

Job Aid: How to Ensure Document Confidentiality

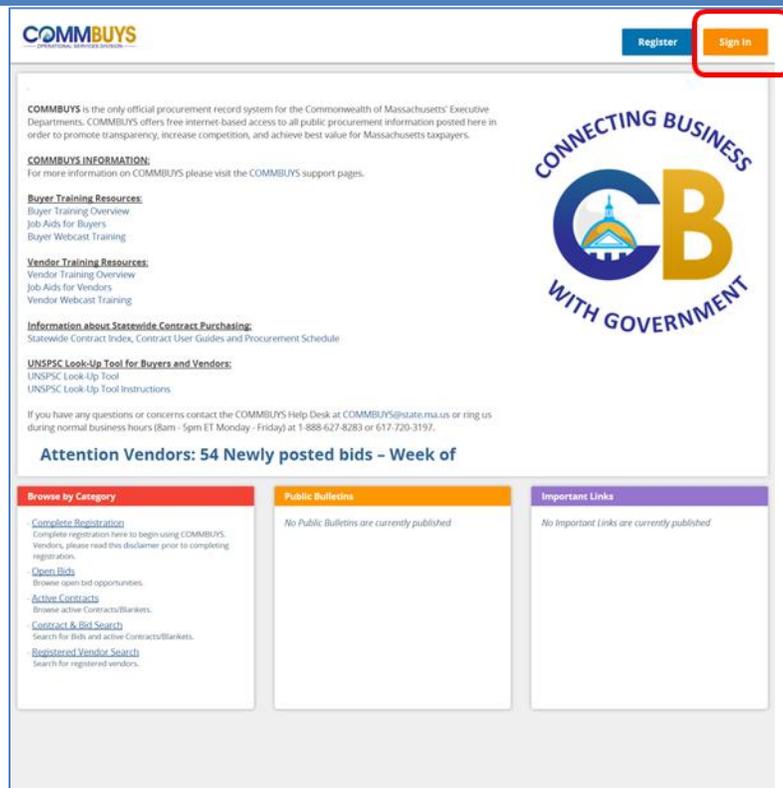
This Job Aid explains how to:

- Ensure that confidential vendor documents submitted with quotes do not display publicly after award.

Of Special Note:

Documents submitted with quotes during the bid process normally become part of the public record after award. At times vendors may submit documents with their quote that contain sensitive information. Examples of these documents are: W9, Standard Contract Form, Commonwealth Terms & Conditions, Electronic Funds Transfer (EFT), and Contractor Authorized Signatory Listing. In effect, anything that is not subject to the Freedom of Information Act (FOIA) should not display publicly. Prior to quote submission, vendors should mark these documents as confidential. However at times they may not. It is incumbent upon the buyer to review all submitted documents and designate any documents that should be confidential as such - prior to bid award or the creation of the Master Blanket Purchase Order (MBPO).

Screenshot



The screenshot shows the COMMBUYS website homepage. At the top right, there are two buttons: 'Register' (blue) and 'Sign In' (orange). The 'Sign In' button is highlighted with a red rectangular box. Below the buttons, the page features a large graphic with the text 'CONNECTING BUSINESS WITH GOVERNMENT' and a logo. The main content area includes sections for 'COMMBUYS INFORMATION', 'Buyer Training Resources', 'Vendor Training Resources', and 'Information about Statewide Contract Purchasing'. At the bottom, there are three columns: 'Browse by Category' (with links for Complete Registration, Open Bids, Active Contracts, Contract & Bid Search, and Registered Vendor Search), 'Public Bulletins' (with a message 'No Public Bulletins are currently published'), and 'Important Links' (with a message 'No Important Links are currently published').

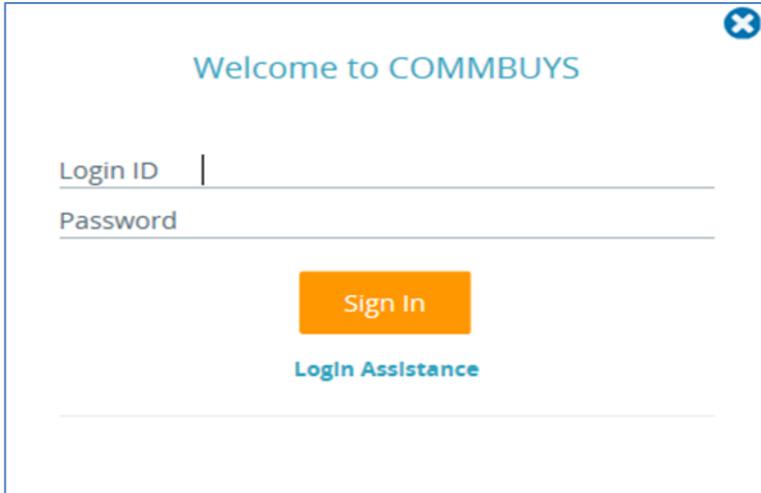
Directions

Step 1: Signing in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](#).
2. Click on the orange **Sign In** button in the upper right hand corner.

Job Aid: How to Ensure Document Confidentiality

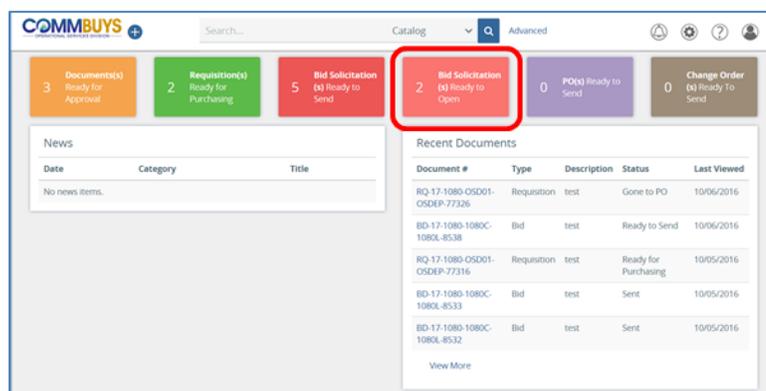
Screenshot



Directions

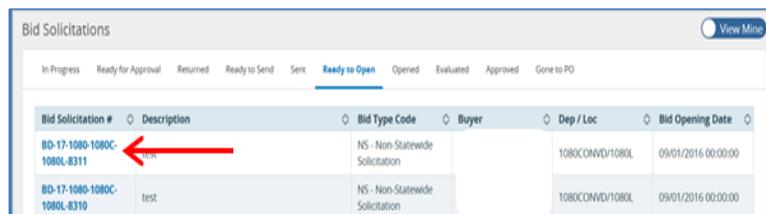
Step 2: Logging In

1. Enter your Login ID and Password.
2. Click on the **Sign In** button.



Step 3: Locating Ready to Open Bids

Click on the **Bid Solicitation(s) Ready to Open** box.



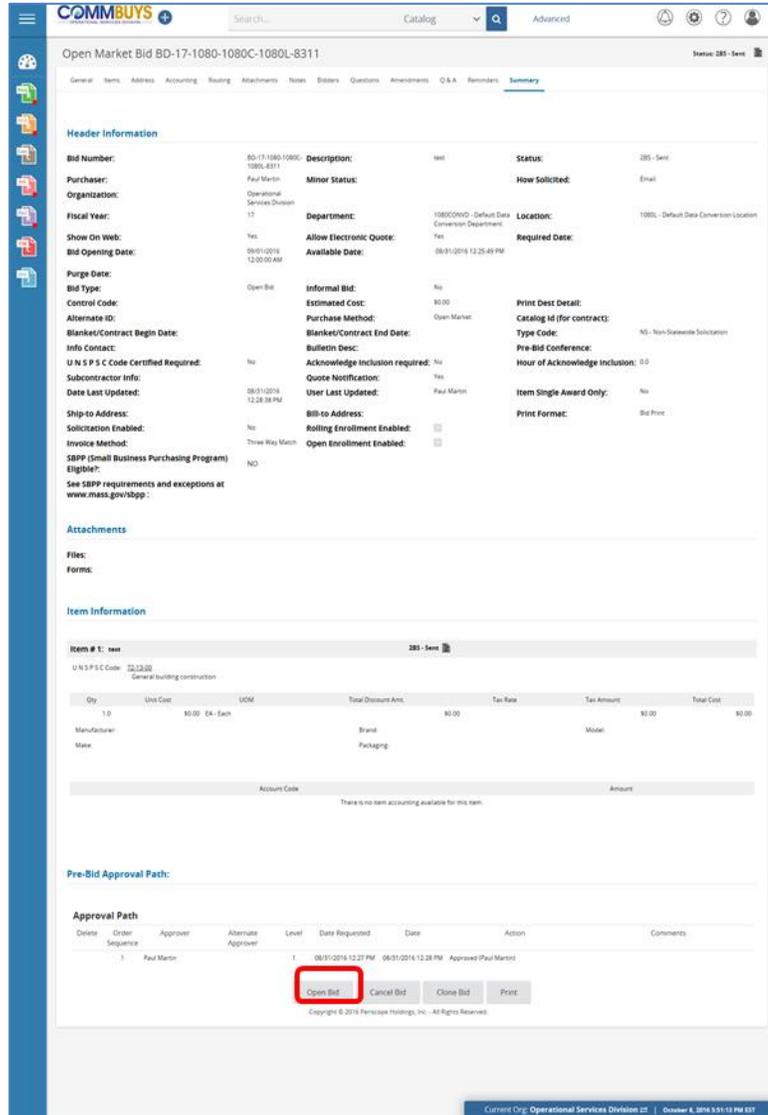
Step 4: Locating the Bid

Click on the desired blue hyperlink in the Bid Solicitation # column.



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Screenshot



Directions

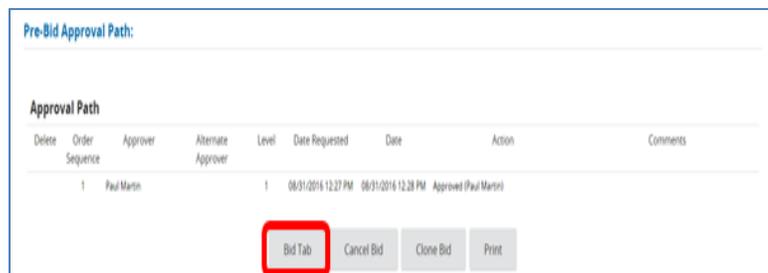
Step 5: Opening the Bid

The bid opens to the **Summary** page. Scroll to the bottom of the page and click the **Open Bid** button.

Step 6: Opening the Bid Tabulation Screen

The Summary page redisplay and note that the bid status changed to **2BO- Opened**.

Scroll to the bottom of the page and click on the **Bid Tab** button.





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Screenshot

Directions

Step 7: Selecting the Bid

The Bid Tabulation page opens to the **Quotes** Tab.

Click on the blue hyperlink in the **Quote #** column to open the vendor quote.

Step 8: Locating the Attachments

Click on the **Attachments** tab.

Step 9: Viewing the Quote Attachments Page

Note the **Name** and the **Confidential** columns.

Any documents marked confidential will not display publically.

In this example the bidder submitted a completed **W9** but did not check the **Confidential** box.

Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Total Number of Submitted Quotes: 3

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15757	text	00019974	Acme Services	10/06/2016 06:07:00 PM	No attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15758	text	00020012	Kramatica	10/06/2016 06:13:54 PM	Download
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15759	text	00020013	Bane	10/06/2016 06:25:51 PM	Download

[Create New Quote](#) [Save And Continue](#)

Quote QT-1080-1080C-1080L-15759 - Bane

General Items Questions Subcontractors Terms & Conditions **Attachments** Evaluations Preference Reminders Summary

Header Information

Quote #: QT-1080-1080C-1080L-15759	Bid #: BD-17-1080-1080C-1080L-8311	Status: Submitted
Organization: Operational Services Division	Delivery Days: 0	Discount Percent: 0.0
Description: text	Alternate Bid: No	Shipping Terms:
Bid Flag: LowBall	Ship Via Terms:	Payment Term:
Freight Terms:	Info Contact:	Quote Total: 195.00
Promised Date:	User Last Updated: Paul Martin	User Created: Paul Martin
Comment:		
Date Last Updated: 10/06/2016 06:27:58 PM		

Attachments

Agency Files: [W9.docx](#)
[Chrysanthumum-8.jpg](#)

Agency Forms:
Vendor Files:
Vendor Forms:

Quote QT-1080-1080C-1080L-15759 - Bane

General Items Questions Subcontractors Terms & Conditions **Attachments** Evaluations Preference Reminders Summary

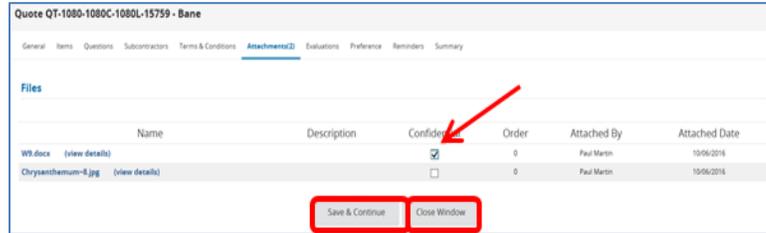
Files

Name	Description	Confidential	Order	Attached By	Attached Date
W9.docx (view details)		<input type="checkbox"/>	0		10/06/2016
Chrysanthumum-8.jpg (view details)		<input type="checkbox"/>	0		10/06/2016

[Save & Continue](#) [Close Window](#)

Job Aid: How to Ensure Document Confidentiality

Screenshot



Quote QT-1080-1080C-1080L-15759 - Bane

General Items Questions Subcontractors Terms & Conditions **Attachments** Evaluations Preference Reminders Summary

Files

Name	Description	Confidential	Order	Attached By	Attached Date
W9.docx (view details)		<input checked="" type="checkbox"/>	0	Paul Martin	10/06/2016
Chrysanthemum-0.jpg (view details)		<input type="checkbox"/>	0	Paul Martin	10/06/2016

Save & Continue Close Window

Directions

Step 10: Making the Document Confidential

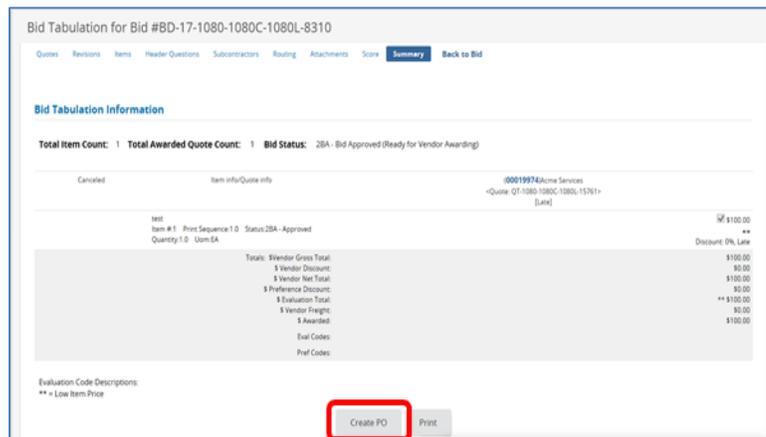
1. Click on the **Confidential** checkbox next to the W9 file.
2. Click on the **Save & Continue** button.
3. Click on the **Close Window** button.

The bid may now be awarded. Confidential documents will not display publicly.

NOTE: If for some reason a confidential document is not marked as such at this time, the buyer has another opportunity to mark the document confidential. This must be during the creation of the MBPO. Proceed to Step 11.

Step 11: Accessing the PO Creation Page

After award, click on the **Create PO** button.



Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8310

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score **Summary** Back to Bid

Bid Tabulation Information

Total Item Count: 1 Total Awarded Quote Count: 1 Bid Status: 2BA - Bid Approved (Ready for Vendor Awarding)

Cancelled		Item info/Quote info	00019974Acme Services -Quote QT-1080-1080C-1080L-15761- (Bane)	\$1100.00
Item #1	Print Sequence 1.0	Status 2BA - Approved		**
Quantity 1.0	Uom EA			Discount 0% Late
Totals:		\$ Vendor Gross Total:		\$1100.00
		\$ Vendor Discount:		\$0.00
		\$ Vendor Net Total:		\$1100.00
		\$ Preference Discount:		\$0.00
		\$ Evaluation Total:		** \$1100.00
		\$ Vendor Freight:		\$0.00
		\$ Awarded:		\$1100.00
		Eval Codes:		
		Pref Codes:		

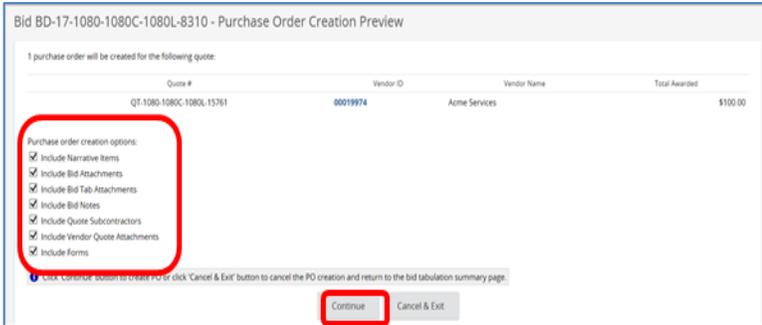
Evaluation Code Descriptions:
** = Low Item Price

Create PO Print



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Screenshot



Directions

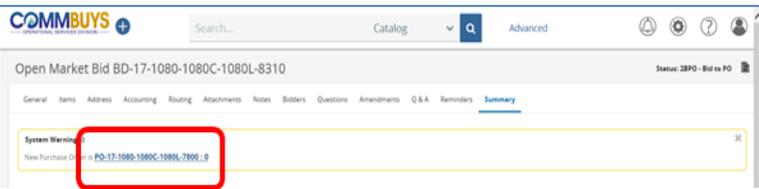
Step 12: Creating the MBPO

The Purchase Order Creation Preview page displays.

Leave all the options checked, then click on the **Continue** button.

NOTE: If any options are unchecked they will not display in the PO but you will lose the ability to mark the document confidential. They will display publically in the quote.

If you do not want certain documents included in the MBPO do not uncheck them here. Delete the documents from the MBPO attachment tab.

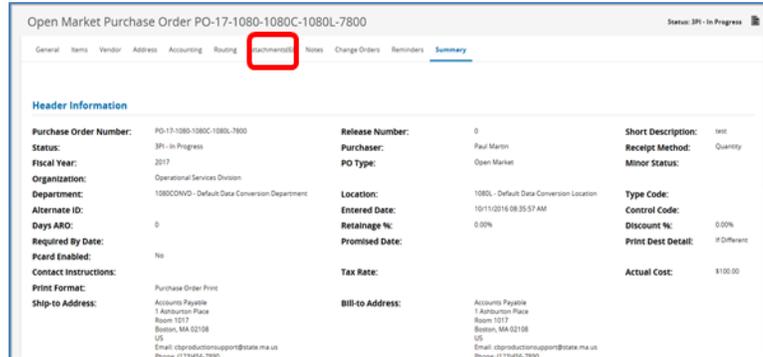


Step 13: Opening the MBPO

The PO has been created. Click on the blue hyperlink in the **PO#** column to open the PO.

Job Aid: How to Ensure Document Confidentiality

Screenshot



Open Market Purchase Order PO-17-1080-1080C-1080L-7800 Status: SPI - In Progress

General Items Vendor Address Accounting Routing **Attachments** Notes Change Orders Reminders Summary

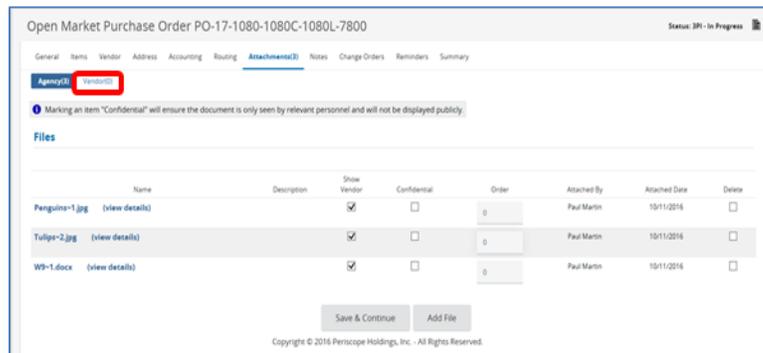
Header Information

Purchase Order Number: PO-17-1080-1080C-1080L-7800	Release Number: 0	Short Description: test
Status: SPI - In Progress	Purchaser: Paul Martin	Receipt Method: Quantity
Fiscal Year: 2017	PO Type: Open Market	Minor Status:
Organization: Operational Services Division	Location: 1080L - Default Data Conversion Location	Type Code:
Department: 1080CONVD - Default Data Conversion Department	Entered Date: 10/11/2016 08:35:57 AM	Control Code:
Alternate ID:	Retainage %: 0.00%	Discount %: 0.00%
Days ARD: 0	Promised Date:	Print Dest Detail: If Different
Required By Date:	Tax Rate:	Actual Cost: \$100.00
PCard Enabled: No	Bill-to Address: Accounts Payable 1 Auburn Place Room 1017 Boston, MA 02108 US Email: ctproductionsupport@state.ma.us Phone: (274)66-7800	
Contact Instructions:		
Print Format: Purchase Order Print		
Ship-to Address: Accounts Payable 1 Auburn Place Room 1017 Boston, MA 02108 US Email: ctproductionsupport@state.ma.us Phone: (274)66-7800		

Directions

Step 14: Accessing the Attachments

From the PO screen click on the **Attachments** tab.



Open Market Purchase Order PO-17-1080-1080C-1080L-7800 Status: SPI - In Progress

General Items Vendor Address Accounting Routing **Attachments** Notes Change Orders Reminders Summary

Agency(3) **Vendor(3)**

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

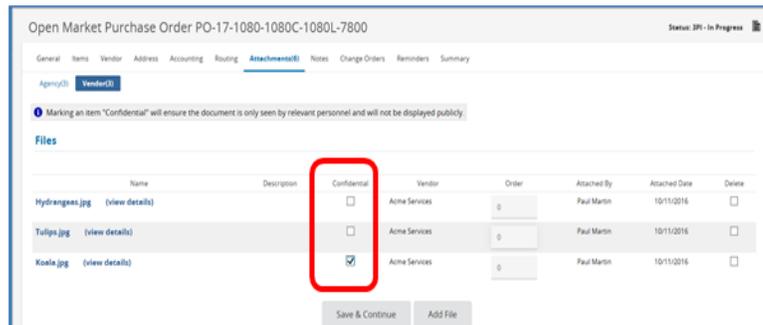
Name	Description	Show Vendor	Confidential	Order	Attached By	Attached Date	Delete
Penguins-1.jpg	(view details)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Paul Martin	10/11/2016	<input type="checkbox"/>
Tulips-2.jpg	(view details)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Paul Martin	10/11/2016	<input type="checkbox"/>
WB-1.docx	(view details)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Paul Martin	10/11/2016	<input type="checkbox"/>

Save & Continue Add File

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Step 15: Viewing the Attachments

Click on the **Vendor** sub-tab to view Vendor Quote attachments.



Open Market Purchase Order PO-17-1080-1080C-1080L-7800 Status: SPI - In Progress

General Items Vendor Address Accounting Routing **Attachments** Notes Change Orders Reminders Summary

Agency(3) **Vendor(3)**

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

Name	Description	Show Vendor	Confidential	Vendor	Order	Attached By	Attached Date	Delete
Hydrangeas.jpg	(view details)	<input type="checkbox"/>	<input type="checkbox"/>	Acme Services	0	Paul Martin	10/11/2016	<input type="checkbox"/>
Tulips.jpg	(view details)	<input type="checkbox"/>	<input type="checkbox"/>	Acme Services	0	Paul Martin	10/11/2016	<input type="checkbox"/>
Koala.jpg	(view details)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Acme Services	0	Paul Martin	10/11/2016	<input type="checkbox"/>

Save & Continue Add File

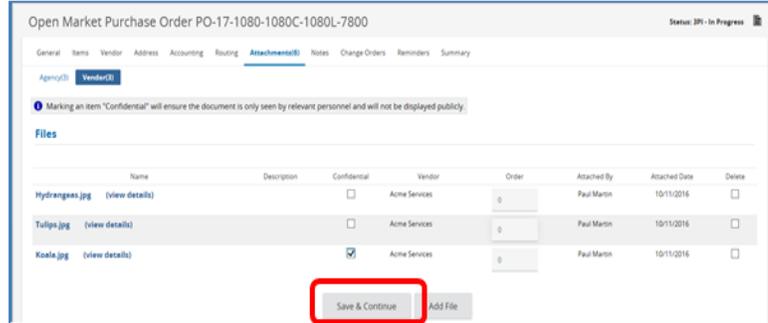
Step 16: Making Attached Documents Confidential

Review all the documents and mark confidential as required by clicking the checkbox next to the document name in the **Confidential** column.



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Screenshot



Directions

Step 17: Saving the Changes

Click on the **Save & Continue** button.