

Hawaii State eProcurement HlePRO

Requestor Training SPO 303

What Will be Covered

- Intro, Definitions, eProcurement and HlePRO
- Transition from HePS
- Requester Responsibilities, Ethics and Security
- Other Roles and Responsibilities in HlePRO
- Some Differences from HePS
- Finding Commodity Codes
- How to Gain Access to HlePRO
- Creating a Request
- Add vendors to notification, release of request

Resources and Training Materials

<http://Hawaii.gov/SPO> > HEPS-HlePRO
> HlePRO for State Personnel

- **HlePRO Program Manual**
 - Overview, roles, your responsibilities, who may have access, and more.
- **HlePRO Requester Quick Reference**
 - Step-by-step guide to getting your request on HlePRO **providing** you:
 - Have specifications, minimum qualifications;
 - Know your timeline; and
 - Have Administrative requirements.
- **SPO 303 Training Reference (PowerPoint)**

This Webinar is Designed for

State Personnel who:

- Are not buyers or procurement specialists but know the subject matter of the goods, services or construction that needs to be purchased ;
- Are given access to HlePRO by their Department eProcurement Administrator as requesters;
- Are managers or administrators for divisions or programs and are considering using the requester function for consolidating the procurement process;
- Are Department or CPO Jurisdiction eProcurement Administrators or Alternates.

This Webinar is Intended to:

- Provide an overview of HlePRO;
- Provide responsibilities of requesters when using HlePRO;
- Teach the mechanics of entering a request on HlePRO;

This Webinar will Not:

- Teach everything needed to conduct procurement, awarding, contracting or contract administration. (There is not enough time. You must take the required workshops for the method of procurement or function.)
- Serve as a refresher on how to conduct procurement. You should take the class for the method of procurement again.
- Give anyone access to HlePRO. Only your Dept. eAdministrator can do that. Not everyone should have access. (Security issue)

Definitions

- **Dept. eAdministrator/ eAdministrator / Dept. Administrator=**
 - the Department or CPO Jurisdiction eProcurement Administrator or their alternates.
 - There is only one eAdministrator for each Department/ CPO Jurisdiction. Each department may have up to 3 Alternate eAdministrators. Executive branch departments eAdministrators and alternates are delegated on form SPO-036. CPO Jurisdiction eAdministrators are delegated on form SPO-041
 - The listing of eAdministrators/alternates is at:
<http://hawaii.gov/SPO> > for State & County Personnel > Administrators, Mgrs. & POCs for SPO Programs

Definitions

Continued

- **RFQ** = small purchase method of procurement pursuant to HRS 103D-305
- **IFB** = competitive sealed bidding method of procurement pursuant to HRS 103D-302

- See also Definitions in the ***HlePRO Program Manual***

What is eProcurement?

- Open & transparent system for vendors to compete for state contracts electronically.
- Online through the application:
 - Solicitations & addenda issued.
 - Vendors ask questions, buyers issue answers.
 - Vendors submit offers.
 - Bid (or quote) opening is virtual.
 - Buyer issues Contract Award Notice.

Hawaii State eProcurement HlePRO

- Pronounced [hi-pro]
- Solicitation notices & awards- posted to public site automatically.
- Use of NIGP Commodity Codes for automatic courtesy email notifications to vendors.
- Pre-bid conference, Q&A, addenda.
- Offers submitted.
- Upon logging in, vendors notified if not compliant in Hawaii Compliance Express(HCE).

Requester Responsibilities

1. Maintain security of HlePRO and its data.
2. Provide clear written specifications, minimum qualifications as applicable, and administrative requirements. (HlePRO doesn't do it for you.)
3. Follow the procurement code of ethics.

Maintaining Security

- HlePRO accounts may NOT be 'shared'. Your name is on the account and its use is your responsibility.
 - Maintain security of your account (login/password)
- Data in HlePRO must also be kept secure.
 - Don't be casual about the information in HlePRO.
 - Log out of HlePRO before leaving your computer.
 - Procurement data is also subject to requirements for open information.
 - Make sure you know when information must be kept confidential and when it must be released.
 - Know what is on the public site.

Ethical Procurement

- Procurement Code of Ethics;
- Essential to the procurement process and public faith and perception;
- Affects everyone;
- No conflict of interest or appearance of.
 - You must be an employee of the state through the personnel process.
 - If you are a vendor to the state, you may not have access to HlePRO.
- Ref: HRS 103D-101, HAR Chapter 131, Sec 131-1.02

Follow Procurement Procedures

- For your protection
 - Hawaii Revised Statutes
 - Hawaii Administrative Rules
 - Procurement Circulars
 - Internal policies and procedures (Dept., Div., etc.)
- You must do more than attend training.
 - Know and follow procurement procedures.
 - Keep up to date with changes.
 - For certain goods, services and construction there may be other procedures you must follow

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Know your responsibilities

Questions?

Other HlePRO Roles & Responsibilities

- Department eProcurement Administrator/
eAdministrator
 - Oversees HlePRO program for the Department.
 - HlePRO point-of-contact for buyers.
- System Administrator
 - Oversees HlePRO program for the state.
 - HlePRO point-of-contact with department administrators.
 - HlePRO point-of-contact with the vendor administering the HlePRO application (HIC).

Other HlePRO Roles and Responsibilities

Continued

- Approver
 - Depends on how your dept. sets it up -check before you procure.
 - Approves solicitation & addenda.
 - Approves award & contract amendments.
 - In HlePRO, approver is a buyer who has been assigned to an approval path.
- Requestor
 - New optional role (not a procurement role)- may not be used by all departments.
 - Provides specifications & goods/services requirements for the buyer.

Differences in HlePRO

- email is user ID.
- For vendors:
 - No master and sub accounts. Vendors staff may have separate accounts.
 - Vendors are notified if they are not compliant in HCE each time they log in.
- Commodity codes
 - Select commodity code by line item.
 - No commodity codes ending in 00.
- Do not have 40,000 vendors in HlePRO.
 - Buyers must contact their vendors to make sure they know solicitation will be issued in HlePRO.

About NIGP Commodity Codes

- Developed by National Institute of Governmental Purchasing = **Public Procurement Institute**
 - First 3 digits - the class (300+)
 - Second 2 digits - the goods/service/construction (7,000+)
- Code numbering - somewhat alphabetical
 - Classes up to 899 - goods
 - Classes 900 and above - services

Finding Commodity Codes

- Commodity codes by class available without logging in.
- Can search by key word (after logging in).
 - Keep it short, one word or part of a word.
- Searching vendors.
 - After selection, search for vendors by commodity code to verify.
 - Can search for specific vendors and see the commodity codes in their profile.

Commonly Used Commodity Codes

- 07180- SUV type vehicles
- 07190- Vans, cargo
- 07201- truck, class 1, 6,000 lb
- 91039- janitorial/custodial services
- 98802- arborist services
- 98888- tree trimming, pruning services
- 91027- garbage, trash removal
- 91036- heating, air conditioning maintenance & repair

Commodity Codes are Not Procurement Methods

- Purpose of commodity codes is to link solicitations and vendors.
- Some commodity codes will have professional services in their title. This is NOT the same as the professional services method of procurement.
 - At this time, professional services method of procurement is not conducted on HlePRO.
 - Some solicitations may only be conducted using professional services method of procurement.

About HiePRO Accounts

- Number of accounts per dept is limited. Not everyone should have an account. Security issue.
- Only your dept. eProcurement administrator has the ability to grant access to HiePRO. Check with your eAdministrator for the process for your dept.

Obtaining a HiePRO Account

- Two-step process;
 1. You must have an eHawaii.gov account (some may already have one);
 2. eAdministrator grants you access when they have:
 - User exact email address; and
 - User position title.
- Check with your eAdministrator for the procedures for obtaining an account.

Creating an eHawaii.gov Account

- Go to <http://Hiepro.hawaii.gov>
- Select login
 - do **not** select Login & Register as a Vendor
- Select **Create Free Account**.
- Your email is your user ID (login).
 - You must use a Hawaii.gov (or other clearly work) email to be a buyer in HlePRO.
- Follow instructions for creating account.

Not sure if you already have an eHawaii.gov account?

- You may already have an account if you log in to access HCE, eCrim (law enforcement), boating registration, etc.
- If you are not sure, create an account using your work email.
- If you already have an account you will receive the message one already exists for your email. Follow the instructions for retrieving your password if you have forgotten it.

Getting Access/Permission to use HlePRO

- Only your e Administrator can give you access to HlePRO and will need:
 - Your **exact** email address;
 - Your position title;
- Each department has its own procedures. Contact your department for the procedures.

Questions?

Finally, on to HlePRO...
(You may want to take out your HlePRO
Requester Quick Reference)

<http://HlePRO.hawaii.gov>

In Summary

- HlePRO does not do the thinking for the buyer or requester.
- Just because it is physically possible to do something in HlePRO does not mean it is permissible or allowable.
- The more the requester knows,
 - The less likely time will be spent sending the request back to the requester for clarification or more information back
 - The less the buyer will have to do and the faster your solicitation will be released;
 - The less the buyer will have to change and the less likely there will be mistakes.
- HlePRO does not know what you want to buy.
- Commodity codes are NOT specifications.

To Enter a Request in HlePRO: Requester Requirements

- ehawaii.gov account;
- HlePRO permissions/access from Dept. eAdministrator.
- Clear specifications.
- Minimum qualifications, as applicable.
- Other requirements specific to the goods, services or construction to be purchased.
- Timeline -at least delivery or contract start/end dates)
- Estimated price.
- Potential vendors.

State Procurement Office

<http://hawaii.gov/spo>

Questions?

<http://Hawaii.gov/SPO> > HePS-HlePRO > HlePRO
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