

Contracting Officer's Representative (COR) Interactive SharePoint Wiki

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Background -1

Today, when a Contracting Officer's Representative (COR) needs guidance on contracting for software solutions, there is no single reference:

- Many documents
- Contradictory guidance
- Not necessarily relevant to his/her agency

Desire to have a *single* reference that can help guide CORs to an understanding of how software-intensive solutions:

- What is different about software-intensive solutions?
- How do these differences impact
 - Contract planning
 - Contract formation
 - Contract management
 - Contract closeout





Approach

Collect existing references, guidance, “best practices” into a single knowledge base that can be accessed in multiple ways:

- Workflow perspective
- Topical perspective
- Interactive and hardcopy format

Not simply a compilation of “stuff,” but a *curated* collection of the best available guidance drawn from multiple sources, including:

- *Applicable statutory, regulatory, and agency guidance* (i.e., FAR, DFARS, DoD Instructions, etc.)
- *Deep knowledge and experience within SEI and other FFRDCs* (e.g., SEI technical reports, Aerospace TORs)
- *Other Agency and Service guidance* (e.g., USAF Weapon Systems Software Management Guidebook)
- *Applicable practices in existing acquisition and development models* (e.g., CMMI-ACQ®)



Single Knowledge Base

General and agency-specific guidance:

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Newsfeed OneDrive Sites James Smith

BROWSE DELIVERPOINT FILES LIBRARY

Desk Reference Wiki How to Use Wiki Deskguide Topics Printout

General Guidance

+ new document or drag files here

Printing agencyListView AllItems Find a file

Name	Title	Asset Type	Topic	Active
11tr014	A Decision Framework for Selecting Licensing Rights for Noncommercial Computer Software in the DoD Environment	Guidance; Informational	Software Data Rights; Software Licensing	Yes
2009_004_001_15041	A Proactive Means for Incorporating a Software Architecture Evaluation in a DoD System Acquisition	Example; Guidance; Informational	AoA; CDRL; MS B; PDR; CDR; SOW; SOO; SRD; SRS; Systems Engineering	Yes
Technical Data and Computer Software Rights Handbook 5th Edition	Acquiring and Enforcing the Government's Rights in Technical Data and Computer Software Under DoD Contracts: A Practical Handbook for Acquisition Professionals, 5th Ed. (Oct 2012)	Guidance; Informational	Software Data Rights	Yes
ACA COR Guide	Army Contracting Agency COR Guide (Section I)	Example; Process	COR/COTR	Yes
ARMYcor-deskguide	Army COR Desk Guide	Example; Guidance	COR/COTR	Yes
COR Smartcard	Army COR Smartcard	Tool	Acquisition Management; COR/COTR	Yes
commercial computer software license (far 52.227-19)	Commercial Computer Software License	Policy	FAR/DFARS; Software Data Rights; Software Licensing; COTS	Yes
DD Form 1423-1	Contract Data Requirements List (CDRL)	Template	CDRL	Yes
COR Desk Guide elevator pitch_20140226a	COR Desk Guide Elevator Pitch	Informational	COR/COTR	Yes
COR Deskguide How To Wiki	COR Deskguide How To	Informational	COR/COTR	Yes
2011-SRDRInitial	Data Item Description: Software Resources Data Reporting - Initial Developer Report and Data Dictionary	Standard	CDRL	Yes
DefenseAcquisitionGuidebook	Defense Acquisition Guidebook	Guidance; Informational	Acquisition Management; Contract Type; COR/COTR; FAR/DFARS; Requirements; Systems Engineering; Technical Reviews	Yes
500001p	Defense Acquisition Policy	Policy	Acquisition Management	Yes
DCCH-V5_July2015	Defense Contingency Contracting Handbook	Guidance	COR/COTR	Yes
2014_003_001_311942	Development of an Intellectual Property Strategy	Guidance	Software Data Rights; Intellectual Property (IP)	Yes
dfars 227.71	DFARS 227.71: Rights in Technical Data	Policy	CDRL; DAL; FAR/DFARS; Requirements; Software Data Rights; Software Licensing; NCI; NDI	Yes
dfars 227.72	DFARS 227.72: Rights in Computer Software and Computer Software Documentation	Policy	CDRL; COTS; FAR/DFARS; Software Data Rights; Software Licensing	Yes
DIZE SvcV-4	DIZE SvcV-4	Informational		Yes
USAA01300-13 DoD COR Handbook Signed1	DoD COR Handbook	Guidance	COR/COTR	Yes



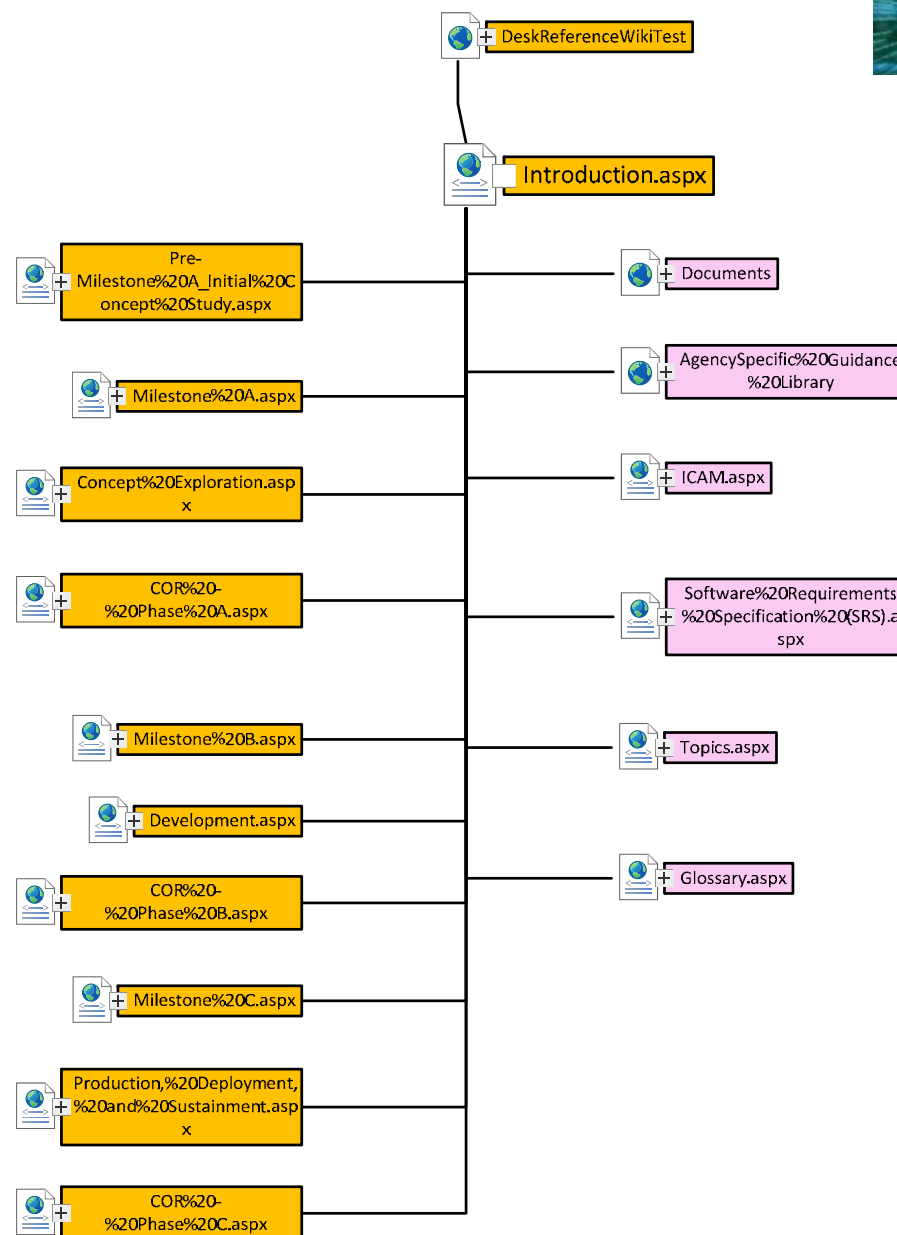
High-Level Structure

The Desk Guide is organized around the acquisition life cycle, from Pre-Milestone A through Phase C

- Milestone entry criteria
- Phase software activities
- Phase exit criteria

Within each phase, software-related COR guidance provided, including representative RFP language and proposal evaluation criteria

Knowledge base organized into general guidelines/references, agency-specific guidance, and specific topics (e.g., Software Requirements Specification – SRS)



Workflow Perspective - 1

“I need to...”

The screenshot shows the COR Desk Reference Wiki interface. The left sidebar contains navigation links such as 'Desk Reference Wiki', 'FAQ', and 'Contact Us'. The main content area features a welcome message and a search bar. A red circle highlights the search bar. Below the search bar, there are sections for 'My Role is' and 'COR Workflow Tasks'. On the right, there is a diagram titled 'Systems Acquisition Framework' showing the flow from User Needs to Milestone Document Identification (MDID) and finally to Milestone Document Identification (MDID) tool.

Workflow Perspective - 2



Data Rights - 1

Version 1.1
Status Checked in and available by authorized users.

Intellectual Property (IP) Rights

With software-acquisition systems, the determination of Government rights for Intellectual Property (IP) is an important part of any acquisition. Different rights accrue for commercial and non-commercial software. FAR 12.207-14, (DFARS 207.7) is a good resource to understand the distinction between technical data and computer software. Technical data includes data that is the work of the data and computer software documentation (e.g., operator's manual), engineering and design material. Computer software includes the executable code, source code, design, design documentation, etc. (FAR 12.207-14, (DFARS 207.7-14)).

Is the software & computer software (IP) to be commercialized? ☐ Yes ☒ No

References

Item	Title	Item Type
12.207-14	A Decision Framework for Selecting Licensing Rights for Noncommercial Computer Software in the DoD Environment	Guidance
2014.05.01.14.14.14	Development of an Intellectual Property Strategy	Guidance
Commercial computer software license (for 12.207-14)	Commercial Computer Software License	Guidance
DFARS 207.7-14	DFARS 207.7-14 Rights in Technical Data	Policy
DFARS 207.7-14	DFARS 207.7-14 Rights in Computer Software and Computer Software Documentation	Policy
FAR 27.14	FAR 27.14 Rights in Data - General	Policy
FAR 27.14	FAR 27.14 Rights in Data and Copyrights	Policy
Technical Data and Computer Software Rights Maintenance	Accounting and Enforcing the Government's Rights in Technical Data and Computer Software Under DoD Contracts: A Practical Handbook for Acquisition Professionals, 1st ed. (Oct 2012)	Guidance

Agency-Specific Guidance

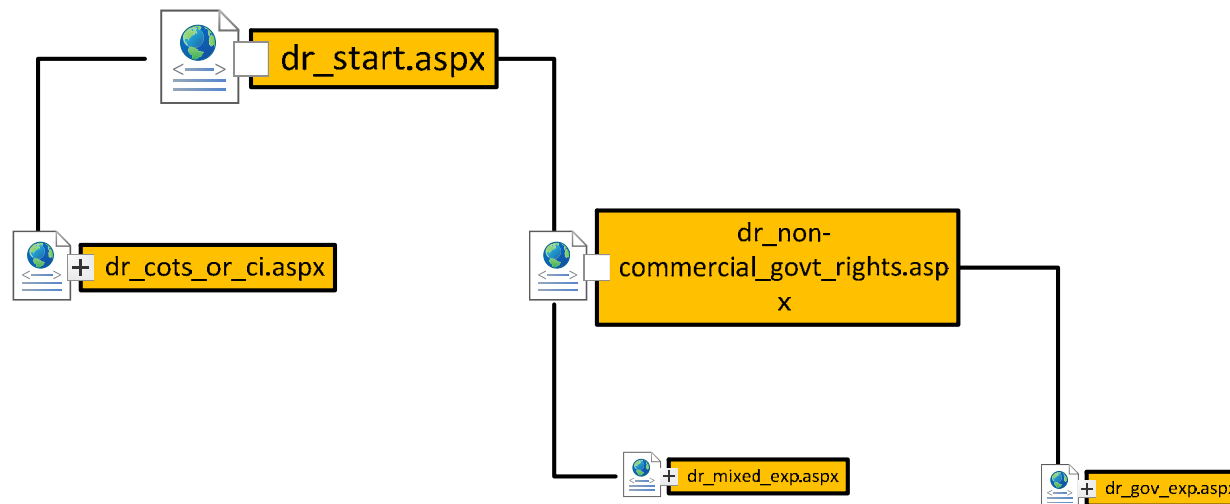
There are no documents in this view.





Workflow Perspective - 3

The data rights workflow provides an instance of a decision tree—used in conjunction with the general and agency-specific guidance—to lead a COR through a simple “Yes/No” path to determine the appropriate Government licensing and data rights



Topical Perspective - 1

“I want to learn about...”

The screenshot shows the SEI SharePoint Wiki interface. The left sidebar contains a navigation menu with categories like 'Desk Reference', 'COR Community Site', and 'Reference Libraries'. The main content area has a yellow banner with version information (Version: 1.18, Status: Checked in and viewable by authorized users). Below the banner, there's a welcome message and a search bar. A red circle highlights the 'Learn About...' dropdown menu, which is set to 'Development (Phase B)'. The page also features a 'Systems Acquisition Framework' diagram, a 'Milestone Document Identification (MDID)' table, and a 'COR Workflow Tasks' section.

Systems Acquisition Framework

The diagram shows a flow from 'User Needs' through 'Pre-Systems Acquisition' (Material Solution Analysis, Technology Development, Engineering and Manufacturing Development) to 'Systems Acquisition' (Production and Deployment, Operations and Support) and finally to 'Sustainment'.

Milestone Document Identification (MDID)

Your Acquisition and Documentation Requirements Tool

Milestone and Phase Information Requirements (See Table Notes)	MDID	MDID-A	MDID-B	MDID-C	MDID-D	MDID-E	MDID-F	MDID-G	MDID-H	MDID-I	MDID-J	MDID-K	MDID-L	MDID-M	MDID-N	MDID-O	MDID-P	MDID-Q	MDID-R	MDID-S	MDID-T	MDID-U	MDID-V	MDID-W	MDID-X	MDID-Y	MDID-Z
STATUTORY																											
ANALYSIS OF ALTERNATIVES (AoA)																											
BENEFIT ANALYSIS AND DETERMINATION																											
BUSINESS PROCESS REENGINEERING																											
CLINGER-COHEN ACT COMPLIANCE																											
COOPERATIVE OPPORTUNITIES																											
CORE LOGISTICS DETERMINATION / CORE LOGISTICS AND SUSTAINING WORKLOADS ESTIMATE																											
CYBERSECURITY STRATEGY																											
DOT&E REPORT ON INITIAL OPERATIONAL TEST AND EVALUATION (IOT&E)																											
FREQUENCY ALLOCATION APPLICATION (DD Form 1494)																											
GENERAL EQUIPMENT VALUATION																											
LIVE FIRE TEST AND EVALUATION (LFT&E) REPORT																											
LOW-RATE INITIAL PRODUCTION (LRIP) QUANTITY																											
MARKET RESEARCH																											
OPERATIONAL TEST PLAN (OTP)																											
PESHE AND NEPAE O 12114 COMPLIANCE SCHEDULE																											
POST IMPLEMENTATION REVIEW (PIR)																											
SMALL BUSINESS INNOVATION RESEARCH / SMALL BUSINESS																											

Both Interactive and Hardcopy Formats



