

# Hawaii State eProcurement HiePRO

## Approver Training SPO 305

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### **What Will be Covered**

- Intro, Definitions, eProcurement and HiePRO
- Transition from HePS
- Approver Responsibilities, Ethics and Security
- Other Roles and Responsibilities in HiePRO
- Some Differences from HePS
- Finding Commodity Codes
- How to Gain Access to HiePRO
- About Approvals and Approval Paths
- Reviewing and Approving/Disapproving

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### **Resources and Training Materials**

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

- **HiePRO Program Manual**
  - Overview, roles, your responsibilities, who may have access, and more.
- **HiePRO Approver Quick Reference**
  - Step-by-step guide to approving on HiePRO **providing** you:
    - Know the requirements for conducting the method of procurement;
    - Know the requirements of the goods, services or construction.
- **SPO 305 Training Reference (PowerPoint)**

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### **This Webinar is Designed for**

#### **State Personnel who:**

- Have or will have written delegated authority to approve using eProcurement;
- Have taken the required workshops for the method of procurement to be used (i.e. Small Purchases Method of Procurement and/or Competitive Sealed Bidding)
- Are given access to HiePRO by their Department eProcurement Administrator; or
- Are Department or CPO Jurisdiction eProcurement Administrators or Alternates.

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### **This Webinar is Intended to:**

- Provide an overview of HlePRO;
- Provide responsibilities of approvers when using HlePRO;
- Teach the mechanics of approving a solicitation on HlePRO;
- Provide some reminders about common mistakes when reviewing small purchase method of procurement using eProcurement.

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### **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)

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### 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

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### 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***

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## **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.

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## **Hawaii State eProcurement HlePRO**

- Pronounced [hi-pro]
- Solicitation notices & awards- posted to a 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).

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## **Transition from HePS to HlePRO**

### **Why We are Changing**

- Newer technology - Fewer conflicts with newer browsers.
- Faster.
- Mobile-friendly.
- Lower transaction fee.

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## **Transition to HlePRO**

### **Timeline**

- September -November
  - Ongoing training
  - Buyers enter HlePRO solicitations as they are trained.
  - Print/download data from HePS for procurement files.
- December
  - Last solicitation issued in HePS
  - Continue printing/downloading data from HePS for procurement files.
- January-February
  - Complete printing/download of data from HePS for procurement files.
  - Award of solicitations conducted in 2013 in HePS

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### **Approver Responsibilities**

1. Maintain security of HiePRO and its data.
2. Ensure procurement is conducted following the procurement procedures for the method of procurement. (HiePRO doesn't do it for the buyer.)
3. Ensure that there are clear written specifications, minimum qualifications as applicable, and administrative requirements. (HiePRO doesn't do it for the buyer.)
4. Follow the procurement code of ethics.

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### **Maintaining Security**

- HiePRO 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 HiePRO must also be kept secure.
  - Don't be casual about the information in HiePRO.
    - Log out of HiePRO 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.

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## **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 to be followed.

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## **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

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## **Approvers in HlePRO**

- There is no separate approver role in HlePRO. Approvers are ‘users’ who are in an approval path.
- As an approver, you will have the same access to HlePRO as a buyer.
- Your responsibility: to conduct yourself on HlePRO in accordance with your delegation.
- If you are not delegated authority to conduct procurements as a buyer, do not do so.

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## **Know your responsibilities**

# **Questions?**

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## **Other HiePRO Roles & Responsibilities**

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

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## **Other HiePRO Roles and Responsibilities**

### *Continued*

- Buyer
  - Conducts the solicitation.
- Requestor
  - New optional role (not a procurement role)- not all departments may choose to use this role.
  - Provides specifications & requirements for the goods/services for the buyer.

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## Differences in HlePRO

- user ID is your email.
- 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
  - Commodity codes are selected 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.

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## About NIGP Commodity Codes

- Developed by **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

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## 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.

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## Commonly Used Commodity Codes

- **Class 071 – Automobiles, Sch. Buses, SUVs and Vans**
  - 07180- SUV type vehicles
  - 07190- Vans, cargo
- **Class 072 - Trucks**
  - 07201- truck, class 1, 6,000 lb
- **Class 910 – Bldg. Maintenance, Installation & Repair Svcs**
  - 91039- janitorial/custodial services
  - 91027- garbage, trash removal
  - 91036- heating, air conditioning maintenance & repair
- **Class 988 – Roadside, Grounds, Recreational & Park Area Svcs.**
  - 98802- arborist services
  - 98888- tree trimming, pruning services

### **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 HiePRO.
  - Some solicitations may only be conducted using professional services method of procurement.

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### **About HiePRO Accounts**

- Number of active buyer 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.

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## 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.

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## Creating an eHawaii.gov Account

- Go to <http://Hiepro.hawaii.gov>
- Select Log In
  - do **not** select Login & Register as a Vendor
- Select **Create a 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 HiePRO.
- Follow instructions for creating account.

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### **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 if you have an account, create try creating one using your work email.
- If you already have an account you will receive the message that an account already exists for your email. Follow the instructions for retrieving your password if you have forgotten it.

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### **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;
  - Approval path details
  - Buyers to whom approval path will be assigned
- Each department has its own procedures. Contact your department for the procedures.

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## About Approvals and Approvers

- Approvals are optional – Departmental decision to use them. A buyer should NOT approve him/herself.
- Approval paths are created by your eAdministrator.
- Must be created in advance of issuing a solicitation/award.
- **2 step Process**
  1. Create approval path
  2. Assign approval path to a buyer.
- No uniquely identified approver role in HlePRO. Approvers are simply buyers assigned to an approval path.
- Approvers in the path must be in HlePRO.
- Note: if you are only an approver and do not have written delegated authority to procure on HlePRO, do not use HlePRO to procure.
  - For approvers, having access does not mean you have authority to procure on HlePRO.

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## Approval Path Requirements

- **Solicitation/Award.** whether this path will be for a solicitation or award.
- **Methods of procurement.** methods of procurement to which this approval path will apply (small Purchase Request for Quote (RFQ), Competitive Sealed Bid (IFB)).
- The approvers in the path in the order they shall approve.
- The approver backups (in case the approver goes on vacation)  
Note: Backups are assigned by path so an approver in one path can have a different back-up than the same approver who is in another path.

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## Approval Path Options

- **Amount.** If the approval path will apply only to a specific to a range of amounts, (for instance \$25,000-\$100,000). Otherwise, leave blank. If left blank it will apply to all amounts. If using range amounts ensure that conflicting paths are not assigned to the same buyer.
- **Note:** this only applies to the use of the approval path. HlePRO does NOT place a physical limit on the amount a buyer may procure/award.

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## Approving a Solicitation

1. Log in. Select **Home Dashboard** if it does not appear.  
All items awaiting your approval will appear at the top of your Dashboard.
2. Select the link under the **Action** column to open the solicitation/award for your review and approval.
3. Select the tabs to review.
4. Select **approve** or **reject**.

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## Common Issues/Items to Review

- **Title and description** make sense (clear and descriptive, no conflicts)
- Sufficient **time** between opening and closing of solicitation
- Clear **specifications, minimum qualifications, administrative requirements**
- Correct **Commodity Code**
- **Unit of Measure** and **Quantity** make sense
- **No conflicts** (does not say one thing in an attachment and something else in another part of the solicitation.)

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## Questions?

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

<http://HlePRO.hawaii.gov>

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### **In Summary**

- HiePRO does not do the thinking for the buyer/approver.
- Just because it is physically possible to do something in HiePRO does not mean it is permissible or allowable.
- Approver must know which procurement method is appropriate to be used.
- HiePRO does not know what you want to buy.
- Commodity codes are NOT specifications.

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### **To Approve a Solicitation/Award in HiePRO: Requirements**

- Written delegated authority;
- Taken all required training;
- ehawaii.gov account;
- HiePRO permissions/access from Dept. eAdministrator.
- Be in an approval path.
- Approval path assigned to the buyer before issuing the solicitation/award.

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**-FYI-**  
**ADA (American Disabilities Act)**  
**Compliance**

- The State has the responsibility to be ADA compliant.
- State websites and documents uploaded to state websites must be accessible to the visually impaired. HiePRO is accessible.
- In HiePRO under the attachments is a statement that questions about the accessibility of any documents associated with the solicitation should be directed to the buyer.

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**Needed for Entering a Solicitation in HiePRO**

- Specifications;
- Minimum qualifications of vendor;
- Administrative requirements;
- Timeline (prebid conf, Q & A, submittal deadline, delivery);
- Estimated price;
- Potential vendors
- Other requirements specific to the goods, services or construction to be purchased.

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### In Summary - 3 things

- 1. HlePRO does not do the thinking for the buyer.**
  - Just because it is physically possible to do something in HlePRO does not mean it is permissible or allowable.
- 2. HlePRO is not a method of procurement.**
  - It is a tool to make the procurement more open and efficient.
  - Buyer must know which procurement method to use and how to conduct it.
- 3. The buyer must have the Specifications.**
  - HlePRO does not know what you want to buy.
  - Commodity codes are NOT specifications.

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### State Procurement Office

<http://hawaii.gov/spo>

## Questions about HlePRO?

Check with your eAdministrator at:

<http://Hawaii.gov/SPO> > HePS-HlePRO > HlePRO  
for State Personnel > [Department and CPO  
Jurisdiction eAdministrators](#)

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