



Acquisition Insight Days 2015



TO Life Cycle Management Update

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One Team, Delivering Capabilities to Fly, Fight & Win...Today & Tomorrow



Topics

- **AF TO Life Cycle Management Policy**
- **TO Development**
- **Developing S1000D TOs**





AF TO Life Cycle Management Policy

TOs are acquired or developed for the organic operation, inspection and maintenance of centrally acquired and managed Air Force systems and end items (AFI 63-101, *Integrated Life Cycle Mgt*)



HQ AFMC

HQ AFMC TO Policy Office

Responsible for AF TO system policy, including final waiver authority IAW AFI 63-101

AFLCMC

AFLCMC TO Home Office

Responsible for AFLCMC TO system policy; organize, train and equip (OT&E) all AFLCMC programs IAW AFMCI 21-301 (in re-write)

Program Office

TO Management Agent / Agency (TOMA)

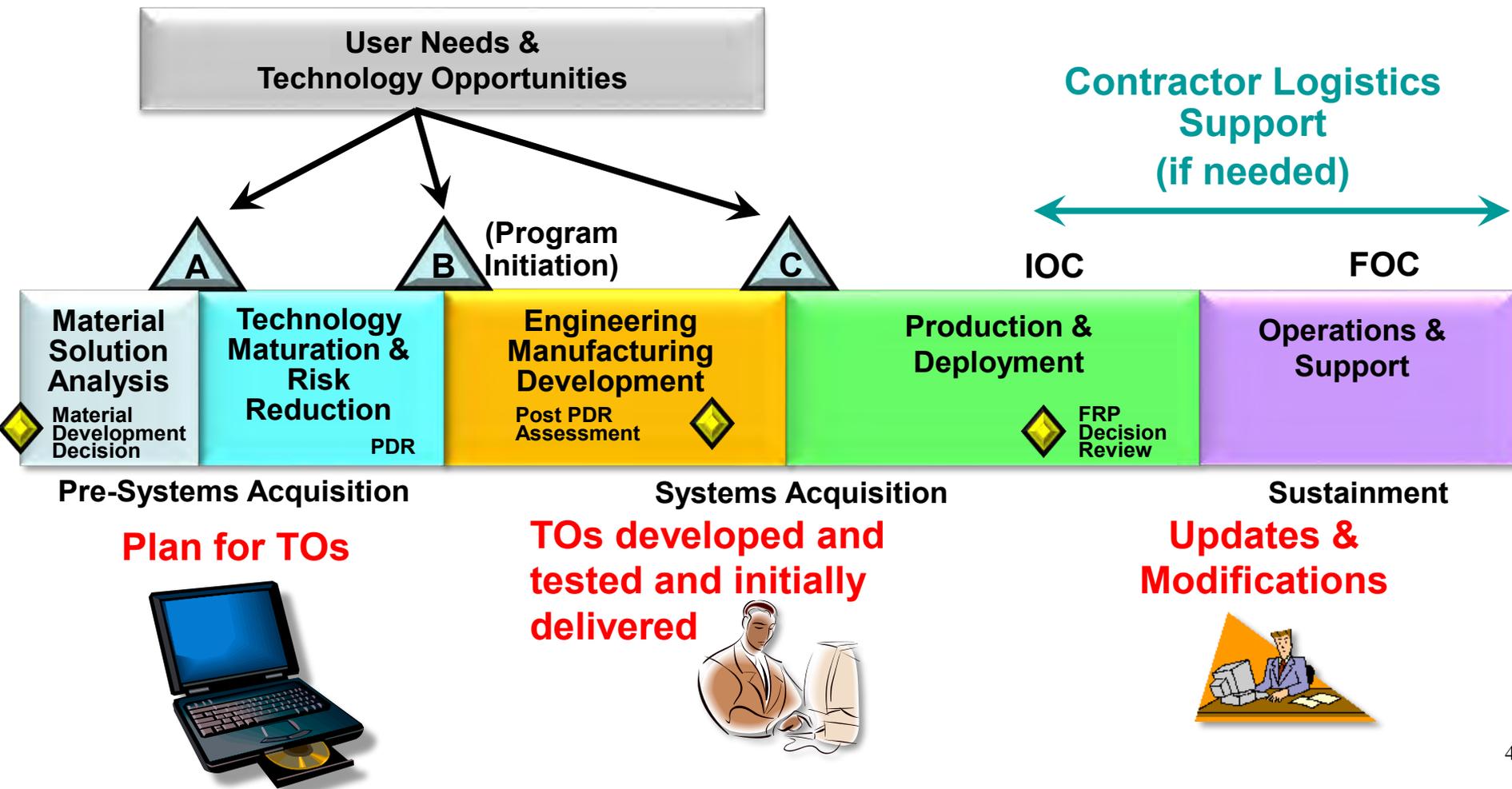
Responsible to PM for TO life cycle management IAW TO-00-5-3



AF TO Life Cycle Management Policy

DoD 5000 Management Framework

Defense Acquisition Management System





TO Development

Flow

- **TO Concept of Operations (CONOPS) Development**
 - TO Data Formats
 - Technical Data Rights
- **TO Life Cycle Management Plan (TOLCMP) Development**
- **Statement of Objectives (SOO) or Statement of Work (SOW) Development**
- **Contract Data Requirements List (CDRL) needed for TOs Development**
- **Technical Manual Requirements (TMCR) Tailoring to meet requirements**

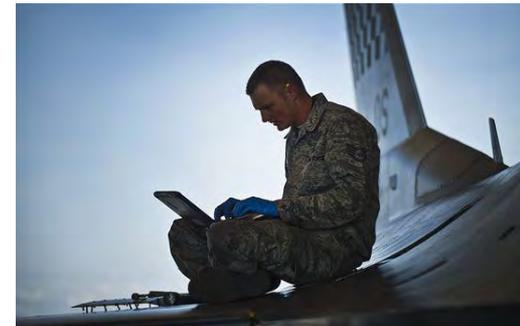




TO Development

TO CONOPs Development

- **Should be developed for all new programs**
- **Attach to the program (TMCR) to aid the offerors in understanding USAF TO Requirements**
- **Attach to the TO Life Cycle Management Plan**
- **Aids in defining TO contracts requirements**
 - What kind of TOs are needed?
 - Funding available?
 - Type of equipment?
 - TO Data formats?
 - Technical data rights?





TO Development

TO Data Formats

- **Authoring Formats: TMSS SGML and S1000D XML**
 - Data standards for authoring/data creation and sustainment
 - Can be viewed or printed through use of a rendering process
 - Usually only used by TO Managers and TO authors
- **Distribution Formats: PDF, HTML, Paper, and Rendered XML**
 - What is viewed by the TO user
 - Cannot be easily edited or updated
 - Resultant output of the authoring formats



TO Development

Technical Data Rights

➤ **Technical Data**

- Recorded information, regardless of the form or method of the recording, of a scientific or technical nature (including computer software documentation)

➤ **NOT Technical Data**

- Data describing the contractor itself, or information incidental to performance of a contract (corporate information such as G&A, overheads, salaries, etc.)
- Oral communications or information never recorded
- Physical manifestations of technical data, such as the very product whose design is described in the data (e.g. a hardware item)



TO Development

Technical Data Rights

➤ Technical Data Rights

- **Ensure sufficient technical data rights are obtained to provide life-cycle support of the weapon system, including priced options for additional rights if support concepts change.**
 - If the support concept includes contractor support, ensure that priced options are included for additional data deliveries and increased data rights if support concepts change from contract to organic.
- **TOs are procured with Unlimited Rights, Government Purpose Rights, or Limited Rights (see TO 00-5-3)**



TO Development

Technical Data Rights

Data Rights: The Pendulum has swung back!

- **10 U.S.C. §2320: Program managers of major weapons systems are required to:**
 - Assess the long-term technical data needs of such systems and subsystems
 - Establish corresponding acquisition strategies that provide for tech data rights needed to sustain such systems and subsystems over their life cycle
- **Acquiring or not acquiring the right data can critically affect long-term cost of a system**



TO Development

TOLCMP Development

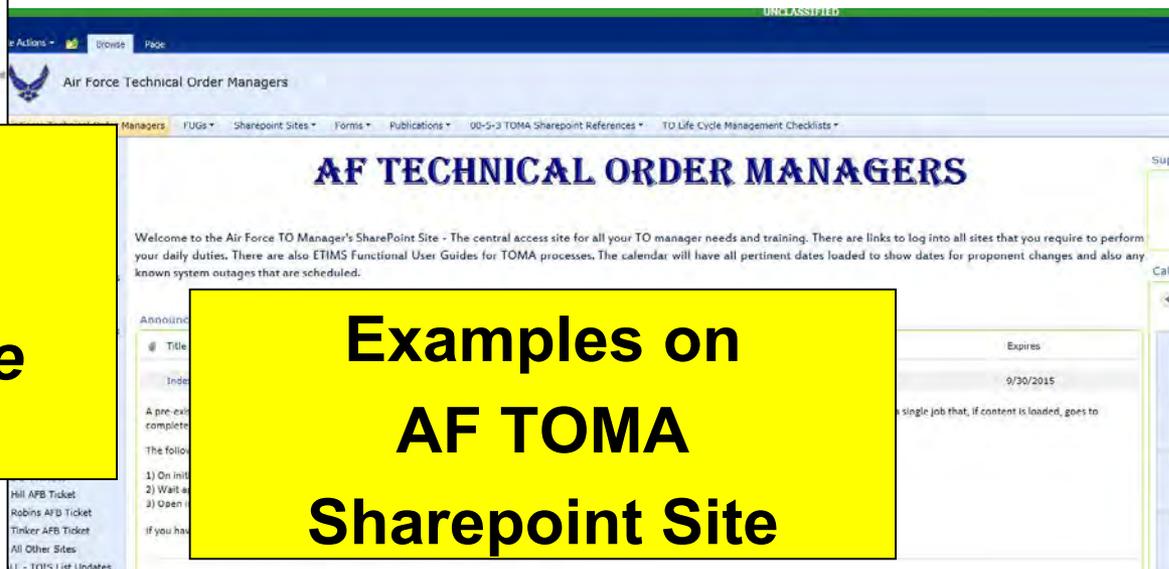
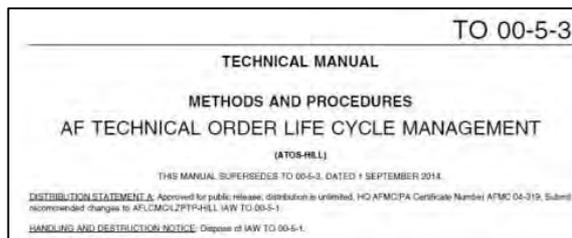
- **Provides management policy, assigns responsibilities, defines terms and specifies procedures**
- **Addresses:**
 - TO development, contractor Quality Assurance, verification and formalization of TOs during the program acquisition phase
 - Maintenance of the TOs after formalization, including updating, distributing and archiving.
- **Mandatory for all programs listed on the Acquisition Master List when TOs must be developed**
- **Technical Order Life Cycle Verification Plan (TOLCVP)**
 - **Attached to the TOLCMP; Lays out TO Verification**
- **Attached to the Weapon System Life Cycle Sustainment Plan (LCSP)**



TO Development

TOLCMP Development

- Coordinated and approved at the TO Planning Requirements Conference
- Reviewed/updated as part of the annual CAFTOP submission process during operation and support phase



**Guidance in
TO 00-5-3,
AF TO Life Cycle
Management**

**Examples on
AF TOMA
Sharepoint Site**





TO Development

- **Statement of Objectives (SOO)**
 - Attachment to either Section J or L of the Request for Proposal
 - Basic, top-level objectives of the acquisition or modification program
- **Statement of Work (SOW)**
 - Defines all tasks to be performed
 - The SOW is limited to what is required qualitative, quantitative and other requirements (how, when and where) will be contained in specifications and CDRLs (MIL-HDBK-245 and DOD 5010.12-M)

**Contract
SOO/SOW**

4.3.1 The contractor shall develop and update Technical Orders and Time Compliance Technical Orders as required IAW with TM-86-01 Air Force Technical Manual Contract Requirements, attached. (CDRL A00X)

**Reference the TMCR
through the CDRL**



TO Development

The CDRL

- List of authorized data requirements for a specific procurement that forms a part of the contract
- DFARS Subpart 215.470 requires the use of the CDRL in solicitations when the contract will require delivery of data
- CDRLs are linked directly to SOW tasks
 - A DD Form 1423 CDRL is developed as an exhibit with the TMCR referenced

Contract SOO/SOW

4.3.1 The contractor shall develop and update Technical Orders and Time Compliance Technical Orders as required IAW with TM-86-01 Air Force Technical Manual Contract Requirements, attached. (CDRL A00X)

CONTRACT DATA REQUIREMENTS LIST (Data Item)						Form Approved OMB No. 0704-0188
<small>The prime reporting burden for this collection of information is estimated to average 110 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, any person who furnishes information to a collection of information that it does not display a currently valid OMB control number. Please DO NOT RETURN this form to the above address. Send completed forms to the Government using Contracting Office for Contract FPNs. Read in Block E.</small>						
A. CONTRACT LINE ITEM NO.		B. EXHIBIT		C. CATEGORY:		
D. SYSTEM/ITEM		E. CONTRACT/PR NO.		F. CONTRACTOR		
SYSTEM COVERED		TBD		TBD		
1. DATA ITEM NO.		2. TITLE OF DATA ITEM		3. SUBTITLE		
A00X		Technical Orders and TCTOs				
4. AUTHORITY (Data Acquisition Document No.)		5. CONTRACT REFERENCE		6. REQUESTING OFFICE		
TM-86-01		SOW Para X.X		List Your Office		
7. DD 250 REQ		9. DIST STATEMENT #/REQ#		10. FREQUENCY		12. DATE OF FIRST SUBMISSION
LT		ASREQ (See 16)				See Blk 16
11. AS OF DATE		13. DATE OF SUBSEQUENT SUBMISSION		14. DISTRIBUTION		
A		N/A		See Blk 16		
16. REMARKS						
Block 4: Technical orders/manuals/changes/TCTOs will be prepared IAW TM-86-01 attached						
Block 8, 10, 12, 13: See TM-86-01						
Block 14: Distribution/Delivery for all technical manuals shall be IAW Part B of TM-86-01						
G. PREPARED BY		H. DATE		I. APPROVED BY		J. DATE
Donald Madtes						

TM-86-01P 9 D		TMCR		1	
Air Force Materiel Command		Technical Manual Contract Data Requirements List		EXHIBIT	
ATTACHMENT TO CDRL SEQUENCE NUMBER		REQUEST FOR PROPOSAL/CONTRACT		DATE	
<small>NOTE: Delete ALL indicated notes prior to placing the TMCR in the RFP.</small>					
<small>LAW AFMCI 21-801 and TO 06-5-3, all ACAT I and II programs will coordinate TMCRs with the local TO functional line offices prior to the TMCR being placed in an RFP or proposal. All other programs are encouraged to coordinate the TMCR with the local TO functional line offices to ensure the TMCR meets current USAF TO policies for acquisition and sustainment.</small>					
<small>This TMCR must be tailored by the TO Manager before placing the TMCR in an exhibit to the RFP, system performance specification or in the proposal technical library. Since the TMCR is a tailored document it is not necessary to add a TO to each paragraph indicating additional tailoring. The TMCR must be referenced in RFP section 1. If some or all of the TO program requirements are included in RFP Section 2 instructions to Contractor, remove them from the TMCR. URLs are either public access sites, or are on the Air Force Portal - contractors may access the Portal using an External Certificate Authority (ECA) when sponsored by a DoD activity.</small>					
SECTION 1. TECHNICAL ORDER (TO) PROGRAM REQUIREMENTS					
1. TMCR Tailoring. This TMCR has been tailored by the program office, including the associated tables, matrices and Specification/Standard Interface Records (SIRs). The Contractor may propose and submit in writing additional tailoring to the TO Manager Agency/Agent (TOMA) and Procuring Contracting Officer (PCO) for consideration. The tailored TMCR shall be attached to the CDRL for TO delivery, and shall be included in the proposal as a separate exhibit, referenced in the proposal SOW. Proposals shall be compatible with the (program name) Technical Order Concept of Operations. Air Force TO Acquisition procedures, including procedures for tailoring this document, are found in TO 06-5-3, <i>AF Technical Order Life Cycle Management</i> , located on the Internet at http://www.fisher.af.mil/technicalorders/index.asp . A copy may also be obtained from the Program TO Manager. Any terms or procedures found in this document may be reworded here.					
2. TO Program Scope. The Contractor may recommend additional sections 2 tailoring to propose new TO types (Table 1) and source data and TO updates (Table 2) required to support the (program name) program's objectives.					
3. Commercial Manuals. Contractors shall recommend the use of existing commercial manuals to the maximum extent possible without impacting program support objectives. All proposed commercial manuals are subject to government review and approval.					



TO Development

TMCR

TM 86-01P

TM-86-01

1

Air Force Technical Manual Contract Requirements (TMCR)
for

(Program/Modification/Military System)

ATTACHMENT _____ TO CDRL SEQUENCE NUMBER _____, EXHIBIT _____
REQUEST FOR PROPOSAL/CONTRACT: _____

Date: _____

Technical Manual/Technical Order requirements contained herein have been cleared for use by OMB Paperwork Reduction Project No. 0704-0188.

NOTE: Delete ALL italicized notes prior to placing the TMCR in the RFP.

LAW AFMCI 21-301 and TO 00-5-3, all ACAT I and II programs will coordinate TMCRs with the local TO functional site offices prior to the TMCR being placed in an RFP or proposal. All other programs are encouraged to coordinate the TMCR with the local TO functional site offices to ensure the TMCR meets current USAF TO policies for acquisition and sustainment.

This TMCR must be tailored by the TO Manager before placing the TMCR in an exhibit to the RFP, system performance specification or in the proposal technical library. Since the TMCR is a tailored document it is not necessary to add a (T) to each paragraph indicating additional tailoring. The TMCR must be referenced in RFP section J. If some or all of the TO program requirements are included in RFP Section L (Instructions to Contractor), remove them from the TMCR. URLs are either public access sites, or are on the Air Force Portal – contractors may access the Portal using an External Certificate Authority (ECA) when sponsored by a DoD activity.

SECTION 1. TECHNICAL ORDER (TO) PROGRAM REQUIREMENTS

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2. **TO Program Scope.** The Contractor may recommend additional Section 2 tailoring to propose new TO types (Table 1) and source data and TO updates (Table 2) required to support the (*program name*) program's objectives.

3. **Commercial Manuals.** Contractors shall recommend the use of existing commercial manuals to the maximum extent possible without impairing program support objectives. All proposed commercial manuals are subject to government review and approval.

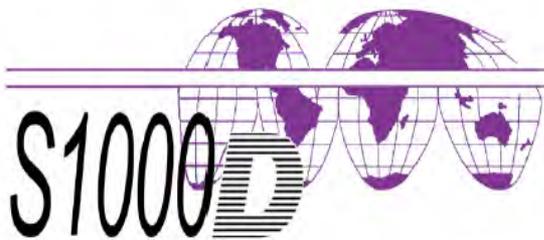
NOTE: a) Contractors shall use Data Item Description (DID) DI-TMSS-80067, *Technical Manual (TM) Contractor Furnished Aeronautical Equipment or Contractor Furnished Equipment (CFAE/CFE) Notices*, to provide recommendation data. A copy is available from the TOMA upon request. b) Government activities will use MIL-PRF-32216, *Evaluation of Commercial Off-The-Shelf (COTS) Manuals and Preparation of Supplemental Data*, as a guide for review and acceptance of all recommended con-

- Divided into three sections
 - TECHNICAL ORDER (TO) PROGRAM REQUIREMENTS
 - TM TYPE AND DELIVERY REQUIREMENTS
 - SPECIFICATION/ STANDARD INTERFACE RECORDS (SIRS)
- Used for all USAF acquisition, sustainment or modification contracts
- TO managers **must tailor** the TMCR!
 - Delete excess requirements
 - Select options presented within Specs and Standard



Developing S1000D TOs

Develop Interactive Electronic Technical Manuals IAW with ASD-S1000D, *International Specification for Technical Publications Utilizing a Common Source Database* and current business rules listed in MIL-STD-3048, *Air Force Business Rules for the Implementation of S1000D*. (AFI 63-101, *Integrated Life Cycle Mgt*)



ASD-S1000D, *International Specification for Technical Publications Utilizing a Common Source Database*
Issue 4.0.1



MIL-STD-3048
(USAF) w/CHANGE 1
10 September 2013

SUPERSEDING
MIL-STD-3048
(USAF)
24 July 2013

**DEPARTMENT OF DEFENSE
STANDARD PRACTICE**

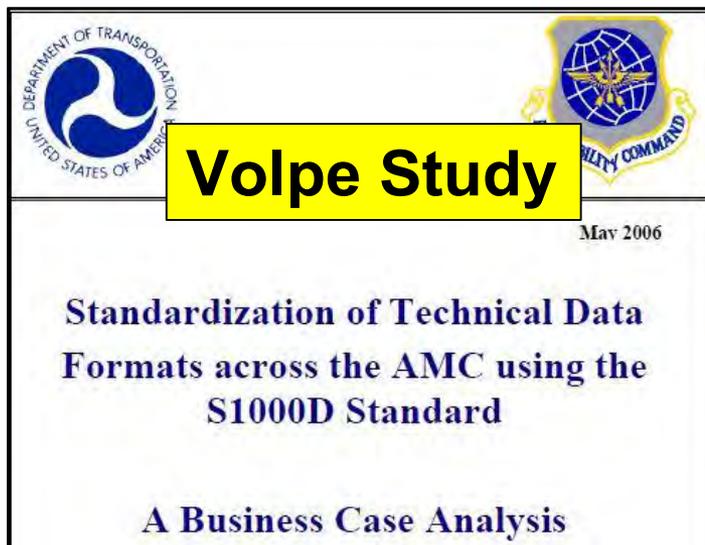
**AIR FORCE BUSINESS RULES FOR
THE IMPLEMENTATION OF S1000D**



Developing S1000D TOs

What is S1000D?

- An international standard for the creation, storage, management and delivery of technical data.
- Standardizes the acquisition and production of technical publications world-wide



The slide features the Department of Transportation logo on the left and the Air Force Materiel Command logo on the right. A yellow box with the text "Volpe Study" is centered. Below it, the text reads "Standardization of Technical Data Formats across the AMC using the S1000D Standard" and "A Business Case Analysis". The date "May 2006" is printed in the bottom right corner of the slide content.

➤ Benefits

- IT platform independent output, page-oriented or Interactive Electronic Technical Publications (IETP).
- Timely, current and accurate data
- Savings on data purchase and management
- Savings on TO use (IETP) – single interface, simpler navigation, more logical search, supports effectivity and links to other systems (e.g. maintenance information and supply).



Developing S1000D TOs

Authoring vs Distribution Formats

- **Authoring Formats: TMSS SGML and S1000D XML**
 - Data standards for authoring/data creation and sustainment
 - Can be viewed or printed through use of a rendering process
 - Usually only used by TO Managers and TO authors
- **Distribution Formats: PDF, HTML, Paper, and Rendered XML**
 - What is viewed by the TO user
 - Cannot be easily edited or updated
 - Resultant output of the authoring formats

**S1000D term for Rendered XML is
“Interactive Electronic Technical Publications (IETPs)”**



Developing S1000D TOs

S1000D Is XML Based

- **XML is a simpler subset of SGML that offers most of the power of SGML**
 - Less expensive to render due to widespread XML COTS tools
 - About 90% of SGML application data can transition to XML if data has been created to intent of TMSS SGML
 - Allows unparalleled data transportability
- **XML is used by all segments of industry, not just the publishing industry**
 - Leads to much lower software tool costs
 - XML experts readily available in industry



Developing S1000D TOs

Data Module - Key Concepts

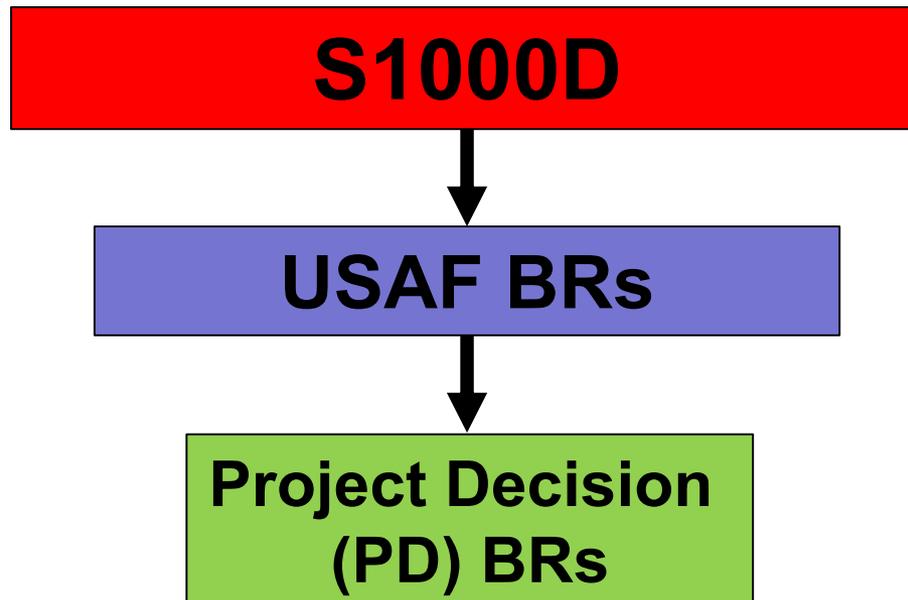
- **Each DM has world-wide unique identification number called a Data Module Code (DMC)**
- **DMs common to weapon system are gathered and managed in the Common Source Database (CSDB) for that product.**
 - **CSDB is a logical construct, not a tool**
- **Whenever a DM is updated, most up-to-date version is presented to users**
- **DM module is stand alone, so it can be reused in other contexts or logistics information systems**



Developing S1000D TOs

Business Rules (BR)

- Rules applicable to product definition, maintenance philosophy, CONOPS, security, business processes, data creation, data exchange, data integrity, data output and/or legacy data conversion, management, handling and other program TO issues





Developing S1000D TOs

Business Rules (BR)

- **S1000D outlines over 700 BR decision points**
 - USAF and DOD business rules can be found in MIL-STD-3048 - *AIR FORCE BUSINESS RULES FOR THE IMPLEMENTATION OF S1000D*
 - USAF projects will be required to define remaining project decision (PD) BRs
- **S1000D Business Rules Exchange (BREX)**
 - Automated method of communicating DOD/USAF/Project BRs
 - BREX is stored as a DM in the CSDB and received by the contractor electronically
 - MIL-STD-3048 has corresponding BREX



Developing S1000D TOs

S1000D



USAF BRs



PD BRs

S1000D Chapter 1.4 - Introduction to the specification - How to tailor for a specific project:

Project business rules must be agreed between parties to document the details of the agreed tailoring of this specification.

(Chapter) **5.2: S1000D Chapter 1.4 - Introduction to the specification - How to tailor for a specific project:**

5.2.1.1 Use of project business The project shall develop business rules documenting the details of the tailoring of S1000D for a specific project. These rules shall include documented decisions for every decision point. **[AF 1.4-001]**

5.2.2 Project decisions. None.

None.



Developing S1000D TOs

USAF BRs

A.3 TABULAR LISTING OF PROJECT DECISIONS

Para No.	PD No.	PD Description	Decision
5.6.2.1	3.3-001	Definitions for C-E and legacy information sets Decide and agree on definitions for C-E and legacy projects information sets.	
5.7.2.1	3.4-001	Using zoning and access Decide whether to use zoning and access.	
5.7.2.2	3.4-002	Methods for zoning Decide which method to use for zoning.	



PD BRs



COMBAT RESCUE HELICOPTER (CRH) TECHNICAL ORDER S1000D PROJECT BUSINESS RULES

PD 3.4-002 Decide which method to use for zoning.

Reference: (5.7.2.2) Methods for zoning

PROJECT RULE: The CRH program shall use Method C for aircraft zoning as described in S1000D Chapter 3.4.



Developing S1000D TOs



S1000D-I9005-01000-00

Chapter 3.4

Information generation - Zoning

Table of contents

Information generation - Zoning and access.....	
References	
1 General	
2 Zoning requirements	
2.1 Zoning of air systems.....	
2.1.1 Air-specific zoning requirements	
2.1.2 Zone identification.....	
2.2 Zoning of land systems.....	
2.2.1 Example of zoning a land vehicle	
2.2.2 Example of zoning a ground based facility	
2.3 Identification of access points.....	
2.3.1 General	
2.3.2 Diagrams and tables.....	
2.3.3 Access points numbering requirements	
2.3.4 Identifying access points for air systems	
2.4 Engine zones and identification of engine-mou ports	
2.4.1 General	
2.4.2 Requirements	
2.5 Identifying access points for land systems	
2.5.1 Access identifier.....	
2.5.2 Location references	28
2.5.3 Example of access for a ground based facility	28

2.1.2.3 Method C
Method C is shown in Fig 3. The major areas must be identified as follows:

Table 8 Major areas (zones) - Method C

Major area (zone) (Standard number grouping)	Area
100	Fuselage
200	Cockpit
300	Aft section
400	Power plants, transmissions and rotors
500	Left (multipurpose) wing
600	Right (multipurpose) wing
700	Landing gear
800	Specific Mission equipment
900	Reserved for major differences in models, versions or series of the same air vehicle type not covered by the standard number groupings

Zones in major areas (eg 200, 300) must be subdivided into zones using the second element digit of the standard number grouping. As an example, Zone 300 can be subdivided as follows:

Table 9 Major sub-zone

Major zone	Major sub-zones	Area
300		Aft section
	310	- Empennage structure with vertical wing
	320	Rear vertical fin, tail and tail wheel fairing



Developing S1000D TOs

Functionality Matrix

- **Intended to be used by acquisition professionals as an aid to define TO requirements**
 - Tool for documenting the functional needs of required TOs with using command
 - Balance with life cycle cost
- **Provides standard definitions for each functionality**
 - Allows needs and capabilities to be clearly stated
 - Within/beyond the capabilities of the S1000D Schema
 - Includes viewers and data delivery mechanisms

Functionality Matrix

- 2.4.2.5 Redlining text
Capability provided during the publication development and verification process to annotate text using markings for deletions and insertions. The capability exists to save and attribute redline markups. These are saved for feedback only for the improvement of the publication. This is an IETP viewer functionality.
- 2.4.2.6 Redlining graphics
Capability provided to annotate graphics using an overlay freehand-type drawing facility. This capability can be used to report errors during the publication development and verification process. The capability exists to save and attribute redline markups. These are saved for feedback only for the improvement of the publication. This is an IETP viewer functionality.



ICN-AE-A-060401-0-07GB6-00002-A-001-01

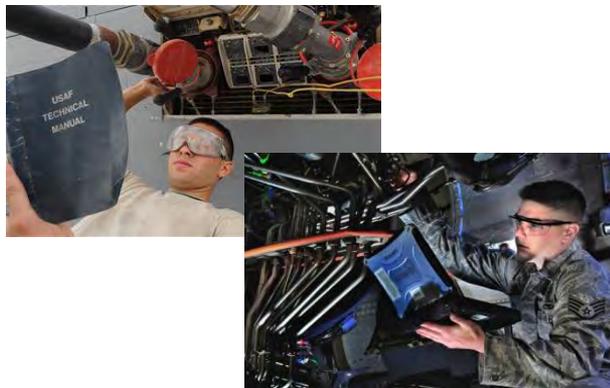
Fig 2 Redlining graphics



Developing S1000D TOs

Recent Policy Change

- **All major acquisition and major modification programs must perform a Cost Benefit Analysis (CBA) and, if supported, acquire, convert legacy and sustain TOs IAW S1000D and MIL-STD-3048**
 - Program-specific TO requirements must be identified using the TO functionality matrix, included in the program TMCR and documented in the TOLCMP.





Developing S1000D TOs

Pending Policy Change

- **In early 2016, the USAF expects to develop technical data on new acquisitions to S1000D specification, issue 4.1**
 - **What's new in i4.1?**
 - Improved Service Bulletin support
 - Improved Illustrated Parts Data support
 - Common Information Repository (CIR) and incremental updates
 - Standardized Front Matter in CSDB
 - **MIL-STD 3048 update: Publication expected Jan 2016**
 - Continued support for i4.0.1 and earlier

Emphasis changing from development of TO products to delivery of TO functionality



Recap

- **Develop TOs for organic operation, inspection and maintenance of centrally acquired and managed Air Force systems**
- **TO Development Flow/Tools: TO CONOPS, TOLCMP, SOO/SOW (with CDRL and program TMCR)**
- **S1000D is an international standard for the creation, storage, management and delivery of technical data**
- **All USAF major acquisition and major modification programs must perform a Cost Benefit Analysis (CBA) and, if supported, acquire, convert legacy and sustain TOs IAW S1000D and MIL-STD-3048**
- **Expecting to prescribe S1000D i4.1 in early 2016, including an update to MIL-STD 3048**



References and Resources

- **TO Policy: AFI 63-101/20-101; AFMCI 21-301**
- **TO 00-5-3, *AF Technical Order Life Cycle Management***
 - Appendix C: RFP Preparation
- **TOMA SharePoint Site:**
 - **Acquisition Product Support**
 - TOLCMP & TOLCVP Template and Examples
 - TMCR (TM 8601P) Template and Examples
 - Digital Support Suites (DSSs)
 - S1000D: Specification i4.0.1; MIL-STD 3048 and BREX; Project Business Rules template and examples; other supporting documents and tools
 - **Functional User Guides and Checklists (Sustainment)**
- **AFLCMC TO Home Office (AFLCMC/LG/LZSA) and AFLCMC TO Site Functional Offices**



BACKUP SLIDES



- **Federal Acquisition Regulations (FAR) to address data rights**
 - **DFARS 252.227-7013 - Rights in Technical Data-- Noncommercial Items.**
 - **DFARS 252.227-7014 - Rights in noncommercial computer software and noncommercial computer software documentation.**
 - **DFARS 252.227-7015 – Rights in Technical Data - Commercial Items**



- **Operations, Maintenance, Installation and Training (OMIT) rights**
 - **OMIT includes definition of Form, Fit, and Function data**
 - **FAR enables government to obtain government purpose rights**
 - **Includes proprietary data**
 - **Also applies to software and style sheets**
 - **Enables acquisition of all TO products and tools to allow organic sustainment of TO data**
- **TO data rights are best acquired during acquisition process.**