Create and maintain an accurate database of current contracts for public viewing via our website, while assuring confidential vendor data remains restricted.

COA COOP Project

October 2020

Revised November 2021

Julia Wilkes

BACKGROUND

With the Agency entering the new COA COOP, our team will be required to create new public facing content which will become accessible from links on our public website.

PHASE I

Will require the assigned Support Specialist II to follow the instructions below for each of our current active contracts. The new content will consist of creating a new subfolder in SharePoint, a new *.pdf document for each contract that ONLY contains the "front end" documents (contract with exhibits) and a new *.pdf for each associated Modification that contains ONLY the fully executed modification form. These documents will become visible to the public at large, so we must assure there is no confidential or proprietary data from the vendor included in the *.pdf documentation.

The naming convention for the folders and the *.pdf documents created will be extremely important to assuring our IT Department is able to link to the content later.

PHASE II

The assigned Support Specialist II will follow the instructions detailed below for each of our current active contracts to remove pricing details from each contract and/or contract modification form and replace the missing pages with a redaction notification.

PHASE III

Each Buyer/CA will QA/QC all subfolders and documents created for the contracts they administer, to assure the naming convention is accurate and the new .pdf documents do not contain any vendor proprietary/confidential information or detailed pricing data.

PHASE IV

Procurement managers will perform a QA/QC audit on random samples *and* the Executive Assistant, I will perform a random QA/QC audit beginning with 10% of the final content per Buyer/CA subfolder.

PHASE V

Initial go live - publishing current contracts for public viewing!

PHASE VI

Ongoing content maintenance as new contracts or mods are executed and/or older contracts expire.

Procurement Department
COA COOP Agreement
Project Details

Within the [Procurement Only](#) SharePoint Library, folder [COA-COOP](#) has been created to temporarily store the new content. Each Buyer/CA has a subfolder already created with their name:

REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY

ANTICIPATED DEADLINES FOR COMPLETION

PHASE I – October 31, 2020

PHASE II – November 20, 2020*

PHASE III – November 30, 2020*

PHASE IV – December 4, 2020*

PHASE V – December **14**, 2020*

PHASE VI – Ongoing

*dates revised

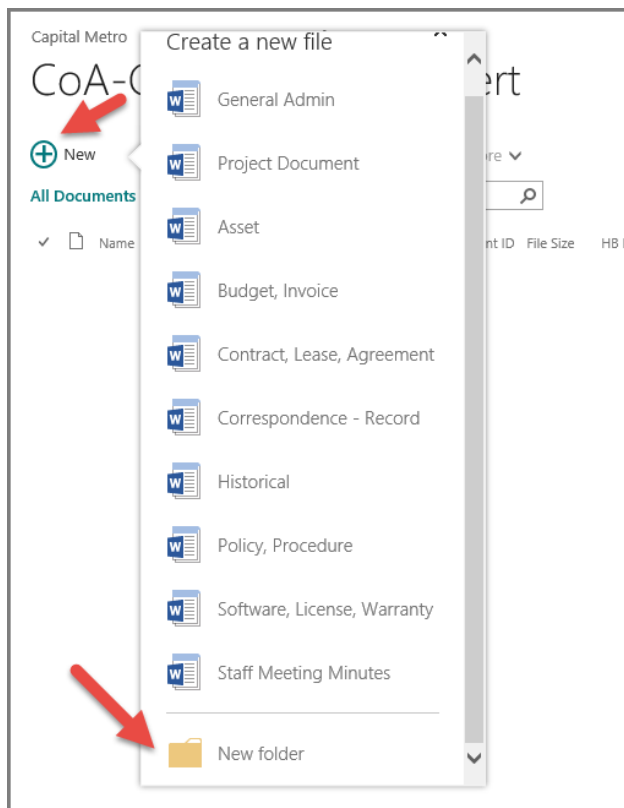## REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY

PHASE I – INSTRUCTIONS: CREATING CONTENT

The assigned Support Specialist II will follow the instructions below for each of our current active contracts.

1. Navigate to the **CA/Buyer** named subfolder within the [Procurement Only](#) SharePoint Library, folder [COA-COOP](#)

2. Create additional subfolders, one for each contract the Buyer/CA oversees

   - The new subfolder will be named the six-digit contract number ONLY

     o This will allow our IT Dept. to create links directly to these folders based on a script they will write to generate a HTML link (once a final storage place is determined by IT team)

     o Do not include any spaces or other characters!

3. Navigate the [Contract Library](#) to locate contracts for the specific CA/Buyer, for each contract they administer

4. Open the *.pdf for the fully executed contract

5. Save a copy of the contract in **the CA/Buyer** named folder (within the corresponding contract number titled subfolder) in the [COA-COOP](#) folder

- If the contract is NOT able to be piggybacked, name the new document by the six-digit contract number ONLY
    - **Example:** 555123.pdf
- If the contract is IDIQ and other members of the COOP CAN piggyback, name the new document by the six-digit contract number, dash, IDIQ
    - **Example:** 555123-IDIQ.pdf
- If the contract is IDIQ, but also a professional services contract, other members of the COOP can NOT piggyback, name the new document by the six-digit contract number, dash, IDIQ, dash P
    - **Example:** 555123-IDIQ-P.pdf

6. Open the "Tools" menu

6.1. Locate the beginning of the proposal/Volume II, to delete pages of the document that potentially contain proprietary/confidential vendor data

- **Note:** the final contract .pdf will contain ONLY the "front end" documents (contract with exhibits), minus pricing details

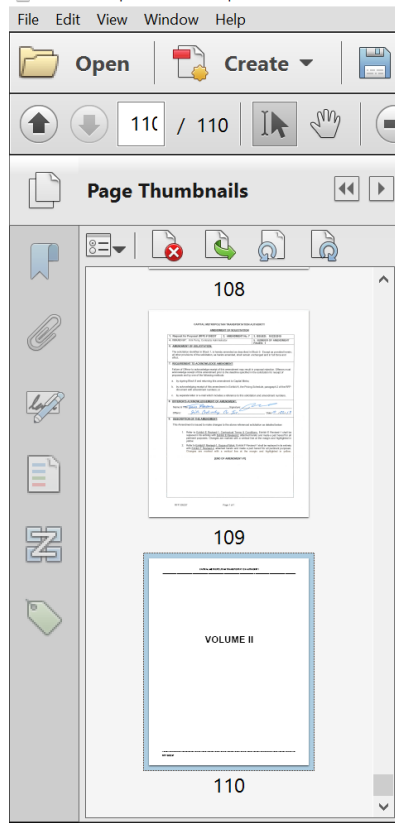**6.2.** In Tools menu, select "Page Thumbnails":
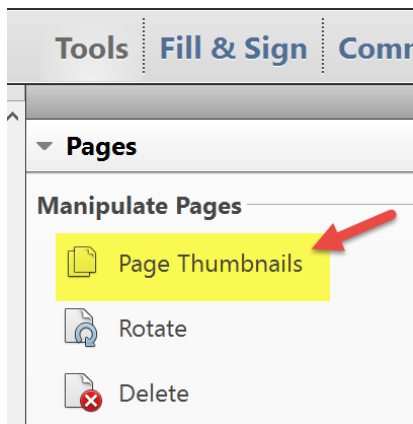
- This will open a toolbar on the left side of the screen so you may select multiple pages

6.3. Select the thumbnail for the first page of proprietary information

6.3.1. Scroll down in the list of thumbnails to the last page of the contract containing vendor submitted documentation

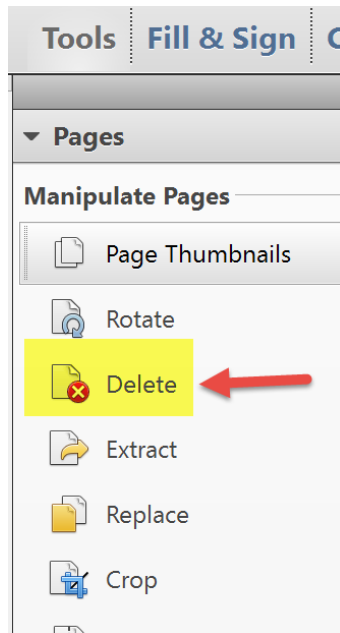**6.3.2.** Hold the Shift key and select the last page to be deleted

6.4. In Tools menu, select "Delete":

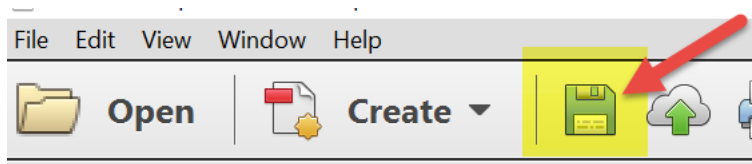**6.5.** Verify the correct page numbers are selected and click "OK":
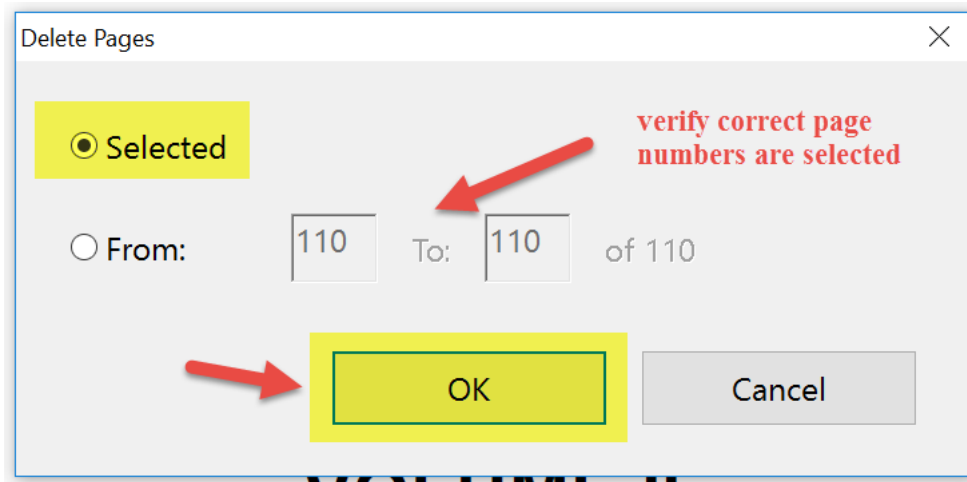
6.6. A new pop-up will ask you to confirm you want to delete the selected pages, select "OK":
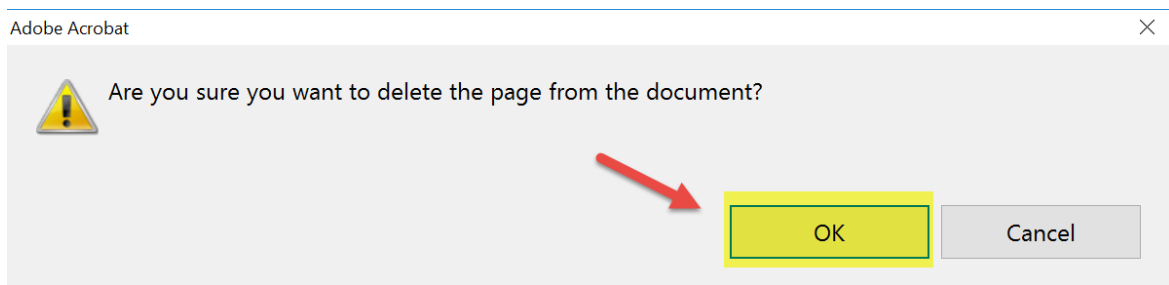
6.7. Save the new document you created

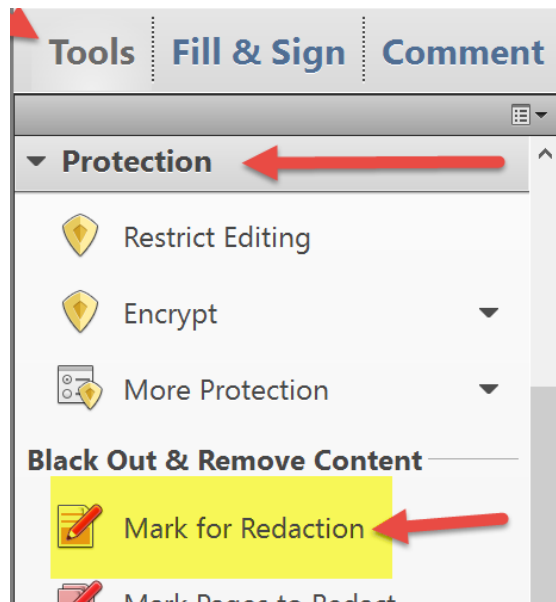**7.** Locate page 1 of Exhibit B and **REDACT** the **federal tax ID #**

7.1. In Tools menu, select "Protection", to open drop down

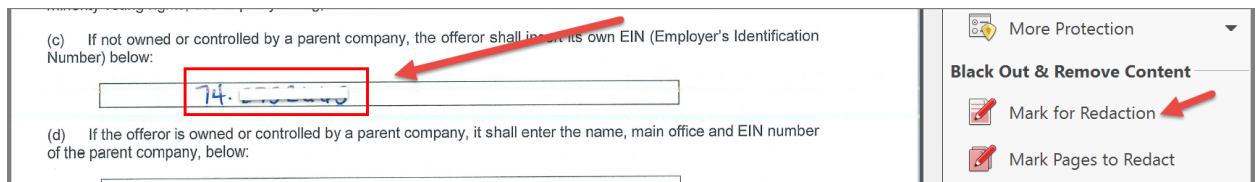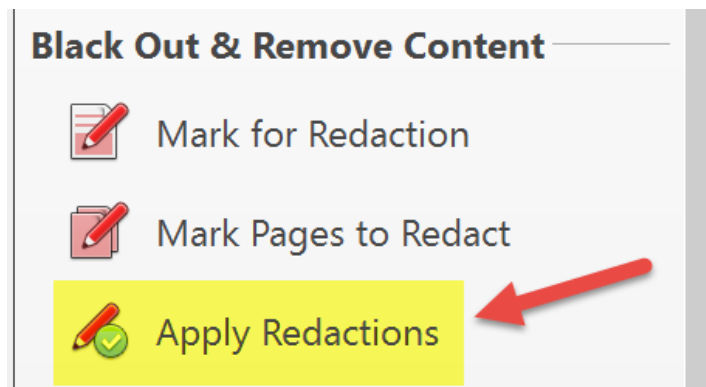**7.2.** In Tools menu under Black Out & Remove Content, select "Mark for Redaction":

7.3. Draw a box around the EIN data to be redacted

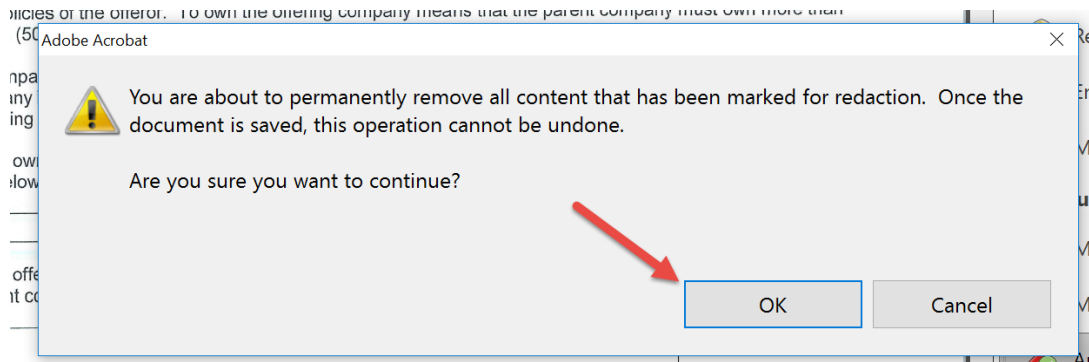**7.4.** In the Tools menu under Black Out & Remove Content, select "Apply Redactions"

7.5. A new pop-up will advise you that the changes cannot be undone once you save this new document, select "OK":
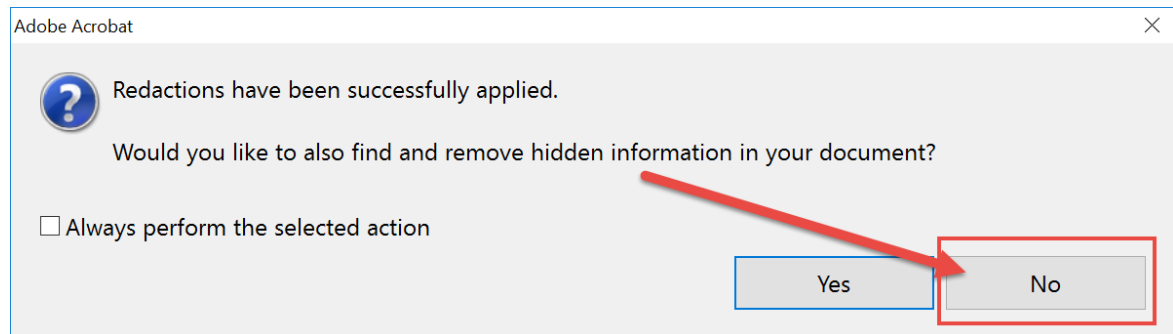
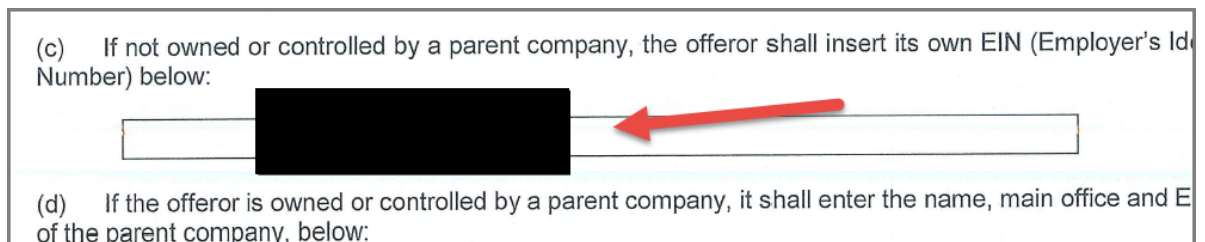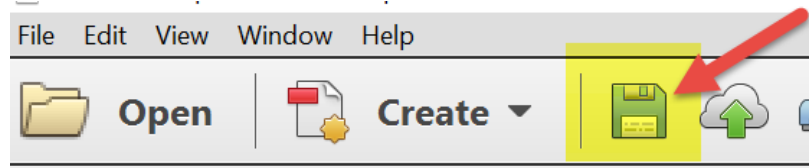**7.6.** A new pop-up will appear advising redactions have been completed successfully and asking if you want to remove hidden content, select "No":

- The new document will appear with a black box over the redacted data:

7.7. Save the new document you created

8. Navigate the Contract Library to locate all related MODS for the specific CA/Buyer, for each contract they administer

9. Open the *.pdf for each corresponding fully executed MOD

10. Save a copy of the fully executed MOD in the **CA/Buyer** named folder (within the corresponding contract number titled subfolder) in the COA-COOP folder

   - Name the new document by the six-digit contract number, dash, MOD, dash the mod #

     o **Example:** 555123-MOD-1.pdf

     o **Example:** 555123-MOD-2.pdf

     o **Example:** 555123-MOD-3.pdf

   10.1. Repeat this step for each fully executed modification

11. Open the "Tools" menu

   11.1. Locate the end of the fully executed modification form, to delete pages of the document that potentially contain proprietary/confidential vendor data

   - **Note:** the final MOD .pdf will contain ONLY the "front end" documents (signed MOD form), without pricing details

   11.2. In Tools menu, select "Page Thumbnails":
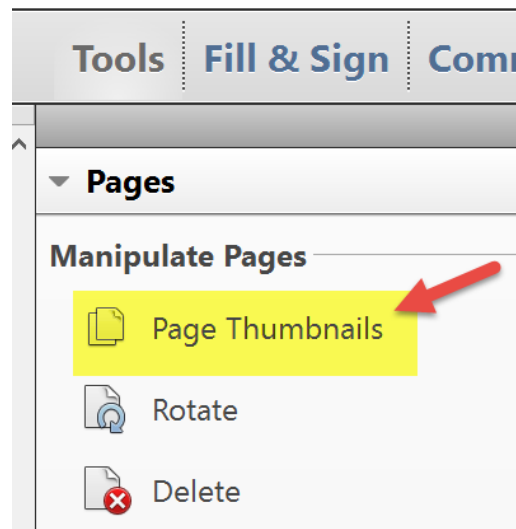
   - This will open a toolbar on the left side of the screen so you may select multiple pages

   11.3. Select the thumbnail for the first page of proprietary information

     11.3.1. Scroll down in the list of thumbnails to the last page of the MOD
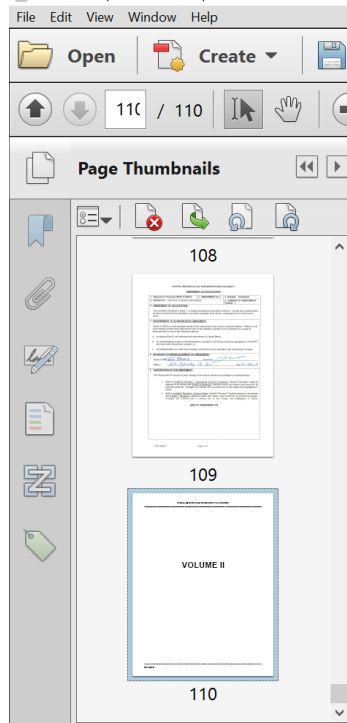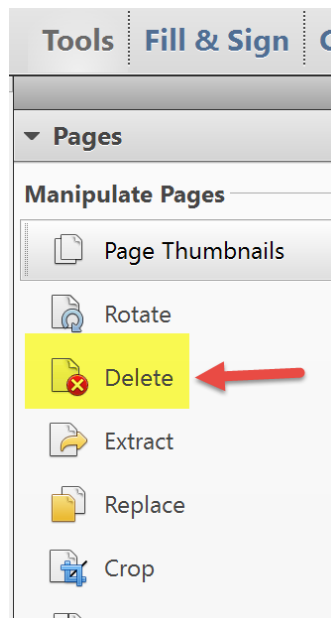
containing vendor submitted documentation

11.3.2.   Hold the Shift key and select the last page to be deleted

11.4.   In Tools menu, select "Delete":

11.5.   Verify the correct page numbers are selected and click "OK":
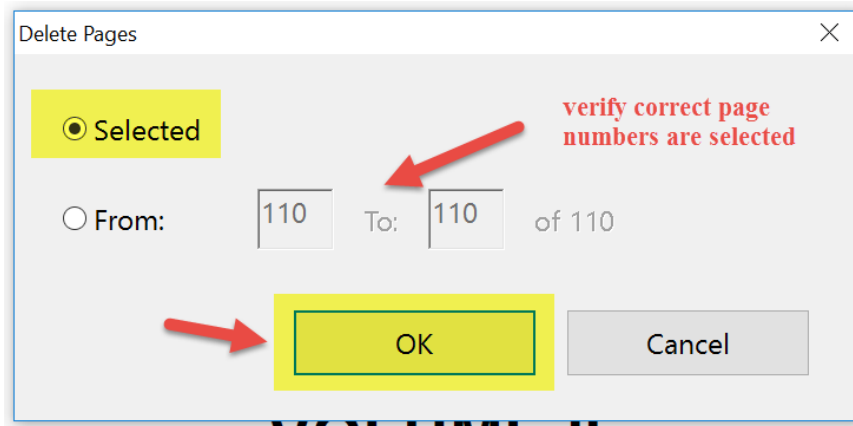
11.6. A new pop-up will ask you to confirm you want to delete the selected pages, select "OK":
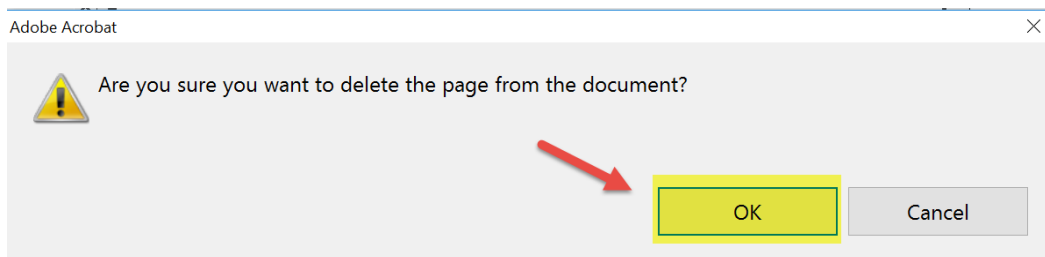
11.7. Save the new document you created
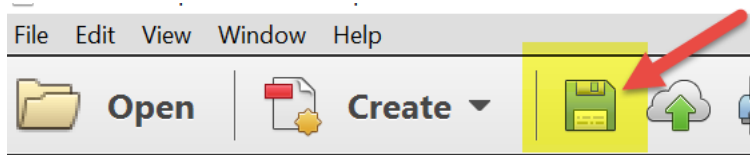
- Repeat this step for each fully executed modification

12. Repeat steps **1** through **11.7** for each fully executed contract and their corresponding fully executed modifications until creation of content for all current/active contracts for that Buyer/CA are complete.

PHASE II – INSTRUCTIONS: REDACTING DETAILED PRICING CONTENT

The assigned Support Specialist II will follow the instructions below for each of our current active contracts.

1. Navigate to the **CA/Buyer** named subfolder within the <u>Procurement Only</u> SharePoint Library, folder <u>COA-COOP</u>

2. Open the *.pdf for the fully executed contract

3. Open the "Tools" menu

    3.1. Locate the beginning of **Exhibit A – Pricing Schedule**, to delete pages of the document that contain detailed pricing

    • **Note:** the final contract .pdf will contain ONLY the "front end" documents (contract with exhibits), minus pricing details – Total contract value remains intact as this information is made public when the Board approves a new contract

    3.2. In Tools menu, select "Page Thumbnails":

    • This will open a toolbar on the left side of the screen so you may select multiple pages

    3.3. Select the thumbnail for the first page of Exhibit A that contains pricing (after the contact details, generally page 3 of Ex. A)

    • Scroll down in the list of thumbnails to the last page of Exhibit A that contains pricing details

    • Hold the Shift key and select the last page to be deleted

3.4. In Tools menu, select "Delete":

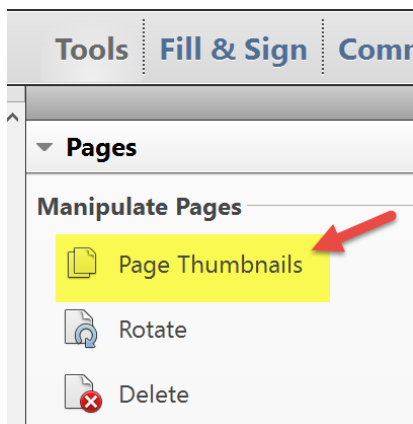**3.5.** Verify the correct page numbers are selected and click "OK":

Delete Pages   ✕

⦿ Selected   verify correct page
                              numbers are selected

○ From: [7]   To: [9]   of 109

            [OK   ]   [Cancel]
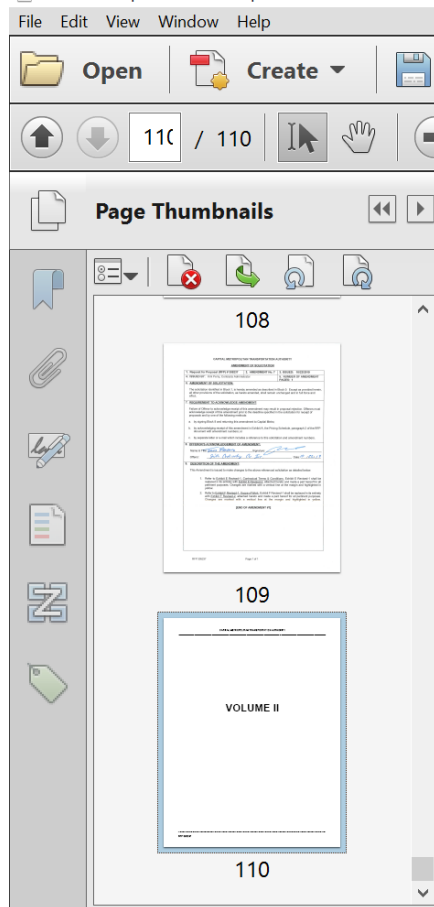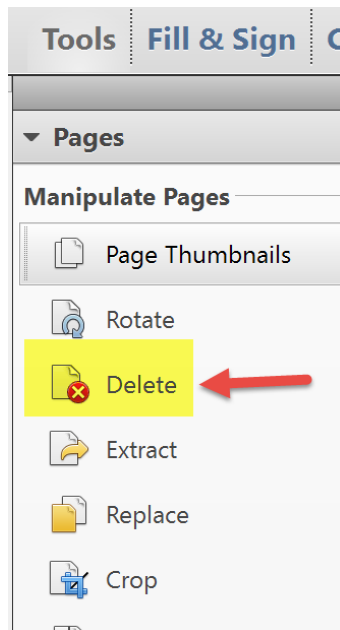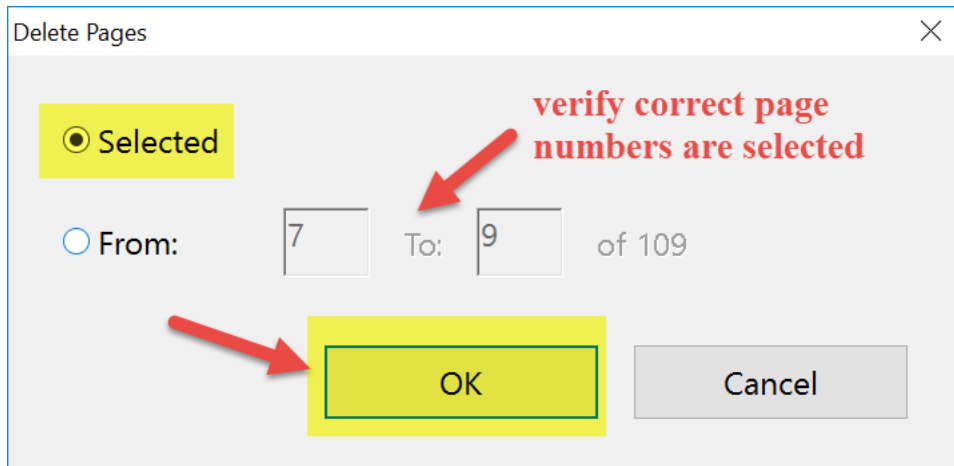
3.6. A new pop-up will ask you to confirm you want to delete the selected pages, select "OK":

Adobe Acrobat   ✕

⚠ Are you sure you want to delete the page from the document?

                                   [OK   ]   [Cancel]
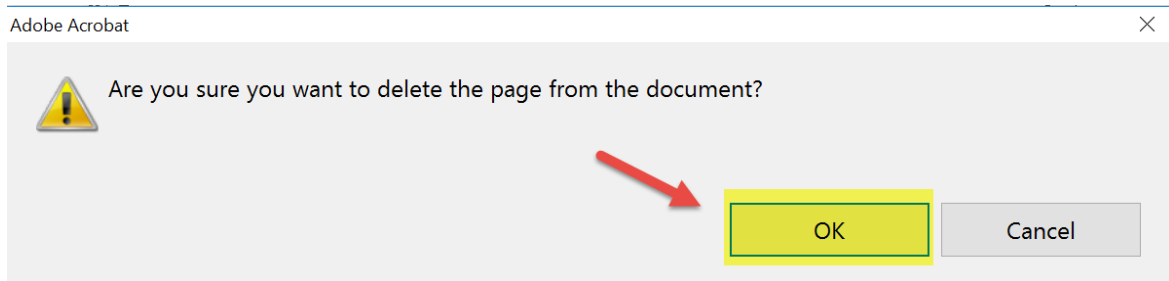
3.7. In Tools menu, select "Insert from File":

Insert Pages

📄 Insert from File
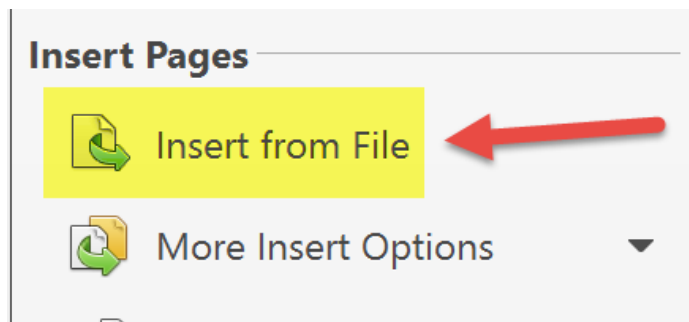
📄 More Insert Options   ▾

3.8. Select the document to insert "**RedactionNotice-Exhibit-A**", click "OK":
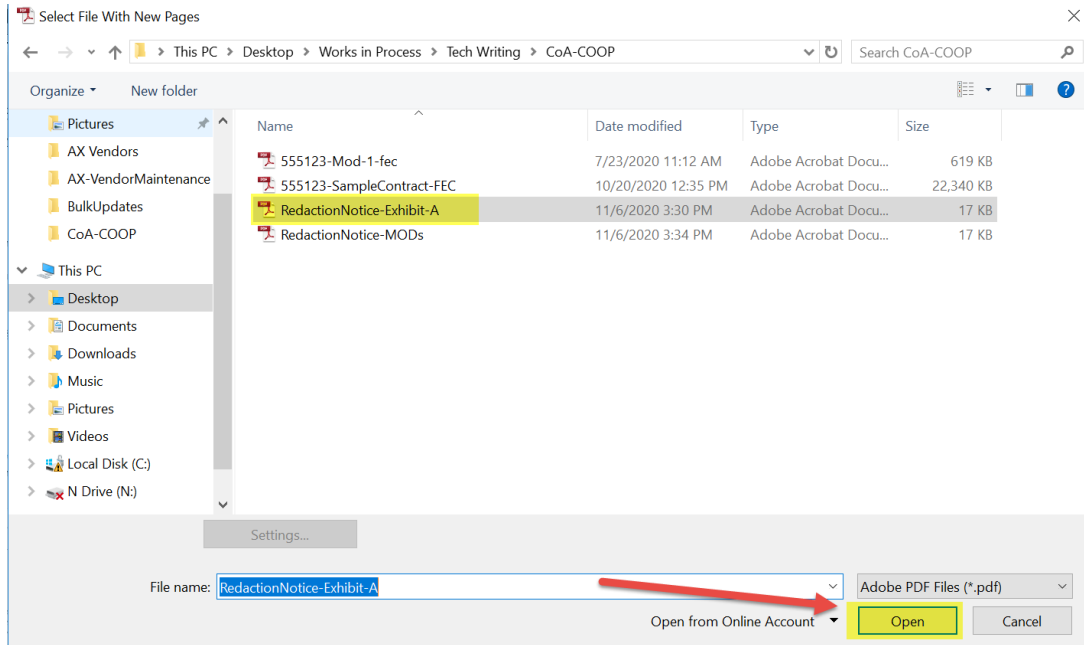
3.9. A new pop-up will ask you to confirm where the page should be inserted; verify the location and select "OK":
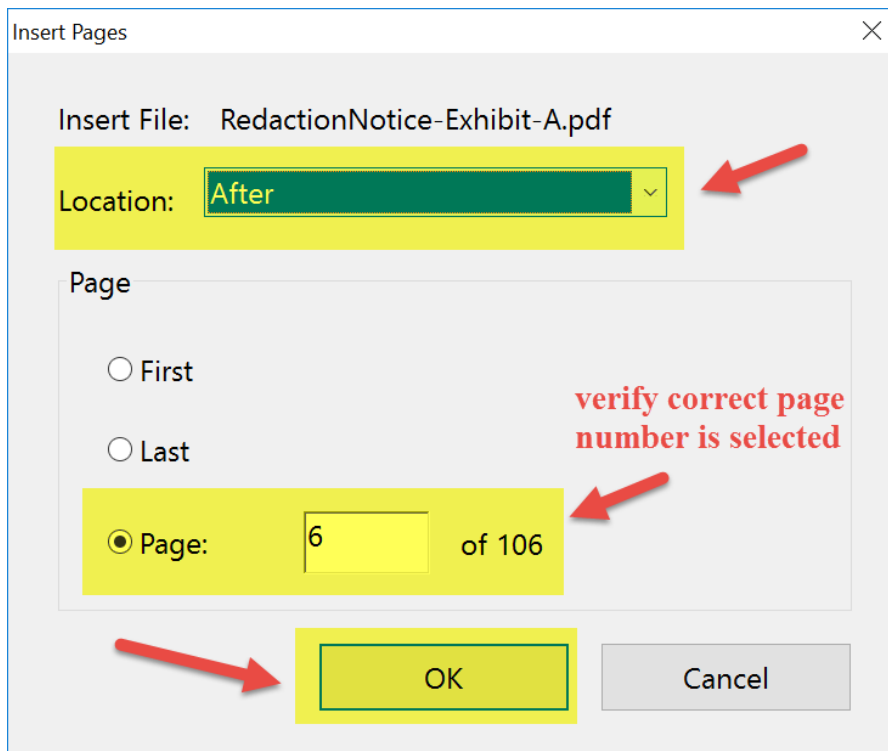
3.10. Verify that the detailed pricing pages of Exhibit A have been removed and the "**RedactionNotice-Exhibit-A**" has been inserted in the proper location

The remainder of Exhibit A – Pricing Schedule has been redacted.

For further information regarding Exhibit A, you may:

- Reach out to the Contractor directly via the Contractor contact details provided on the cover page of this contract.

OR

- Submit a public information request directly to ▇▇▇▇▇▇▇▇▇▇▇▇▇

For more information regarding the Public Information Act and submitting public information requests, follow this link to our website: https▇▇▇▇▇▇▇▇▇▇▇▇

3.11. Save the revised document you created
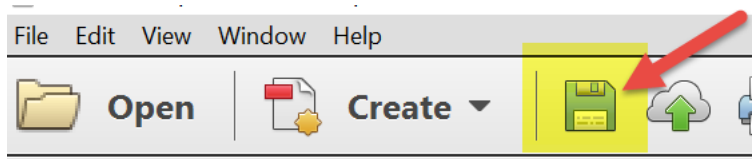
4. Navigate the **CA/Buyer** named subfolder within the Procurement Only SharePoint Library, folder COA-COOP to locate all related MODS for the specific CA/Buyer, for each contract they administer

5. Open the *.pdf for each corresponding fully executed MOD

6. Review each contract modification form to determine if it contains pricing **details**

6.1. *IF* the MOD only updates a total price or does not impact pricing, leave the document "as is"; repeat steps **1** through **6** for each fully executed Contract
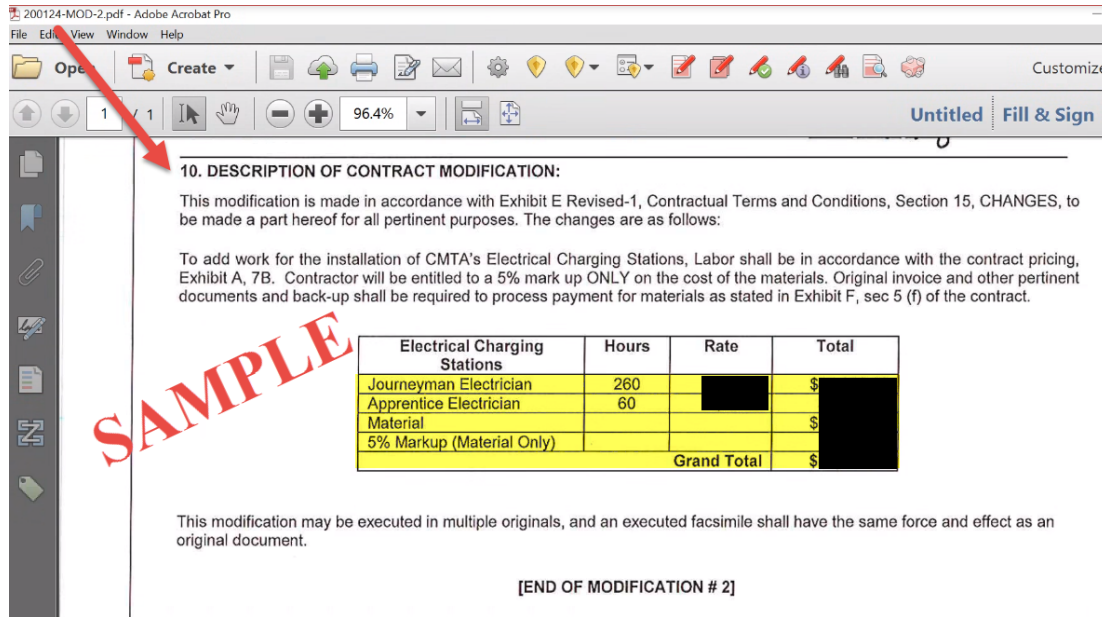
Modification form

6.2. **IF** detailed pricing is included, follow steps **7** through **8.2** to delete the entire Contract Modification form

7. **IF** detailed pricing is included, right click on the document name and select "Delete":

8. Save a copy of the document "**RedactionNotice-MODs**" in place of the MOD within the **CA/Buyer** named folder (inside the corresponding contract number titled subfolder) in the COA-COOP folder

   8.1. Rename the copy of the document "RedactionNotice-MODs" to replace the MOD document you just deleted

   - Name the new document by the six-digit contract number, dash, MOD, dash the mod #
     - o **Example:** 555123-MOD-1.pdf
     - o **Example:** 555123-MOD-2.pdf
     - o **Example:** 555123-MOD-3.pdf

8.2. Repeat steps **6** through **8.2** (as applicable) for each fully executed modification

- Repeat steps **1** through **8.2** (as applicable) for each fully executed contract and their corresponding fully executed modifications until creation of content for all current/active contracts for that Buyer/CA are complete.

9. Notify each Buyer/CA upon final completion of content for their respective contracts

    9.1. Copy the Procurement Management, and the Executive Assistant I

- Each of the copied parties has duties assigned in Phase III & Phase IV

REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY

PHASE III – INSTRUCTIONS: QA/QC

Each CA/Buyer will follow the instructions below for each of the current active contracts they administer.

1. Navigate to YOUR **CA/Buyer** named subfolder within the [Procurement Only](#) SharePoint Library, folder [COA-COOP](#)

2. Navigate through each contract subfolder

   2.1. Verify the name of each subfolder is accurate within the **CA/Buyer** named folder in the [COA-COOP](#) folder

   - The new subfolder will be named the six-digit contract number ONLY

     o Does not include any spaces or other characters!

   2.2. Open each contract subfolder and verify the name of each document is accurate within the **CA/Buyer** named folder (within the corresponding contract number titled subfolder) in the [COA-COOP](#) folder

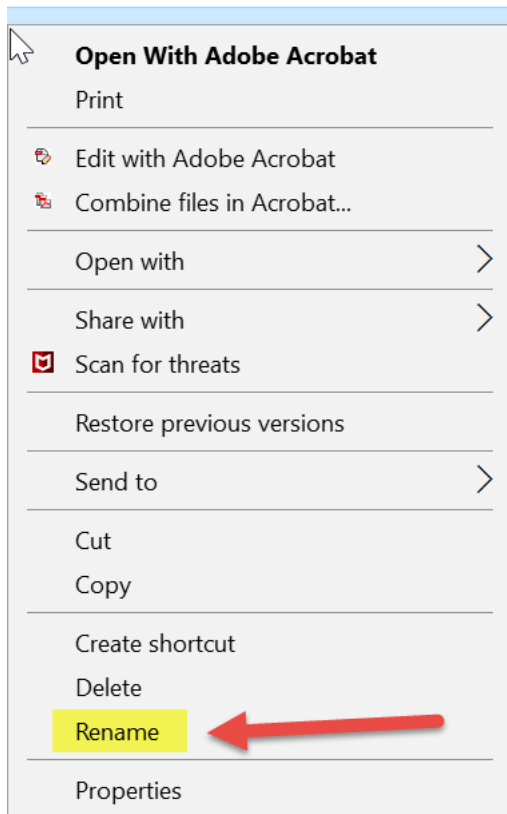   - If the contract is NOT able to be piggybacked, the new document will be named by the six-digit contract number ONLY

     o **Example:** 555123.pdf

   - If the contract is IDIQ and other members of the COOP CAN piggyback, the new document will be named with by the six-digit contract number, dash, IDIQ

     o **Example:** 555123-IDIQ.pdf

   - If the contract is IDIQ, but also a professional services contract, other members of the COOP can NOT piggyback, the new document will be named by the six-digit contract number, dash, IDIQ, dash P

     o **Example:** 555123-IDIQ-P.pdf

   - Each new MOD document will be named by the six-digit contract number, dash, MOD, dash the mod #

     o **Example:** 555123-MOD-1.pdf

     o **Example:** 555123-MOD-2.pdf

     o **Example:** 555123-MOD-3.pdf

3. Navigate through each contract subfolder and open the *.pdf for each fully executed contract

   3.1. Locate page 1 of **Exhibit B** and verify the **federal tax ID #** has been **REDACTED**

   3.2. Locate **Exhibit A** and verify all pages containing **pricing details** have been **REMOVED** and **REPLACED** with the document "**RedactionNotice-Exhibit-A**" (generally pages 3 *to* end of Ex. A)

The remainder of Exhibit A – Pricing Schedule has been redacted.

For further information regarding Exhibit A, you may:

- Reach out to the Contractor directly via the Contractor contact details provided on the cover page of this contract.

OR

- Submit a public information request directly to PIR@▓▓▓▓▓▓▓▓▓.

For more information regarding the Public Information Act and submitting public information requests, follow this link to our website: https:▓▓▓▓▓▓▓▓▓▓

3.3. Review the entire contents of the contract .pdf to confirm pages of the document that potentially contain proprietary/confidential vendor data *and* pricing details have been DELETED

- **Note:** the final contract .pdf should contain ONLY the "front end" documents (contract with exhibits) minus pricing details – Total contract value remains intact as this information is made public when the Board approves a new contract

4. Open the *.pdf for each corresponding fully executed MOD

4.1. Scan the entire contents of each MOD .pdf to confirm pages of the document that potentially contain proprietary/confidential vendor data *and* pricing details have been DELETED

- **Note:** the final MOD .pdf should contain ONLY the "front end" documents (signed MOD form), minus pricing details – Total contract value remains intact as this information is made public when the Board approves a new contract

4.2. *IF* the MOD included **detailed pricing**, confirm the complete Contract Modification form has been replaced by the "RedactionNotice-MODs" document

> # This Contract Modification form has been redacted.
>
> ## For further information regarding this contract modification, you may:
>
> - Reach out to the Contractor directly via the Contractor contact details provided on the cover page of this contract.
>
> **OR**
>
> - Submit a public information request directly to PIR@▇▇▇▇▇▇rg.
>
> For more information regarding the Public Information Act and submitting public information requests, follow this link to our website: https://ww▇▇▇▇▇▇▇▇/

- Repeat steps **1** through **4.1** for each fully executed contract and their corresponding fully executed modifications until creation of content for all current/active contracts for that Buyer/CA are complete.

5. Notify the Support Specialist II upon final completion of QA/QC for your contracts

    5.1. Copy Procurement Management, and the Executive Assistant I

        - Each of the copied parties has duties assigned in Phase IV

REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY

PHASE IV – INSTRUCTIONS: QA/QC PRE-PUBLISHING AUDIT

Each Procurement Manager and the Executive Assistant, I will follow the instructions below for a random sampling of the current active contracts before final approval is given to our IT Department to link this data live to the public at large.

1. Navigate through each **CA/Buyer** named subfolder within the <u>Procurement Only</u> SharePoint Library, folder <u>COA-COOP</u>

2. Select a random sampling of files to audit (suggested 10%, to start)

3. Navigate through each contract subfolder

   3.1. Verify the name of each subfolder is accurate within the **CA/Buyer** named folder in the <u>COA-COOP</u> folder

   - The new subfolder will be named the six-digit contract number ONLY

     o Does not include any spaces or other characters!

   3.2. Open the randomly selected contract subfolder and verify the name of each document is accurate within the **CA/Buyer** named folder (within the corresponding contract number titled subfolder) in the <u>COA-COOP</u> folder

   - If the contract is NOT able to be piggybacked, the new document will be named by the six-digit contract number ONLY

     o **Example:** 555123.pdf

   - If the contract is IDIQ and other members of the COOP CAN piggyback, the new document will be named with by the six-digit contract number, dash, IDIQ

     o **Example:** 555123-IDIQ.pdf

   - If the contract is IDIQ, but also a professional services contract, other members of the COOP can NOT piggyback, the new document will be named by the six-digit contract number, dash, IDIQ, dash P

     o **Example:** 555123-IDIQ-P.pdf

   - Each new MOD document will be named by the six-digit contract number, dash, MOD, dash the mod #

     o **Example:** 555123-MOD-1.pdf

     o **Example:** 555123-MOD-2.pdf

     o **Example:** 555123-MOD-3.pdf

4. Navigate through each randomly selected contract subfolder and open the *.pdf for each fully executed contract

   4.1. Locate page 1 of **Exhibit B** and verify the **federal tax ID #** has been **REDACTED**

   4.2. Locate **Exhibit A** and verify all pages containing **pricing details** have been **REMOVED** and **REPLACED** with the document "**RedactionNotice-Exhibit-A**" (generally pages 3 *to* end of Ex. A)

> # The remainder of Exhibit A – Pricing Schedule has been redacted.
>
> ## For further information regarding Exhibit A, you may:
>
> - Reach out to the Contractor directly via the Contractor contact details provided on the cover page of this contract.
>
> **OR**
>
> - Submit a public information request directly to ████████████rg.
>
> For more information regarding the Public Information Act and submitting public information requests, follow this link to our website: https:/████████████/

4.3. Review the entire contents of the contract .pdf to confirm pages of the document that potentially contain proprietary/confidential vendor data have been DELETED

- **Note:** the final contract .pdf should contain ONLY the "front end" documents (contract with exhibits), minus pricing details – Total contract value remains intact as this information is made public when the Board approves a new contract

5. Open the *.pdf for each corresponding fully executed MOD

5.1. Scan the entire contents of each MOD .pdf to confirm pages of the document that potentially contain proprietary/confidential vendor data and detailed pricing have been DELETED

- **Note:** the final MOD .pdf should contain ONLY the "front end" documents (signed MOD form), minus pricing details – Total contract value remains intact as this information is made public when the Board approves a new contract

5.2. IF the MOD included detailed pricing, confirm the complete Contract Modification form has been replaced by the "RedactionNotice-MODs" document

> # This Contract Modification form has been redacted.
>
> ## For further information regarding this contract modification, you may:
>
> - Reach out to the Contractor directly via the Contractor contact details provided on the cover page of this contract.
>
> **OR**
>
> - Submit a public information request directly to P̶I̶R̶@̶▓▓▓▓▓̶.̶o̶rg.
>
> For more information regarding the Public Information Act and submitting public information requests, follow this link to our website: https://▓▓▓▓▓▓▓gal/

- Repeat steps **1** through **5.2** for each fully executed contract and their corresponding fully executed modifications until QA/QC PRE-PUBLISHING AUDIT for random sampling of current/active contracts for that Buyer/CA are complete.

6. Notify the Support Specialist II via email upon final completion of QA/QC PRE-PUBLISHING AUDIT for each Buyer/CA

   6.1. The Procurement Manager will copy the respective Buyer/CA, the Senior Director, and the Executive Assistant I

   6.2. The Executive Assistant I will copy the respective Buyer/CA, the Senior Director, and the respective Procurement Manager

- Repeat steps **1** through **6.2** for each Buyer/CA until QA/QC PRE-PUBLISHING AUDIT for current/active contracts is complete.

PHASE V – GO LIVE!: IT Department Responsibilities

- Generate a report from our current ERP (Microsoft Dynamics AX) that will form the foundation of the public facing content metadata

- Create a script to convert the contract numbers within the above report into HTML links for each contract listed

- Determine final location for public facing content

- Assign necessary permissions to Procurement staff for initial data migration and ongoing maintenance

- Work with Marketing Department to assure proper branding of public facing content

- Work with Procurement Department to determine proper instructions and content to be displayed on public facing content

- Once approved, move all content to the publicly accessible destination of their choosing

  - The Executive Assistant I, Procurement will provide final approval to our IT Department to move the new content into a live environment to be shared with the public at large

- Once content is fully migrated, IT Department will conduct testing to assure proper functionality of new public content/links, etc,

- Publish link to public facing website and provide to Procurement team

REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY

PHASE VI – ONGOING MAINTENANCE: Procurement and IT Department

- Weekly content updates will be uploaded to a live environment to be shared with the public at large

Procurement Department Responsibilities

- Generate appropriate content (as detailed in Phases I – III above) throughout the workweek as new contracts or modifications are executed

- The assigned Support Specialist II will upload appropriate content to location designated by IT Department no later than close of business each Friday

- The assigned Support Specialist II will remove folders for expired contracts from location designated by IT Department, no later than close of business each Friday

IT Department Responsibilities

- Generate a report from our current ERP (Microsoft Dynamics AX) that will form the foundation of the public facing content metadata

- Run a script to convert the contract numbers within the above report into HTML links for each contract listed

- Publish revised links to the public facing content page no later than close of business each Monday

- Research software or technologies to improve user experience going forward with assistance from Executive Assistant, I, Procurement