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of Defence

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VOLUME 7
SUPPORT ENGINEERING

PART 8.05
TECHNICAL DOCUMENTATION

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CHAPTER 1: TECHNICAL DOCUMENTATION

CONTEXT

1. This part of JSP 886 Volume 7 provides key points of policy and guidance in the selection of the type and appropriate level of Technical Documentation (TD) for Through Life Support (TLS).
2. TD is defined as the information necessary to operate, maintain, repair, support and dispose of equipment throughout its life. This includes Supportability Analysis (SA) data, Data Modules, text or illustrations, reproducible Master Material, Interactive Electronic Technical Publications (IETP) and any output derived from such regardless of the media.
3. The aim of TD Policy is to ensure that detailed specific requirements for TD activities for any Platform, System or Equipment (PSE) is provided, allowing it to be operated, managed and maintained effectively, efficiently and safely. To achieve this, the various users of the TD: operators, maintainers, managers and contractors, must be able to access the TD, in an appropriate manner, wherever they, or the equipment, are deployed.

POLICY

4. It is MOD policy, as directed by Director Joint Support Chain (DJSC) and the Defence Logistics Policy Working Group (DLPWG), that:
 - a. TD shall be produced and delivered in electronic format as Electronic Technical Documentation (ETD) and will be provided to every equipment, to support, maintain, train and provide technical support from the first usage, allowing it to be operated, managed, maintained and disposed of effectively, efficiently and safely.
 - b. The output shall be available as close to the point of use as is possible.
 - c. TD is to be delivered in a structured coherent format whose configuration is controlled throughout its life.
 - d. TD is to be delivered in an appropriate format accessible to all users, including support contractors, MOD authorities, Establishments and deployed units throughout the world. This Policy also covers the TD solution for Urgent Operational Requirement (UOR) equipment.
5. Further information on the TD solution for UORs is detailed in Chapter 5.

PRECEDENCE AND AUTHORITY

6. Ownership of Logistics policy in support of the Logistics Process falls to the Assistant Chief of Defence Staff Logistics Operations (ACDS Log Ops) as Chief of Defence Materiel's (CDM) Process Architect. This role is exercised through the Defence Logistics Policy Working Group (DLPWG) and the Defence Logistics Steering Group (DLSG) reporting up to the Defence Logistics Board (DLB). It is against this governance framework that sponsorship for TD policy is delegated to Hd JSC SCM. PTs are required to assess and show compliance with key policies and governance as signposted by the SSE.

MANDATED REQUIREMENTS

7. To meet the legal duty of care obligations, it is an MOD requirement that all Platforms Systems and Equipments (PSE's) are provided with accessible, accurate, relevant and up to date Technical Documentation that is safe to use.

IMPLEMENTATION PROCESS

8. The implementation of this policy at Platform, System or Equipment level will be developed and promulgated as a Project Technical Documentation Management Plan (TDMP) agreed by stakeholders. The Plan must consider the following:

- a. How the contractual obligations to develop and deliver the service TD to the required quality will align with the schedules within the Project Programme Plan / Integrated Support Plan.
- b. The format and disposition of contents for all TD deliverables will be defined.
- c. The needs of the users, maintainers and managers must be considered alongside the capabilities of the current and future support infrastructure.
- d. The TDMP is to be coherent with the requirements set out in the AOF and SSE, taking advice where necessary from DES JSC SCM EngTLS-TD. Project decisions to adhere to, or to divert from, MOD Policy will be agreed and promulgated in the TDMP.
- e. The TDMP will ensure that any TD deliverables and the hosting Information Systems are matched to technology levels that TD stakeholders (particularly User Units) can accept.
- f. The monitoring Process will be defined to ensure that the progressive delivery of documentation is controlled and verified for accuracy by the nominated issuing authority, prior to the initial use of the equipment.

9. The TDMP should be produced during the Concept phase of the support solution and the progress to delivery of Technical Documentation monitored against the milestones defined within it.

KEY PRINCIPLES

10. TD shall be provided in an appropriate format and time to meet the aims laid out in Paragraph 4.

11. In deciding what format to deliver the TD, consideration shall be given to the through life costs of supporting it. Wherever possible it must be integrated with TD used on similar Platforms, Systems or Equipment with the aim of utilising the same hosting solution, fit with existing structure documents, fall under the same management arrangements and have people trained in the same way.

12. It is essential that the delivery of TD in support of all projects is timely and meets the agreed criteria for Training Readiness Date (TRD), Logistic Support Date (LSD) In-Service Date (ISD), Initial Operating Capability (IOC) or Full Operating Capability (FOC) as appropriate.

TECHNICAL DOCUMENTATION DELIVERY

13. MOD Policy directs Projects to deliver Technical Documentation as Electronic Technical Documentation (ETD). ETD is defined as documentation that is viewed on screen. The various TD deliverables attract different functionality, costs and supportability requirements. Armed with this information, the project shall select the TD deliverable most appropriate to the Platform, System or Equipment operational needs, User and interoperability requirements. The TD solution must be both practical and cost-effective, especially when compared to the Whole-Life Costs of the Project, System or Equipment being procured and must be change managed.

14. The preferred method of delivery, which shall be used on all projects and associated equipments unless it can be demonstrated that it is impracticable or that an alternative can be more cost effective through life, when implementing MOD policy for Technical Documentation is Interactive Electronic Technical Publications (IETP).

Interactive Electronic Technical Publications

15. Interactive Electronic Technical Publications (IETP) are delivered as Datasets and comprise of Data Modules (DMs), produced in accordance with ASD/AIA S1000D version 2.2 and delivered using trilogiView, the MOD's Corporate viewer. This IETP is the digital equivalent of the traditional paper based technical manual. The required set of data modules are dynamically linked together to form a meaningful publication. It is called IETP because it can be made to display the information based on the User's response rather than in the order the originator may have chosen to present it. The Electronic format makes it possible to link to other electronic publications and systems. These highly flexible documents are able to link both textual and graphical data and are facilitated by using the principles of ASD/AIA S1000D providing configuration control and multiple use of the same information in various information sets. This delivery option relies on the MOD DII accredited viewer / browser – 'trilogiView' as the interface between the user and the data store.

16. Where the cost of a full IETP structure cannot be justified, Project Teams shall use Portable Document Format (PDF) as the delivery solution.

Portable Document Format

17. Portable Document Format (PDF) or Linear Electronic Documents describes the manner in which the information is presented to the User in this type of deliverable. The data content is presented consecutively, one page after another, as in a hard-copy book, and, appropriately, such TD deliverables are often described as 'Page-Turners'. PDF/A is an ISO standard (ISO 19005-1:2005) that specifies how to use the Portable Document Format (PDF) 1.4 for long term preservation of electronic documents and is suggested as a preferred format for page-oriented textual documents. PDF/A documents are self-contained and all of the information necessary for displaying the document in the same manner every time is embedded in the file. Tech Docs on Line (TDOL) is the corporate hosting solution for this delivery method. Full details of this mode of TD delivery are promulgated within the AOF Content.

Commercial off the Shelf Manuals

18. Commercial off the Shelf (COTS) manuals can be an acceptable TD solution for short term projects but must be justified. Care should be taken to consider whether there is likely

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to be any amendment action in the future. These are normally readily available Manufacturers Publications that are suitable for issue without amendment.

ASSOCIATED STANDARDS AND GUIDANCE

19. The following provides details on the associated standards and guidance currently available to assist with the production and maintenance of TD:

- a. JSP (D) 543: Defence Technical Documentation Guidance.
- b. DEFSTAN 00-600: Integrated Logistic Support Requirements for MOD Projects.
- c. DEFSTAN 05-123: Technical Procedures for the Procurement of Aircraft, Weapon and Electronic Systems. Part 4: Supply of Technical Information.
- d. 2010DIN04-195: Urgent Operational Requirements Standing Instruction Version 6 (UOR SI V6).
- e. 2011DIN04-080: Policy, Advice & Guidance for TD in the UOR environment.
- f. ASD/AIA S1000D: AeroSpace and Defence Industries Association of Europe (ASD) Specification for Technical Publications utilising a common source database.
- g. PDF (A) (ISO 19005-1:2005): Electronic Documents file format for long term preservation.

OWNERSHIP AND POINTS OF CONTACT

20. The policy for Technical Documentation is sponsored by DES JSC SCM-EngTLS-PEng. Contact details are:

- a. Technical enquiries are to be addressed to:

DES JSC SCM-EngTLS-TD-Pol
Tel: Mil: 9679 Ext 35395. Civ: 030679 35395
- b. Editorial enquires are to be addressed to:

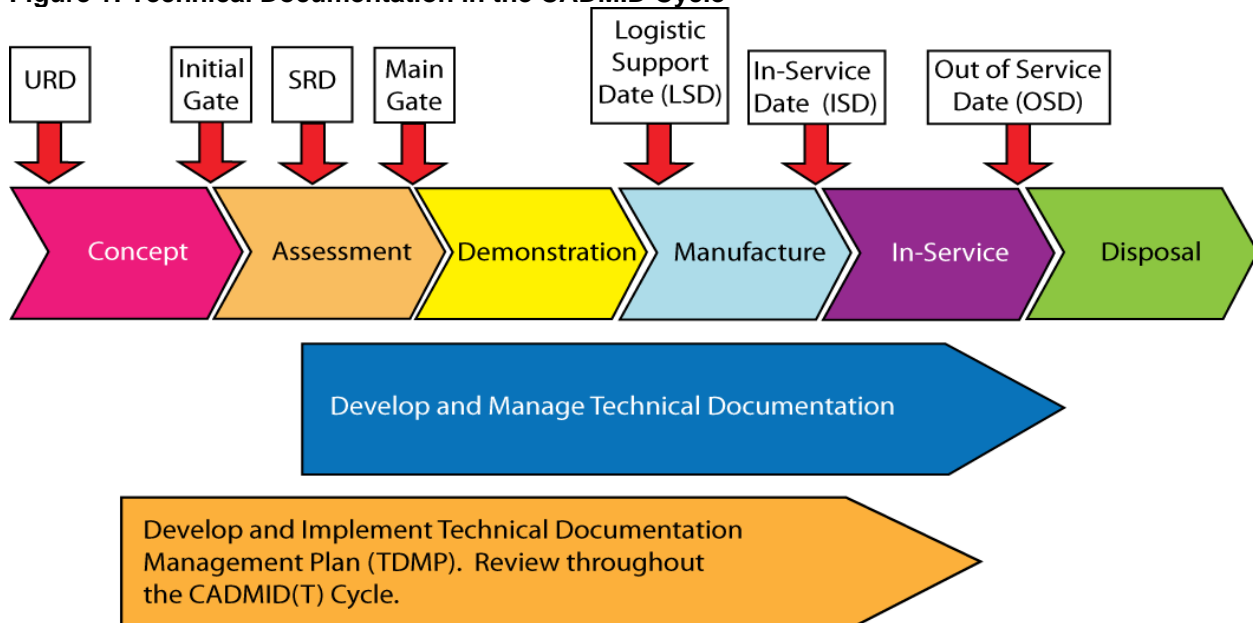
DES JSC SCM-SCPol-Editorial Team
Tel Mil: 9679 Ext 80953. Civ: 030 679 80953

CHAPTER 2: TECHNICAL DOCUMENTATION IN THE CADMID CYCLE

INTRODUCTION

1. This chapter assists Project Teams (PT) to identify the key Technical Documentation (TD) requirements at or by the major approval points within the Concept, Assessment, Demonstration, Manufacture, In-service and Disposal / Terminate (CADMID (T)) cycle.
2. The Approving Authorities will expect to see, at the major Decision Points, that a wide range of Acquisition lifecycle Strategies has been considered. The CADMID cycle has two main approval points:
3. Initial Gate (IG) is the first approval point in the lifecycle. It occurs before any assessment work is undertaken and is considered to be a relatively 'low hurdle'.
4. Main Gate (MG) occurs after the assessment work has been undertaken and is the major decision point at which the solution is approved. Main Gate approval remains the key investment decision point for Projects, where the risks to successful delivery are considered against the benefit of the proposed solution in meeting an endorsed Defence requirement. Main Gate approval also considers Whole Life Costs across all Defence Lines of Development (DLoD). Crucially, it addresses the support solution as well as the equipment procurement.
5. Each phase of the CADMID cycle involves executing agreed plans from the previous phase, reviewing the outcome, planning for the next phase and outline preparation for the remaining phases. A graphical representation of TD requirements in the CADMID cycle is shown in Figure 1.

Figure 1: Technical Documentation in the CADMID Cycle



USER REQUIREMENTS DOCUMENT (URD)

6. The Project Teams shall ensure the requirement for TD is clearly articulated within the URD. TD is one of the Integrated Logistics Support (ILS) elements and shall be outlined within the overall Integrated Logistics Support Plan (ILSP). For more detailed information on TDMP see Chapter 3.

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7. Where there is uncertainty or clarification is required the PT shall contact the TD team (DES JSC SCM-EngTLS-TD-AG), who will provide advice and guidance on all aspects of TD. Detailed information on URD structure and submission and ILS plans can be found on the Acquisition Operating Framework (AOF).

INITIAL GATE (IG)

8. The PT shall provide evidence of the requirements as documented in the Support Solution Envelope (SSE) Compliance Tool.

SYSTEM REQUIREMENTS DOCUMENT (SRD)

9. The Project Teams shall ensure the requirement for TD is captured within the SRD. The solution shall comply with the mandated policy as detailed in Chapter 1 of this document, above. Detailed information on the SRD structure and submission can be found on the AOF.

MAIN GATE (MG)

10. The PT shall provide evidence of the requirements as documented in the SSE Compliance Tool.

LOGISTIC SUPPORT DATE (LSD)

11. The PT is responsible for ensuring it has obtained the appropriate evidence and that its support solution is compliant with SSE Governing Policy (GP) 2.6.

12. It will be necessary to demonstrate / confirm that agreed standards and specifications associated with the TD support solution have been adhered to. If Specification ASD/AIA S1000D is deemed appropriate for the project then a Data Module Requirements List (DMRL) will be required and a set of Business Rules drawn up.

13. The PT must ensure that sufficient TD is made available to affect LSD. The TD must have been approved, via the In-Service Process Review (IPR) process and verified by LSD. The responsibility for 1st verification lies with the Prime Contractor and is mandatory. The 2nd verification process is the responsibility of the Project Team and, although this is not a mandatory requirement within S1000D, it is advisable that Project Teams take measures to ensure that the documentation is accurate and safe to use. This can be achieved by ensuring attendance, where practical, at Contractors 1st verification to witness the process. Further information on validation and verification is available in DEFSTAN 05-123.

IN-SERVICE DATE (ISD)

14. The PT shall provide evidence of the requirements as documented in the SSE Compliance Tool.

OUT OF SERVICE DATE (OSD)

15. The PT shall ensure that TD disposal is addressed through the Disposal Plan. If equipment is passed to a third party for sale or scrap the PT must ensure associated TD is up to date. The PT shall also consider contacting their respective museum/historic branch to offer TD for historical purposes.

CHAPTER 3: TECHNICAL DOCUMENTATION MANAGEMENT PLAN

PURPOSE

1. The purpose of the Technical Documentation Management Plan (TDMP) is to outline the methods that will be used to identify, produce and maintain the TD for the Platform, System or Equipment (PSE). All the TD activities and responsibilities will be detailed in the TDMP.

SCOPE

2. The scope of the TDMP is to show how the Project TD team will create, supply and manage the TD deliverable to the Authority. This shall also include full identification of the equipment and services that the plan applies to.

PROJECT DETAILS

3. This shall be a short description of the project that the plan refers to and the nature of the intended support solution. The main areas will provide:

- a. The name of the Project.
- b. A brief overview of the Project covered by TDMP.
- c. A description of the Support Solution. This will include information that will aid the assessment of the TDMP in relation to the overarching Support Solution.

PROJECT STAKEHOLDERS

4. Stakeholders are those individuals, groups or organisations who have an interest or stake in a particular project. This section identifies those Project Stakeholders.

STATEMENT OF REQUIREMENTS

5. This section identifies the key requirements for the project outlining the Authority's Specification and the Contractor's Statement of Work (SoW) for TD. It shall contain information relating to the description, operation and maintenance. The requirement must be aligned with current TD Policy as laid down in Chapter 1 above.

PROPOSAL FOR TECHNICAL DOCUMENTATION

6. This section will describe the range and format of information to be supplied. This will include a description of the general TD process and a breakdown of the preparation process. If the deliverable is to be in IETP format then development of DMRL and the implementation of S1000D Business rules and how they link to the LSAR and Parts list will need to be included. There is also a requirement for a breakdown of the production process, including generation of data modules or manuals and validation/sign off procedures.

ORGANISATION AND ROLES AND RESPONSIBILITIES

7. This paragraph will provide an overview of the Design Authorities' (DA) organisation and structure. If there is a requirement to provide a description of the TD teams, their responsibilities and the Terms of Reference (TOR) it will be detailed here.

DELIVERY

8. This section will give a description of the final delivery process, including any final review and up issue procedures and the delivery schedule. Chapter 4 provides further information and advice on delivery.

QUALITY MANAGEMENT SYSTEM

9. This will provide relevant information on the Quality Management System in force and include a breakdown of the associated Quality Assurance processes.

STATUS REPORTING / AMENDMENTS

10. This will specify how any updates are planned relating to data module issue states, control version numbering, and report on the overall process status. This section will also identify and detail how any changes or updates to the documentation are managed.

RISK MANAGEMENT

11. This section will detail how any risks are managed.

SECURITY

12. This will include a breakdown of material classification and how the classified data will be managed. Consideration shall be given for handling of Export Controlled information, particularly International Traffic in Arms Regulations (ITAR) constraints, during the production of TD and for subsequent distribution. Care must be taken to follow the security instructions covered by JSP 440: Defence Manual of Security.

CHAPTER 4: TECHNICAL DOCUMENTATION MANAGEMENT AND DELIVERY

INTRODUCTION

1. An effective and efficient Management and Delivery system for Technical Documentation (TD) is vital to enable the flow of information to be controlled and maintained to ensure that TD information is accurate, up to date and meets the support requirements of the Project, System or Equipment (PSE) whilst it is at all stages of the CADMID cycle.

IDENTIFICATION OF THE SUPPORT AND PROVISIONING OF TD

2. It is MOD policy to deliver Electronic Technical Documentation (ETD) as close to the point of use as is practically possible. Therefore the identification of support and provisioning to enable this is vital to the success of the project. It is also very important to take cognizance of current TD policy requirements as specified in Chapter 1.

PUBLICATION SPONSOR

3. The Publication Sponsor is the declared owner of the publication. Sponsorship usually rests with the manager of the platform; vehicle or equipment supported by the publication and, accordingly, is vested in the appropriate PT Leader (PTL).

4. The role of the publication sponsor is fundamental to the effective implementation of current MOD documentation strategies and particularly to the management of ETD across the Service user base.

5. The Sponsor carries the responsibility for identifying the business case for the publication, specifying the requirement and overseeing the publication production, distribution and maintenance life cycle, through to disposal. The Sponsor is to maintain a technical point of contact during the production phase of the publication and thereafter until the publication is obsolete. Sponsors shall ensure a suitable review period for publications and prohibit the use of hand written amendments in place of reissuing the amended publication.

6. Joint Support Chain Services publish a Forms & Publications Guide for Sponsors

PROJECT TEAM RESPONSIBILITIES

7. The Project Team (PT) has responsibility for the procurement and management of all aspects of the TD required. The PT liaises and deals directly with Contractors and other MOD establishments on TD delivery requirements as necessary.

8. Advice should be obtained from the FLIS LogNEC Programme on TD to ensure compliance with Joint Support Chain policy on the delivery of Logistic and engineering systems.

9. It is the ILSM responsibility, within the PT, to authorise publication tasks and determine the acceptability of the final delivered materiel, in accordance with the contracted specification(s) and the TD policy mandated in Chapter 1 above.

PUBLICATION DELIVERY

10. Chapter 1 directs Projects to deliver TD as Electronic Technical Documentation (ETD). This preferred method of delivery, which shall be used on all projects and associated equipments unless it can be demonstrated that it is impracticable or that an alternative can be more cost effective through life, when implementing MOD policy for Technical Documentation is Interactive Electronic Technical Publications (IETP's). This will be delivered from trilogiView.
11. Where the cost of a full IETP structure cannot be justified, Project Teams shall use Portable Document Format as the delivery solution.
12. Project Teams who intend to deliver their own solution, must seek prior approval from DES JSC SCM-EngTLS-TE and DES LogNECProg-Future Logistic Information Services (FLIS). This is to ensure that stovepipe solutions (ie stand-alone solutions, where the application does not integrate, or share data or resources with, other applications), are not introduced to the Joint Support Chain (JSC) and Front Line Commands (FLCs) Systems.
13. Consideration must be given to constraints such as DII/F capability. Consideration shall also be given to infrastructure requirements such as bandwidth and hardware, and the delivery environment.
14. All equipment publications, current or future, that require a hard copy output must be managed in DR TDOL. TDOL is used to store the Master Copy; this is Configuration Managed with full audit trail and also provides the Print Master and source for the TDOL viewer.

ELECTRONIC TECHNICAL DOCUMENTATION

15. The most common outputs from ETD include Interactive Electronic Publications (IETP), page orientated publications and database deliverables of all data required to support the equipment in use.
16. Information management issues associated with IETP shall be as specified in the contract. The Contract Requirements and Business Rules shall specify how the information shall be managed in accordance with Chapter 4 of ASD/AIA S1000D. JSC Services shall be responsible for any distribution requirements in accordance with the sponsor's distribution list, Pagination and any Special Instructions (SI).

INTERACTIVE ELECTRONIC TECHNICAL PUBLICATIONS

17. An IETP is one of the deliverables for ETD. From a DEFSTAN 00-600 perspective, this requirement can be fulfilled by IETP in SGML, XML, HTML and PDF format. It should, however, be noted that PDF deliverables do not necessarily fulfil the entire IETP requirements as defined in DEFSTAN 00-600.
18. TrilogiView is the corporate IETP viewer accredited for use on DII. Delivery of any alternative solution must get approval from both the DES JSC SCM-EngTLS-TD-Pol and the FLIS LogNEC Programme.

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TECHNICAL DOCUMENTS ON LINE (TDOL)

19. The TDOL capability within the Design Repository (DR), managed by Future Logistics Information Services Logistic Network Enabled Capability (FLIS Log NEC), provides a tool for the configuration management and viewing of technical publications. Design Repository is the Joint Support Chain's Defence reference solution.

20. IETP are currently not available in TDOL; however, all IETP and any TDs not managed in TDOL must still be referenced in TDOL with a placeholder document containing details of how they may be obtained.

COTS MANUALS

21. Commercial off the Shelf (COTS) manuals provide a quick, temporary solution to provide TD information when speed is of the essence. This is generally considered the minimum acceptable for Urgent Operational Requirements (UORs) but not for conventional TD procurement. In essence front cover and preliminary material is added to Commercial publications to obtain a recognised reference number, enabling them to be effectively controlled. It is possible to have COTS manuals provided in PDF format, noting that PDF "normal" is the Standard required for TDOL upload to restrict file size and allow search functions.

TECHNICAL DOCUMENTATION DEPLOYED (TDD)

22. The hardware and infrastructure needed to deploy platform TD is the responsibility of the PT and must be integrated with current and future operational logistic IT policy and requirements.

23. Project Teams must obtain approval from DES JSC SCM EngTLS-TD-Pol and DES LogNECProg-FLIS to ensure that no stovepipe solutions add burden to the JSC.

CHAPTER 5: URGENT OPERATIONAL REQUIREMENT (UOR)

1. The Urgent Operational Requirements (UOR) process enables rapid procurement to address equipment capability shortfalls that have arisen as a result of current or imminent operations. Under this process the procurement of new or additional equipment (or the enhancement of existing capability) occurs more quickly than the 'normal' equipment acquisition cycle. The TD support solution must be available to the User to safely operate, maintain and repair equipment in Theatre.

SCOPE

2. This section is applicable to all Project Teams (PT's) and Front Line Commands (FLC's) and gives specific guidance on TD procurement and management for UORs.

PROJECT TEAM (PT) RESPONSIBILITIES

3. To meet the MODs legal duty of care obligations, it is a requirement that all equipments are provided with accessible, accurate, up to date and relevant TD from the date that MOD takes responsibility for their operation.

4. It is the responsibility of the PT to manage the distribution of TD to meet this aim, or to ensure this role is discharged on their behalf by a competent contractor and / or other appropriate arrangements.

5. The UOR process is defined in 2010DIN04-195. It includes PT responsibilities in relation to engagement with organisations such as Permanent Joint Headquarters (PJHQ) and Logistics Network Enabled Capability (LogNEC).

POLICY FOR INTERIM TD FOR UOR EQUIPMENT IN THE OPERATIONAL ENVIRONMENT

6. As a minimum TD must be delivered in electronic format, via Tech Docs on Line (TDOL) if more sophisticated arrangements have not been made. The following paragraphs provide policy and supporting advice when providing interim TD in the form of Commercial off the Shelf (COTS) manuals for UOR equipment.

7. Configuration Control must be adopted in line with the current in theatre Equipment Care Inspection (ECI) assurance process.

8. There are two options for PTs to consider for producing and delivering TD to theatre:

- a. Interim Publication.
- b. Compliant Publication.

Option 1 - Interim Publications

9. Interim Publications may be chosen under the following circumstances:

- a. When time is of paramount importance and producing publications under any other option would cause a delay to the deployment of the equipment, or
- b. For short-term deployments, ie less than 12 months. Upon returning from theatre / operations the Interim Publication must be cancelled.

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10. The PT will raise an appropriate task on the Design Organisation (DO) to provide Interim Publications in support of the UOR, clearly outlining the User requirements. It is acceptable to use Original Equipment Manufacturer (OEM) or other COTS data, providing it is legible and appropriate for use in the operational environment. Photographs, snapshots of engineering drawings or Computer Aided Design (CAD) models may be used in lieu of fully compliant line drawings.
11. The Interim Publications will be electronic. Hard copy requirements will be met, and managed, via a printing facility in theatre. All TD must clearly be identified with a TD reference number.
12. Although this is an interim solution the DO will ensure normal requirements for authentication in the form of Certificates of Conformance (CofC) are adhered to.
13. Publications provided under these arrangements are strictly to provide an interim solution in the short term; development work should continue to provide a coherent suite of compliant documents that must be made available once they are matured.

Option 2 – Compliant Publication

14. Option 2 should be chosen under the following circumstances:
 - a. When there is sufficient time to produce publications compliant with current policy, in accordance with the relevant standards and specifications, without delaying deployment, and:
 - b. When a deployment is expected to last for more than 12 months.
 - c. If the equipment is expected to be brought into the core equipment programme, irrespective of deployment duration.
 - d. When Option 1 has been utilised and it is subsequently decided to extend the deployment beyond 12 months.
15. The PT will raise a task on the DO to provide Compliant Publications in support of the UOR, clearly outlining the User requirements in line with normal procedures or contractual arrangements.
16. The DO shall provide a CofC for the Compliant Publication which confirms and certifies that all the information contained within the TD is accurate, safe in application and suitable for its intended purpose as defined in the contract.

Delivery

17. Advice should be obtained on the delivery of the TD support solution from Future Logistic Information Service, Logistic Network Enabled Capability Programme (FLIS LogNEC Prog).

CHAPTER 6: CONTRACTING FOR TECHNICAL DOCUMENTATION

INTRODUCTION

1. This Chapter provides Project Teams with appropriate information and access to relevant supporting Standards and Guidance that will ensure that requirements for contracting for Technical Documentation (TD) are met.
2. TD is a product of intellectual effort, and a framework of legal rights known as Intellectual Property Rights (IPR), protects them.
3. The key principles of contracting for TD are therefore:
 - a. To satisfy the Policy requirements defined in JSP 886, Volume 7, Part 8.05, Chapter 1. The preferred method of delivery is Electronic Technical Documentation, Interactive Electronic Technical Publications (IETP's) to ASD S1000D.
 - b. To ensure that the MOD has certain rights of use, such as copying and distributing the TD for any UK Government purpose (except the purpose of manufacturing equipment)
 - c. To prevent unauthorised disclosure of the TD delivered to MOD under a contract.

COMMERCIAL CONSIDERATIONS

Statement of Requirements (SOR)

4. Typically, after consultation with the relevant Subject Matter Experts, the MOD Integrated Logistic Support Manager (ILSM) will produce a set of requirements for work and TD deliverables that are recorded in an ILS SOR and its associated Contract Document Requirements List (CDRL). The Commercial Officer must ensure that the requirements of the SOR are included within the Invitation to Tender (ITT) documentation, either by referring to the SOR within the draft contract or extracting the requirements into the main body of the document. In response to the SOR, the bidder will be expected to produce a Statement of Work (SOW).

Bidders' Response to Invitations to Tender (ITT's)

5. The bidders must document how they will meet the TD requirements, and if not, document any deviation from the requirements. If conformance with the requirement is not considered necessary its impact must be subject to risk analysis by the MOD project officers.
6. It is a legal obligation for MOD to ensure the equal treatment of all bidders. Therefore, Project Teams will most likely have to share any agreed deviations from the SOR simultaneously with all bidders.

The Contract

7. A contract is a legally binding agreement between two or more parties. Whatever the form or value of the contract involved, only those MOD employees with specific written authority to do so are empowered to sign and commit the department. Those who choose to ignore this principle are likely to face disciplinary action and personal liability.

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8. Before discussing any business with industry prior to the award of a contract always use the term “Without Commitment” and if you discuss any business with a contractor once a contract is in place always use: “Without Prejudice”. For more information, see the Commercial Awareness Guide.

Terms and Conditions

9. It is standard practice for MOD contracts to include the following clause when contracting for TD:

“The Contractor shall ensure that the Authority has the right to copy, amend, extend or have copied, amended or extended any technical documentation delivered under the Contract or any part thereof including any such part when incorporated in any amended or extended version of such technical documentation, and to circulate, use or have used said technical documentation including any amended or extended version and any copies thereof for any United Kingdom Government purpose but not for the purpose of manufacturing equipment to which the technical documentation relates”.

10. However, it is important to determine which specific IPR conditions are applicable. For more information, see the IPR Conditions topic on the Commercial Toolkit.

11. DEFCON 531: Disclosure of Information, is mandatory for inclusion in all contracts. It sets out mutual obligations and exceptions for MOD and contractors in respect of information disclosed to one another.

Project Considerations

12. It is essential that when Projects are considering the TD element of their Contract that In-Service support, upkeep and amendments are included. The contract for TD is to include the amendment and maintenance of the TD, not just the delivery and introduction to service.

Safety first

13. TD needs to be accessible to all users, it must be accurate, relevant, up to date and safe to use. Project Teams must consider what infrastructure is available and whether it needs to work in a Shared Data Environment (SDE). The End User's access to the information is also a major consideration due to the following:

- a. Will the SDE integrate with the current MOD infrastructure and / or Deployed Environment?
- b. Will the End User be working in a hazardous environment?
- c. Is it necessary for the End User to be located close to weapons / munitions and be subject to Explosives Maintenance Regulations or Electro Magnetic Pulse considerations?

14. Projects also need to consider how the TD shall be delivered and whether the Contractor will have access to all operator / maintainer information. This has been driven by Intellectual Property Rights (IPR) and International Traffic in Arms Regulations (ITAR). Chief Information Officer Note 1/2012, MOSS file saving policy for caveat, descriptor and ITAR information can be accessed [from this link](#). (Not for Internet version)

Use Study

15. The Use Study is provided to external parties including potential bidders and contractors as guidance on the intended in-service use and of interpreting the MOD requirements. It also provides the data that MOD must supply to the contractor so that they can carry out their tasks (although it must not constrain innovation). The Use Study is not a contractual document.

16. The Use Study contains information (as applicable) on:

- a. The intended use of the product to be procured.
- b. A description of the system to be replaced.
- c. The proposed support strategy envisaged and any constraints arising from the existing support infrastructure.
- d. Manpower and available skills.
- e. Identifies existing and future resources that could be utilised for the support of the product.

Concept of Use (CONUSE)

17. A CONUSE describes the way in which specific equipment is to be used in a range of operations or scenarios. It is normally produced in the development phase. The Use Study and the CONUSE are synonymous and only one document shall be in existence within a Project. For projects that have not been generated against the current policy and do not have a CONUSE then the ILS manager must generate a Use Study.

18. DEFSTAN 00-600 requires the Use Study / CONUSE to be updated through life and be revisited if the acquisition lifecycle is reiterated for mid life upgrades.

Government Furnished Assets (GFA)

19. GFA is a term used to describe MOD owned assets supplied to industry in support of MOD contracts. Generically materiel on loan to industry is known as Government Furnished Equipment (GFE). GFE is a sub-category of GFA. It is essential that all GFA issued to contractors be clearly defined in the contract, including IETP viewing software.

ILS Plan

20. Development of the support concept starts at the beginning of a project's life when initiated by the ILS plan. The ILS Plan describes the MOD approach to ILS, based on Defence Standard 00-600, tailored to meet the requirements of a project. The Plan is provided to external parties including potential bidders and contractors to provide guidance in interpreting the MOD requirements detailed in the Statement of Work (SOW).

Statement of Work (SOW)

21. The SOW identifies the MOD requirements. The ILS Plan is to be included within the SOW, which is the contractual document for the Project.

TD Management Plan (TDMP)

22. The TDMP will outline the methods that will be used to identify, produce and maintain the TD for the Platform, System or Equipment (PSE) and will show how the Project will create, supply and manage the TD deliverable. [Chapter 3](#) provides information on TDMP.

TD Business Rules

23. Projects should produce and maintain through life, a comprehensive set of Business Rules that define how their data is constructed and constrained / standardised.

TD Test Script

24. For IETP's to ASD S1000D, Projects should produce and maintain through life, a comprehensive Test Script that covers all mandatory and optional S1000D constructs used.

Deliverables

25. It is vital that there is an effective delivery system for TD to enable the flow of information to be controlled and maintained to ensure that TD is accurate, up to date and meets the support requirements. Technical Documentation management and delivery information can be found in [Chapter 4](#).

Verification and Validation of Electronic Technical Documentation

26. First verification is a contractor obligation and is sometimes known as validation and is a mandatory activity. On completion, the data module (DM) will be promoted to a quality assurance status of first verified. MOD will not accept DM's that have not been verified.

27. Second verification is an optional activity carried out by the customer and ensures fitness for purpose. This activity can be performed at the same time as first verification through agreement with the contractor.

Hosting and Distribution

28. Project Teams should seek guidance from DES LOGNEC Prog and DES JSC SCM-EngTLS –TD-Pol to ensure that stovepipe solutions (ie stand-alone solutions, where the application does not integrate, or share data or resources with other applications) are not introduced to the Joint Support Chain (JSC) and Front Line Commands (FLC's) Systems.

29. Logistics Commodities and Services (LCS) Forms and publications team based at Bicester provide services for the receipt, storage and distribution of MOD registered Forms and Publications. Other government departments, Foreign Governments, Contractors and private individuals may also be customers.

ASSOCIATED STANDARDS / GUIDANCE OR SUPPORTING INFORMATION REQUIREMENTS

Standards and Specifications

30. The following documents provide access to the associated standards currently available to assist with contracting for TD:

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- a. DEFSTAN 00-600. This document is the current standard for those contracting for ILS deliverables.
- b. DEFSTAN 00-60. This document is the legacy standard for those concerned with contracting for ILS deliverables. This standard should not be used for new projects, but may be used for updates to existing projects that were originally contracted to DEF-Stan 00-60.
- c. DEF-Stan 13-99: Requirements for DGM Project Team Munitions Technical Publications.
- d. ASD S1000D: International Specification for Technical Publications.

Guidance / Supporting Information

31. The following documents provide access to the associated guidance currently available to assist with contracting for TD:

- a. JSP (D) 543: Technical Documentation Guidance.
- b. JSP 886 Volume 7, Part 2: Integrated Logistics Support (ILS) Management.
- c. Military Aviation Authority (MAA) Regulations.
- d. ILS Product Descriptions are contained in JSP 886, Volume 7 Part 2 Annex B.
- e. DEFCONS.
- f. Framework Agreement for Technical Support (FATS), Useful FATS documents.

Commercial Toolkit

32. Commercial guidance for the UK MOD Defence Acquisition community is detailed within the Acquisition Operating Framework, Commercial Toolkit which can be accessed [from this link](#).

More Effecting Contracting (MEC)

33. MEC is an acquisition initiative that seeks to promote the application of good practice using proven project management tools to both de-risk programmes and prevent either MOD or suppliers becoming over committed. It has particular relevance where there is a technology risk. Use the following link to access MEC: [MEC Link](#).