INCOSE/OMG MBSE Initiative PBSE Patterns Challenge Team



Meeting: September 2, 2014

(Schedule adjustable as needed)

Meeting Agenda

INCOSE PBSE Patterns Challenge Team (of MBSE Initiative)

Web Conference Meeting: Tuesday, September 2, 2014, 4:00 - 5:30 PM EST

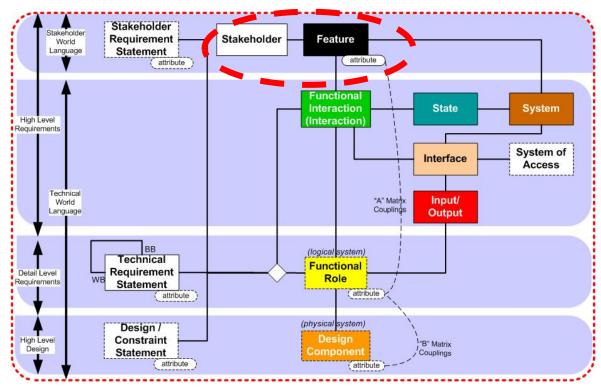
Pre-Reading for this meeting: Minutes of team meetings, Aug 18-19, 2014 General background, past meetings: Team web site on MBSE wiki: <u>http://www.omgwiki.org/MBSE/doku.php?id=m</u>	bse:patterns:patterns
Meeting start up: Review of meeting objectives and agenda	4:00 - 4:05 PM EST
Challenge Team Current Projects: • List of known team projects in progress or starting • General goals of these projects and related team charter objectives • Plans for related IS2015 (November 9 submission) and GLRC2014 (submissions now closed) papers	4:05-4:15
Walk-through of next segments of S*Pattern(s): • Stakeholders and Features Model (configurable) • Purpose • Q&A • Domain Model (configurable): • Purpose • Examples from current project pattern(s) • Purpose • Plans for next segment of S* Pattern(s): Interactions; States (configurable)	4:15-5:15
Planning Next Activities: • Future pattern review meetings schedule, by pattern segment • Plans for IW2015 • Outreach: Who else should be involved?	5:15 - 5:30
Closing: • Contact information • Adjourn	5:30

For more information, contact-- Bill Schindel schindel@ictt.com Troy Peterson peterson troy@bah.com

- Primary objective of today's meeting:
 - Review next segments of the team's project patterns
- This Challenge Team is concerned with <u>configurable, re-usable</u> <u>system models</u>, called "S*Patterns":
 - Models containing a certain minimal set of elements are called S*Models
 - May be expressed in any modeling language (e.g., SysML, or other)
 - Re-usable, configurable S*Models are called S*Patterns
 - By "Pattern-Based Systems Engineering" (PBSE) we mean MBSE enhanced by these generalized assets
 - These are system-level patterns (models of whole managed platforms), not smaller-scale component design patterns
- These are the team's pattern projects known to be underway:
 - Multi-domain product/manufacturing process example (Oil Filter Family) (Bill Schindel, Stephen Lewis, Saumy Sanyal, David Cook)
 - Mil/Aero Electronic Systems (Tamara Valinoto)
 - RC / Autonomous Car (Troy Peterson)
 - Verification Systems (Andy Pickard)

Walk-through of some initial S*Pattern segments

- Stakeholders, stakeholder Features, and their Associations:
 - <u>Stakeholders</u>: People or Organizations with a "stake" in the behavior of the system of interest.
 - <u>Features</u>: Selectable sets of stakeholder-valued system behaviors, in (often non-technical, subjective) language and concepts of stakeholders.
 - <u>Feature Attributes</u>: Parameterize the Features, with variables that the stakeholder cares about (e.g., Passenger Seating Capacity for a bus)

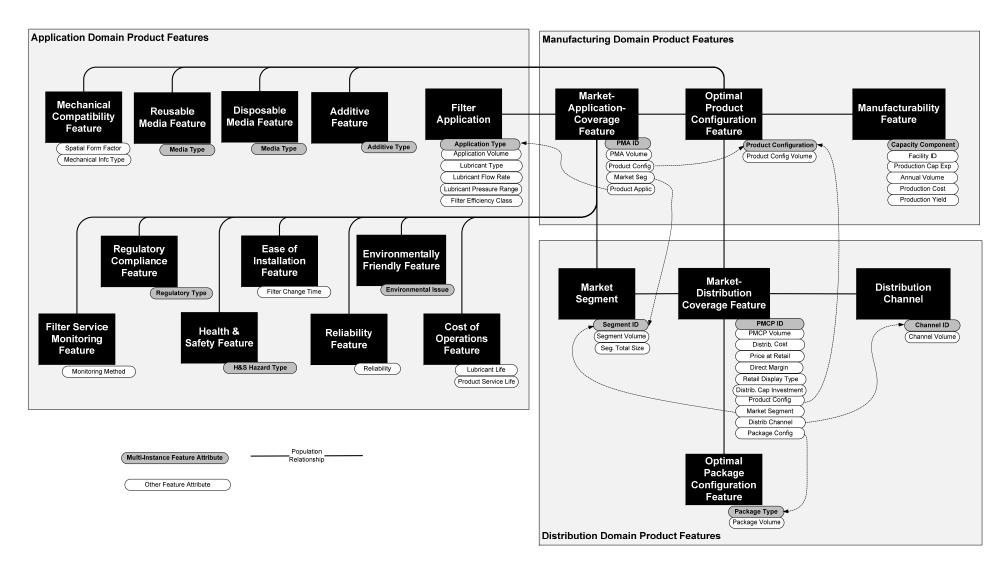


Once we establish a Pattern for a Platform or Product Line System, specific configurations are generated by selection (population) of Features, and setting values for Feature Attributes.

An example S*Pattern Extract

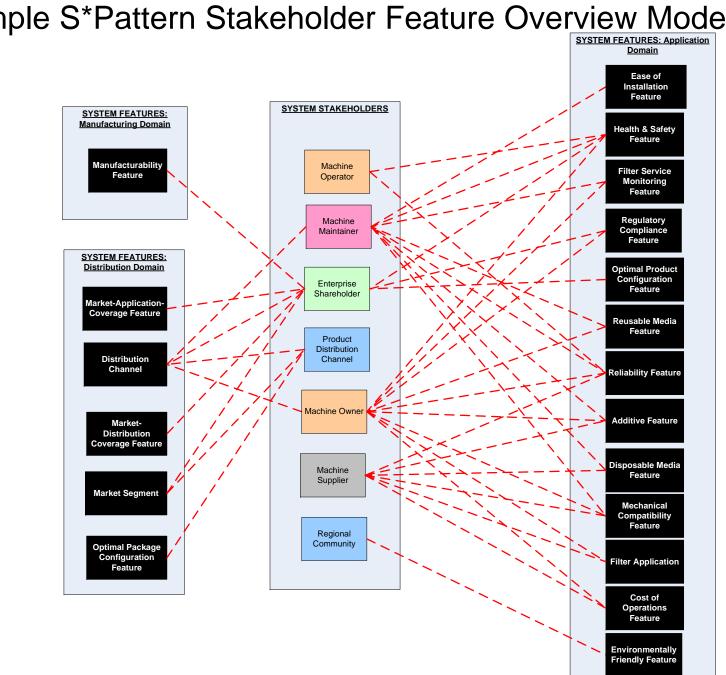
Lubricant (Oil) Filter Product Family

Example S*Pattern Stakeholder Feature Overview Model



Example S*Pattern Stakeholder Feature Model Extract

Feature	Feature Attribute	Multi- Instance	Attribute Definition	Attribute Units	Attribute Values
Optimal Product Configuration Feature	Product Configuration	X	Identifies the configuration of the product, as a model ID. Multiple configurations may be populated.	N/A	
Configuration Feature	Product Configuration Volume		The number of units of this product configuration produced per year.	Units/Year	
Filter Application	Application Type		The type of lubricated system application supported by a lubricant filtration system. More than one type may be instantiated for a single product configuration.	N/A	Consumer Automotive, Commercial Automotive, Fixed Base Engine System, Harsh Environment, High Temperature Environment, Cold Environment
Filter Application	Application Volume		The number of units of this application placed into service during a year.	Units/Year	
Filter Application	Lubricant Type		The type of lubricating fluid to be used.	N/A	
Filter Application	Lubricant Flow Rate		The rate at which the lubricating fluid must be circulated in order to meet equipment lubrication objectives.	GPM	High, Medium, Low
Filter Application	Lubricant Pressure Range		The amount of hydraulic pressure under which the lubricant will circulate.	PSI	High, Medium, Low
Filter Application	Filter Efficiency Class		The profile of filtration efficiency provided by the filter	N/A	
Mechanical Compatibility Feature	Spatial Form Factor		The class of three dimensional structure of a component, subsystem, or space within a system reserved for a component or subsystem.	N/A	
Mechanical Compatibility Feature	Mechanical Interface Type		The mechanical class of the interface between the oil filter and the equipment to which it is connected.	N/A	
Cost of Operation Feature	Lubricant Life		The amount of time that a lubricant is intended to operate, meeting requirements within the specified environment, before it is replaced.	Hours	

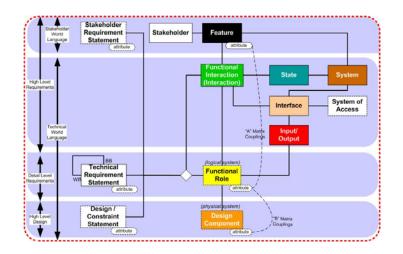


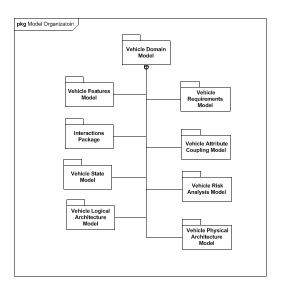
Example S*Pattern Stakeholder Feature Overview Model

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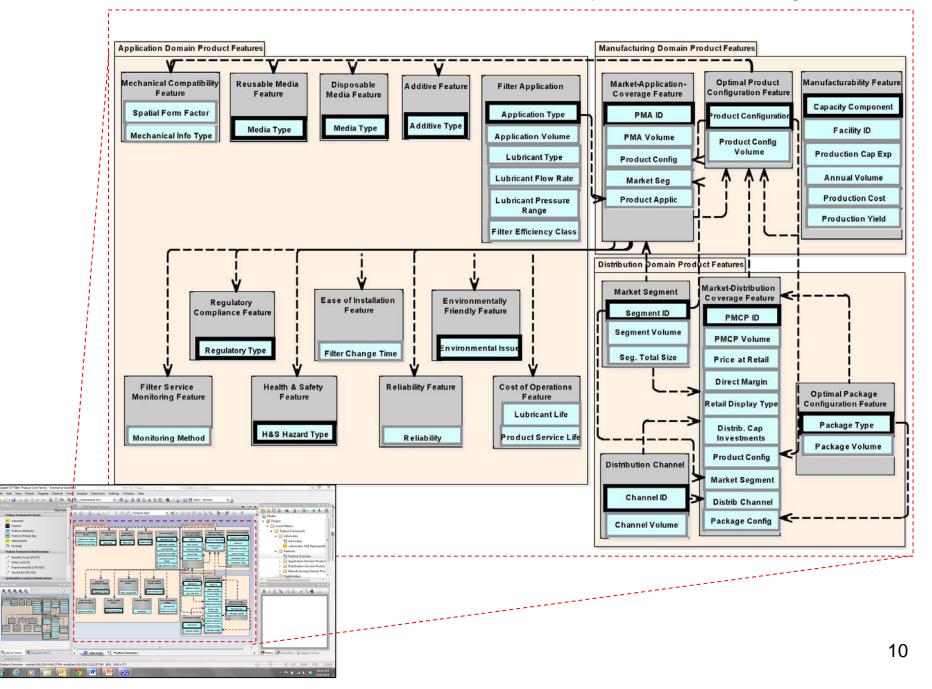
What modeling tools, languages will we use?

- S*Metamodel is modeling language independent:
 - Readily expressed in SysML or other modeling languages.
 - For INCOSE work, if the sub-team does not have a conflicting goal, we'd encourage use of SysML, familiar to more in INCOSE.
 - Be prepared to learn a few things that the modeling language standards have not quite caught up with yet.
 - One of our team's spin-offs is feedback to Sandy Friedenthal's inputs on future SysML releases.
 - If you have a different language in mind, we'll help.





Examples from Enterprise Architect (a SysML Modeling Tool)



Global Oil Filter Product Line Family - Enterprise Architect

Enterprise Architect

	Enterprise Shareholder	Machine Maintainer	Machine Operator	Machine Owner	Machine Supplier	Product Distribution Channel	Regional Community
Additive Feature		Î		Î	Î		
Cost of Operations Feature				Î			
Disposable Media Feature		Î		Î	Î		
Distribution Channel	Î	Î		Î		Î	
Ease of Installation Feature		Î					
Environmentally Friendly Feature							Î
Filter Application				Î	Î		
Filter Service Monitoring Feature		Î		Î			
Health & Safety Feature		Î	Î	Î			
Manufacturability Feature	Î						
Market-Application-Coverage Feature	Î						
Market-Distribution Coverage Feature	Î						
Market Segment	Î					î	
Mechanical Compatibility Feature		Î		Î	Î		
Optimal Package Configuration Feature	Î					Î	
Optimal Product Configuration Feature	Î						
Regulatory Compliance Feature				Î			
Reliability Feature		Î	Î	Î	Î		
Reusable Media Feature		Î		Î			

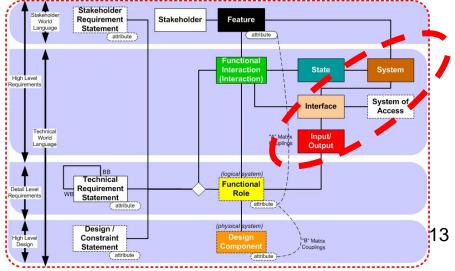
Examples from Enterprise Architect (SysML Modeling Tool)

Discussion of your Patterns . . .

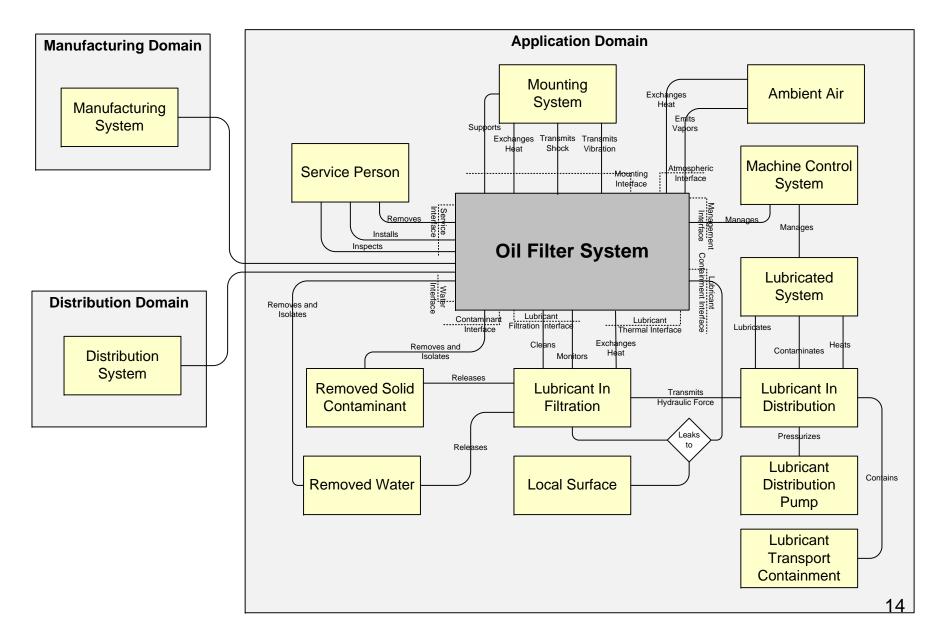
Stakeholders, Features

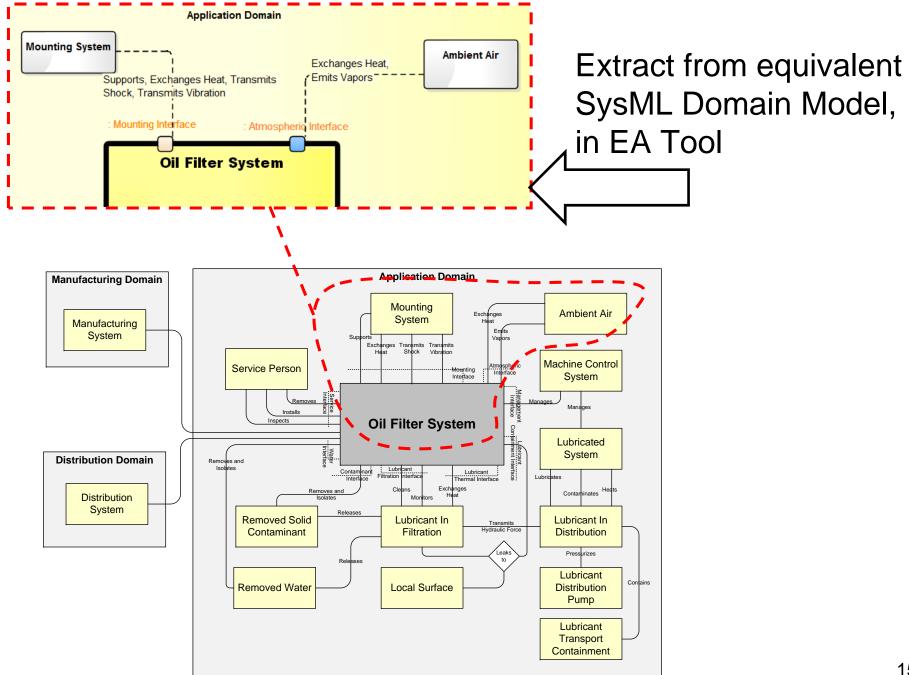
External "domain model" for System of Interest

- Will later help us identify all the external interactions with System of Interest.
 - <u>So what</u>? All system black box requirements are identified with (may be discovered through) those interactions.
- Domain diagram shows Actors, Interfaces, Input-Outputs or Relationship--:
 - <u>Actors</u>: People or other Systems that directly interact with the system of interest, by exchanges of force, energy, mass, or information.
 - Input-Outputs: The exchanged forces, energy, mass, or information.
 - <u>Domain Architecture Relationships</u>: Alternative way to summarize inputoutputs
 - Interfaces: Associations of Systems (that "have" the interfaces), Input-Outputs (that "pass through" the interfaces), Interactions (that "describe behavior" at interfaces, and Systems of Access (that provide the external media of interaction).

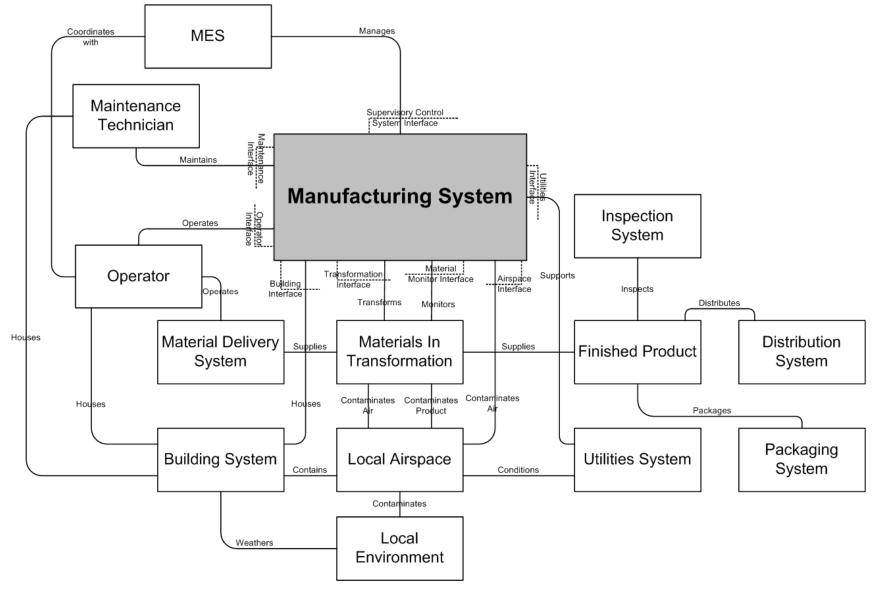


Domain model for Oil Filter System





Domain model for Manufacturing System (of Oil Filter)



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- Challenge Team goal for second half of 2014:
 - Make enough sub-team progress on selected patterns important to members to support . . .
 - One or more related INCOSE IS2015 papers for Seattle (paper drafts due Nov 2014, complete in Mar 2015—two currently known in progress)
 - One or more related INCOSE GLRC2014 presentations for Chicago (October, 2014—one currently known accepted)
- In support of this goal:
 - Bill Schindel is holding bi-weekly, web-based pattern review sub-team work sessions (e.g., 90 minutes) throughout the second half of 2014
 - Typically meet every other Monday, 4:00 5:30 PM EST (like today's)
 - Purpose of these sessions to assist sub-teams in preparing S*Patterns conforming to S*Metamodel and meeting each team's application goals.

Sessions	Configurable S*Pattern Construction
Aug	Configurable Features Model; Domain Model
Sep	Domain Model; Interactions; States
Oct	Detail Interactions; Requirements; Attribute Couplings
Nov	Logical Architecture; Detail Interactions; Requirements
Dec	Physical Architecture; Failure Modes
Jan	More about configuration rules

Scheduling and communications

- Currently planned next meeting dates:
 - Monday, Sept 15, 4:00 5:30 PM EST
 - Monday, Sep 30, 4:00 5:30 PM EST
 - And every other Monday thereafter . . .
- Team web site:

http://www.omgwiki.org/MBSE/doku.php?id=mbse:patterns:patterns

Related Activities by Other WGs and MBSE Initiative

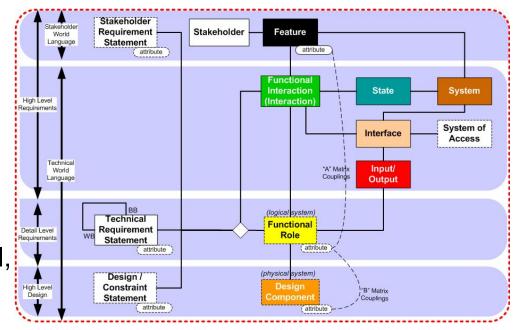
- Working with Rick Dove (Agile Systems WG, Security WG) on an IW2015 MBSE Workshop break-out session:
 - On Agile Systems, System Patterns, and Composable Designs
- We'd like to have cooperative activities with other WGs:
 - e.g., Biomedical / Healthcare
- Other groups in the MBSE Initiative are creating a cloud resource for working groups and teams such as ours:
 - On-line shared models repository, for sharing models
 - On-line access to limited set of tool vendor licenses, for use in INCOSE projects
- News from other members, WGs:

• To whom else should we be reaching out?

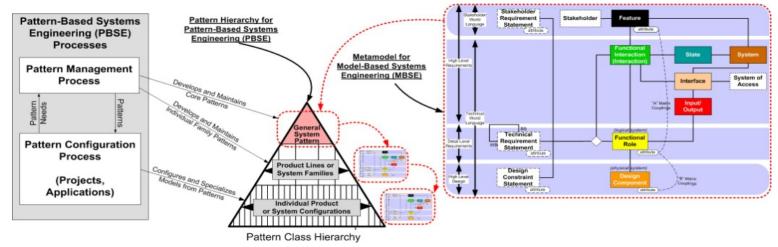
Back up materials—from earlier meetings of this Challenge Team

Patterns Demand Strongest Underlying Models

- The S*Metamodel describes the <u>smallest</u> set of ideas necessary to model a system for purposes of engineering or science:
 - Most of them familiar to modelers, and all of them basic to the training of engineers and scientists—but not always found in their system models.
 - A metamodel is a model of other models;
 - Sets forth underlying concepts of Requirements, Designs, Failures, Trade-offs, etc. (not modeling language syntax)
- The resulting S*Models may be expressed in SysML or other modeling languages, and constructed / reside in numerous commercial tools and information systems.
- Has been applied to SE in aerospace, transportation, medical, advanced manufacturing, communication, construction, consumer, other domains.



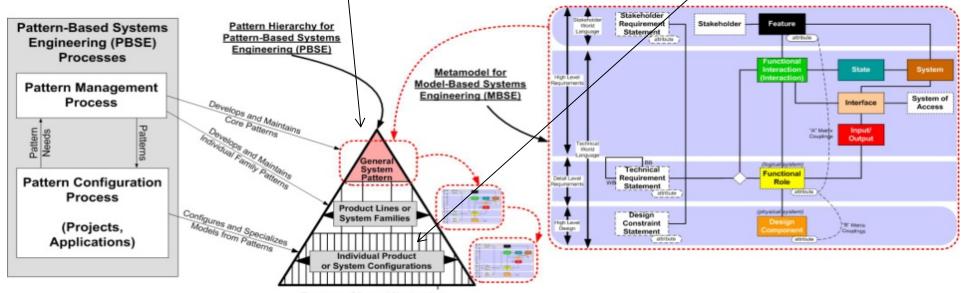
- The PBSE approach respects the systems engineering tradition, body of knowledge, and historical lessons, while providing a high-gain path forward.
- An S* Pattern is a configurable, re-usable S* Model. It is an extension of the idea of a <u>Platform</u> (which is a configurable, re-usable design). The Pattern includes not only the Platform, but all the extended system information (e.g., requirements, risk analysis, design trade-offs & alternatives, decision processes, etc.):



- By including the appropriate S* Metamodel concepts, these can readily be managed in (SysML or other) preferred modeling languages and tools—the ideas involved here are not specific to a modeling language or specific tool—ported to several.
- The order-of-magnitude changes have been realized because projects that use PBSE rapidly start from an existing Pattern, gaining the advantages of its content, and feed the pattern with what they learn, for future users.
- The "game changer" here is the shift from "learning to model" to "learning our (your) model", freeing many people to rapidly <u>configure, specialize, and apply patterns</u> to <u>deliver value</u> in their model-based projects.

A little more about S*Patterns

- Fixed (Pattern) Portion, Variable (Configuration) Portion, and the Configuration Process:
 - The generalized <u>S*Pattern</u> is expressed in exactly the same S*Metamodel classes and relationships as a specific configured <u>S*Model</u> derived from it.
 - "Configuring" a pattern means a process limited to exactly two things:
 - Populating (or de-populating) instances of classes and relationships
 - Setting the values of attributes (parameters)

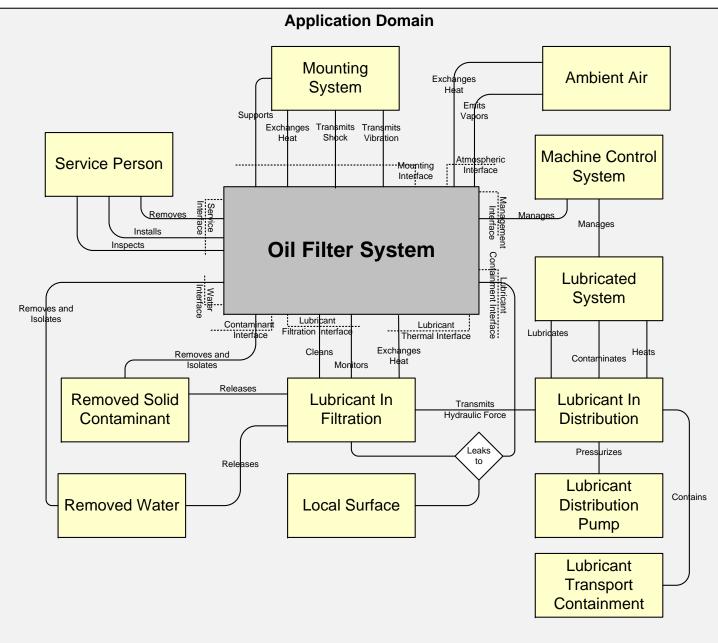


Pattern Class Hierarchy

A little more about S*Patterns

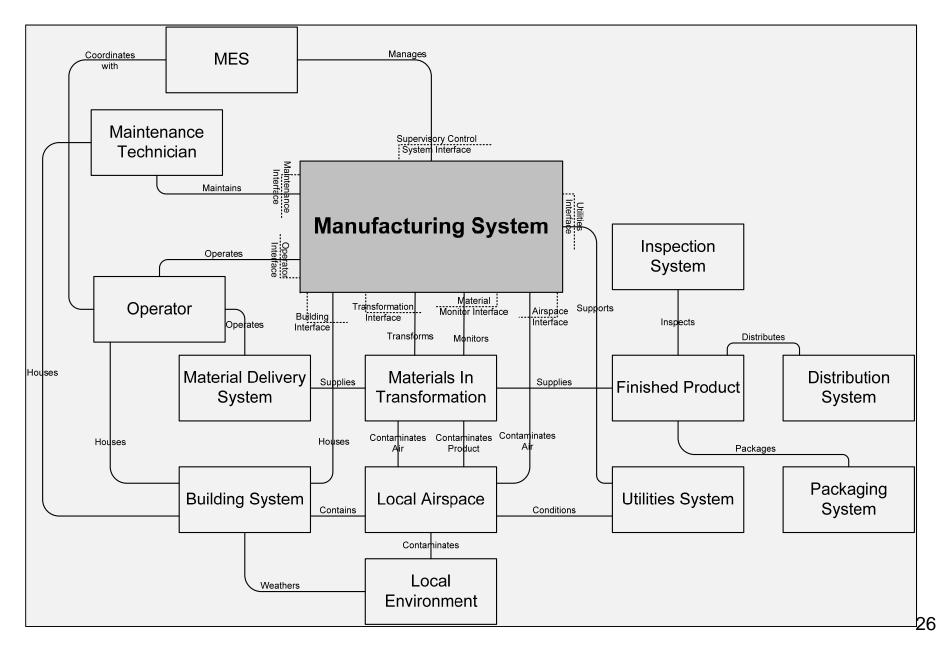
- Having an S*Pattern meeting the underlying S*Metamodel demands has some surprising positive consequences beyond basic benefits of MBSE:
 - The <u>Stakeholder Feature</u> portion of the pattern directly generates a formal Trade Space / Scoreboard for arguing, defending all decisions.
 - "Configuring" the (low dimension) <u>Stakeholder Feature</u> portion of the Pattern for a specific project or system configuration can "automatically" generate the (high dimension) configured <u>Technical Requirements</u> for that system configuration.
 - For a sufficiently built-out S*Pattern, the same applies to the System <u>Design</u> (physical architecture, allocations, attribute couplings, etc.).
 - The S*Pattern can rapidly generate very complete first draft <u>FMEA</u> tables, since S*Features lead directly to modeled <u>Effects</u>, S*Requirements lead directly to modeled Counter-Requirements (<u>functional failures</u>), S*Design Components lead directly to modeled <u>Failure Modes</u>, and combinatorial FMEA analyses of the three together may be rapidly generated by machine matching algorithm.
- All these produce much faster <u>initial drafts</u> that are much more <u>complete</u> and <u>consistent</u> than manual approaches, but which can (should) still be subject to the normal human SME review and update:
 - We are <u>not</u> suggesting turning our thinking and fate over to the model, without human judgment, expertise, etc.

Example S*Pattern Application Domain Model

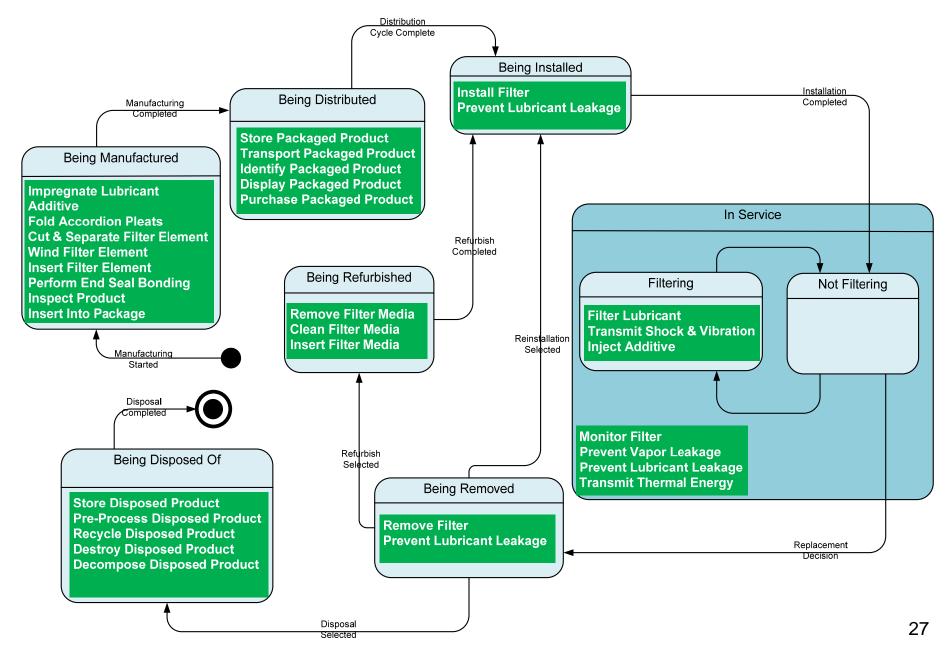


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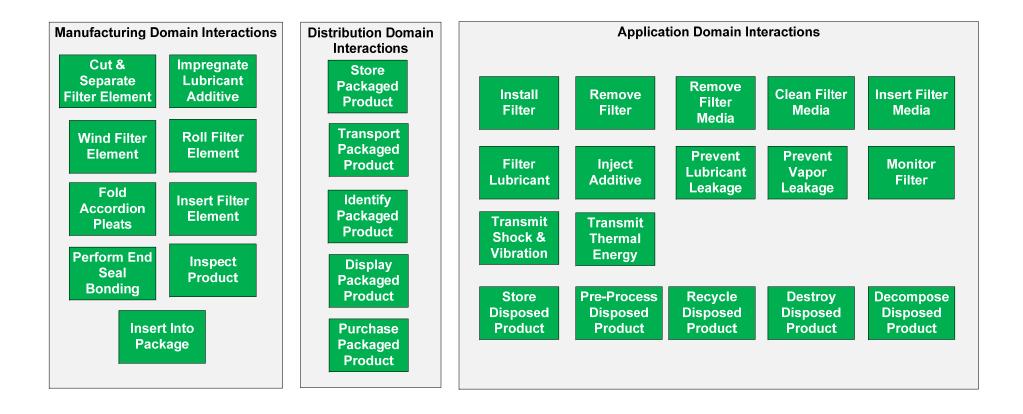
Example S*Pattern Manufacturing Domain Model



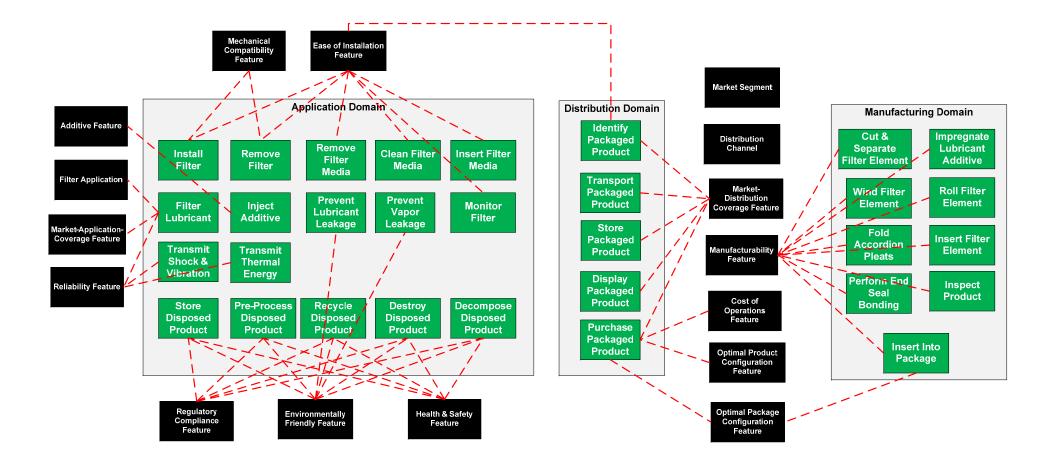
Example S*Pattern State (Modes) Model



Example S*Pattern Interaction Overview Model



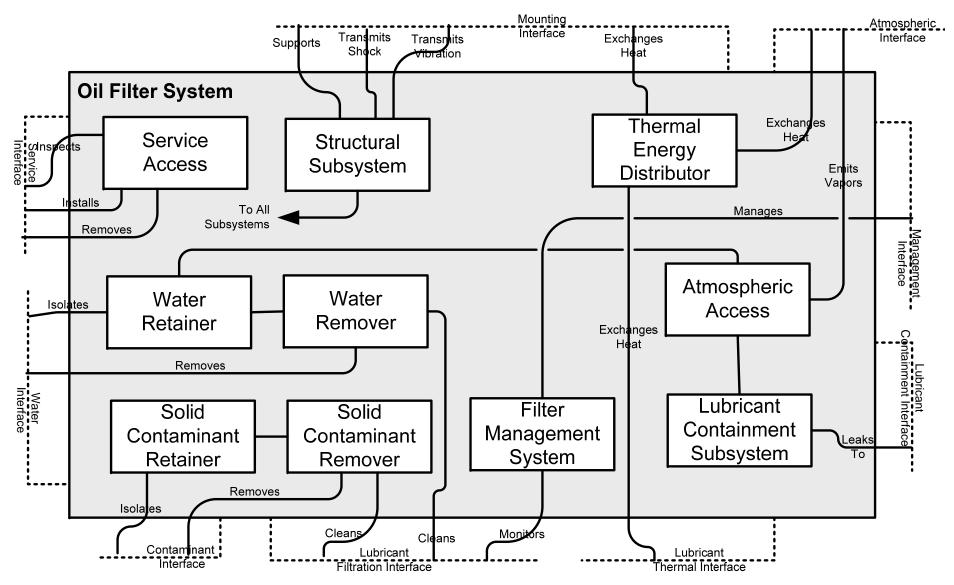
Example S*Pattern Feature-Interaction Associations Model (Part of Pattern Configuration Model)



Example S*Pattern Interaction Overview Model Extract

Interaction Name	Interaction Definition	Oil Filter System	Service Person	Mounting System	Ambient Air	Removed Solid Contaminant	Lubricant In Filtration	Removed Water	ocal Surface	Lubricated System	ubricant In listribution	Lubricant Distribution Pump	Lubricant Transport Containment	Waste Management System	lanufacturing ystem	Distribution System	ackage	Buyer
Filter Lubricant	The interaction during which the oil filter system	X	S	<u>≥ ∽</u> X	▲	<u>×0</u> X		<u>∝s</u> x		م ا	 X		X X	<u>5≥0</u>	201	- N	-	
Impregnate Lubricant Additive	filters the lubricant in filtration. The interaction during which the manufacturing system impregnates the oil filter with lubricant	x		~		~	~	^		~	<u>л</u>	~	^		x		_	
Fold Accordion Pleats	additive. The interaction during which the manufacturing system folds the sheet oil filter element into the	x													x		_	
Cut & Separate Filter Element	form of accordion pleats. The interaction during which the manufacturing system cuts and separates individual oil filter elements.	x													x			\neg
Wind Filter Element	The interaction during which the manufacturing system winds the fiber oil filter element into a cylindrical shape.	x													x			
Insert Filter Element	The interaction during which the manufacturing system inserts the filter element into the filter housing.	x													x			
Perform End Seal Bonding	The interaction during which the manufacturing system bonds the end seal of the oil filter.	x													х			
Inspect Product	The interaction during which the manufacturing system inspects the finished oil filter product.	x													х			
Insert Into Package	The interaction during which the manufacturing system inserts the finished oil filter product into the package.	x													x	x	x	
Remove Filter Media	The interaction during which maintainer removes the filter media from the oil filter system.	x	x															
Clean Filter Media	The interaction during which the maintainer cleans the filter media.	х	x															
Insert Filter Media	The interaction during which the maintainer inserts the filter media back into the filter housing.	х	x															
Roll Filter Element	The interaction during which the manufacturing system rolls the sheet filter element into a cylindrical shape.	x													x			
Transmit Shock & Vibration	The interaction during which the oil filter system is subject to, and transmits, mechanical shock and vibration originating externally.	x		x														
Monitor Filter	The interaction through which the service person or lubricated equipment monitors the condition of the oil filter.	x	x															
Prevent Vapor Leakage	The interaction through which the oil filter prevents undue quantities of gaseous vapor contaminants from reaching the external local atmosphere.	x			x													
Prevent Lubricant Leakage	The interaction through which the oil filter prevents undue quantities of lubricant from escape from its portion of the lubrication loop.	x					х		х									
Transmit Thermal Energy	The interaction through which the oil filter receives and transmits thermal energy, originating in external components.	x		х	x		x										30)

Example S*Pattern Logical Architecture Model



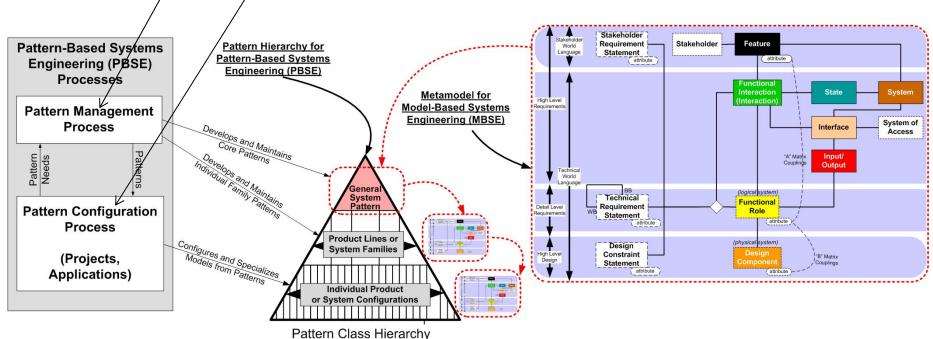
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Example S*Pattern Requirements Model -- Extract

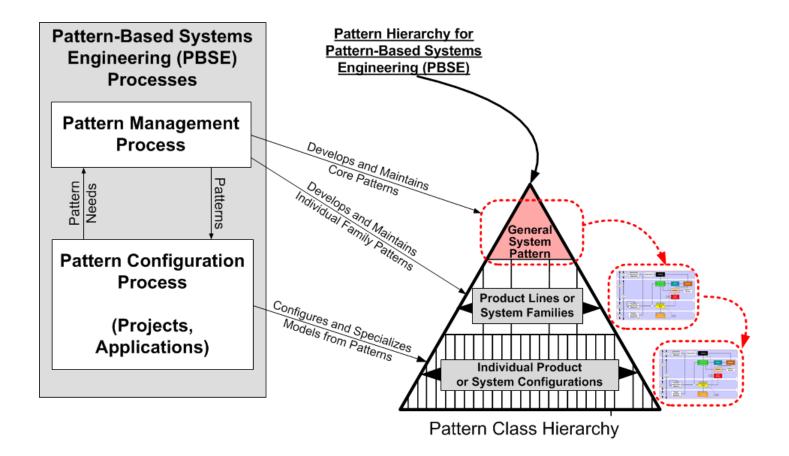
Interaction	Role	ID	Requirement Statement
Filter Lubricant	Oil Filter System	OF-50	For a Return Lubricant stream of [Lubricant Viscosity Range] and [Lubricant Pressure Range], the Oil Filter
			shall separate Filtered Contaminant particles from the Lubricant output stream, according to the [Filter Particle
			Size Distribution Profile].
Filter Lubricant	Oil Filter System	OF-51	The Oil Filter shall operate at lubricant pressure of [Max Lubricant Pressure] with structural failure rates less
			than [Max Structural Failure Rate] over an in-service life of [Min Service Life].
Filter Lubricant	Oil Filter System	OF-52	The Oil Filter shall accommodate a Lubricant flow rate of [Lubricant Flow Rate].
Filter Lubricant	Lubricant Distribution Pump	OF-53	The Pump shall maintain oil pressure within the [Lubricant Pressure Range].
Filter Lubricant	Lubricant In Filtration	OF-54	The Lubricant in Filtration shall have viscosity within the [Lubricant Viscosity Range].
Filter Lubricant	Lubricated Machine	OF-55	The Lubricated Machine shall contribute a Contaminant Load to the lubricant, not to exceed [Lubricant
Filter Lubricant	Lubricated Machine	OF-56	Contaminant Load Rate]. The Lubricated Machine shall not heat the lubricant above [Max Lubricant Temperature].
Inject Additive	Oil Filter System	OF-57	The Oil Filter shall inject additive of type [Additive Type] into the Lubricant flow, at a rate of [Additive
	on The System	01 57	Injection Rate] per unit of lubricant flow, over the service life of the filter element.
Remove Filter Media	Oil Filter System	OF-90	The Oil Filter System shall permit the removal of its used Filter Media.
Remove Filter Media	Oil Filter System	OF-91	The Oil Filter System filter media removal process shall allow the service person to avoid direct contact
	on The System	01-71	contamination with filtered contaminants and lubricant.
Clean Filter Media	Oil Filter System	OF-92	The Oil Filter System shall permit the cleaning of its used Filter Media, for reuse purposes, using cleaning
	on The System	01)2	solvent and method of type [Filter Media Cleaning Method and Solvent].
Clean Filter Media	Oil Filter System	OF-93	The Oil Filter System filter cleaning process shall allow the service person to avoid direct contact contamination
		01 70	with filtered contaminants and lubricant.
Insert Filter Media	Oil Filter System	OF-94	The Oil Filter System shall permit the insertion of its Filter Media, of type [Filter Media Type].
Insert Filter Media	Oil Filter System	OF-95	The Oil Filter System filter media insertion process shall allow the service person to avoid direct contact
			contamination with filtered contaminants and lubricant.
Transmit Shock & Vibration	Oil Filter System	OF-100	The system shall meet its other requirements when subject to a vibration spectrum not exceeding [Max Vibration
			Spectrum] during its in-service life.
Transmit Shock & Vibration	Oil Filter System	OF-101	The system shall meet its other requirements when subject to shock intensity and frequency not exceeding [Max
	-		Shock Intensity and Frequency] during its in-service life.
Monitor Filter	Oil Filter System	OF-102	The system shall provide a means of inspection of its remaining service life before requiring servicing, using
			[Filter Monitoring Method].
Prevent Vapor Leakage	Oil Filter System	OF-103	When operating within its rated lubricant pressure and temperature, at altitudes not exceeding [Max Service
			Altitude], the system shall maintain Vapor Leakage to the ambient air space below [Max Vapor Leakage Rate].
Prevent Lubricant Leakage	Oil Filter System	OF-104	When operating within its rated lubricant pressure and temperature, at altitudes not exceeding [Max Service
			Altitude], the system shall maintain Fluid Leakage to the surrounding space below [Max Fluid Leakage Rate].
Transmit Thermal Energy	Oil Filter System	OF-105	The system shall meet its other requirements while operating in external ambient air temperatures of [External
			Temperature Range] and lubricant temperatures of [Lubricant Temperature Range].
Install Filter	Oil Filter System	OF-106	The Oil Filter shall be manually installable in ten minutes or less, using only a screwdriver.
Install Filter	Oil Filter System	OF-107	The Oil Filter shall have installation instructions printed on its exterior surface, in [National Language] language.
Install Filter	Oil Filter System	OF-110	The Oil Filter shall not present sharp edge hazards to the installer during the installation process.
Install Filter	Oil Filter System	OF-111	The Oil Filter shall be clearly labeled with instructions to shut down pressurized equipment prior to installation.
Install Filter	Service Person	OF-112	The Service Person with the visual acuity and hand strength of an average 40 year old adult shall be able to
			install the Oil Filter System.
Install Filter	Service Person	OF-113	The Service Person shall be capable of reading [National Language] at the tenth grade level.

Pattern-Based Systems Engineering (PBSE)

- Pattern-Based Systems Engineering (PBSE) has two overall processes:
 - <u>Pattern Management Process</u>: Generates the general pattern, and periodically updates it based on application project discovery and learning;
 - <u>Pattern/Configuration Process</u>: Configures the pattern into a specific model/for application in a project.



Business process optimized for PBSE fulfill a different vision:



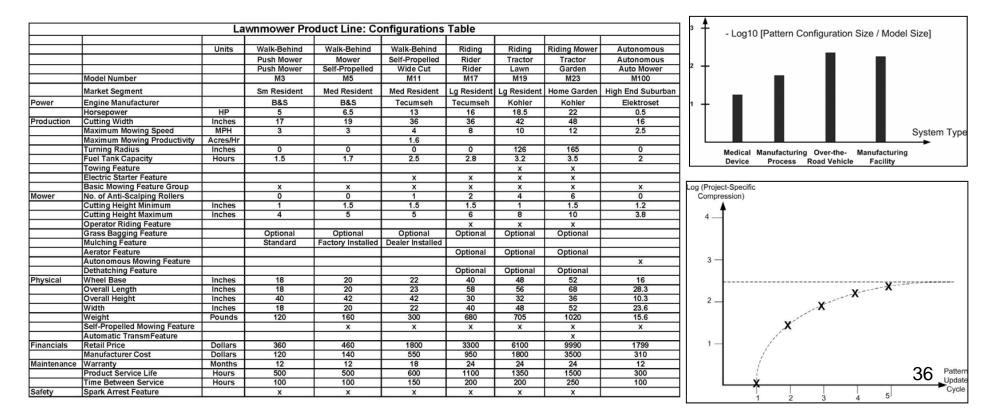
Why do most representations of the systems engineering process appear to assume starting from no formal knowledge about the system of interest & its domain?

Pattern Configurations

Product/Feature	Ice Road Trucking	Consumer Auto	Commercial Auto	Fixed Based Engine
Engine Lubricant Filtration Feature	Cold Environment	Consumer Automotive	Commercial Automotive	Fixed Based Engine System
Mechanical Compatibility Feature	Х	Х	Х	Х
Cost of Operation Feature	Х	Х	Х	Х
Reliability Feature	Х	Х	Х	Х
Maintainability Feature	Х	Х	Х	Х
Additive Feature	No. 7 Efficiency Boost	No. 5 Life Extension	No. 6 Efficiency Boost	No. 3 Efficiency Boost
Environmentally Friendly Feature	Х	Х	Х	Х

Pattern Configurations, Model Compression

- A table of configurations illustrates how patterns facilitate compression;
- Each column in the table is a compressed system representation with respect to ("modulo") the pattern;
- The compression is typically very large;
- The compression ratio tells us how much of the pattern is variable and how much fixed, across the family of potential configurations.



- 1. Eric Berg, "Affordable Systems Engineering: An Application of Model-Based System Patterns To Consumer Packaged Goods Products, Manufacturing, and Distribution", at INCOSE IW2014 MBSE Workshop, 2014.
- 2. Bill Schindel, Troy Peterson, "Introduction to Pattern-Based Systems Engineering (PBSE): Leveraging MBSE Techniques", in Proc. of INCOSE 2013 Great Lakes Regional Conference on Systems Engineering, Tutorial, October, 2013.
- 3. W. Schindel, "System Interactions: Making The Heart of Systems More Visible", in Proc. of INCOSE Great Lakes 2013 Regional Conference on Systems Engineering, October, 2013.
- 4. Bill Schindel, Troy Peterson, "Introduction to Pattern-Based Systems Engineering (PBSE): Leveraging MBSE Techniques", in Proc. of INCOSE 2013 International Symposium, Tutorial, June, 2013.
- 5. "Abbreviated Systematica Glossary, Ordered by Concept, V 4.2.2, ICTT System Sciences, 2013.
- 6. W. Schindel, "Introduction to Pattern-Based Systems Engineering (PBSE)", INCOSE Finger Lakes Chapter Webinar, April 26, 2012.
- 7. ------, "Integrating Materials, Process & Product Portfolios: Lessons from Pattern-Based Systems Engineering", in Proc. of 2012 Conference of Society for the Advancement of Material and Process Engineering, 2012.
- 8. -----, "What Is the Smallest Model of a System?", in Proc. of the INCOSE 2011 International Symposium, International Council on Systems Engineering (2011).
- 9. -----, "The Impact of 'Dark Patterns' On Uncertainty: Enhancing Adaptability In The Systems World", in Proc. of INCOSE Great Lakes 2011 Regional Conference on Systems Engineering, Dearborn, MI, 2011
- 10. -----I, "Failure Analysis: Insights from Model-Based Systems Engineering", in *Proceedings of INCOSE 2010 Symposium*, July 2010.
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The references above may be downloaded from:

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