. During the data entry process, the system date of the hosting server will get recorded as the **Actual Date** the requirement is

verified. There may be occasions when this date may need to be modified to reflect a different date (i.e., perhaps there's an unforeseen delay in release of a test report). On these occasions, the requirement verification **Actual Date** may be overridden. **To override the Actual Requirement Verification Date**, first click the padlock on the upper-right corner of the home page to unlock this admin feature as shown:



Next, navigate to the verification results GUI, check the **Result** check box, select the schedule drop-down, and enter the date you'd like to use for your **Actual Requirement Verification** and click **Update** as shown:

The screenshot shows the 'Session Results' interface for requirement AP-022. The 'Requirement Details' panel includes fields for Requirement Number (AP-022), Requirement Description (The AP shall meet performance requirements throughout the service life prior to vehicle launch with a probability of greater than or equal to 0.99), and a large text area for notes. Below this is a 'Verification Evidence' field. The 'Result Date Override' section contains a 'Result' checkbox and a calendar for selecting a date. The calendar shows June 2017 with the 28th selected. Other fields include 'Deviation Report Number', 'Waiver Number', and a 'Closed' checkbox. The 'Verification Approach' section shows a grid of results for various tests, with one row highlighted for 'KV Fly-out'. At the bottom are 'Result Sign-off' and 'Hyperlink' buttons.

10.1 EIS Requirement Verification Results Bulk Import

Administrators also can perform a bulk update using MS Excel which may be helpful for performing large requirement verification updates ([click here to download the required import template](#)).

To perform a bulk update of requirement verification results, create a MS Excel import template that has column headings defined as shown below:

Column Heading Name	Data Item Definition
Event (*)	Alphanumeric event ID
Requirement (*)	Alphanumeric requirement ID
Closed (*)	Closure status (True/False)
Date (*)	Closure Date
Evidence (*)	Verification document reference (ie, test report)
Waiver Number	Unique ID for waiver (if applicable)
DR Number	Unique ID for Discipline Report (DR) (if applicable)
Verification Approach	Brief description of the approach used to verify the requirement
Hyperlink Title	Title of a hyperlinked document or artifact
Hyperlink	URL of hyperlinked document or artifact (http:// or https://)

* - Required Field

Once the requirement verification results have been loaded into the import template, save the file to the local computer, and access the import module as shown below:

A	B	C	D	E	F	G	H	I
Event	Requirement	Closed	Date	Evidence	Waiver Number	DR Number	Verification Approach	Hyperlink Title
1	2 1000-IMU IMU-013	TRUE	5/15/2016	Test Report 123, Page 1			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
2	3 1001-IMU IMU-005	TRUE	5/16/2016	Test Report 123, Page 2			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
4	4 1001-IMU IMU-007	TRUE	5/17/2016	Test Report 123, Page 3			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
5	5 1001-IMU IMU-014	TRUE	5/18/2016	Test Report 123, Page 4			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
6	6 1002-IMU IMU-011	TRUE	5/18/2016	Test Report 123, Page 5			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
7	7 1002-IMU IMU-023	TRUE	5/18/2016	Test Report 123, Page 6			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
8	8 1003-IMU IMU-004	TRUE	5/18/2016	Test Report 123, Page 7			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
9	9 1003-IMU IMU-008	TRUE	5/18/2016	Test Report 123, Page 8			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
10	10 1004-IMU IMU-006	TRUE	5/18/2016	Test Report 123, Page 9			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
11	11 1004-IMU IMU-009	TRUE	5/25/2016	Test Report 123, Page 10			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
12	12 1004-IMU IMU-012	TRUE	5/25/2016	Test Report 123, Page 11			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
13	13 1005-IMU IMU-001	TRUE	5/26/2016	Test Report 123, Page 12			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	
14	14 1005-IMU IMU-003	TRUE	5/27/2016	Test Report 123, Page 13			Specific data monitors were sampled to verify correct level Compliance Artifact http://local	

Select **Load Excel** and navigate to the worksheet you'd like to import and click **Open**. The import module will then display the contents of your Excel worksheet with column headings shaded green. In the event the Excel worksheet column headings do not match the required heading names from import, the import module will shade these headings grey indicating that these headings must be corrected to conduct a successful import of the data in the associated column.

Click **Assess Worksheet** and the import module will go through a series of data integrity checks to ensure the import worksheet does not violate the following business rules:

1. Required fields must contain data.
2. The requirement/event combination must exist in the database (i.e., requirement must be allocated to the event which is being updated).
3. Requirement and Event IDs must exist in the database.

If the worksheet passes these checks, you will be given the feedback that the import is available.

Helpful Hint: There may be instances where imports must be repeated to update the verification results. In these cases, remove the optional hyperlink name and URL if they still apply to the results being updated since the hyperlink name and URL will get repeated in the hyperlink table with each successive import.

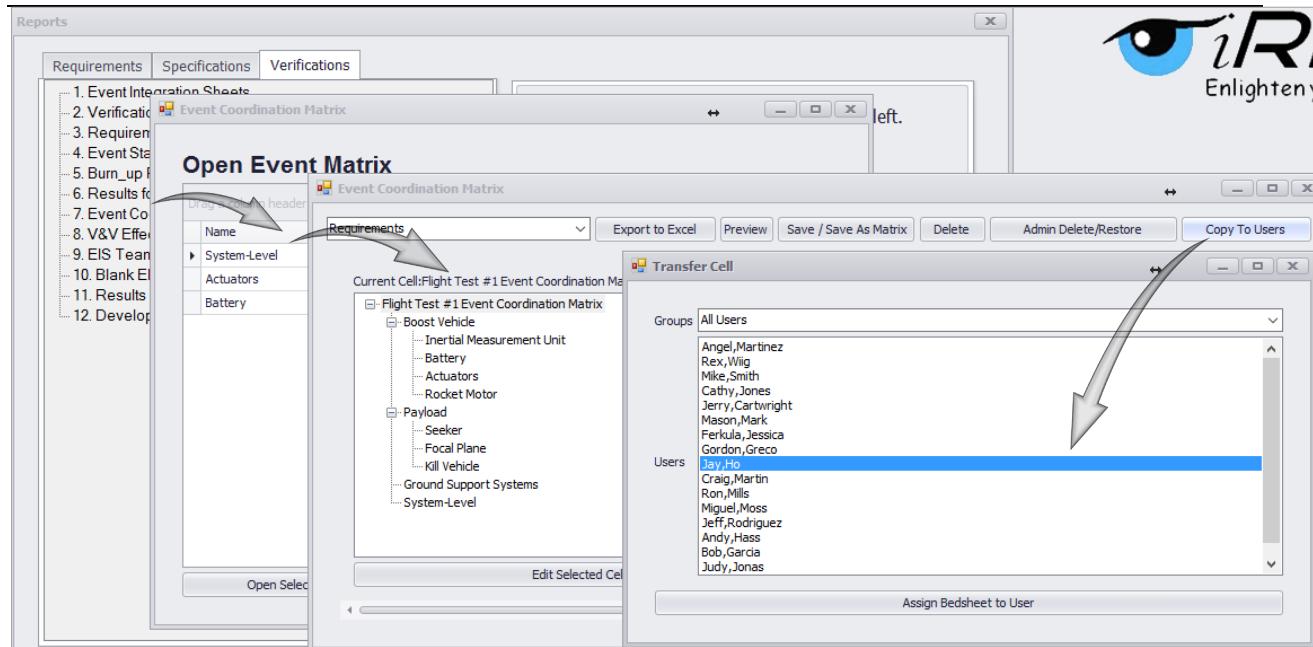
11 Report Setup & Administration

The following sections describe the administrative process to set up and manage advanced reports in iRIS.

11.1 Test & Verification Evaluation Matrix (TVEM) Access and Administration

All users have access and the ability to set up a TVEM report as described in paragraph 7.11 of the Quick Start Users Guide however these reports may be accessed only by the originator. Administrators have the ability to create TVEMs and grant **Read** access to any team member using the following procedure.

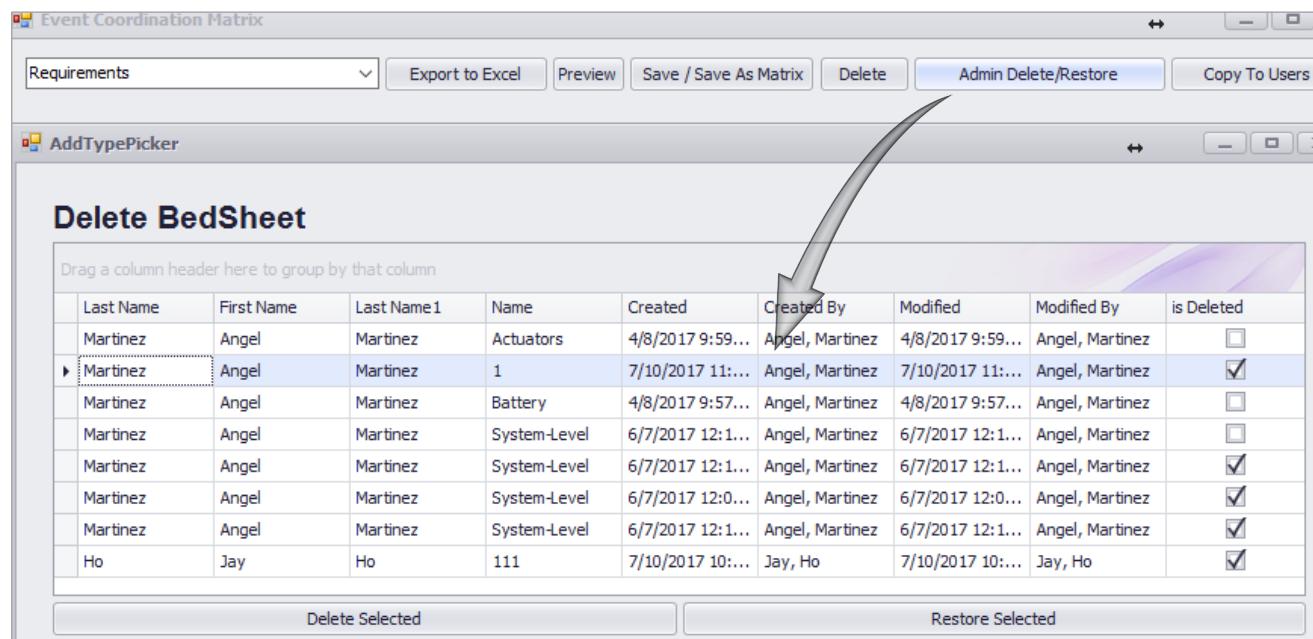
To grant user access to an administrator generated TVEM, open the subject TVEM and click **Copy to Users** as shown:



Select the user(s) you wish to grant access and click ***Copy to User*** as shown.

11.2 TVEM Delete & Restore

On occasion, users may inadvertently delete a TVEM and have the need to restore this report to support their daily tasking. **To restore a deleted TVEM...**open the TVEM report GUI and click ***Admin Delete/Restore*** as shown on the next page:



Select the subject TVEM and click ***Restore Selected*** to reactivate the TVEM. Users will then be able to access the TVEM upon their next login. Conversely, administrators can also delete TVEMs from this GUI by clicking the ***Delete Selected*** button.

11.3 Developmental Evaluation Framework (DEF) Report Configuration

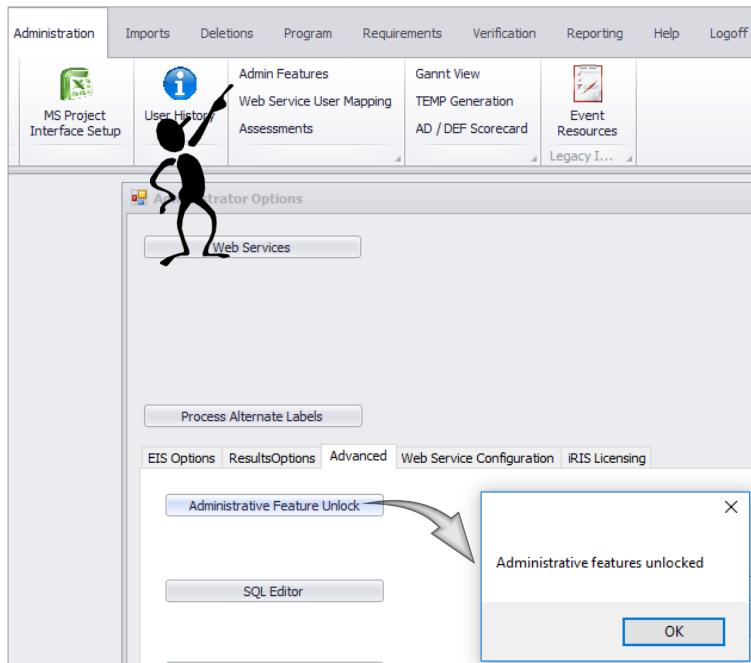
The iRIS DEF report was developed in response to a new Department of Defense Instruction (DoDI) 5000.02 "Operation of the Defense Acquisition System" policy. A key element of the policy requires DoD programs to

implement a Development Evaluation Framework (DEF) that articulates a Developmental Test and Evaluation (DT&E) strategy that enables project management to make key decisions based on accurate and timely verification data. (see Celeris white paper ***Amassing Information for Decisions: Automating the Developmental Evaluation Framework (DEF)*** for more information).

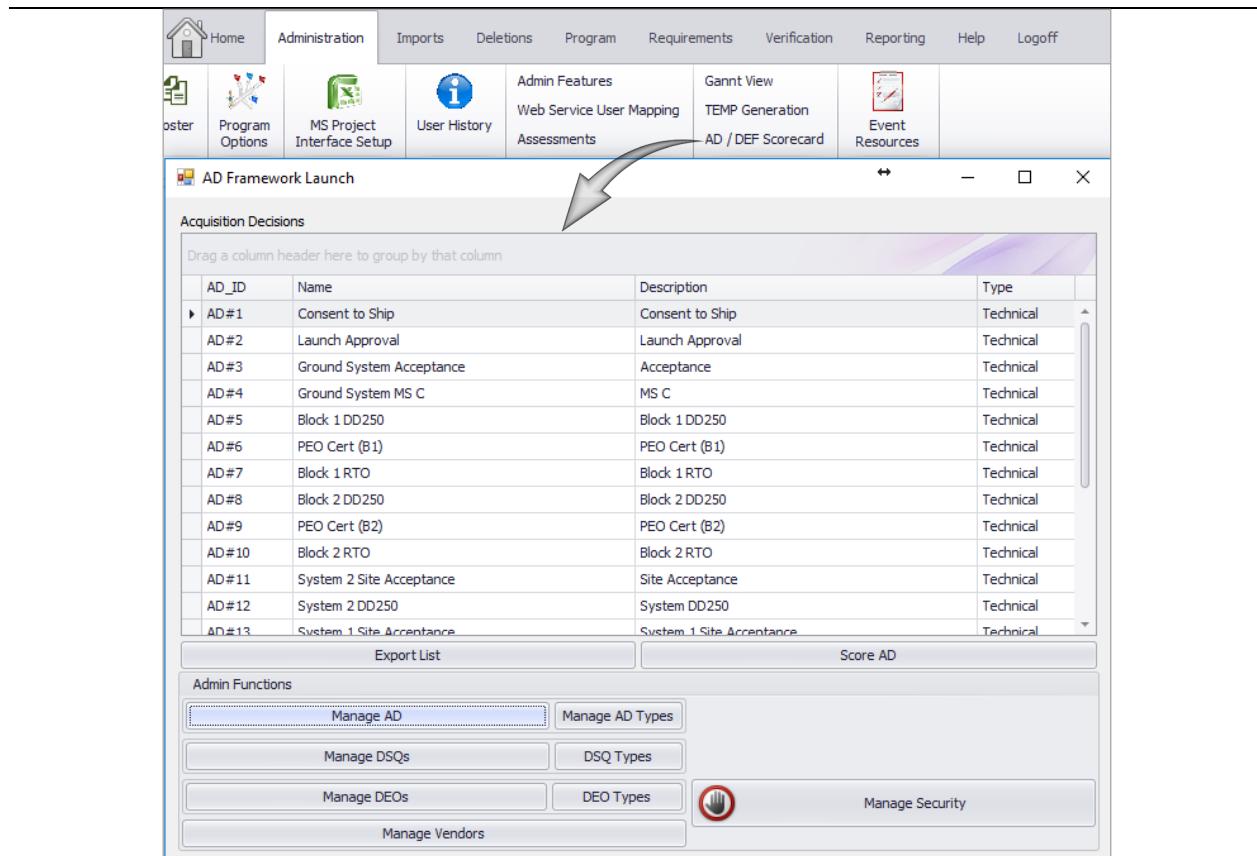
The DEF report configuration uses the following setup sequence:

- Step 1: Enter Acquisition Decision (AD) Types (Programmatic/Operational/Technical)
- Step 2: Enter AD
- Step 3: Enter Decision Support Question (DSQ) Type
- Step 4: Enter DSQ
- Step 5: Link AD to DSQ
- Step 6: Enter Developmental Evaluation Objective (DEO) Type
- Step 7: Enter DEOs
- Step 8: Link DEOs to Requirements
- Step 9: Manage Vendors

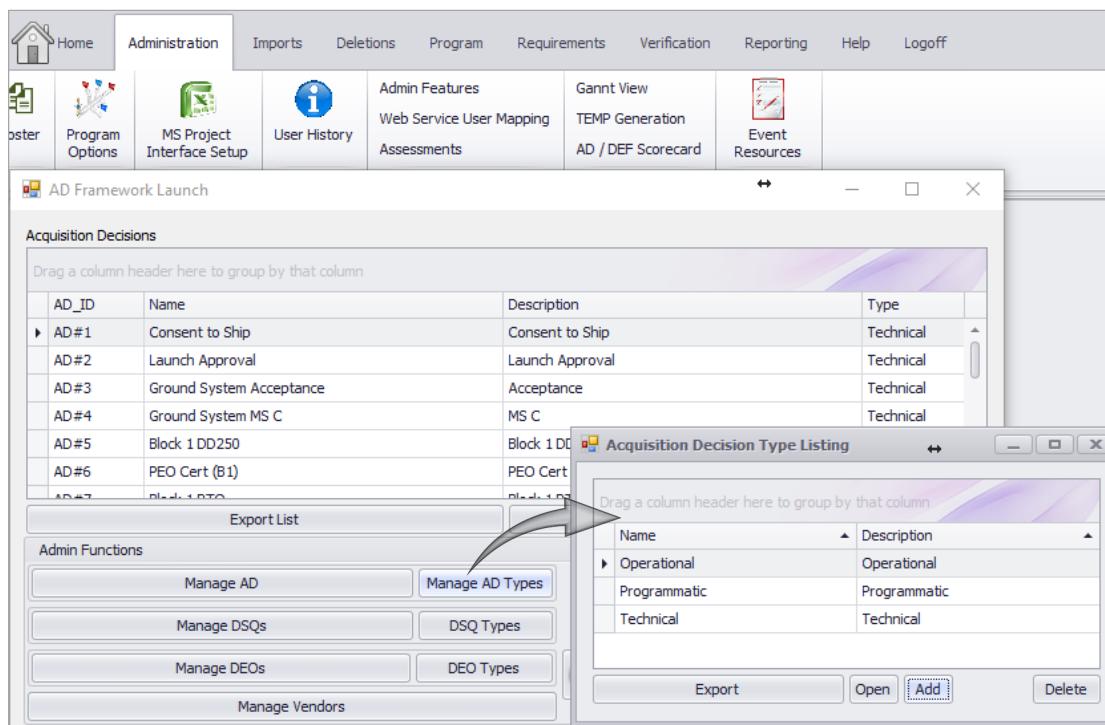
To enter the DEF administrator's console, first unlock administrator features as shown:



Next, click on the ***AD/DEF Scorecard*** button to launch the DEF administration console:



Step 1: Enter Acquisition Decision (AD) Types: to create a new Acquisition Decision Type...click **Manage AD Types to launch the acquisition decision types data entry form:**



Click **Add** to create a new acquisition decision or **Open** to edit an existing AD.

Step 2: Enter AD: to create a new AD...from the DEF management console click **Manage AD to launch the AD data entry form:**

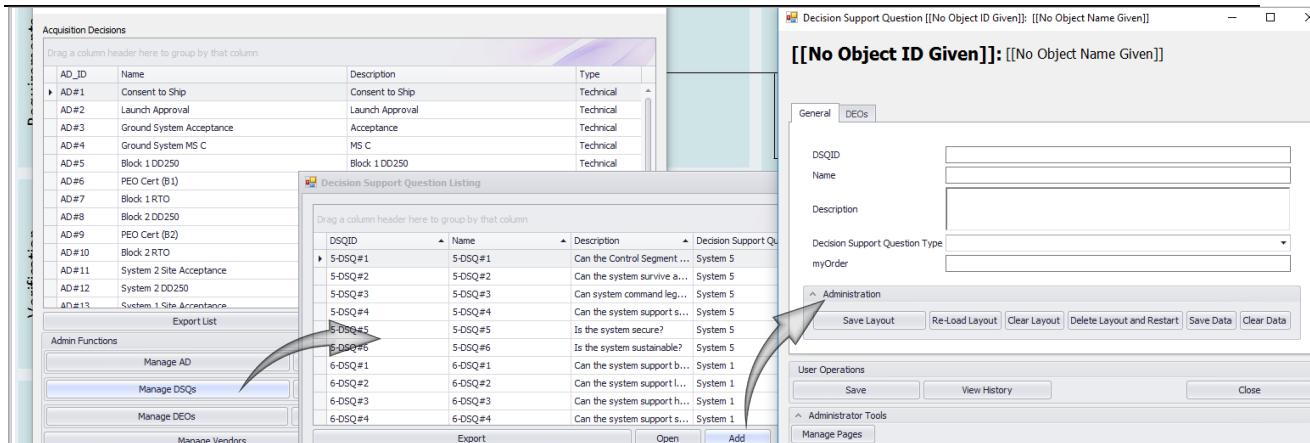
AD_ID	Name	Acquisition Decision Type	Description
AD#1	Consent to Ship	Technical	Consent to Ship
AD#2	Launch Approval	Technical	Launch Approval
AD#3	Ground System Acceptance	Technical	Acceptance
AD#4	Ground System MS C	Technical	MS C
AD#5	Block 1 DD250	Technical	Block 1 DD250
AD#6	PEO Cert (B1)	Technical	PEO Cert (B1)
AD#7	Block 1 RTO	Technical	Block 1 RTO
AD#8	Block 2 DD250	Technical	Block 2 DD250
AD#9	PEO Cert (B2)	Technical	PEO Cert (B2)
AD#10	Block 2 RTO	Technical	Block 2 RTO
AD#11	System 2 Site Acceptance	Technical	Site Acceptance
AD#12	System 2 DD250	Technical	System DD250
AD#13	System 1 Site Acceptance	Technical	System 1 Site Acceptance
AD#14	System 1 DD250	Technical	System 1 DD250
AD#15	System-M MS B/C	Technical	System-M MS B/C
AD#16	System-S/M MS B/C	Technical	System-S/M MS B/C
AD#17	System-M PEO Cert	Technical	System-M PEO Cert
AD#18	System-S/M PEO Cert	Technical	System-S/M PEO Cert
AD#19	System-M Service Fielding De...	Technical	System-M Service Fielding De...
AD#20	System-S/M Service Fielding ...	Technical	System-S/M Service Fielding ...

Starting with the acquisition decision ID field (**ADID**), complete the form including the Acquisition Decision Type (drop-down) and order you'd like the new AD to appear by filling in the **Order** field (will be sorted in the AD list by ascending order). Click **Save** when complete and the new AD will appear in the list.

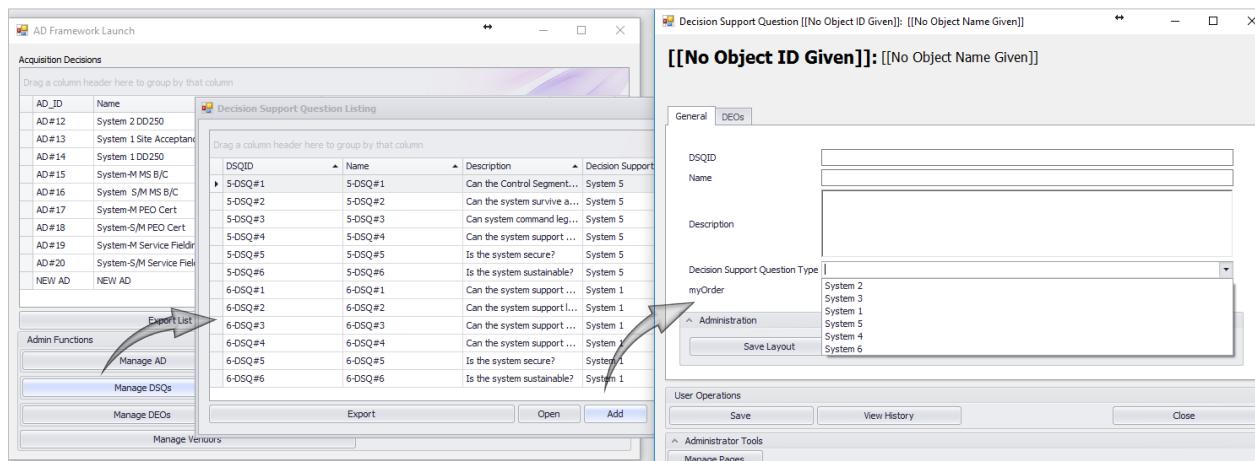
Step 3: Enter Decision Support Question (DSQ) Type...to create a new DSQ you must first assign it a type which refers to the configuration item the DSQ applies to. Click **Manage DSQ Types to launch the DSQ types data entry form:**

DSQ Type	Name	Description
System 1	System 1	System 1
System 2	System 2	System 2
System 3	System 3	System 3
System 4	System 4	System 4
System 5	System 5	System 5
System 6	System 6	System 6

Starting with **Name** field, complete the form including the DSQ Type and order you'd like the new DSQ Type to appear by filling in the Order field (will be sorted in the list by ascending order). Click **Save** when complete and the new DSQ Type will appear in the list.

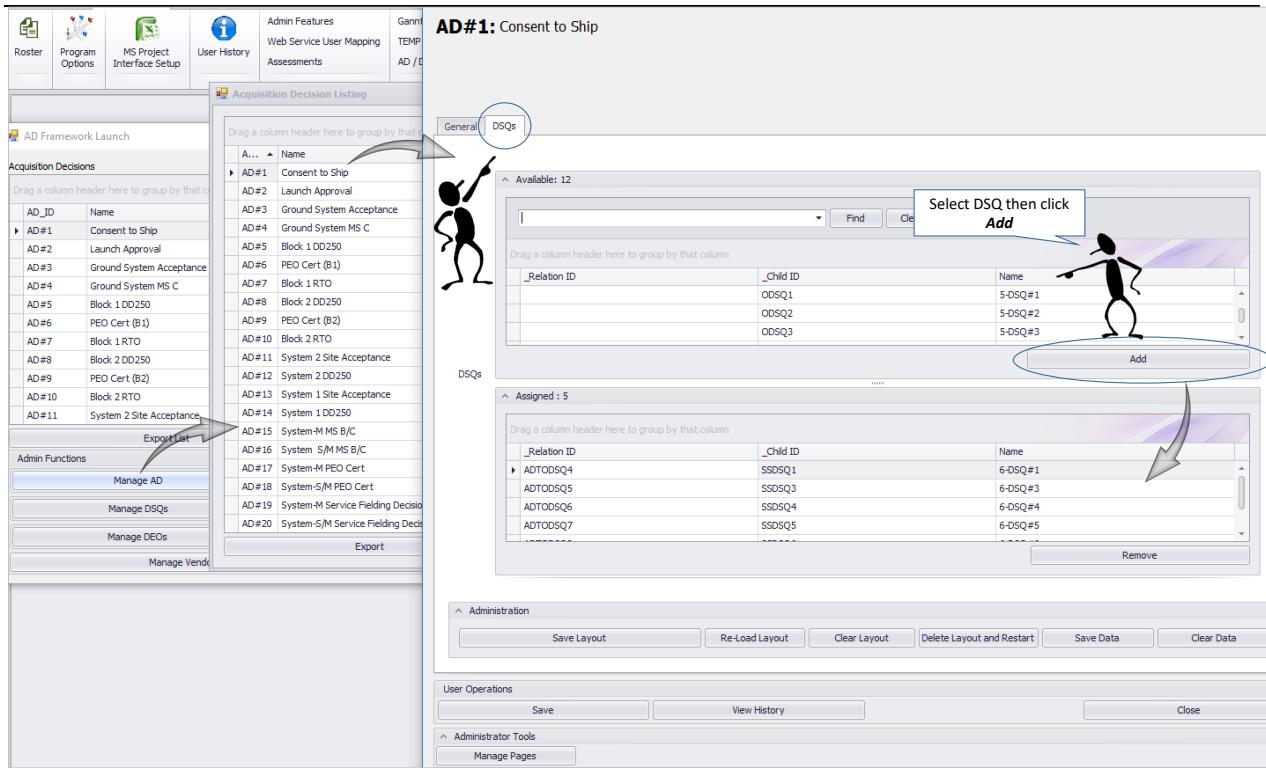


Step 4: Enter the DSQ to enter a DSQ...click the **Manage DSQs** button then click **Add** as shown below:



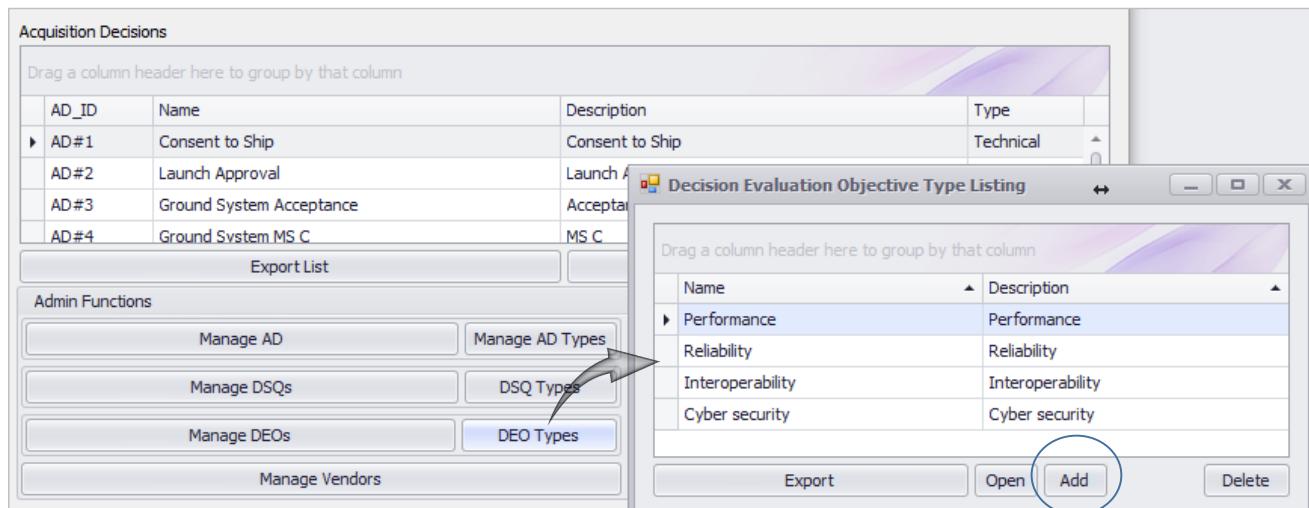
Complete the DSQ data entry form including selection of the **Decision Support Question Type** from the drop-down window. Click **Save** and the new DSQ will appear in the DSQ list.

Step 5: Link AD to DSQ: this step creates the relationships between ADs and the applicable DSQs. **To create a new AD-to-DSQ relationship...** click on the **Manage AD** button then double-click on the AD you'd like to link DSQs to as shown:



Select the DSQ you'd like to link then click the **Add** button. The DSQ will then appear in the lower data grid indicating that the DSQ has now been linked to the AD. Click **Save** to save and close the form.

Step 6: Enter Developmental Evaluation Objective (DEO) Type: DoDI 5000.02 requires DEOs be grouped into the following 4 categories: 1) Performance; 2) Reliability; 3) Interoperability and 4) Cyber security. To enter a new DEO type...click the **DEO Types** button and click the **Add** button. Enter the DEO into the data entry form, click the **Save** button and the new DEO type will appear in the DEO Type list.



Step 7: Enter DEOs: click the **Manage DEOs** button then click **Add** as shown below:

The screenshot shows two windows side-by-side. On the left is the 'Development Evaluation Objective Listing' window, which displays a grid of DEOs with columns for DEOID, Name, Description, and Development Evaluation O... (with a truncated description). On the right is a detailed '[[No Object ID Given]]: [[No Object Name Given]]' form for a new requirement. This form includes fields for DEOID, Name, Description, Development Evaluation Objective Type (a dropdown menu), and various tabs for General, Requirements, and Administration. Buttons at the bottom include Save Layout, Re-Load Layout, Clear Layout, Delete Layout and Restart, Save Data, and Clear Data.

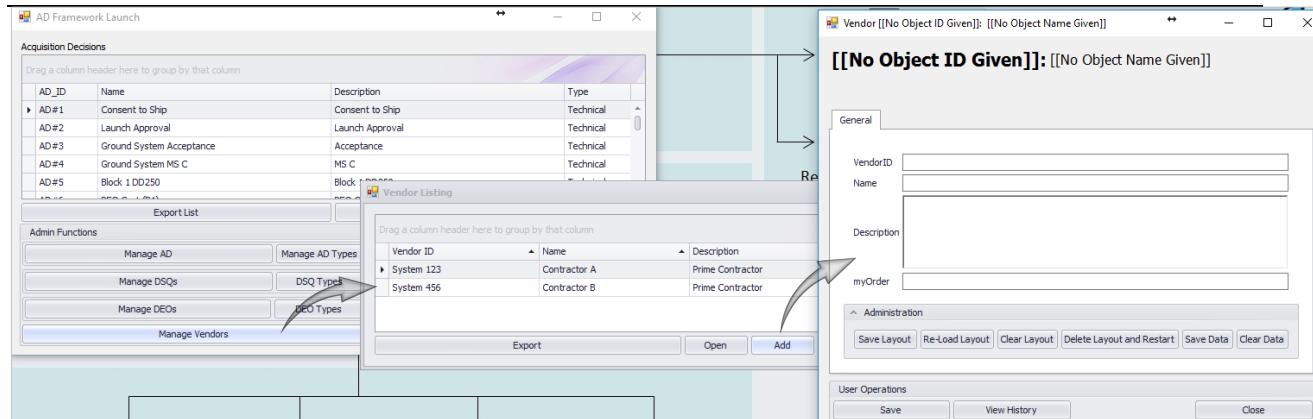
Complete the DEO data entry form including selection of the **Type** from the drop-down window. Click **Save** and the new DEO will appear in the DEO list.

Step 8: Link DEOs to Requirements: this step creates the relationships between DEOs and the applicable requirements. **To create new DEO-to-Requirement relationships...**click on the **Manage DEOs** button then double-click on the DEO you'd like to link requirements to as shown:

This screenshot shows the 'Development Evaluation Objective' window with a specific DEO selected (ODEO#3: Availability Continuity). The 'Requirements' tab is active, showing a list of available requirements with an 'Add' button highlighted. A callout bubble says 'Select requirements then click Add'. Below this, the 'Assigned' section shows requirements linked to the DEO, with an 'Add' button and a 'Assigned DEOs' table. The main interface on the left shows the 'Specifications' and 'Acquisition Decisions' sections.

Select the requirements you'd like to link then click the **Add** button. The requirements will then appear in the lower data grid indicating that the requirements have now been linked to the DEO. Click **Save** to close this form.

Step 9: Manage Vendors: provides the ability to score any number of vendors for a given DEF scorecard. **To add or edit vendors for DEF scoring...**Click the **Manage Vendors** button then click **Add** as shown below:



Complete the vendor data entry form then click **Save** to save and close the form. To edit vendor data, click the **Open** button, update the data in the form then click **Save**.

12 Annual License Key Renewal

iRIS software licenses are set to expire one year after purchase. After the 1-year period, a new license key must be issued by the licensor and installed using the admin console. Please refer to the following steps to execute the renewal process:

User License Key (sample):

Avg2wYQ1775+tRj6LUW990098098kEoshWBtBYww68TezyuD*8836==

Enterprise Key (sample):

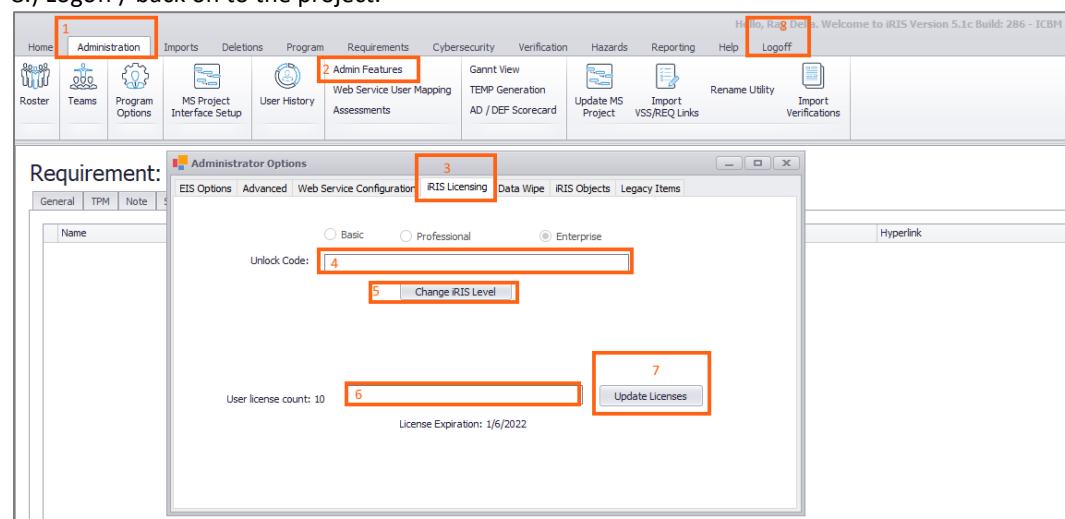
/DUjEa6+lnHa1FYVzje/S0y67JjmaEO

Log into iRIS with an administrator account.

- 1.) Click Administration Tab.
- 2.) Click Admin Features Button.
- 3.) Click iRIS Licensing Tab on Administrator Options Window.
- 4.) Copy / Paste the **Enterprise Key** to the '*Unlock Code*' field.
- 5.) Click Change iRIS Level Button and acknowledge any popup message.
- 6.) Copy / Paste the **User Key** to the text field next to the '*User license count*' field.
- 7.) Click 'Update Licenses' button and acknowledge any popup message.

Close the Administrator Options Window.

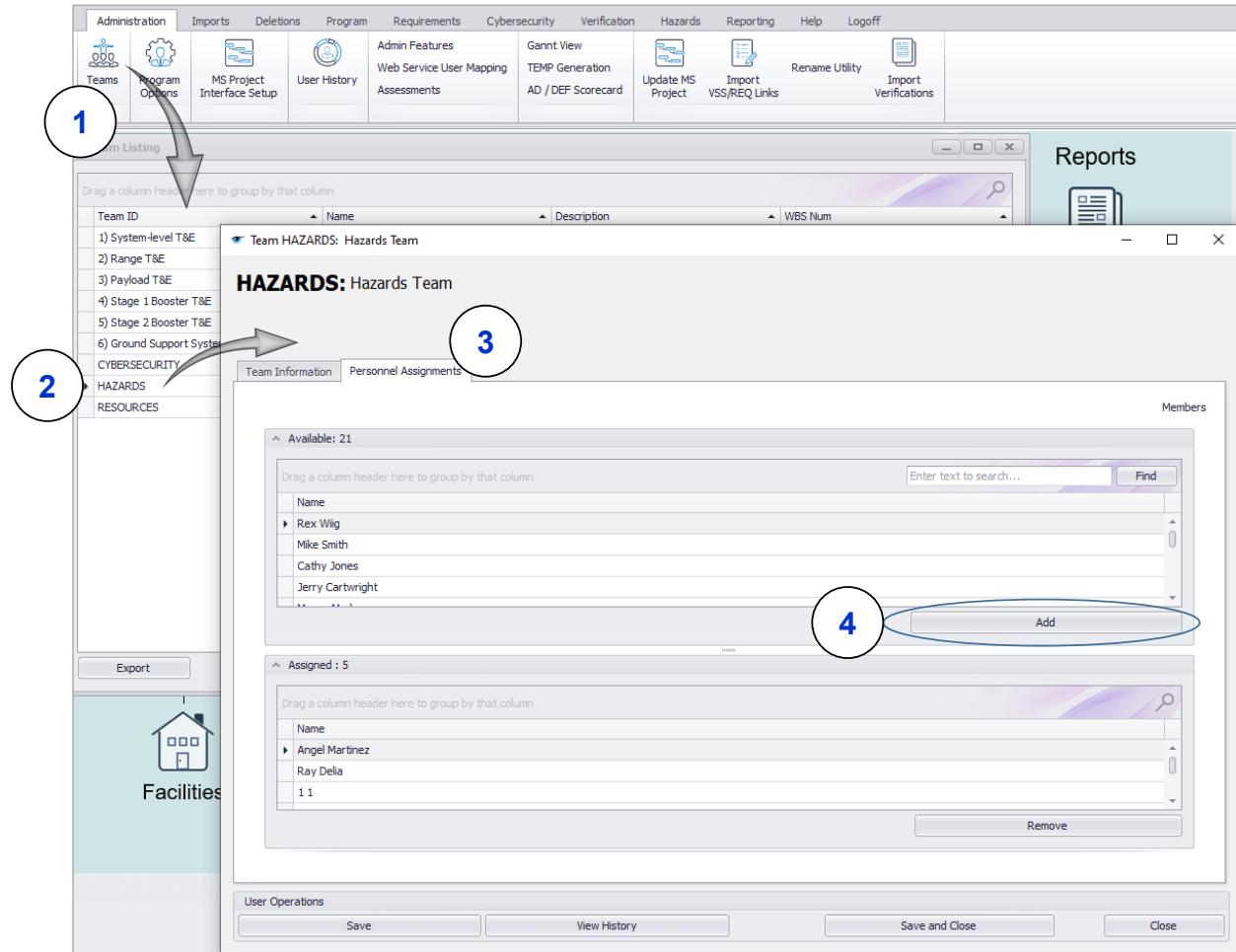
- 8.) Logoff / back on to the project.



APPENDIX A: Hazard Module Setup & Configuration

13 Granting User Access to the Hazard Module

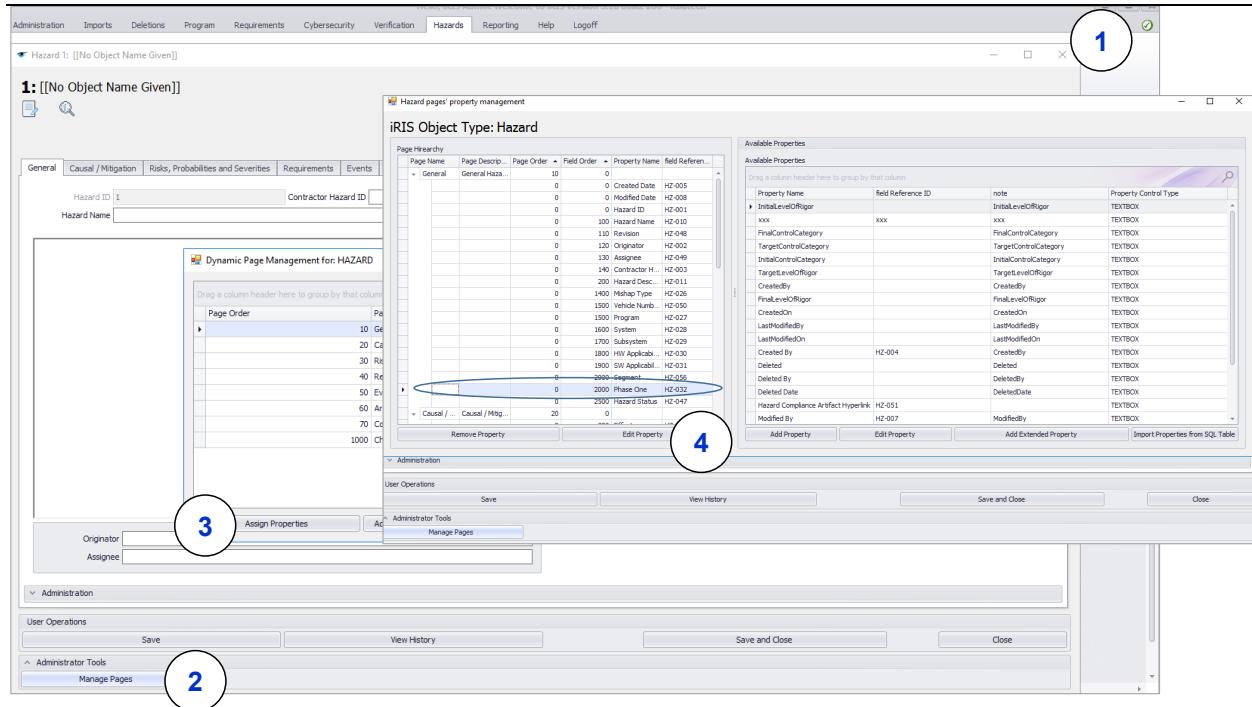
Users can be granted access to the hazard module via the administrator **Teams** console. To grant access to the hazard module, follow these steps:



Note that users are granted “read” access via this method. To grant “write” access to hazards, select the **Hazard** check box in the Roster Administrator’s console.

13.1 Hazard Phase Customization

Administrators can customize the hazard phases displayed in the general hazard GUI tab. **To modify the hazard phases, open any hazard record and follow the steps outlined below:**



Select the row for Property Name “Phase One”, click Edit Property (step 4) and the following forms will appear:

Once the **Manage Selections** button is clicked, the following table will appear:

DynamicPropertySelections

Selection Type: Add Selection Type

Selections

Drag a column header here to group by that column

ID	Object ID	Property ID	Selection	mv Order	is Hidden	Enumeration	Value	Note	Created By	Created Date	Modified By	Modified Date	Deleted	Deleted By	Deleted Date
07D4E6A8-92...	HAZARD	Mishaps	<input type="checkbox"/>	1	1	1	1	1	1	3/4/2016			<input type="checkbox"/>		
0B54CEC2-23...	HAZARD	Mishaps	<input type="checkbox"/>	2	2	2	2	1	3/4/2016			<input type="checkbox"/>			
20DB7060-47...	HAZARD	Mishaps	<input type="checkbox"/>	8	8	8	8	1	3/4/2016			<input type="checkbox"/>			
28A4B8AF-A5...	HAZARD	Mishaps	<input type="checkbox"/>	9	9	9	9	1	3/4/2016			<input type="checkbox"/>			
2D0000F9-3E...	HAZARD	Mishaps	<input type="checkbox"/>	2	2	2	2	1	3/4/2016			<input type="checkbox"/>			
52AB529A-2F...	HAZARD	Mishaps	<input type="checkbox"/>	7	7	7	7	1	3/4/2016			<input type="checkbox"/>			
7ED5068-CD...	HAZARD	Mishaps	<input type="checkbox"/>	5	5	5	5	1	3/4/2016			<input type="checkbox"/>			
B6004D85-B1...	HAZARD	Mishaps	<input type="checkbox"/>	4	4	4	4	1	3/4/2016			<input type="checkbox"/>			
CS9F1B81-0C...	HAZARD	Mishaps	<input type="checkbox"/>	6	6	6	6	1	3/4/2016			<input type="checkbox"/>			
DE08PF4B-9D...	HAZARD	HazardSoftwareCon...	<input type="checkbox"/>	0	0	0	0	1	9/26/2019			<input type="checkbox"/>			
BA426B86-F8...	HAZARD	Severities	<input type="checkbox"/>	1	1	1	1	1	3/4/2016			<input type="checkbox"/>			
64587859-17...	HAZARD	SystemPhases	<input checked="" type="checkbox"/>	1	1	1	1	2	9/22/2020			<input type="checkbox"/>			
C061FD88-9A...	HAZARD	SystemPhases	<input type="checkbox"/>	2	2	2	2	1	9/22/2020			<input type="checkbox"/>			
EED328D0-13...	HAZARD	Severities	<input type="checkbox"/>	3	3	3	3	1	3/4/2016			<input type="checkbox"/>			
D4E99316-9D...	HAZARD	Severities	<input type="checkbox"/>	Margin (3)	3	3	3	3	1	3/4/2016			<input type="checkbox"/>		
64587859-17...	HAZARD	CustomChange...	<input type="checkbox"/>	Mobile (3)	3	3	3	3	9/22/2020			<input type="checkbox"/>			

Export to Excel | Add Selection | Update | Delete

Filter on SystemPhases, modify the phase names in the Selection column, and click **Update**.

DynamicPropertySelections

Selection Type: Add Selection Type

Selections

Drag a column header here to group by that column

ID	Object ID	Property ID	Selection	mv Order	is Hidden	Enumeration	Value	Note	Created By	Created Date	Modified By	Modified Date	Deleted	Deleted By	Deleted Date
64587859-17...	HAZARD	SystemPhases	Phase 1	1	<input type="checkbox"/>	1	1	1	2	9/22/2020			<input type="checkbox"/>		
C061FD88-9A...	HAZARD	SystemPhases	Phase 2	2	<input type="checkbox"/>	2	2	2	2	9/22/2020			<input type="checkbox"/>		
5593110F-565...	HAZARD	SystemPhases	Phase 3	3	<input type="checkbox"/>	3	3	3	3	9/22/2020			<input type="checkbox"/>		
0552026E-0E...	HAZARD	SystemPhases	Phase 4	4	<input type="checkbox"/>	4	4	4	4	9/22/2020			<input type="checkbox"/>		
409D3EA9-2C...	HAZARD	SystemPhases	Phase 5	5	<input type="checkbox"/>	5	5	5	5	9/22/2020			<input type="checkbox"/>		
2CEAA69C-75...	HAZARD	SystemPhases	Phase 6	6	<input type="checkbox"/>	6	6	6	6	9/22/2020			<input type="checkbox"/>		

Export to Excel | Add Selection | **Update** | Delete

Close out of all open forms and relaunch the Hazard record to see updated system phases in the GUI.