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| BSO Functional Tool |
| 2.0 Contracts BSO |
|  |
| Version 0.1 |

10/22/2015

Change Log

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Table of Contents

[1 Introduction 1](#_Toc433278721)

[1.1 Objectives 1](#_Toc433278722)

[1.2 Roles and Responsibilities 1](#_Toc433278723)

[1.3 Control of Documents 1](#_Toc433278724)

[1.4 Acronyms 2](#_Toc433278725)

[2 Introduction 2](#_Toc433278726)

[2.1 Business Introduction 2](#_Toc433278727)

[2.2 Environment Definition 2](#_Toc433278728)

[2.3 Description of Intent 2](#_Toc433278729)

[3 Review of Similar Projects 3](#_Toc433278730)

[4 Project Rationale 3](#_Toc433278731)

[4.1 The need for BSO personnel to Un-release Documents 3](#_Toc433278732)

[4.1.1 Creation of a new IDIQ (Indefinite Delivery, Indefinite Quantity order): 3](#_Toc433278733)

[4.1.2 Accidental Release of the Document: 3](#_Toc433278734)

[4.1.3 Contracts Awarded with Errors: 3](#_Toc433278735)

[4.2 The ability for Contracting Personnel to edit the description of a contract action: 4](#_Toc433278736)

[4.2.1 Inadequate Description: 4](#_Toc433278737)

[4.2.2 Misinformation: 4](#_Toc433278738)

[4.3 The need to bring the current system into DoD STIG and RMF compliance: 4](#_Toc433278739)

[5 Systems analysis and Methodology 4](#_Toc433278740)

[5.1 Current State Analysis 4](#_Toc433278741)

[5.2 Preliminary Requirements 5](#_Toc433278742)

[5.2.1 Discuss the system, process, or approach that resolves the performance gap. 5](#_Toc433278743)

# Introduction

## Objectives

The purpose of this document is to outline the baseline requirements for a new 2.0 Contracts BSO functional Tool. This document will provide an introduction to the elements of the contracting environment that contribute to the need for an improvement in process and the addition of a new Functional tool for the un-releasing and re-releasing of documents, as well as the editing of the document description fields.

## Roles and Responsibilities

This section describes the roles and responsibilities that apply to the Contracts 2.0 Parties responsible for this document:

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| --- | --- |
| **Table 1.2: Roles and Responsibilities** | |
| **Contracts 2.0 Parties** | **Primary Responsibilities** |
| Contract Specialist | While the contracts specialist performs many job functions, for the purpose of this paper it suffices to say that they prepare and distribute award packages consisting of signed and approved contracts and they maintain contract files. |
| Functional Analyst | Take help calls, analyze contract data that to ensure conformance to current policy. They are responsible for ensuring that contract specialists have the most current policy and documents. The functional analysts were originally responsible for un-releasing and re-releasing documents before the original functional tools were discontinued. |
| Technical Support Specialist | Technical support specialists perform many tasks, but for the purpose of this document they are responsible for maintenance of the web site, servers, pd2 servers and technical support for the pd2 and SPS Systems |

## Control of Documents

The Contracts BSO is responsible for the maintenance and dissemination of this document. This document is to be updated upon any recommended changes by the CCB.

## Acronyms

|  |  |
| --- | --- |
| **Acronym** | **Definition** |
| BSO | 2.0 Contracts Business Systems Office |
| CACI | CACI International – Information Technology and Development Company |
| CCB | Change Control Board |
| DBA | Database Administrator |
| DoD | Department of Defense |
| PD2 | Procurement Desktop Defense |
| SPS | Standard Procurement System |
| STIG | Security Technical Implementation Guide |
|  |  |

# Introduction

## Business Introduction

The contracts 2.0 Department of the Navy provides expertise in acquisition planning, business strategy development, solicitation generation, creation and award of contracts and modifications, as well as contract administration. Contract Specialists perform the bulk of the work of writing contracts and awards documents using a software package called PD2 (Procurement Desktop Defense) that was developed by CACI. The specific module of PD2 that Contract Specialists use is called SPS (Standard Procurement System).

## Environment Definition

Section in progress--

## Description of Intent

In order to simplify the process of un-releasing and re-releasing contracts documents, editing document descriptions, and other contract document related tasks, it is proposed that the BSO develop a new functional tool that will conform to DoD STIG standards, and allow Functional Analysts to un-release and re-release contracts and award documents, as well as edit the document description fields and various other fields to be determined.

# Project Rationale

## The need for BSO personnel to Un-release Documents

There are three reasons that a Contract Specialist would need to un-release a document.

### Creation of a new IDIQ (Indefinite Delivery, Indefinite Quantity order):

The creation of a new order requires that there be an existing contract. If a contract does not exist, the Contract Specialist creates a new award as a starting point. This document is then un-released until the creation of the delivery order is complete. The documents are then re-released together in the SPS system. DON’T SET THE NAFI/EDA

### Accidental Release of the Document:

Occasionally, a Contract Specialist will release a document by accident. A help ticket is then created for the BSO Technical Team to un-release that document. Once the document is complete, it is then released from SPS. DON’T SEND THE NAFI/EDA

### Contracts Awarded with Errors:

Occasionally a contract is purposefully released and later errors are discovered. A help ticket is created for the BSO Technical Team. The technical team then records and saves the existing contract data. The contract is then un-released. The contracts specialists then make the corrections to the contracts document. Once the corrections are made, the technical team re-releases the document after re-entering the original release dates and information. A choice is to be presented to set the NAFI/EDA Flag

## The ability for Contracting Personnel to edit the description of a contract action:

The description field would need to be updated for the following reasons:

### Inadequate Description:

On occasion, the contracts specialists will enter a description of a contract or document in SPS that does not adequately describe the contract/award. In this case, the description needs to be edited to more appropriately reflect the description of the contract/award.

### Misinformation:

In the event of a mistake entered into the description field such as: A user includes a contract number in the description field, but the actual contract number is changed. The description field would then reflect misinformation. The description field would then need to be edited to reflect the correct information.

## Additional Contract Document Actions:

### Date Reassignment

The rational for this section is to be discussed in the 12/7/15 Functional Tool Meeting. Attendees shall include: Karen Haden, Alan Karty, Brannon Beames, Suzy Sturgeon, Jeremy McClellan, Corinna Kinman, Eva Vitale, and Caroline Walker.

### Creator Reassignment

The rational for this section is to be discussed in the 12/7/15 Functional Tool Meeting. Attendees shall include: Karen Haden, Alan Karty, Brannon Beames, Suzy Sturgeon, Jeremy McClellan, Corinna Kinman, Eva Vitale, and Caroline Walker.

### Signature Reassignment

The rational for this section is to be discussed in the 12/7/15 Functional Tool Meeting. Attendees shall include: Karen Haden, Alan Karty, Brannon Beames, Suzy Sturgeon, Jeremy McClellan, Corinna Kinman, Eva Vitale, and Caroline Walker.

## The need to bring the current system into DoD STIG and RMF compliance:

The original functional tool was created in PowerBuilder, which is a Sybase proprietary programming language and toolset. These applications required registration in the DADMS database. Support for the original PowerBuilder tools no longer exist, therefor they are no longer compliant for use on a DoD system. Redevelopment of the tool in a compliant web-based format will allow for continuous code maintenance.

# Current State

## Current State Analysis

A set of tools was originally created for un-releasing and re-releasing documents and editing the description tool. The original tools were called the Functional Tool (for un-releasing) and the Description tool (for editing document descriptions). These tools were discontinued for non-compliance to DoD Security Standards as well as incompatibility with a new operating system upgrade. Since the discontinuance of the original functional tool and description tool, it has been impossible for functional analysts to un-release and re-release documents as well as edit the documents description field. If a document needs to be un-released, the Functional Analyst places a help call to the BSO Help Desk. A ticket is created, and forwarded to a member of the BSO Technical Team. The Technical support specialist then proceeds to follow a series of steps to manually change the value of several fields in the database. A text file is maintained, that contains all of the necessary queries. The document identifier is manually entered into each query and then executed one at a time against the database server. While this process works, it is time-consuming and can be inefficient. Additionally, re-releasing documents can compromise the integrity of the original data as the original values are manually copied and then re-entered later.

# BSO Functional Tool

## Preliminary Requirements

The following table details the preliminary requirements for the new BSO Functional Tool to be developed at the contracts BSO.

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| --- | --- | --- |
| Requirement ID  (tool.module.idnumber) | Module | Description |
| ft.gen.01 | Functional Tool | The application shall be accessible from the 2.0 Website |
| ft.gen.02 | Functional Tool | The application shall be accessible to only authorized personnel (Contracts BSO Functional Analysts and Technical Team Personnel) |
| ft.gen.03 | Functional Tool | The application shall utilize SPS logins for authentication |
| ft.gen.04 | Functional Tool | The application shall be constructed in a format that is IE11 compatible, and backwards compatible to IE9 |
| ft.gen.05 | Function Tool | The application shall be constructed in ASP Classic/VBScript, HTML, CSS, JavaScript, and AJAX so as to be compatible with the existing 2.0 website. |
| ft.gen.06 | Functional Tool | The application shall conform to the DoD Application Security and Development STIG (Security Technical Implementation Guide) |
| ft.search.01 | Search Box | The application shall contain a search field in which the user can enter the document number of the document that they wish to modify. |
| ft.search.02 | Search Box | The search field shall accept the following document types:   1. Awards 2. Award Modifications 3. Deliver Orders 4. Deliver Order Modifications 5. Purchase Requests 6. Purchase Request Modifications |
| ft.search.03 | Search Box | Upon submission of the document number (using a submit button) the application shall validate that the document number is of the correct type and construction. |
| ft.search.04 | Search Box | Upon passing form validation, the application shall query the document number against the database and return the following:   1. Applied Date 2. Effective Date 3. Document Status(Released/Un-released) 4. Document Description 5. Creator 6. Signature |
| ft.ur.01 | Un-release Tool | The application shall provide a tool for unreleasing documents that have the status of “Released” |
| ft.ur.02 | Un-release Tool | The “Un-release Tool” shall provide a radio selector that will allow the user to select the reason for the un-release. |
| ft.ur.03 | Un-release Tool | Radio Option 1:  IDIQ(Indefinite Delivery, Indefinite Quantity): This option is selected when an award document must be created in order for a delivery order to be created. The Award must be released in order for the Delivery Order to be created. Then award must then be un-released. These types of documents are re-released via the PD2 interface |
| ft.ur.04 | Un-release Tool | Radio Option 2:  Accidental Release: Occasionally a Contracts Specialist will release a document by accident requiring immediate un-release. These types are documents are to be re-released vial the PD2 interface. |
| ft.ur.05 | Un-release Tool | Radio Option 3:  Awarded with Errors: This option is selected when a document has been purposefully released, but is found to have errors that require the document to be un-released. These types of documents are to be re-released via the PD2 interface. |
| ft.ur.06 | Un-release Tool | Upon selection of “Awarded with Errors” The application shall display a selector to allow the user to define whether or not to send the EDA Flag. |
| ft.ur.07 | Un-release Tool | Un-releasing a document shall modify the following database fields |
| ft.ur.07a | Un-release Tool | dsk\_obj.applied = NULL |
| ft.ur.07b | Un-release Tool | dsk\_obj.ur\_icon\_id = NULL |
| ft.ur.07c | Un-release Tool | dsk\_obj.stmp\_id = NULL |
| ft.ur.07d | Un-release Tool | proc\_object.current\_fl = 0 |
| ft.ur.07e | Un-release Tool | apld\_dt = NULL |
| ft.ur.07f | Un-release Tool | apld\_fl = NULL |
| ft.ur.07g | Un-release Tool | awd\_rel\_dt = NULL |
| ft.ur.07h | Un-release Tool | internal.ko\_cntct\_id = NULL |
| ft.ur.07i | Un-release Tool | internal.ko\_addr\_id = NULL |
| ft.ur.07j | Un-release Tool | internal.ko\_org\_id = NULL |
| ft.ur.08 | Un-release Tool | Upon un-releasing a document, all original values shall be stored in an audit table for future use in un-releasing. |
| ft.ur.09 | Un-release Tool | Upon successful un-release of a document, the application shall retun a message to the user with a description of the changes that were made. |
| ft.ur.10 | Un-release Tool | Upon a failure to un-release the document, the application shall revert to a secure state, and record the error. |
| ft.ur.11 | Un-release Tool | Upon a failure to un-release the document the application shall present an error message to the user |
| ft.rr.01 | Re-release Tool | The application shall provide a module for re-releasing previously un-released documents |
| ft.rr.02 | Re-release Tool | The “Re-release Tool” module shall be displayed only if the document status is “Un-released” and the un-release reason was selected as “Awarded with Errors”. In this case, the “Un-release Tool” shall not be displayed. |
| ft.rr.03 | Re-release Tool | The Re-release module shall access the audit table to retrieve the pre-un-release data that will be re-released into the document. |
| ft.rr.04 | Re-release Tool | The Re-release module displays the following data |
| ft.rr.04a | Re-release Tool | Applied Date |
| ft.rr.04b | Re-release Tool | Release Date |
| ft.rr.04c | Re-release Tool | Signature |
| ft.rr.04d | Re-release Tool | Title |
| ft.rr.04e | Re-release Tool | Organization Code |
| ft.rr.05 | Re-release Tool | Upon submission of the document number for re-release, the application restores the original pre-un-release data to the database fields that were modified. |
| ft.rr.06 | Re-release Tool | Upon successful rerelease, the application shall return a message to the user with the description of the changes that were made. |
| ft.rr.07 | Re-release Tool | Upon failure to rerelease a document, the application shall revert to a secure state and record the error and any changes that were made to the database fields |
| ft.desc.01 | Description Tool | The application shall contain a module for updating the document description |
| ft.desc.02 | Description Tool | The “Description Tool” module shall display the current description. |
| ft.desc.03 | Description Tool | The “description Tool” module shall contain a form field for updating the document description. |
| ft.desc.04 | Description Tool | Upon submission of the updated description, the application shall modify the dsk\_obj.description field. |
| ft.desc.05 | Description Tool | The application shall record the changes made to the dsk\_obj.description field in an audit table. |
| ft.desc.06 | Description Tool | Upon successful update to the description field, the application shall display a message to the user with both the original data and the new data. |
| ft.desc.07 | Description Tool | Upon failure to update the description field, the application shall display an error message to the user and record the error. |
| ft.crt.01 | Creator Reassignment Tool | The application shall provide a module for updating the documents Creator. |
| ft.crt.02 | Creator Reassignment Tool | The “Creator Reassignment Tool” shall display the original creator of the document. |
| ft.crt.03 | Creator Reassignment Tool | The “Creator Reassignment Tool” shall contain a selector from which the user will select a new creator. |
| ft.crt.04 | Creator Reassignment Tool | The creator selector shall retrieve the list of users from the database so as to always have an updated list |
| ft.crt.05 | Creator Reassignment Tool | Upon selection of the Update button, the application shall store the new creator user\_id in the dsk\_obj.creator field. |
| ft.crt.06 | Creator Reassignment Tool | Upon selection of the update button, the application shall store the original data from the dsk\_obj.creator field in an audit table |
| ft.crt.07 | Creator Reassignment Tool | Upon successful update of the dsk\_obj.creator field, the application will return a message to the user with the updated information and the orginial information |
| ft.crt.08 | Creator Reassignment Tool | Upon failure to update the dsk\_obj.creator field, the application will return an error message to the user |
| ft.crt.09 | Creator Reassignment Tool | Upon failure to update the dsk\_obj.creator field, the application shall revert to a secure state and create a log entry with the error |
| ft.sig.01 | Signature Reassignment Tool | The application shall provide a module for reassigning the signature. |
| ft.sig.02 | Signature Reassignment Tool | The “Signature Reassignment” tool shall display the current document’s signature. |
| ft.sig.03 | Signature Reassignment Tool | The “Signature Reassignment” tool shall provide a selector from which users can select the warrant holder. |
| ft.sig.04 | Signature Reassignment Tool | Upon selecting the Update button, the application updates the internal.ko\_cntct\_id and organization information in the database. |
| ft.sig.05 | Signature Reassignment Tool | Upon selection of the update button, the application shall record both the original data and the new signature in an audit table. |
| ft.sig.06 | Signature Reassignment Tool | Upon Successful update of the signature field, the application shall display a message to the user that contains both the original signature and the new signature. |
| ft.sig.07 | Signature Reassignment Tool | Upon failure to update the database, the application shall revert to a secure state and display an error message to the user |
| ft.sig.08 | Signature Reassignment Tool | The application shall document all errors in a log file. |
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## Discussion Points

### Questions:

#### When would it be necessary to update the Creator of a document?

#### Are there legal concerns affiliated with a functional analyst signing a document with a Contracting Officers Name and bitmap?

#### I’ve written code that automatically stores all of the original data for a document when it is unreleased. A rerelease accesses the stored data. Is the date reassignment tool still necessary?

#### What are the conditions under which someone would use the date reassignment tool?

#### Brannon’s code for unreleasing a document includes adding a U code to the end of the document number. Under what conditions would I add a U code to the document number, and what are the numbering conventions for adding this code?

#### Can you think of ANY other legal or security concerns with creating this tool according to the above requirements?