Review Document For

Systems Engineering Workflow Use Case:

Analyze Stakeholders Needs

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# Introduction

## Intent

The intent of this document is to provide the material required to support the review of the use case "Analyze Stakeholders Needs". Use the Word "Track Changes" features to suggest changes and add comments as necessary to log questions and comments. The section called "Items to Review" contains the artifacts that are to be evaluated for this review. The additional material in this document is intended to provide the appropriate context and definitions to support the review.

## Assumptions

1. The workflow use cases defined are intended to be used on large complex systems supported by large geographically diverse development teams. With smaller and simpler systems some of the use cases may not be needed or, they may require a simpler workflow. 2. The workflow use cases are described assuming a model-based approach is used to develop a system. However, many of the use cases are not dependent on using model-based techniques, since they are the very same use cases System Engineers have been using before model-based techniques were available.

# Context

The diagram below defines a typical Product Domain structure. Within this domain is the SE Development System. Systems Engineering Development System (SEDS) is the context for the Systems Engineering Workflow Use Cases. It is the system used to provide an integrated environment of tools and capabilities required to perform Systems Engineering activities and tasks. This includes the environment to support system requirements flowdown, design, analysis, verification, validation activities. The SEDS provides interfaces to external domains such as the software, mechanical, electrical engineering domains and interfaces to manufacturing, support and product management domains.

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Figure 1: Systems Engineering Workflow Use Case Context

# Items to Review

## "Analyze Stakeholders Needs" Use Case

### Use Case Attributes

1. The location of the use case being reviewed, "Analyze Stakeholders Needs", in the model browser is "System Engineering Operations::System Engineering Development System::SE Life Cycle Workflow Use Cases::Exploratory and Concept Stage::Analyze Stakeholders Needs". 2. The Maturity Level is listed as "Early Activity".3. The Selection Status is listed as "Selected".

### Use Case Description

**Goal -** The goal of this workflow use case is to identify all stakeholders and better understand and capture their required needs expectations, goals, and objectives across the entire product life cycle.**Primary Actor -** System Architect**Secondary Actors -** Stakeholders**Preconditions -Activity -** 1. Define Stakeholders and their Needs/Goals - In this task the primary actor identifies and captures the system-of-interest stakeholders from across all life cycle stages. The intent is to elicit and capture a set of stakeholder needs, expectations, goals, or objectives for a desired solution. 2. Define the system domain level model - This task is to evaluate and capture the existing domain structure with and without the system-of-interest included. In this task the definition of the appropriate domain entities and their relationship to other entities are captured. These definitions can include stakeholders, other systems, organizations or roles that participate with or influence the system-of-interest. Also captured are the primary interfaces for each. 3. Analyze mission level use cases - Identify the mission level use cases where the system-of-interest will be expected to participate. This task includes capturing the behavior of the system-of-interest and other participating entities to fully understand the needs of the system-of-interest, what constraints will be imposed because of this surrounding environment and the key system-of-interest interfaces. 4. Analyze system threats - Identify and capture any additional use cases or scenarios that may occur during the mission level use cases that can pose an external threat or unwanted system behavior. 5. Define Effective Measures - Elicit from the stakeholders a set of measurable properties and a means of demonstrating how the overall system goals and objectives are met. 6. Derive a set of stakeholder requirements relative to the system-of-interest needs analysis. 7. Capture any unknowns, risks and assumptions. Derive a method to manage these entities through the product life cycle. 8. Review results with internal stakeholders including appropriate internal development, manufacturing and management teams. 9. Review results with the customer and other appropriate external stakeholders. **Post Conditions -**1. A domain level model is available including all stakeholders, appropriate mission level use cases, the required needs of the stakeholders, the system-of-interest's boundaries and its key interfaces to other entities. **References and Citations:** [2} References: INCOSE Systems Engineering Handbook, Section 4.1 [3] SEBok - Concept Definition [4] ISO/IEC 15288-2008 - 6.4.1 Stakeholder Requirements Definition Process

### Use Case Related Diagrams

#### Use Case Diagram

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Figure 2: Exploratory and Concept Stage Workflow Use Cases

#### Activity Diagrams

##### Analyze Stakeholders Needs Outputs

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Figure 3: Analyze Stakeholders Needs Outputs

#### Block Definition Diagrams

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Figure 4: Artifacts Associated With Analyzing Stakeholder Needs

### Other Called Activities

The following Call Operations are located on the above activities.

1. Conduct a Review
2. Analyze Requirements

# Supporting Information

## Called Activities

### Conduct a Review

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Figure 5: Conduct a Review

### Import Reference Materiel into Model

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Figure 6: Import Reference Materiel into Model

### Analyze Requirements

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Figure 7: Analyze Requirements

### Categorize Requirements

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Figure 8: Categorize Requirements

### Define System Context

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Figure 9: Define System Context

### Add Requirement

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Figure 10: Add Requirement

## Table of Definitions

Table 1: Definition of Terms

| **Name** | **Description** |
| --- | --- |
| Stakeholder Requirements Traceability | All stakeholder requirements should have bidirectional traceability, including to their source, such as the source document or the stakeholder need. |
| Concept of Deployment |  |
| Concept of Operations | Also known as "ConOps" - Describes the way the system works from the operator's perspective. The ConOps includes the user description and summarizes the needs, goals, and characteristics of the system's user community. This includes operation, maintenance, and support personnel. |
| Concept of Support | Describes the desired support infrastructure and manpower considerations for maintaining the system after it is deployed. This includes specifying equipment, procedures, facilities, and operator training requirements. |
| Concept of Production | Describes the way the system will be manufactured, including any hazardous materials used in the process. |
| Measures of Effectiveness Needs | Measures of Effectiveness (MOEs) are the "operational" measures of success that are closely related to the achievement of the mission or operational objective being evaluated, in the intended operational environment under a specified set of conditions (i.e., how well the solution achieves the intended purpose). |
| Stakeholder Requirements | Formally documented and approved stakeholder requirements that will govern the project, including: required system capabilities, functions, and/or services; quality standards; and cost and schedule constraints. |
| Validation Criteria | May specify who will perform validation activities, and the environments of the system-of-interest. |
| MOE Data | Data provided to measure the MOEs. |
| Initial RVTM | Initial Requirements Verification and Traceability Matrix - A list of requirements, their verification attributes, and traceability. |
| Analyze Needs Outputs | A collection of output artifacts for the Stakeholder Requirements Definition Process establish the initial set of stakeholder requirements for project scope and associated agreements. |
| Analyze Needs Inputs | A collection input artifacts required for the Stakeholder Requirements Definition Process. |
| Source Documents | Extract, clarify, and prioritize all of the written directives embodied in the source documents relevant to the particular stage of procurement activity. |
| Project Constraints | Includes all other constraints from the stakeholder including cost, schedule, and solution constraints. |
| Analyze Needs Controls and Enablers | A collection of artifacts that control and enable the Stakeholder Requirements Definition Process.  This includes:  Applicable Laws and Regulations  Industry Standards - relevant industry specifications and standards  Agreements - terms and conditions of the agreements  Project Procedures and Standards - including project plans  Project Directives  Organization/Enterprise Policies, Procedures, and Standards - including guidelines and reporting mechanisms  Organization/Enterprise Infrastructure  Project Infrastructure |
| Stakeholder Needs | Description of users' and other stakeholders' needs or services that the system of interest will provide. |
| Conceptual System Architecture | The Conceptual System Architecture (CSA) is an early view of the finalized system architecture and is typically captures in the proposal stage.  The CSA describes the basic concepts and approach of the actual system architecture. Typically more detail is captured in this early stage of development in aspects of the system that are perceived to contain more risk. In a model-based environment the CSA is captured in the form of a SysML model. A document may also be generated from the CSA model to assist in the review and to help communicate to people without access to the model. |
| Review Package | The review package describes what has changed. Typically this is measured against the previous baseline. The review package contains all the changed items and any additional needed to complete the context of those changed items.  The review package should highlight what items have been added, deleted or updated, e.g. document change bars, red lines, text color changes, annotation, etc.  The review package can consist of any type of artifact, including SysML models, documents, code, parts of the system, prototypes, etc. |
| Review Comments | The Review Comments artifact is produced as a result of reviewing a Review Package. Comments may add, delete or update items in the Review Package. Comments can be captured in many different forms, i.e. document change bars, red lines, text color changes, annotation, etc.. Each comment should identify the reviewer and the time of change,  The set of comments in the Review Comments artifact can be of multiple forms, e.g. an annotated version of the review package, a separate report, etc. |
| Regulatory Documents | Regulatory compliance documents establish a set or rules, principles or usages that describe the goals that an organization, a system or equipment should implement to ensure the awareness of and take steps to comply with relevant laws and regulations. |
| Model-based Systems Engineering | "Model-based systems engineering (MBSE) is the formalized application of modeling to support system requirements, design, analysis, verification, and validation activities beginning in the conceptual design phase and continuing throughout development and later life cycle phases".  Ref - International Council on Systems Engineering (INCOSE), Systems Engineering Vision 2020, Version 2.03, TP-2004-004-02, September 2007. |
| Model-based Systems Development | Model-based Systems Development (MBSD) is the formalized application of modeling to support all aspects of product engineering and support system requirements, design, implementation, analysis, verification, validation, manufacturing, support and management activities beginning in the conceptual design phase and continuing throughout development and later life cycle phases. Therefore MBSD includes domains such as MBSE, software design and implementation and mechanical design and implementation, and electrical design and implementation. |
| Product Development System | Product Development System (PDS) is the system used to provide an integrated environment of tools and capabilities required to develop products that are systems. This includes the environment for systems engineering, software design and implementation engineering, mechanical design and implementation engineering, electrical design and implementation engineering and interfaces to external domains including manufacturing support and product management. |
| System Of Interest | The system whose life cycle is under consideration (INCOSE SE Handbook). |
| Hazard | A hazard is system state that when combined with other environmental conditions inevitably leads to an accident [7]. |
| Fault | A safety fault is a non-conformance of a system that leads to a hazard [7]. |
| Safety Measure | Safety measures are activities and precautions taken to improve safety, i.e. reduce risk related to human health. [6].  A safety measure could be used to detect or mitigate a fault [7]. |
| Safety Report | The result of a safety analysis and evaluation. |

## Table of Use Case List

Table 2: List of Use Cases

| **Owner** | **Name** |
| --- | --- |
| Exploratory and Concept Stage | Response to a Customer Request |
| Exploratory and Concept Stage | Analyze Stakeholders Needs |
| Exploratory and Concept Stage | Derive System Requirements |
| Exploratory and Concept Stage | Analyze System Life-cycle Costs |
| Management Workflow Use Cases | Plan a Development Cycle |
| Management Workflow Use Cases | Manage SE Development Progress |
| Management Workflow Use Cases | Manage SE Development Environment |
| Management Workflow Use Cases | Create a Baseline |
| SE Domain Workflow Use Cases | Derive Product Architecture |
| SE Domain Workflow Use Cases | Evaluate System Safety |
| SE Domain Workflow Use Cases | Perform System RMA Engineering |
| SE Domain Workflow Use Cases | Apply System Security Engineering |
| SE Domain Workflow Use Cases | Analyze System Performance |
| SE Domain Workflow Use Cases | Allocate and Manage SWaP |
| SE Domain Workflow Use Cases | Perform a Trade Study |
| SE Domain Workflow Use Cases | Analyze Behavior Correctness |
| SE Domain Workflow Use Cases | Manage Product Lines |
| SE Domain Workflow Use Cases | Integrate Human Domain Constraints |
| SE Domain Workflow Use Cases | Perform Environmental Engineering |
| SE Domain Workflow Use Cases | Collaborate with Implementation Domain Team |
| SE Domain Workflow Use Cases | Perform EMI Engineering |
| Validation and Verification Workflow Use Cases | Develop Verification Plan and Procedures |
| Validation and Verification Workflow Use Cases | Develop a System Integration Plan |
| Validation and Verification Workflow Use Cases | Execute a Verification Test Procedure |
| Validation and Verification Workflow Use Cases | Provide V&V Status |
| Production Stage | Support Produceability Engineering |
| Product and Service Life Management Stage | Support Initial Installation |
| Product and Service Life Management Stage | Architect Sustainability System |
| Product and Service Life Management Stage | Evaluate Change Request |
| Product and Service Life Management Stage | Support System Modernization Plan |
| Product and Service Life Management Stage | Support System Disposal and Retirement |

## Table of Actors

Table 3: List of Actors

| **Name** | **Description** |
| --- | --- |
| Manufacturing Engineer | Manufacturing engineering is a discipline of engineering dealing with different manufacturing practices and includes the research, design and development of systems, processes, machines, tools and equipment. The manufacturing engineer's primary focus is to turn raw materials into a new or updated product in the most economic, efficient and effective way possible [8]. |
| Program Manager | \*\* consider product manager |
| Engineering Mgr. | Engineering Management is a specialized form of management that is concerned with the application of engineering principles to business practice. Engineering management is a career that brings together the technological problem-solving savvy of engineering and the organizational, administrative, and planning abilities of management in order to oversee complex enterprises from conception to completion. [8] |
| Customer | A customer (sometimes known as a client, buyer, or purchaser) is the recipient of a good, service, product, or idea, obtained from a seller, vendor, or supplier for a monetary or other valuable consideration. [8] |
| Software Engineer | Software engineers apply the principles of software engineering to the design, development, maintenance, testing, and evaluation of the software and systems that make computers or anything containing software work.[8] |
| Mechanical Engineer | Mechanical engineering is the discipline that applies the principles of engineering, physics, and materials science for the design, analysis, manufacturing, and maintenance of mechanical systems. It is the branch of engineering that involves the design, production, and operation of machinery [8]. |
| Electrical Engineer | Electrical engineers apply the principles of electrical engineering to the design, development, maintenance and testing of electrical equipment. Electrical engineering includes the study and application of electricity, electronics, and electromagnetism. [8] |
| Stakeholder | A person, group or organization with an interest in a project. [8] |
| System Architect | Looks across all aspects of the system to ensure the overall system meets the stakeholders' needs. |
| Systems Engineer | A systems engineer is a person or role who supports an interdisciplinary approach and means to enable the realization of successful systems. In particular, the systems engineer often serves to elicit and translate customer needs into specifications that can be realized by the system development team. In order to help realize successful systems, the systems engineer supports a set of life cycle processes beginning early in conceptual design and continuing throughout the life cycle of the system through its manufacture, deployment, use and disposal. The systems engineer must analyze, specify, design, and verify the system to ensure that it's functional, interface, performance, physical, and other quality characteristics, and cost are balanced to meet the needs of the system stakeholders.  A systems engineer helps ensure the elements of the system fit together to accomplish the objectives of the whole, and ultimately satisfy the needs of the customers and other stakeholders who will acquire and use the system. |
| SWaP SysEng | This actor's role of System Engineering is responsible to ensure all requirements associated with size weight and power meets the overall stakeholder's needs. |
| Security SysEng | This actor's role of System Engineering is responsible to ensure all requirements associated with data security and system security meets the overall stakeholder's needs. |
| Safety SysEng | This actor's role of System Engineering is responsible to ensure all requirements associated with the operational safety of the system meet the overall stakeholder's needs. |
| Analyst | This actor's role of System Engineering is responsible for executing a defined analytical study focused on mitigating risk. |
| Environmental SysEng | This actor's role of System Engineering is responsible to ensure all requirements associated with environmental factors including temperature, humidity, UV exposure, radiation, magnetic forces, vibration, and others, meet the overall stakeholder's needs and all appropriate regulatory requirements. |
| Infrastructure SysEng | This actor's role of System Engineering is responsible to ensure all requirements meet the overall stakeholder's needs associated with areas of engineering including systems communications, network hardware and design, enclosures, computing hardware, system management, system time keeping and other, meet the overall stakeholder's needs. |
| V & V SysEng | This actor's role of System Engineering is responsible to ensure all requirements of the system are verified and the overall system is validated to meet the overall stakeholder's needs. |
| Human Factors SysEng | This actor's role of System Engineering is responsible to ensure all requirements associated with the interaction of the systems and humans. |
| EMI SysEng | This actor's role of System Engineering is responsible to ensure all requirements associated with electronic emissions meet the overall stakeholder's needs and meet associated regulatory agency requirements. |
| RMA SysEng | This actor's role of System Engineering is responsible to ensure all requirements associated with reliability, maintainability and availability meet the overall stakeholder's needs. |

**Instructions for Creating New Review Documents**

**Please remove this section when new review document is complete**

**Instructions for creating a new review document ion the model**

1. In the Document package of the model browser copy and paste the “Use Case Review Document Template” package in the same directory.
2. Change the name of this new package to “Review Document – *Use Case Name*” and replace the *Use Case Name* with the name of the use case being reviewed.
3. In the chapter “Items to be reviewed” open the diagram “Use Case being reviewed” and make the following changes.
   1. On the right side of the diagram, add the new use case to be reviewed and the owning package of the new use case.
   2. Move the “referenceTo” relationship from the previous use case package to the new use case package.
   3. Remove the previous use case package and use case from this diagram.
4. In a child package called “Use Case Under Review”:
   1. Open the features dialog for the «dataReference» stereotyped constraint called “UseCaseReviewed “.
5. In a subsection of this same package called “Use Case Diagram” open the child comment, stereotyped with «figure», called “UC Diagram” and change the hyperlink to the use case diagram that contains this use case. If there is more than one another comment can be added.
6. In another subsection of this same package called “Block Definition Diagrams” open the child comment, stereotyped with «figure», called “Information on BDDs” and change the hyperlink to BDD that may contain information that should be reviewed for this use case, such as blocks that define definitions. If there is more than one another hyperlink can be added.

**Instructions for creating a review document from a Generated DocGen export**

1. Generate a new document using DocGen and save to a temporary location. Create the document
2. Create the review document using the template document
   1. Open this template document “Review Document for – Template.docx – Do Not Change this document
   2. Do a “Save as”
      1. The new document name is “Review Document for – *Use Case Name*.docx, replacing the Word “Template” with the actual use case being reviewed.
3. Copy the contents from the generated document and paste to this document by:
   1. In the DocGen Generated document, copy all information by using Ctrl A followed by Ctrl C
   2. In this document select the above paragraph “Select this paragraph and Paste Content Here”
   3. Replace this text by pasting the contents from the generated document, Ctrl V
   4. This temporary document from DocGen can now be destroyed.
4. Run Macro “ChangeHeadingsToBold”
   1. Check the Table of Figures and Table of Tables show the correct figure and table numbers. If not select and update table.
5. Title Page
   1. Examine the Time and date and change if necessary
   2. The text “Use Case Name” on the title page is a Word Field called “Subject”.
      1. Select the text in this field and change it to the name of the use case. Be careful not to replace the field, just the text in the field.
6. In the use case description section fix the indentation and numbering of the numbered paragraphs.
7. In section “Other Called Activities, indent list and changed to numbered.
8. Section 4.1 – Called Activities
   1. Remove activities that are not listed in the section called “Other Called Activities.
   2. Adjust the size of any remaining activities to fit on a page.
9. Update all TOCs, figures, tables, pages and headers/footers.
   1. Select entire document (Ctrl A) and Update Field (Entire Table)
   2. Examine the Figure and Tables to ensure they are numbered correctly. If not, select them again and do an Update Table (Entire table). Repeat as needed.
10. Review entire document and clean-up any formatting issues, i.e.
    1. Remove blank pages
    2. Adjust any diagram’s size or orientation so that the diagram and the caption fit on a single page
11. Remove these directions from the final review document.
12. Add this document to the model as a Controlled File in the package “Generated Review Documents” located in “Generated Documents/Review Documents Models and Documents”