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.

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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.

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Req wf/Enter Requir	ements Data – EMBEDDED REQ (child	J)
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	s (Edit Mode) 🗙	
🖌 Complete Task 📑 Save 💐 Make A	Available 🚯 Move to Waiting 🙀 Reassign Parent info – the portion of the Cor	ntra
Requirement Process	that contains the embedded reg	
Property Values		
Contract Part*:	Contract Section	
Contract Section*:	1	
Contract Subsection (eg. H.13 or I.021)*:	1.058	J
Source Requirement Type*:	Code of Federal Regulations	
SRD Citation*:	41 CFR 101-39	
SRD Title*:	Interagency Fleet Management Systems	
SRD Section/Paragraph Citation:	۵	
SRD Section Title:	۵	ノ
Brief Summary of Requirement:	Embedded (child) info – the assumption is that this is not otherwise called out explicitly in the Contract.	
Link to SRD and/or other info (hyperlink):	Q URL: http://www.gpo.gov/fdsys/grai Name: 41 CFR 101-39	
Link to SRD and/or other info (attachment):	Q 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:	This is the CHILD (the req that is	
Additional Owner Function:	embedded) – so answer NO –unless!! this child has a child of its own.	!
RMC Representative (Case)*:	Young,Lydia J	
	0	
Hierarchy Level*:		
Hierarchy Level*: Policy Area*:	Vehicles at LBNI	
Hierarchy Level*: Policy Area*: Does this contain embedded req?*:	Vehicles at LBNL	
Hierarchy Level*: Policy Area*: Does this contain embedded req?*: Instruction:	Vehicles at LBN/ embedded no If embedded (association)	

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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.

d embedded requirement (parent) - Enter Require	ment Details (Edit Mode) 🗙	
Complete Task 🔲 Save 📑 Make /	Available 🕐 Move to Waiting 🌾 Reassign Task 🚝 Show Job De	taile
Pequirement Process	Wallable W Move to Walting Vi Reassign lask 🔛 Show Job De	
Property Values		
Requirement Information		
Contract Part*:	Contract Section	Parent info in full.
Contract Section*:	I 🗸	
Contract Subsection (eg. H.13 or I.021)*:	1.058	×
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)
SD Section/Paragraph Citation		
SRD Section Title:		۵
Brief Summary of Requirement*:	The Contracting Officer may issue the Contractor an authorization to obtain intera management system (IFMS) vehicles and related services for use in the perform contract. The use, service, and maintenance of interagency fleet management sy and the use of related services by the Contractor shall be in accordance with 41 41 CFR 101-38.301-1.	agency fleet ance of this ystem vehicles CFR 101-39 and
Link to SRD and/or other info (hyperlink):	Q URL: http://www.ucop.edu/laborator Name: C31 Section I (C	Clauses)
Link to SRD and/or other info (attachment):	Q 4	Vpload a file
Contract Effective Date:	Jun 🗣 1 🗣 2005 🗣 🎫 Kara 🕶 Default t	to Contract 31 start date
Change Activity:	pending	
Status:	 ective pending retired 	
Primary Owner*:	Porter,Kory James	
Function (Primary)*:	Facilities	
Additional Owner:	۵	
Additional Owner Function:	- 6	
RMC Representative (Case)*:	Young,Lydia J	
Hierarchy Level*:	0	For this Parent requirement
Policy Area*:	Vehicles at LBNL	THEN add the associated
Does this contain embedded req?*:	 embedded mo 	embedded child to under Associations!!
Instruction:	If embedded, cite embedded (association)	
is this a main req or a component of main?*:	 component main 	

Req wf/Enter Requirements Data – PARENT REQ

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Req wf/Enter Requirements Data – PARENT REQ

Associations		Add omboddod (shild roquiromo	nt here by enabling then
Case to Requirement Workflow	w	search/find/associate Can add	more than 1 of any type of
Associated Case:	2014-11-27/How-to ex	association.	more than 1 or any type or
Requirement Workflow to Req	quirement	The item to be associated MUST	EXIST in the database first!!
Associated Requirement:	/////0		
Requirement Workflow to Emb	pedded Requirement		Show Embedded Requirement(s)
Embedded Requirement:	Q 1.058/41 CFR 101	-39//Interagency Fleet Management Systems//0	🧬 Search 🗵
Embedded Requirement:	Q 1.058/41 CFR 101	-38.301-1//Contractors' Use//0	🧬 Search 🗵 🕂
Requirement Workflow to Req	uirement (Supporting Requirement)		Show Supporting Requirement(s)
Supporting Requirement:	Q		💣 Search 😃
Requirement Workflow to Sup	oporting Document (Supporting Docs)		Show Supporting Document(s)
Supporting Document:	Q,		💣 Search 🙆
Requirement Workflow to Act	ion/ROD		Show Action/ROD(s)
Action/ROD:	Q,		💣 Search 😃
Document to Requirement Wo	rkflow (Supporting Requirement)		Show Document(s)
Document:	Q,		💣 Search 🙆
A Resources			
Job image	Start Choose Ini Requir Is New Requirement Create New	Not a deliverable itialize Job Entries not ok Deliverable This example is So, hitting "Com data in MeDas, close and be con Choose	NOT a deliverable polete" will upload the and the Workflow will mpleted.

- 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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9. 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!

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Insert Page Layout	t Formulas Data Kev	iew view Acrobat				~ 😈
▼ (° <i>f</i> x						
A	В	С	D	E	F	G
Report:	Associated Requirements					
Author:	admin1					
Creation Timestamp:	Thu Nov 27 07:42:53 PST 2014					
Selected Concept	ts (Requirement):				Contract Subsection (so 1142 or	
	Requirement #	Label	Smart Label	Contract Section	LO21)	SRD T
			1 058/FAB 52 251-2//Interagency		1021	
		add embedded requirement	Fleet Management System			Interagency Fleet
ARENT		(parent)	Vehicles and Related Services		1.058	System Vehicles
			(Jan 1991)//0			Services (Ja
	Supporting Ree	quirement (Requirement):				
		[No Records Found]				
	Requirement (Requirement):				
		[No Records Found]				
	Embedded Red	quirement (Requirement):				
		Requirement #	Label	Smart Label	Contract Section	Contract Subsection 1.021
	1			I.058/41 CFR 101-38.301-		
	<u> </u>	1	41 CFR 101-38.301-1	1//Contractors' Use//0		1.05
		Supporting Requ	irement (Requirement):			
Child	/Embedded		[No Records Found]			
		Requirement (Requirement):				
			[No Records Found]			
		Embedded Requ	irement (Requirement):			
			[No Records Found]	1050/44.050.404		
			and described deal about a sec	1.058/41 CFR 101-		
		2	add embedded child req	39//Interagency Fleet		
				Management Systems//0		

Search requirement I.058. Generate Report/Associated Requirement

10. Look at the Parent requirement for the associations.

	Browser	Modelling	Reporting	Deliverables					С 🐉 L
7	C Search Resu	t X Qs	earch Requireme	ent X					
La	bel 📤				Version	Instruction	Contract Part	Contract Section	Contract Sub
1.0	58/41 CFR 101-3	8.301-1//Contra	ctors' Use//0		RELEASED 1.0		Contract Section	I	1.058
1.0	58/41 CFR 101-3	9//Interagency F	leet Managemer	nt Systems//0	RELEASED 1.0		Contract Section	1	1.058
4									
2	Export Ro	ws 1-2 of 5 sho	own						
	Edit 🚮 : Associations	Start Workflow s nt to Case	Depre	cate 📑 Show	v Versions 📑 C	Senerate Report		Shov	w Case(s)
	Case:			2014-11-27/H	ow-to examples				
	Requirement	to Embedded	Requirement				31	ew Embedded Requ	irement(s)
Embedded Requirement: L058/41 CFR 101-38.301-1//Contractors' Use//0									
	Embedded Re	equirement:		1.058/41 CFR	101-39//Interagency F	Fleet Management S	Systems//0		
6 H		nt Workupsel	loquirement					Show Requirem	ent Job(s)
	Requirement								

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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

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