

AD09 Embedded Requirements

I. Purpose:

This procedure explains how to associate an embedded requirement.

II. Who Can Do This:

Only persons with administrator permissions can execute this procedure.

III. Important Pre-requisites

The user is assumed to know:

- How to enter Cases (See How-to #DC04)
- How to “start associated workflow” from within a Case (How-to# DC04), and the basic steps to enter a requirement (How-to #AD02)
- The basic flowdown of associations amongst requirements and documents, and how to set up associations.
- The naming conventions for requirements (See How-to #DC01). *Consistency amongst all the formats and nomenclature in field parameters is paramount for search integrity.*
 - *If unsure before hitting “complete”, look at similar examples in the existing RMS (Production) data.*
 - *Always verify any new entries by searching afterward.*

IV. Examples of Embedded Requirements

The following were excerpted from Contract 31, and the embedded requirements are highlighted. Clause I.061 is the parent and the embedded requirement, 10 CFR part 708, is the child. Similarly, Clause I.058 is the parent while 41 CFR-101-39 and 41 CFR 101-38.301.1 are the children.

CLAUSE I.58 - FAR 52.251-2 INTERAGENCY FLEET MANAGEMENT SYSTEM VEHICLES AND RELATED SERVICES (JAN 1991)

The Contracting Officer may issue the Contractor an authorization to obtain interagency fleet management system (IFMS) vehicles and related services for use in the performance of this contract. The use, service, and maintenance of interagency fleet management system vehicles and the use of related services by the Contractor shall be in accordance with 41 CFR 101-39 and 41 CFR 101-38.301-1.

CLAUSE I.61 - DEAR 952.203-70 WHISTLEBLOWER PROTECTION FOR CONTRACTOR EMPLOYEES (DEC 2000)

- (a) The Contractor shall comply with the requirements of “DOE Contractor Employee Protection Program” at 10 CFR part 708 for work performed on behalf of DOE directly related to activities at DOE-owned or -leased sites.
- (b) The Contractor shall insert or have inserted the substance of this clause, including this paragraph (b), in subcontracts at all tiers, for subcontracts involving work performed on behalf of DOE directly related to activities at DOE-owned or -leased sites.

V. Procedure:

1. If the embedded requirement is explicitly called out in the Contract, then it is “merely” another contract requirement, and should be entered under “associations” per Step V.5 of this procedure.

2. If the child/embedded requirement is NOT explicitly called out in the Contract – that is, its only reference is within the parent requirement, then it must be uploaded into the system.
 - a. Follow Procedure A02, Steps V.1 to V.6.
 - b. In the “Enter Requirements Data” step, enter the information for the embedded requirement as below.
 - c. In particular: Answer NO to the question: “Does this contain an embedded requirement?”
[unless, of course, it has children of its own – example of this is I.078, which has an embedded requirement, which has 3 children of its own]
 - c. Complete the workflow for the embedded/child requirement.

Req wf/Enter Requirements Data – EMBEDDED REQ (child)

add embedded child req - Enter Requirement Details (Edit Mode) X

Complete Task Save Make Available Move to Waiting Reassign

Requirement Process

Property Values

Requirement Information

Contract Part*: Contract Section

Contract Section*: I

Contract Subsection (eg. H.13 or I.021)*: I.058

Source Requirement Type*: Code of Federal Regulations

SRD Citation*: 41 CFR 101-39

SRD Title*: Interagency Fleet Management Systems

SRD Section/Paragraph Citation:

SRD Section Title:

Brief Summary of Requirement:

Link to SRD and/or other info (hyperlink): URL: <http://www.gpo.gov/fdsys/grai> Name: 41 CFR 101-39

Link to SRD and/or other info (attachment): Upload a file...

Contract Effective Date: Jun 1 2005

Change Activity: pending

Status: active pending retired

Primary Owner*: Porter, Kory James

Function (Primary)*: Facilities

Additional Owner:

Additional Owner Function:

RMC Representative (Case)*: Young, Lydia J

Hierarchy Level*: 0

Policy Area*: Vehicles at LBNL

Does this contain embedded req?*: embedded no

Instruction: If embedded, cite embedded (association)

Is this a main req or a component of main?*: component main

Parent info – the portion of the Contract that contains the embedded req

Embedded (child) info – the assumption is that this is not otherwise called out explicitly in the Contract.

This is the CHILD (the req that is embedded) – so answer NO –unless!!! this child has a child of its own.

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3. For the Parent requirement, open another workflow (procedure AD02, steps V.1 to V.6).
4. In “Enter Requirements Data” step, enter the data indicated in the next diagram.
5. Add the associated embedded/child requirement to the associations of the Parent requirement. OK to add more than 1 if there are more.

Req wf/Enter Requirements Data – PARENT REQ

The screenshot shows the 'add embedded requirement (parent) - Enter Requirement Details (Edit Mode)' form. The form is divided into several sections:

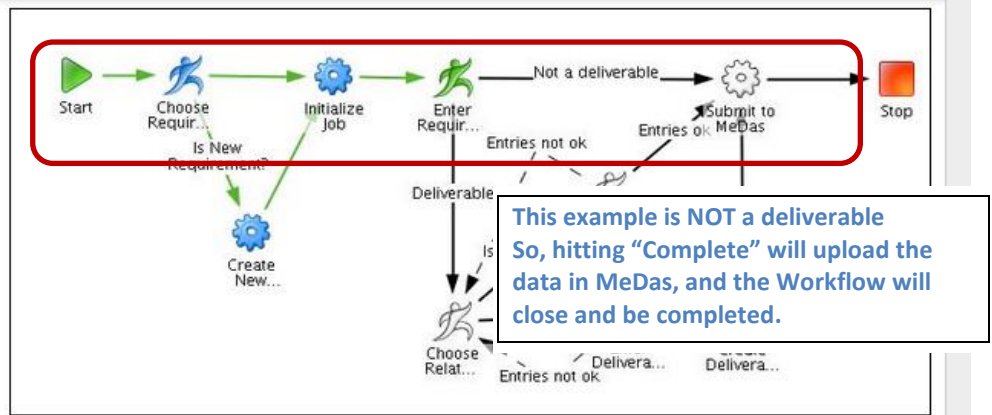
- Requirement Process**: Includes buttons for Complete Task, Save, Make Available, Move to Waiting, Reassign Task, and Show Job Details.
- Property Values**:
 - Requirement Information**:
 - Contract Part*: Contract Section
 - Contract Section*: I
 - Contract Subsection (eg. H.13 or I.021)*: I.058
 - Source Requirement Type*: Federal Acquisition Regulation (FAR)
 - SRD Citation*: FAR 52.251-2
 - SRD Title*: Interagency Fleet Management System Vehicles and Related Services (Jan 1991)
 - SRD Section/Paragraph Citation: (empty)
 - SRD Section Title: (empty)
 - Brief Summary of Requirement*: The Contracting Officer may issue the Contractor an authorization to obtain interagency fleet management system (IFMS) vehicles and related services for use in the performance of this contract. The use, service, and maintenance of interagency fleet management system vehicles and the use of related services by the Contractor shall be in accordance with 41 CFR 101-39 and 41 CFR 101-38.301-1.
 - Link to SRD and/or other info (hyperlink): URL: http://www.ucop.edu/laborator, Name: C31 Section I (Clauses)
 - Link to SRD and/or other info (attachment): Upload a file...
 - Contract Effective Date: Jun 1 2005
 - Change Activity: pending
 - Status: active (selected), pending, retired
 - Primary Owner*: Porter, Kory James
 - Function (Primary)*: Facilities
 - Additional Owner: (empty)
 - Additional Owner Function: (empty)
 - RMC Representative (Case)*: Young, Lydia J
 - Hierarchy Level*: 0
 - Policy Area*: Vehicles at LBNL
 - Does this contain embedded req?*: embedded (selected), no
 - Instruction: If embedded, cite embedded (association)
 - Is this a main req or a component of main?*: component, main (selected)

Annotations in the image:

- A red box highlights the 'Requirement Information' section, with a callout: **Parent info in full.**
- A red arrow points to the 'Contract Effective Date' field, with a callout: **Default to Contract 31 start date**
- A red box highlights the 'Does this contain embedded req?' section, with a callout: **For this Parent requirement, check "embedded". THEN add the associated embedded child to under Associations!!**

Req wf/Enter Requirements Data – PARENT REQ

Job:



7. When sure that all information is correct and complete, select “Complete Task.” The workflow will close and be completed.
8. Refresh and check the associated Case to verify that the Requirement Workflow is indeed complete.

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- Verify that the entered requirement(s) were set up with the correct relationships. Search for the parent requirement, then select Generate Report (How-to # V05), select Associated Requirements. Check the report has the desired hierarchical relationship!

Search requirement I.058. Generate Report/Associated Requirements

Report: Associated Requirements
Author: admin1
Creation Timestamp: Thu Nov 27 07:42:53 PST 2014

Selected Concepts (Requirement):

Requirement #	Label	Smart Label	Contract Section	Contract Subsection (eg. H.13 or I.021)	SRD Title
1	add embedded requirement (parent)	I.058/FAR 52.251-2//Interagency Fleet Management System Vehicles and Related Services (Jan 1991)//0	I	I.058	Interagency Fleet Management System Vehicles and Related Services (Jan 1991)
Supporting Requirement (Requirement): [No Records Found]					
Requirement (Requirement): [No Records Found]					
Embedded Requirement (Requirement):					
Requirement #	Label	Smart Label	Contract Section	Contract Subsection (I.021)	
1	41 CFR 101-38.301-1	I.058/41 CFR 101-38.301-1//Contractors' Use//0	I	I.058	
Supporting Requirement (Requirement): [No Records Found]					
Requirement (Requirement): [No Records Found]					
Embedded Requirement (Requirement): [No Records Found]					
2	add embedded child req	I.058/41 CFR 101-39//Interagency Fleet Management Systems//0	I	I.058	
Supporting Requirement (Requirement):					

- Look at the Parent requirement for the associations.

Browser Modelling Reporting Deliverables

Search Result X Search Requirement X

Label	Version	Instruction	Contract Part	Contract Section	Contract Sub
I.058/41 CFR 101-38.301-1//Contractors' Use//0	RELEASED 1.0		Contract Section	I	I.058
I.058/41 CFR 101-39//Interagency Fleet Management Systems//0	RELEASED 1.0		Contract Section	I	I.058

Export Rows 1-2 of 5 shown

1058/FAR 52.251-... X 1058/FAR 52.251-... X

Edit Start Workflow Deprecate Show Versions Generate Report

Associations

- Requirement to Case: Show Case(s)
- Case: 2014-11-27/How-to examples
- Requirement to Embedded Requirement: Show Embedded Requirement(s)
- Embedded Requirement: I.058/41 CFR 101-38.301-1//Contractors' Use//0
- Embedded Requirement: I.058/41 CFR 101-39//Interagency Fleet Management Systems//0
- Requirement Workflow to Requirement: Show Requirement Job(s)
- Requirement Job: I.058/FAR 52.251-2//Interagency Fleet Management System Vehicles and Related Services (Jan 1991)//0 /Complete

Resources

VI. Related Other How-To's

- DC01 Data Entry Naming Conventions
- DC04 Data Entry – Case Workflow
- DC07 Data Entry – Setting Up Associations
- AD02 Adding a new non-deliverable requirement
- V05 Generating a Report

Revision History

Revision	Date	Who	Description
0	11-23-2014	L.J. Young	Initial
0.1	11-27-2014	L.J. Young	Re-do pictures