

Process for Updating and Running Reports

Introduction

Both the Software Design Specification (SDS) and the Software Requirements Specification (SRS) require that tables be added to the documents.

The SRS shows the functional business areas, the incremental phase in which the module for that area will be programmed, along with the requirement, requirement number and the business rule with the corresponding number.

The SDS will include fields and database information to assist the developers in programming the application.

Below are instructions for updating the documents as well as details on how to pull the report from the database. The instructions also include a process to extract information from the spreadsheet and paste it into the corresponding tables for the respective document.

SRS Document Updates and Reports

Process

1. Add any changes from feedback from the previous versions.
2. Under Section 4.4, add new requirements section for specified Increment (see *Phase and Blocks – Increments* spreadsheet). For example: 4.4.1 Accountability Requirements would be added to section 4.4 for the next increment.
3. Write an introductory paragraph (use *SRS V4.0 Draft April 2011.docx* as a reference) for the new section.
4. Copy the graphic for the new section from the *Phase and Blocks – Increment* spreadsheet and paste below the introductory paragraph.
5. Add a figure number.
6. Write details for the new section on the Phase Definition page. The page will contain separate areas for details: Phase:, Activity:, Goal:, Description:, Assumptions:, and Dependencies:.
7. Copy and paste requirements (landscape page) into the document.
8. Select the Merge Table paste option on the right click menu.

Note: These requirements come from a report that is exported from Apex (web application), see **Running SRS Reports** section below.

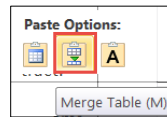


Figure 1. – Merge Table Options

Running SRS Reports

Note: Prior to beginning this process, obtain access from the DBA and log in to the database.

1. Open Apex report (database 108) at this link: <https://123.456.7.89>
2. Scroll to the bottom of the report and click the **Download** link.
3. The Opening **report_1.csv** dialog box displays. Select **Open with Microsoft Excel** (default).
4. Click **OK**.
5. Click the **Download** arrow in the toolbar at the top of the screen and select the **report_1.csv** file.

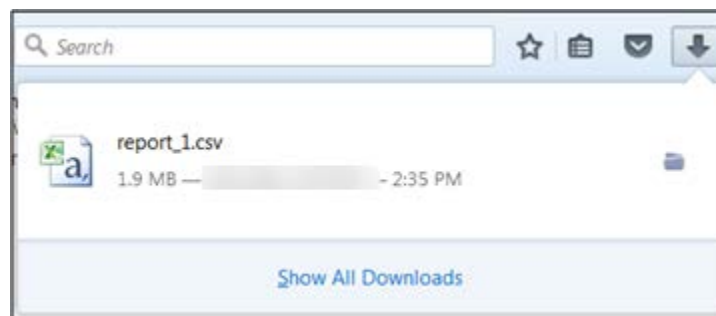


Figure 2. – Report_1.csv

6. The report opens in Excel. Select **File > Save As SRS Report [Date]** (example: SRS Report08152015).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	INCREME	PHASE_ID	PHASE_DE	ACTIVITY	ACTIVITY	REQUIRE	REQUIRE	REQUIRE	REQUIRE	REQUIRE	REQUIRE	REQUIRE	REQUIRE	BR_NBR	BR_NAME	BR_DESCR	BR_REVIEW	Requireme	Requireme	Requireme	Br Mod	Us Br	Mod Date
2	AP	Appraisals	Appraisals	0	Perform A	Appraisals	1	0	The system	See rule	AI	The system	G										
3	AP	Appraisals	Appraisals	0	Perform A	Appraisals	2	0	The system	Task may	I	The system	G	APP0211	TASK CODH	Task Code	G						
4	AP	Appraisals	Appraisals	0	Perform A	Appraisals	2	0	The system	Task may	I	The system	G	APP0212	TASK CODH	Task Code	G						
5	AP	Appraisals	Appraisals	0	Perform A	Appraisals	2	0	The system	Task may	I	The system	G	APP0219	TASK CODH	MANDATC	G						
6	AP	Appraisals	Appraisals	0	Perform A	Appraisals	2	1	The system														
7	AP	Appraisals	Appraisals	0	Perform A	Appraisals	3	0	The system	See rule	AI	The system	G	APP0020	COST TO C	Cost to Cu	G						
8	AP	Appraisals	Appraisals	0	Perform A	Appraisals	4	0	The system	See rule	AI	The system	G	APP0030	APPROVAL	Approval	G						
9	AP	Appraisals	Appraisals	0	Perform A	Appraisals	5	0	The system	1. Valki	The system	G	APP0050	APPROVAL	Approval	G							
10	AP	Appraisals	Appraisals	0	Perform A	Appraisals	6	0	The system	See rule	AI	The system	G	APP0040	PROJECT/I	MANDATC	G			MARMOU	7-Aug-15	MARMOU	7-Aug-15
11	AP	Appraisals	Appraisals	0	Perform A	Appraisals	6	1	The system														
12	AP	Appraisals	Appraisals	0	Perform A	Appraisals	7	0	The system	Entry requ	The system	G	APP0021	ACTION	Status will	G							
13	AP	Appraisals	Appraisals	0	Perform A	Appraisals	8	0	The system	See rule	AI	The system	G	APP0060	APPROVAL	Purpose w	G						
14	AP	Appraisals	Appraisals	0	Perform A	Appraisals	9	0	The system	Valid	The system	G	APP0120	APPROVAL	Approval	G							
15	AP	Appraisals	Appraisals	0	Perform A	Appraisals	10	0	The system	APP0213	The system	G	APP0213	WORK ACC	Work Acc	G							
16	AP	Appraisals	Appraisals	0	Perform A	Appraisals	11	0	The system	APP0070	The system	G	APP0070	NAME OF	The Name	G							
17	AP	Appraisals	Appraisals	0	Perform A	Appraisals	12	0	The system	See rule	AI	The system	G	APP0080	APPROVAL	Approval	G						
18	AP	Appraisals	Appraisals	0	Perform A	Appraisals	13	0	The system	If Work C	The system	G	APP0222	APPROVAL	Approval	G			SWINDSOH	4-Jun-15	SWINDSOH	4-Jun-15	
19	AP	Appraisals	Appraisals	0	Perform A	Appraisals	14	0	The system	See rule	AI	The system	G	APP0090	APPROVAL	Approval	G						
20	AP	Appraisals	Appraisals	0	Perform A	Appraisals	15	0	The system	See rule	AI	The system	G	APP0100	APPROVAL	Approval	G						
21	AP	Appraisals	Appraisals	0	Perform A	Appraisals	16	0	The system	See rule	AI	The system	G	APP0110	APPROVAL	Approval	G						
22	AP	Appraisals	Appraisals	0	Perform A	Appraisals	18	0	The system	See rule	AI	The system	G	APP0130	APPROVAL	MANDATC	G						
23	AP	Appraisals	Appraisals	0	Perform A	Appraisals	19	0	The system	1. The system				APP0226	APPROVAL	A Yes / No	G						
24	AP	Appraisals	Appraisals	0	Perform A	Appraisals	20	0	The system	See rule	AI	The system	G	APP0216	APPROVAL	Approval	G						
25	AP	Appraisals	Appraisals	0	Perform A	Appraisals	21	0	The system	Reviewer	The system	R	APP0223	REVIEWER	Reviewer	G			17-Jun-15	JLANCASTER			
26	AP	Appraisals	Appraisals	0	Perform A	Appraisals	21	1	5.15.15	The system	R	APP0022	REVIEWER	Reviewer	I	G			17-Jun-15	JLANCASTER			
27	AP	Appraisals	Appraisals	0	Perform A	Appraisals	22	0	The system	Automatic	The system	G	APP0224	APPROVAL	Display On	G							
28	AP	Appraisals	Appraisals	0	Perform A	Appraisals	23	0	The system	See rule	AI	The system	G	APP0140	ESTATE AP	The narrat	G						
29	AP	Appraisals	Appraisals	0	Perform A	Appraisals	24	0	The system	See rule	The system	G	APP0150	APPRAISE	The street	G			16-Jun-15	RRICHER			
30	AP	Appraisals	Appraisals	0	Perform A	Appraisals	25	0	The system	Date equal	The system	G	APP0221	APPROVAL	MANDATC	G							
31	AP	Appraisals	Appraisals	0	Perform A	Appraisals	26	0	The system	See rule	AI	The system	G	APP0160	REMARKS	Remarks	G						
32	AP	Appraisals	Appraisals	0	Perform A	Appraisals	27	0	The system	System sh	The system	G											
33	AP	Appraisals	Appraisals	0	Perform A	Appraisals	28	0	The system	See rule	AI	The system	R	APP0170	REVIEW H	The capab	R						
34	AP	Appraisals	Appraisals	0	Perform A	Appraisals	29	0	The system	Asurails c	The system	G											

Figure 3. – SRS Report

7. Add a row between **column I** (Requirement_Sub_Nbr) and **column J** (Requirement Description).
 - a. Use the heading title: **Req Nbr.**
 - b. Select row **J2**.
 - c. Type the formula:
`=IF(VALUE(C2)<10,CONCATENATE(B2,".0",C2),CONCATENATE(B2,".",C2))`
 - d. The formula creates a combination of the requirement number and requirement sub-number with a decimal between (1.0, etc.).
 - e. Drag the formula to the end of the rows.
 - f. Hide columns **H & I**.
8. In the last column, after BR Mod Date, add an **Updated** column.
 - a. Type this formula into the column: `=IF(COUNTA(T2,V2)>0,"*", "")`
 - b. Drag the formula to the end of the rows (this adds an * to the **Updated** column)
9. Highlight the first row and filter all the fields by selecting **Home > Editing > Sort & Filter > Filter**.
10. Hide the following columns:
 - a. Phase Description
 - b. Activity Description
 - c. Requirement Notes
 - d. BR Name
11. Save the file.
12. Select the filter drop down on the Requirement_Corrected_Desc column.
 - a. Uncheck the **Select All** square.
 - b. Select the blank area, the “.” and (**Blanks**) at the bottom of the list.
 - c. Click **OK**.

Note: The Requirement_Description column may require that **Wrap Text** be selected in order to view the blank cells in the Requirement_Correct_Desc column.

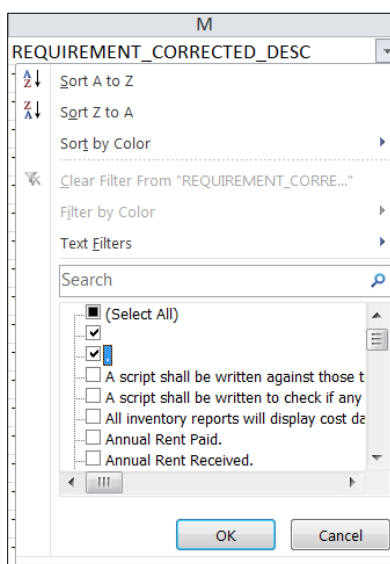


Figure 4. – Requirement Filter

- d. In the Requirement_Correct_Desc column, type an “=” sign and select the cell beside the blank cell under Requirement_Description.
- e. Select the Requirement_Correct_Desc column and when the “+” displays, drag the = formula to the last blank cell in the column.
- f. Hide the Requirement_Desc column.
- g. Remove the filter from the Requirement_Correct_Desc column. All columns will display.

Update changes are as follows:

Requirements (example from document)

A. Revised Requirement

Requirements:

Phase	Activity	Req #	Requirement Description	BR #	Business Rule Description	Updated
<i>(See Appendix B for updates to requirements and business rules).</i>						
AP	000					*

B. New Requirement

Requirements:

Phase	Activity	Req #	Requirement Description	BR #	Business Rule Description
AP	000				

Sorting/Filtering the SRS Report

A. Revised Requirements

Filter by

Column	Process
C	Phase_Name
F	Activity_Name (These are broken out within each Phase – <i>Appraisal</i> then <i>Appraisal Name</i>)

Then filter by:

Column	Process
N & R	G (green), Y (yellow), P (purple), B (blue) – all requirements and business rules are included in this application. Removed the check from R(red) and (Blank).

Hide the following columns:

Column	Heading
A	Increment_Nbr
C	Phase_Name
F	Activity_Name
N*	Requirement_Review_Status
R*	BR_Review_Status
*	These are used for filtering.

B. Revised & Removed Requirements/Business Rules – Added to Appendix

For Revised, filter by:

Column	Process
Updated, T & V	Filter the Updated column with (*) Copy the spreadsheet and paste to the Appendix corresponding with updated Requirements/Business Rules

For Removed, filter by:

Column	Process
N & R	Check R(red) and (Blank) only for both BR and Req.
<i>NOTE</i>	<i>To make finding the red req/br easier, color the font in red.</i>

SDS Document Updates and Reports

Process

Information for the SDS comes from the programmers as they develop the screens.

1. Add any changes from feedback from the previous versions.
2. Under **Section 6 – Functional Designs**, add a heading for the new section (as of second increment of the SDS, new sections will be broken out into individual pages and object linked prior to sending the document for review).
3. Pull a report from this link in Apex (SDS Components Database): <https://123.456.7.89>
 - a. Click the **Actions** drop down list.
 - b. Select **Download**.
 - c. Click the **CSV icon**.
 - d. The **Opening** components dialog displays. Open with **Microsoft Excel** (default) is selected. Click **OK**.
 - e. The report opens in Excel. Select **File > Save As** to save the report as an Excel spreadsheet instead of CSV.
4. Highlight the first row and filter all the fields by selecting **Home > Editing > Sort & Filter > Filter**.
5. Filter by **Module ID**. Select the rows and copy and paste into the related section of the SDS. (PROJNEW would be placed in the **Project New** table in the Project section of the SDS).

6. Select the Merge Table paste option on the right-click menu.

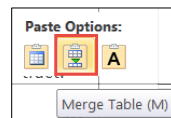


Figure 5. – Merge Table

Screen Design Template and Import Process

1. Open the file “*Template for Individual Screens.*”
2. Click **File > Save As** and name the file by the screen name.
3. Update the **Title**, add an introductory paragraph and topography information.
4. Type details for the **Search, New, Edit** screens.
5. Capture screens as each becomes available from the development team.
6. Obtain entity relationship diagrams (ERD) from the DBA.

When complete, open the SDS and scroll to the section where the screen template will be placed.

1. Select **Insert > Object > Text from File.**

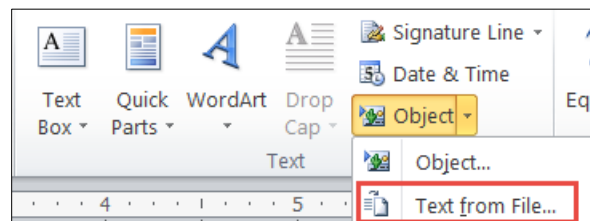


Figure 6. – Text from File (Object drop down)

2. The **Insert File** window displays. Select the name of the template (Appraisal, Acquisition, etc.).

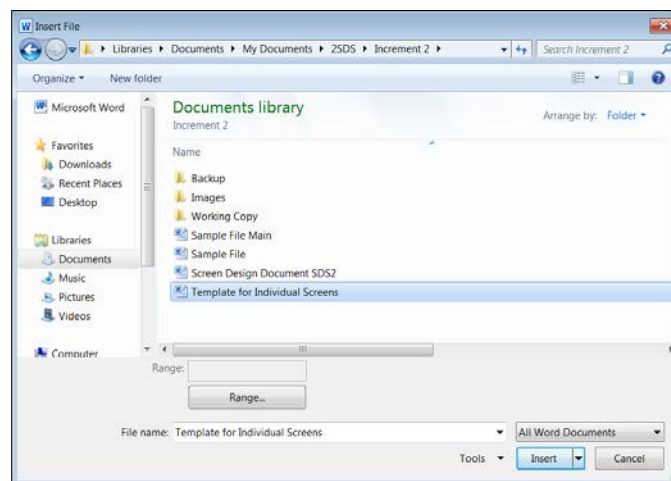


Figure 7. – Merge Table

The information immediately displays in the defined section of the SDS.