Prerequisite: SPO-001 Procurement Basics (slide 1)
Title slide (slide 2)
Welcome to the first recorded online training for HIePRO, the State's eProcurement application.
SPO 301 is the basic training for government personnel who will be issuing solicitations on HIePRO.

As with most new things, you can expect this training will change as we learn to maximize using this type of medium. We would appreciate your feedback to help us do that. SPO will continue to publish attendance reports until the State obtains a Learning Management System. Please note that once you access the training, and complete the certificate of completion, you assume responsibility for knowing the contents. You are welcome to review the training or parts of it, whenever you have a need. Now that we have handled logistics, let's get started…

What will be covered (slide 3)
First, we'll cover resources and required training, some definitions, a little about eProcurement applications in general and about the HIePRO application. Then we'll cover the Buyer role and responsibilities. To put it all in perspective, we'll briefly review the other roles in HIePRO so you have a good idea of how everything and everyone fits in the system. It will make it easier to work together and more efficiently when you know what everyone is supposed to do.

We'll examine commodity codes so it will be easier for you to work with them and find the appropriate codes for your solicitation.

We'll cover what you should do in preparation entering your solicitation. Completing these tasks first will make the process of entering your solicitation a quick and efficient process.

We'll cover the HIePRO landing page, log in and get a quick overview of the buyer home dashboard.

In the next section,)(still part of part 1) we'll cover vdendor administrative fees, approval routes, and vendor instructions. We will walk through entering a solicitation in HIePRO and how to answer questions in HIePRO.

In Part 2, we will step through issuing an addendum, viewing the abstract of offers and vendor attachments once the solicitation closes, and issuing an award.

Resources and Training Materials (Slide 4)
There are three main documents:

The HIePRO Program Manual, provides information such as the all the roles and responsibilities, and definitions. Read it first, before doing anything on HIePRO.

The HIePRO Quick Reference has the step by step directions with screenshots of procedures for entering your solicitation into HIePRO. Keep it handy when you enter a solicitation.
The Training Reference contains the Powerpoint slides used in training.

You can find them on the SPO site by selecting HIePRO from the Header Menu of any SPO webpage and scrolling to HIePRO for State & County Personnel. They are also in the training section of the SPO website.

This Training is Designed for (5)
This training is designed specifically for the personnel who will have the buyer role on HIePRO. With the exception of eAdministrators , SPO does not require that the other roles take this workshop and it is not designed for them. However, some departments may require certain staff take this training.

This workshop is designed for personnel who:

- Have or will have written delegated authority (per the SPO form SPO-036) to procure and procure using eProcurement; and
- Have taken the required workshops for the method of procurement to be used; and
- Are given access to HIePRO by their eAdministrator;
- eAdministrators also take this training.- Your eAdministrator is your first point of contact when you have a HIePRO question.

This webinar is intended to: (6)
Notice that this training doesn't teach you about the method of procurement – you need to know that before taking this webinar series. HIePRO is NOT a method of procurement. It is a tool to help you conduct a solicitation in a more transparent and efficient way.

Before You Procure/Administer Contract (7)
Just a reminder before you procure ANYTHING
You must have delegation and have taken required training.

Required Training (8)
So what SPO webinars must you take to conduct a procurement on HIePRO?
First – you need to take the appropriate training for the method of procurement you will conduct on HIePRO:

- SPO 120 - Small Purchase Method of Procurement, and/or
- SPO 100 - Competitive Sealed Bidding
  - If you will be conducting an IFB you must also take: SPO 150 - Insurance Requirements for Contracts.

You also need to take:

- SPO 001 - Procurement Basics
- SPO 127 - Understanding, Detecting and Preventing Anti-Trust Violations is required for all methods of procurement.
- SPO 301 – HIePRO Buyer Training (all parts)

If procuring for construction you must also take:

- SPO 130 – Construction Procurements
- SPO 185 - Prevailing Wage, Certified Payroll and Contract Agency Responsibilities.

Definitions (9)
Just a couple of definitions so we know we are all talking about the same thing on HIePRO. There are more definitions in the HIePRO Program Manual.
In different places you may see Dept. eAdministrator/ eAdministrator / Dept. Administrator – they are all referring to the same role, that is ,the Department or CPO Jurisdiction eProcurement Administrator or their alternates.
The listing of eAdministrators is on the SPO website.
Select **Manual for State and County Personnel** and then the **Dept/CPO Administrators Contacts** tile**.**

Definitions *Continued (10)*
For the Purposes of HIePRO
RFQ is the small purchase method of procurement pursuant to HRS 103D-305
IFB also known as the invitation for bid, is the competitive sealed bidding method of procurement pursuant to HRS 103D-302
There are additional definitions in the HIePRO Program Manual

What is eProcurement? (11)
Basically it is doing procurement using an online application to create an Open & transparent system for vendors to compete for state contracts electronically. What do buyers and vendors do on an eProcurement system?
Buyers issue Solicitations & addenda.
Vendors ask questions and buyers issue answers. (In most eProcurement applications)
Vendors submit their offers.
Virtual (online) Bid (or quote) opening. In HIePRO for small purchase request for quotes and IFBs*, there is an automatic opening after the solicitation closes. That is,* vendors who log in may see other vendors bids once the offer due date and time has passed.
Buyers issue Award Notices.
Solicitations and awards are searchable.

About HIePRO (12)
We Pronounce it [hi-pro] no e
Solicitation notices & awards- posted to a public site automatically. (with the exception to of small purchase request for quotes that the buyer has limited to Hawaii only vendors)
HIePRO has Pre-bid conference notice, Q&A section,
Addenda are issued on HIePRO.
Offers must be submitted on HIePRO. (Cannot accept them if vendors mail/email them)

Your role and responsibilities as a buyer…(13)

Buyer Responsibilities (14)
A Little bit about Buyer responsibilities. What is a buyer responsible for:

- The buyer Maintains security of HIePRO and its data.
- Serves as the point-of-contact with vendors for the solicitation.
- Issues the procurement by following the procurement procedures for the method of procurement and provides
- Provides clear written specifications, minimum qualifications as applicable, and administrative requirements. (HIePRO doesn't do it for you. If it did, the HIePRO application would cost much more and this training would be a week long.)
- Lastly, the buyer follows to the procurement code of ethics.

Maintaining Security (15)
HIePRO accounts may NOT be 'shared'. Your name is on the account and its use is your responsibility. Do not ‘lend’ your account.
Maintain security of your account. Your login is your email which means your password is even more important and you must protect your password. Don’t do things like post your password on your computer monitor. Note that you will be prompted to change it every 3 months.
Data in HIePRO must also be kept secure.
Log out of HIePRO when you step away from your computer.
Procurement data is also subject to requirements for open information. (FOIA) Make sure you know when information must be kept confidential and when it must be released. And Know what is on the public site.

Follow Procurement Procedures (16)
The statutes, Admin Rules and Procurement Circulars are they are there for your protection.
And you have to do more than just attend the webinars. Procurement rules change. You are not required to take training over and over (but you can). You are responsible for staying up to date. You can do that by checking the website each time you procure. Go to the Procurement Circulars, sort them by date with the most recent first; especially a few weeks after legislature adjourns. Check the manuals and training handouts for updates. Check the webpages on the method of procurement you will be utilizing.
Remember also, what you are buying may also be subject to statutes/admin rules that are not in the procurement statutes/rules. For instance, the apprenticeship and construction. You have to be the expert in what you are buying.

Point-of-Contact with Vendors (17)
You are the point of contact with the vendor. If the vendor asks a question and you don’t know the answer, tell the vendor you will get back to them. Don’t send the vendor off to ask someone else. There are a couple of exceptions to that:
If the vendor is having problems with the HIePRO application (forgot their login or a button does not work, provide them with the HIC contact info on the HIePRO landing page on the right.
if they have policy questions on how/why HIePRO is used, provide them with SPO contact information.

Ethical Procurement (18)
Conducting an ethical procurement is critical. It reflects not only on you but on every one who purchases for the statE

There needs to be no conflict of interest or even appearance of conflict.
When you have access to HIePRO as a user you have access to information about every vendor in HIePRO. You must be an employee of the State through the personnel process. You cannot be hired through the contracting process because that makes you a vendor. It would not be fair for one vendor to have access to other vendors information. HIePRO buyers may not be a vendor to the state- even if it is for something entirely different than what you do or for another department.

Other HIePRO Roles and Their Responsibilities (19)

Other roles and Responsibilities (20)
The eAdministrator Has the primary responsibility to oversee HIePRO for the department (or CPO Jurisdiction). They ensure security, control who has access, make sure it is used properly, and are the point-of-contact for department buyers.

The **system** administrator oversees HIePRO for the State and serves as the point-of-contact with the departments and CPO jurisdictions and with the vendor administering HIePRO, Hawaii Information Consortium, LLC (HIC), the vendor for our State portal.

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Other roles and Responsibilities - continued(21)
These are optional roles - Not every department uses them.

Approvers – Most departments do use them.

- Approves solicitation & addenda; and or
- Approves award & contract amendments
    - check before you procure to see if you should have an approver,

Requester- this is a new optional role to help centralize procurement functions. Not many departments are using this role yet.

Non-procurement personnel who are the experts in the goods/services to be purchased enter the specifications and other requirements, a buyer picks up the request and finalizes it and issues the solicitation.

About Commodity Codes (22)

Commodity Codes Purpose (23)
We use Commodity codes to connect vendors with appropriate solicitations. We use the NIGP commodity codes which are proprietary.

Codes are also used to conduct analyses of where our expenditures are.

About NIGP Commodity Codes (24)
The codes we use were developed by the National Institute of Governmental Purchasing now called the Public Procurement Institute.
We use the 5 digit version

- The first 3 digits are the class. There are over 300 classes.
- The second 2 digits are the goods/service/construction and there are over 7,000. You probably don't want to print out all the codes.

Numbering is somewhat alphabetical.

- Classes up to 899 – are for goods, that is, stuff.
- Classes beginning with 900 and above are for services, including construction.

Common Commodity Codes (25)
As an illustration here are some of the most commonly used commodity codes
Class 071 – Automobiles, Sch. Buses, SUVs and Vans
O71**80- SUV type vehicles**
07190- Vans, cargo
910**39- janitorial/custodial services**
91027- garbage, trash removal
91036- heating, air conditioning maintenance & repair

Finding Commodity Codes (26)
You can see Commodity codes by class without logging in.
You can search by key word (after logging in). **When you do search** Keep it short, one word or part of a word.
You can also research commodity codes by Searching vendors.
After selecting the code, search for vendors by commodity code to verify that you've gotten it correct; or
If you are unsure of the commodity code there is a vendor who delivers the goods/services you need that you know is in HIePRO, you can search for the vendor in the vendor search and review their commodity codes.

Just a reminder that Commodity Codes are Not Procurement Methods (27)
We use commodity codes primarily to link the right vendors with the right procurements. Just remember that this is just an NIGP description and is NOT the same as the professional services method of procurement. At this time, professional services method of procurement is not conducted on HIePRO.

Getting Access to HIePRO (28)

Obtaining a HIePRO Account (29) is a 2 step process.
You must have an eHawaii.gov account (some may already have one);
eAdministrator grants you access when they have **certain information**
SPO has some forms departments may use for requesting accounts but we have several forms so it may be done a number of different ways and departments tend to take the forms and tweak them so save yourself some time and effort by checking on your departments procedure before doing anything.

The number of accounts per dept is limited. Not everyone should have an account. It is a security issue. Only your eAdministrator has the ability to grant access to HIePRO. Check with your eAdministrator for the process for your dept.

Not sure if you already have an eHawaii.gov account? (30)
You may already have an eHawaii account if you log in to access HCE, eCrim (law enforcement), boating registration, etc.
If you are not sure, create an account - use your work email.
If you already have an account you will receive the message one already exists for your email. There will be instructions for retrieving your password.

Getting Access/Permission to use HIePRO (31)
This is a description of the information you will need to submit to your eAdministrator. You MUST check with your eAdministrator for forms and procedures.

Creating an eHawaii.gov account (32)
Here is the how-to for creating an eHawaii.gov account. The procedure is also in the Buyer Quick Reference and on the HIePRO site.

Forgot your password? (33)
Here are some instructions if you forget your password. There is also some help information on the HIePRO site.

There are 2 HIePRO sites (34)
HIePRO has 2 sites

- One where you enter your solicitations – the production site.
- And one where you can practice entering solicitations – the training site.

They are two entirely different sites and you must go through separate registration process for each.

The HIePRO Training Site: A Place to Practice Issuing Solicitations (35)
You will see the training site a little later when we walk through entering a solicitation.

Training site (36)
Here is what you need to do to gain access to the training site.

When Using the HIePRO Training Site (37)
Although it is just a training site, it is not a private training site.
Vendors have access so they can practice as well. You don't want to enter anything confidential in this site.
Also, the training site is not connected to HCE. All vendors appear to be non-compliant in the training site.

Before Entering a Solicitation in HIePRO: Research… (38)

Before Entering Your Solicitation Do Your Research (39)
HIePRO doesn't do it all for you. You need to know what you need and it must be articulated in as much detail as needed in writing. Remember, your award goes to the lowest responsive, responsible offer.

Do your research ahead of time; writing clear specifications and minimum requirements, finding whether there are vendors who can deliver the goods and services you are specifying and whether they are in HIePRO; selecting commodity codes. If vendors you would like to submit a response are not are not in HIePRO, contact them, let them you know will be procuring in HIePRO and how to get registered in HIePRO.
Just direct them to hiepro.hawaii.gov

To Enter a Solicitation in HIePRO (40)
This is a quick summary of all the information you will need. As you can see, there is a lot and it requires that you plan ahead.

Questions (41)
If you have questions, contact your eAdministrator after you have reviewed the training resources mentioned earlier and the HIePRO FAQs.

Navigating HIePRO: An Introduction…http://HIePRO.hawaii.gov (42)
Next we will go to the production site and learn a little about the HIePRO landing page and buyer dashboard.

(Point with mouse or highlight) So this is HIePRO. We are on the production site where you will be entering your solicitations.
At the top of the page is an area with a black background.
(Point to helpchat) Toward the right, you will see help chat. Selecting this link connects to a chat with Hawaii Information Consortium, (HIC) the vendor providing the HIePRO application. This link is primarily for vendors. It is manned by HIC staff. They know about the application. They do not know about procurement.
As a buyer, you can use it if you are having problems logging in; if there is a problem with the application itself, for instance if a window doesn't open, or if you need to find a screen you have seen in the past but cannot remember how to get to it.

Do not use help chat to for questions about commodity codes, the unit of measure or any procurement-related questions. Contact your eAdministrator if you cannot find the answer in the training reference materials.
Below the black area on the right is a cellphone, laptop and tablet icons. There is nothing to click, it just means this application is mobile friendly,
Below that you'll see a green or teal header.
On the left is **Home** -that is this page, the HIePRO landing page.
Next to that is Commodity codes. This is where you view commodity codes by class.
(click commodity codes)
(Slowly scroll to class 898) When you select it, a list of over 300 classes appears. Notice that they are alphabetical and all goods (or stuff) until you get to class 898, X-ray. Classes 900 and above are services including construction.
(select a class) Each class is a link. When you select the class name, all the codes in that class appear.
(select search) Moving to the right on the green header, you will see Public Search. Select this and you will be able to search solicitations that are open to all vendors on HIePRO. Note that I didn't say all solicitations. This application allows buyers to limit small purchase method of procurement solicitations to Hawaii-only vendors. If the buyer chooses this option, vendors registered in HIePRO who have not entered a Hawaii address cannot even see the solicitation. Small Purchase solicitations for which the buyer has chosen the Hawaii vendors -only option will NOT appear on the public site. It would cause a great deal of confusion. Non Hawaii vendors would see the Hawaii-only solicitations on the public site, then log in and not be able to find them. This Hawaii Vendors only option is available for small purchase request for quotes (RFQs) & is NOT an option for competitive sealed bids (IFBs) or competitive sealed proposals (RFPs). If you want your solicitation to be on the public site do not select the option to limit it to Hawaii-only vendors.
(select search button) Notice there are a number of parameters to search for solicitations. If you want to view all solicitations, select the search button without choosing any parameters.
(Select solicitation number
(point to the tabs) To view the details of a solicitation, select the solicitation number. Information about the solicitation is on 3 tabs on the public search.

(scroll down slowly) The General Information tab is the default view.
(scroll back to the tabs) On this tab you will see : the department issuing the solicitation, offer due date, details of the pre-offer conference, question and answer due dates/times, delivery points and billing contacts and attachments that apply to all line items.
(Select line item tab and scroll down) The next tab is the line item tab and contains details about the line items.
(select the line item number leave open a 5 seconds, close)
After selecting the line item tab, you will see a listing of the line items. To see the details of each line item, select the line item number.

(Select Instructions tab) The third and final tab on the public site is the instructions for the solicitation.
(Scroll to bottom of page) Notice that on this public site there is no place for a vendor to respond to the solicitation. Vendors must log in to respond. You may get a call from a vendor indicating he cannot respond to a solicitation, remind him he needs to be logged in to respond.
(Click public search again)
On the public search, there are 2 tabs. The second tab is for searching awards.
(Select Awards tab) You can search all Awards in HIePRO. Like solicitations, there are a number of parameters by which you can search for awards or, you can select search button to view all.
(Select an award number) To view a contract award, select the award number. Information is in tabs.
(Point to solicitation number) Note that the solicitation number is a link to the solicitation.
(Select back button) One more thing about getting around in HIePRO.
(Point to the buttons at top of list) Wherever there is a listing you will find 2 buttons.
(Select the button with arrows, Select dropdown)
(Select ALL) The button with the diagonal arrows allows you to control the number of records, in this case, awards, that appear on the screen. By selecting the button and the dropdown arrow you can view more or all records in a single window.
(Select bullets button, Uncheck & recheck two items) The other button that looks like bullets allows you to control which columns appear.

(Point to FAQs) The next item on the green header points to FAQs on HIePRO. This includes questions from all users and is another reference resource.
(Point to vendor registration) The very last item in this header menu is the Vendor Registration button. This is where you will direct vendors to register if they are not already in HIePRO.
(Select Home) Get back to the landing page by selecting Home.
(Point to See more info about **HIePRO**) Moving further down the page just above the login button Is the Learn more about HIePRO link.
Selecting this, and scrolling about halfway down the page will take you to HIePRO for State and County Agencies training references & info.
(Point to log in) Just below Lean more about HIePRO is the Log In button where everyone who has access to HIePRO may log in. Next to the login button you will see the Sign up link. Select sign up to create an eHawaii.gov account (the first step in gaining access to HIePRO).
(Point to vendor registration) It is also a two-step process for vendors to gain access to HIePRO. The first step is the same as buyers – you must have an eHawaii.gov account. The second step is different. Buyers must get access from their eAdministrator; vendors have to select this Vendor Registration link and, on the next page, select the Log in and Register as a Vendor button.
(Point to home) Once you have completed the buyer 2 step process, when you log in with your eHawaii.gov account the home link will become the Home Dashboard link. On the right where you see Vendor registration you will see your login/email address. If

you log in and see your email address on the right but the Home Dashboard doesn't appear, it means you have not been given access. If a vendor logs in and does not see the home dashboard, it means the vendor has not completed the second step of registering in **HIePRO**, register as a vendor. You should direct the vendor to the Vendor Registration link.

(Select sign up, open each section if closed) Creating an eHawaii.gov account

Creating an eHawaii.gov account, that first step, is fairly simple and straightforward. Select Sign-up. Open each section, follow the instructions and complete the information.

(Point to question icon) When creating the password, click the little question icon above the field. It will tell you what you need as a minimum for a password; Remember the answer to the secret question. Should you forget your password, you will need the answer to retrieve your password.

(Point to subscriber info) For contact information provide your work address, phone and email. Skip the subscriber account section, it is for vendors.

(Point to checkbox) Select the Agree to the terms of the agreement checkbox and select the create account button. Step one for gaining access to HIePRO is easy.

(Enter login and password) The Buyer Dashboard

Next we will log in and look at the buyer dashboard. Notice that the overall look is the same - but there are differences.

(Point to Home Dashboard) Notice the header menu. It says Home DASHBOARD instead of just Home. The link to Commodity codes is still there. Where it used to say Public search, it now says search. That is another clue that you have logged in.

(Select Search and Vendor tab) The Vendor Tab

If you select Search and look at the tabs, you will see one more tab that was not on the public site, the vendor tab.

(Enter 'office' in commodity code search, select office furniture, custom, select button to show all vendors) You may search for vendors by name or by commodity code. Here you can do your homework by conducting your research on whether the vendors you expect or want to respond are in HIePRO. This is also where you can do some research on commodity codes. If you think you have the right commodity code, enter it and look at all the vendors registered for that commodity code. Are they the vendors you would expect to see? If so, you probably have the right commodity code, if not maybe you need to do more research.

(Select a vendor, Select commodity code tab) If you are having doubts or problems finding the proper commodity code and you know there is/are a vendor or vendors who deliver the goods or services and the vendor is in HIePRO, search for a vendor by name. (The system searches both the legal name and the DBA). Once you find the vendor, select the vendor name and look at the second tab, the commodity code tab. Here you will see all the vendor codes the vendor registered for. It may help you find the right code.

(Point to email address, Select dropdown) All the way to the right, where it said Vendor registration on the public site, it now has your login, that is, your email address. Selecting the dropdown next to your login you will see logout - and update your ehawaii.gov account. If you need to change your address, phone, name, email,

password or secret question, this is where you do it. Only you have access to change this information.
(Slowly scroll down) Now let's move down the dashboard. If you have solicitations that require attention, they will be listed at the top of the dashboard. This buyer has none.
(Scroll to tiles) Below that you will see several tiles.
(Select View my profile tile) On the left is View my profile and approval paths. Selecting it will show your name, email, phone and department.
It also shows the approval paths to which you are assigned, that is, approval paths that your solicitations and/or awards must travel.
Looking at your profile allows you to know whether your solicitation will be subject to an approval path before you issue your solicitation.
(Scroll down) Below that you will see if you are assigned as an approver in any approval paths.
(Point to & select back to dashboard) Going back to the dashboard, you will select the middle tile to create a new solicitation.
(Select Create a Solicitation Tile Point to first 3 tabs) Notice the first 3 tabs are similar to the public view. We will go into this in more detail in the next section.
(Select home dashboard) When I leave this page there is a pop-up asking if I am sure I want to leave. If you have entered information, you will lose whatever information you have entered. Select save as draft at the bottom of the page to save your work.
(Point to My solicitations and awards Select it) Back at the dashboard, the tile on the right is My solicitations and awards. Select this to see your current, open solicitations and awards.
(Point to the checkboxes for closed/cancelled) Notice the two checkboxes at the top. Select the closed or cancelled solicitations checkboxes to see those.
(Point to I am out of office button) At the very bottom of the dashboard is an I am out of the office button. This is only to be used if you are an approver. Selecting it will reroute all pending approvals, that is, approvals you need to approve, to the backup if one has been assigned. Backups can only be created by the eAdministrator and are assigned by each approval route.
That is it for this first section of part 1.

As a review, what we have covered so far:
Buyer responsibilities include:
- protecting the security of HIePRO,
- providing specifications and any administrative requirements)
- conducting ethical procurements
- following procurement statutes, Hawaii Administrative Rules, Procurement Circulars and departmental procedures.

You have also learned:
- Gaining access to HIePRO is a two-step process.
- The details of the HIePRO landing page (the home page) and what the public can see without logging in, and
- The buyer dashboard & what you will see once you log in.

In the next section you will learn how to enter a solicitation and to answer questions.

Title slide (slide 1)
We are now on the second half of SPO 301 Part 1

You are welcome to review the training or parts of it, again, whenever you need to.

What will be covered (slide 2)
We'll cover administrative fees to vendors, approval routes, and vendor instructions. We will walk through entering a solicitation in **HIePRO** and also cover how to answer questions in HIePRO.

In part 2
We will step through issuing an addenda, review of the abstract of offers and vendor attachments once the solicitation closes and issuing an award.

Vendor Transaction Fees: How HIePRO is Funded (3)
When eProcurement passed in 2006 it was done so as an unfunded initiative. That means the state was tasked to implement it but no funds were appropriated. We found that many states were in a similar position. Like many other states, an administrative fee was adopted to be paid by the vendor directly to the vendor contracted to implement and manage the eProcurement system. Vendors are advised of this in the in the HIePRO instructions in the solicitation and award. If you hold a pre-offer conference you should also draw attention to it.
Vendors are advised to consider this fee when calculating and establishing their price. You should consider this fee when estimating your costs.

Vendor Transaction Fees (4)
The transaction fee is point .75% of the award amount or estimated amount at the time you issue the notice of award. That means for every $1000 awarded, the vendor pays $7.50. There is also a cap of $5,000 per vendor per award. The vendor pays the vendor of the HIePRO application, Hawaii Information Consortium, (HIC). HIC is the state's portal manager. It is very important that you have accurate pricing and good estimates when you issue your notice of award. Note that if are buying less than your estimate and know it at the time of award. You may adjust the award accordingly provided it is allowable and you provide an explanation in HIePRO. More about this when we create an award.

About Approvals and Approval Paths in HIePRO (5)
Approval are not done on the fly in HIePRO. Approval paths in HIePRO must be built in advance.
You cannot decide who to send a solicitation to for Approval in HIePRO. The path has to be built and active before you release your solicitation or award.

About Approval Paths (6)
Approval paths must be created and assigned in advance in HIePRO and can be for solicitations and addenda or awards and contract amendments).

Approval paths can have several approvers. They are always consecutive. If the first approver in the path does not approve, there is no way for the second approver to approve. Subsequent approvers do not have access until the preceding approver, approves.

Your Administrator needs to create the approval path and most of the time they are not psychic. They do not know unless someone tells them. If you should have an approval path in HIePRO, be sure to check with your eAdministrator for your departmental process. There are forms on the SPO website in the HIePRO section. These are optional forms for department use.

Approvals are not mandatory in HIePRO. It is the decision of each department. Approvals are a good check and balance for HIePRO. SPO uses them for that purpose. Do NOT set yourself up as your own approver.

Building Approval Paths: Mandatory Criteria (7)
Approval paths have to be assigned to a function, either solicitation or award. They also have to be assigned to a method of procurement.
All addenda will flow through the same path as a solicitation. All award/contract amendments will flow through the same path as an award.

Building Approval Paths: Amount Range (8)
An approval path can be assigned an amount range instead of applying to all solicitations or awards. As an example, a department may set up an approval path for solicitations estimated at $100,000 or less go through one approval path, and solicitations of $100,000 to 2 million dollars to go through another approval path.
The amount range is only for determining which or whether it will go through an approval path. It does not limit a buyer from issuing a solicitation for an amount over a path range amount.

Assigning Approval Paths (9)
Only users with a HIePRO account can be assigned as an approver. Lastly, approvals are fine and wonderful but if they are not assigned to a buyer, nothing will go on the approval path.

Vendor instructions (10)
Vendor instructions are in both solicitations and awards.
Instructions are NOT the same as terms and conditions or specifications and requirements. You should NOT use the instructions for those purposes. They may not carry the same weight as in a document or attachment that is clearly labeled as Terms & Conditions, Specifications, Administrative Requirements, etc.

HIePRO Vendor Instructions: Mandatory & Optional (11)
There are mandatory instructions in HIePRO that will be added to your solicitation automatically. Your job is to make sure you understand them and that you do not enter

any conflicting information in your specs or terms. Optional instructions are in HIePRO but you must select them if you want them on your solicitation or award.
Instructions can be created by the system administrator, your eAdministrator or the buyer for a specific solicitation.

HIePRO Vendor Instructions (12)
There are several mandatory instructions in HIePRO and we'll cover them when we walk through creating a solicitation. You should always review the instructions when you are creating a solicitation as they may be modified, added or deleted. If you do not understand an instruction, contact your eAdministrator. Instructions are part of your solicitation.

Vendor Instructions (cont.) (13)
Just a reminder to not use the instructions section for items that belong elsewhere in your solicitation.

Questions and Answers (14)
This is a section you should always include. It is best to have everything in writing. Doing so enables all vendors get the same information at the same time. It also protects you - there is no dispute over what you told one vendor over another. It is all there in writing.

About the Questions and answers Section (15)
Please note that answers are published on the date and time you establish when you create your solicitation,
If the answer due date and time comes and you have not answered all the questions, the answers go out anyway. The good news- you can later add answers you missed. If you are not going to be able to enter the answers in time, you should issue an addenda prior to the due date/time extending the answer due date.   If any answers are a significant clarification, or cause an addition , deletion or modification of your solicitation, issue an addenda amending the changed section of your solicitation.

Entering a Solicitation in HIePRO (16)

To Enter a Solicitation in HIePRO, Plan Your Timeline (17)
Before you enter a solicitation you want to plan properly and that includes building your timeline thoughtfully.
Start with the date you need the goods/services by and build your timeline backwards.

Summary of Information Needed (18)
This is most of the information you need to enter a solicitation. See why it is important you do your homework first?

In Summary, 3 Things (19)
Just because something is do-able in HIePRO, does not mean it is okay to do it. You need to know if something is allowable. If it was not allowable when you didn't use HIePRO, it is not allowable in HIePRO.
HIePRO is NOT a method of procurement. It is just a tool.

If someone asks you what method of procurement you are using, DO NOT say HIePRO. You need to know what method is most appropriate. Not sure? ask your eAdministrator. Still not sure? Call SPO.

You need to know exactly what you want and it has to be clear and in writing in your HIePRO solicitation.

Questions? (20)
Contact Info if you have questions

Entering a Solicitation into HIePRO and Answering Questions (21)

Point to plain background The training Site. As indicated earlier HIePRO has 2 sites. the training site where you can practice and the production site where you will enter your solicitations. We'll be using the training site demonstrate creating a solicitation. This is the training site. It looks a lot like the production site with a few differences. Remember the picture that was in the background? The training site has no pretty picture.
Point to URL You can also tell by the URL. It has training in the URL.
Switch to production site This is the training site, this is the production site.
Let's see what it looks like when you are logged in the training site
Point to top of dashboard This buyer had done quite a few solicitations and the dashboard is showing solicitations that have closed but not been awarded yet.
What you need to have or do before placing place a solicitation on HIePRO you need to do your research - before you enter your solicitation, that is, what do you really need; what is the going rate; are there vendors who can provide it and are they in HIePRO? This is known as market research.
• If you are properly prepared, when you enter a solicitation you will have the following when you log into HIePRO:
• requirements/specifications including, minimum qualifications of the vendor, if applicable;
• what the vendor must submit so you can verify they meet minimum specifications or qualifications;
• estimated cost;
• administrative requirements,special conditions/terms and conditions;
• commodity codes - you need to be sure the correct commodity codes are used so the right vendors get notified;
• timeline and due dates; including pre-offer conference and question and answer deadline dates and times.

- You'll also need billing and delivery information;

(Select Search, select vendor tab). About vendor research - If you know of vendors, you need to verify if they are in HIePRO using the vendor search. The vendor search is a tab on your search menu available to buyers logged in. To search for a vendor enter part of the name and select search. Select the vendor name link when it appears. You can select the vendors commodity code tab to see the commodity codes the vendor included in their profile. (Type in Bonnie, Select vendor code tab, scroll tab)

(Enter commodity code in field) You can also search for vendors by commodity code. Go to home page point to right side Helpful Information If vendors are not in HIePRO, let them know you will be procuring in HIePRO and how to sign up. Direct them to the HIePRO landing page to sign up. There is Helpful Information section to the right with videos and a guide and a Learn More about HIePRO link above the Log In button

(Select Create new solicitation tile) It is relatively easy to Create a solicitation if you are prepared, that is, if you have done your research and planned it out. After logging in, select Create New solicitation tile from your dashboard. If you do not see your dashboard, select Home dashboard from the header menu,

(Point to tabs) Notice there are several tabs you will use to enter your information: general information, line items, instructions and vendor notification. Additional tabs will appear when you select certain options in creating your solicitation. We'll begin with the first tab, general information.

(Scroll part way down page and back again) **General Information Tab**
We will begin completing the fields. They are generally text boxes, date fields or dropdowns where you select one or more choices. There are a few yes or no questions, too.

Department Solicitation Number is optional. Use this only if needed. HIePRO will assign a number to the solicitation automatically.

(Select purchasing from Division) **Division** - Select your division from the dropdown.

(Select small purchase RFQ from Method of Proc dropdown) **Method of procurement** - It is important that you select the correct method of procurement. If you conduct a competitive sealed bid (IFB) as a small purchase request for quote (RFQ) you will need to cancel the solicitation and conduct it properly. Some of you will only have one choice, usually RFQ. If it is not the correct choice for the solicitation you wish to conduct, contact your eAdministrator.

(Select dropdown, select goods & services) **Type of procurement** - Note that Health & Human Services is there for future use and is not being conducted on HIePRO as of the date of this recording.

(In Solicitation Title enter- title) **Solicitation Title** - Enter a solicitation title that is descriptive of what you are buying. Note that this is a different field from the line item title which we will see on the next tab. If you are purchasing only one line item you might enter the same thing in this field as your line item title filed. If you are buying more than one line item, the solicitation title may be different than your line item titles. For instance, if you are buying trucks and SUVs the solicitation title may be vehicles and your line item titles may be trucks and SUVs respectively. If you are only buying a truck, your both your solicitation and line item title might be Truck.

(Enter description) **Solicitation Description** - Enter a brief description of the solicitation. For instance, following the previous example you may enter "2 trucks and an SUV." Your detailed description or specifications should go in the line items tab.

(Select different release date from calendar) Release date defaults to the current day. You can set it for a future date.

Note the release date may change if you have an approver and the approver does not approve it by the day the buyer releases it, or the day the buyer schedules it for release. It is important for you to keep track of when the solicitation is actually released and the number of days between the date it is released and the date offers are due. You may need to extend the offer due date and time, especially if you are using the competitive sealed bid (IFB) method of procurement

(Select offer due date) **Offer due date** - select your offer due date and time from the calendar. If you fail to select a time, the default is 2:00 PM HST.

(Select yes, enter date & time)
Pre-offer conference - You must select yes or no. If you are holding a pre-offer conference, select yes and complete all the fields that open upon selecting yes. Examples of buyer comments placed in the Pre-Offer comments field are: where to park,

- if an ID has to be presented at the door;
- if the pre-offer conference is conducted in a secure facility there is often a requirement to call a number and give names of who will attend in advance.
- If you are conducting a pre-offer conference by webinar, you can enter the link to register for the webinar in the pre-offer comments.

(Specifications Contact Select same as buyer) Specifications Contact- this section was added at request of a few buyers. If you are the contact, check same as buyer. A word of caution about naming someone other than you as the specifications contact, if they are knowledgeable of the subject matter but not knowledgeable of procurement. Buyers have had to cancel several procurements because of the comments or actions made by specifications contacts to vendors simply because the contacts were not familiar with procurement requirements. We recommend you enter same as buyer and utilize the Q

& A section. You can then pass questions to the subject matter expert and review their answers before you enter them in the Q & A section.
(Select date) **Contract Start Date** - enter the estimated date of the contract start date if this is a contract that will occur over time. Use the calendar.
(Select date) **Delivery/End of Contract Date** - If this contract occurs over time enter the end of the contract date. If this is a one time delivery contract (for instance, for a part), enter the delivery date and leave the Contract Start Date field blank.

(Show to Hawaii Vendors only Select "no") **Show to HI Vendors Only** - This option will only appear when small purchase request for quote is selected. If you select YES, the solicitation will only be visible to vendors registered in HIePRO with a Hawaii address. Note that the solicitation will NOT show on the public website as there is no way of to tell a Hawaii vendor from a non-Hawaii vendor until they have logged in. it also would be confusing and misleading to have a solicitation on the public website and then have a non-Hawaii vendor log in and not be able to find it.

(Show Islands dropdown. Select Kauai, remove, select Oahu) **Islands** - enter the islands to which the goods are services are to be delivered. You can also select statewide. If you select the wrong isleand simply remove it.

(Allow for submission of questions Select yes) **Allow for Submission of Questions** - (Q & A) We recommend you utilize this option. Select YES and complete all the fields. Be sure to select a due date and time for both questions and answers. Note that a due time of 12:00 AM is 59 seconds after the beginning of the date listed, that is 59 seconds after midnight of the day before. If you are holding a pre-offer conference, it makes sense to have questions due after the conference date

(**Allow for Interested Vendors list**, select NO)**Allow for Interested Vendors List** This is mainly used for construction when there will be primes and subcontractors. - This field was designed for times when vendors may need to get together with subcontractors to submit a proposal or bid. Most, if not all of the time you will select NO. Do not select yes if it is not appropriate to your solicitation. It is confusing to vendors.

(Enter delivery point) **Delivery Points** - if there are only 1 or a few delivery points, select the Add new delivery point button and complete the fields that appear. If there are several delivery points or many and you plan to include them in an attachment with the specifications, select Yes under There are various and unknown delivery points.

(Select John Farmer) **Billing Information** - There are several choices for entering billing information - you may enter a new address and contact for billing in the fields below. In the dropdown you will be able to choose the buyer, a delivery point, if you entered one in the section before or Various options. Use various options if there are many billing points and you will be including them in an attachment with your specifications or requirements.
General Comments - Enter any comments you wish to make to the vendor about the solicitation in general. This is an optional field. This is not the place for specifications.

(Enter name) **Procurement Officer** - enter the procurement officer for the solicitation. Note that the procurement officer for the solicitation is NOT SPO. It is determined by your department and may vary from solicitation to solicitation.

Select browse
Upload an attachment call administrative requirements Attachments - upload any attachments that apply to all line items by selecting the BROWSE button. You will know your attachments have successfully uploaded when they appear below the word Attachments in the section Heading. To delete an attachment, select the REMOVE button.
Select 103D General Conditions and upload If you wish to upload the Chapter 103D General Conditions be sure to select the checkbox and then select upload. Selecting the checkbox alone will not upload the general conditions.
Select Next button
Rabbits= 04085 Select the NEXT button to move to the next tab. You can also move to the top of the page and select the tab.`
Select add new line item, enter
RABBITS=04085 Line Items Tab
Adding a Line Item - Each solicitation must have at least one line item. Select the Add New Line item button and a window will appear. In the first field, if you have already done your homework, you can enter the commodity code. You can also enter a word to search for the appropriate commodity code. `
Select the add button After you find the correct commodity code, select the add button to the right of the field.
Point to add field If you wish to select another commodity code follow the same procedure.
Point to Remove If you decide a commodity code is not appropriate, you can delete it by selecting the remove button.
Enter 15 Quantity & Unit of Measure.
Quantity - If you are not sure exactly how much you will need, enter an estimate and state in your specifications that the quantities are estimates and not guaranteed. In your specifications you may want to enter a minimum you will purchase for better pricing.
For unit of measure select each Unit of measure - select the unit of measure that makes sense for what you are buying. Most of the time you will select each when you are purchasing goods (stuff). If you are procuring a one time service, the unit of measure may be a job. If it is a recurring service you will select a unit of time, such as a year, a month or an hour. You want to use industry standards whenever possible. Vendors are busy too, and may not read it correctly if you enter something unusual. You don't want to have to resolicit.

Enter 500 Enter the estimated price per unit. This remains hidden with one exception which will be explained next.
Point to buttons The buttons:

Note: grayed buttons mean they are not selected
Make estimate public - Select this button only if you want the estimated price you just entered to be seen by the vendors. Most of the time you will not select it.

Point to buttons - do not select	the remaining buttons - DO not select any of the buttons unless you know what they are and it is mandatory for the vendor to submit the information. If you select any of these buttons, the vendor will NOT be able to submit an offer unless it is completed. This includes:

- o	Manufacturer Name
- o	Manuafacturer ID
- o	Manufacturer Part Number
- o	Manufacturer URL
- o	Item ID

In Title, enter rabbits, male	Title- enter the title or name of the line item.
To description Add rabbits for sustainable demonstration farming project as per attached	Description - this is the line item description. If your specifications are short enough you can place them in this field. If you prefer to have your specifications in an attachment, enter a short description of the goods or services and refer to the attachment.
Add "Rabbit specs2014"	Attached Files - add the specification attachments here. You may enter a name for each attachment to make them easier to identify.
Upload file and point to where it appears	Select the browse button, find the attachment, select add. Then select UPLOAD. You know your attachments have been successfully uploaded when they appear directly below the words Attached Files in the section Heading.

(Select submit)	When you are done, select submit. This is submitting your line item, not your solicitation.
(Point to **add line items** button)	To add another line item, select the add line item button and repeat the procedure.
(Point to question, click yes)	Notice the question below Add New Line Item.
Vendors are allowed to submit by line item? Select YES if there are multiple line items and you want to allow vendors to be able to submit an offer for one or some of the line items.

(Click no)	Select NO if vendors must submit an offer for all line items.
If you have only one line item select either yes or no (but you have to select one).

If you have more than one line item, you should indicate in your specifications, admin requirements or terms and conditions the method you will use to award: Lowest overall price for all line items or lowest price for each line item.

(Select Next)	When you have completed all information on this tab select next .

(Point to Instructions list)	**Instructions Tab**

Instructions - Be sure you review all instructions and are sure of what they mean. If you have any questions, contact your eAdministrator. There are 2 basic types of instructions, mandatory and optional. Mandatory instructions are under the Instructions List section at the top of the page. You cannot remove these instructions and they will appear on your solicitation. Be sure you do not issue any information contrary to these instructions in your solicitation.
(Slowly scroll down and back to first instruction) At the time of this recording, mandatory instructions include but are not limited to:
RESPONSES must be made in HIePRO. Vendor cannot mail or email them to you. Questions must be directed to the buyer (unless otherwise indicated).

TRANSACTION FEES - this is how HIePRO is paid for. Vendors pay our vendor for HIePRO, Hawaii Information Consortium (HIC) a fee of .75% of the award or estimated award. This is capped at $5,000 per award to a vendor and is due 30 days net (after notice of award). Vendors should take this fee into consideration when submitting their offer and may not charge separately afterward. This instruction also appears in the notice of award.

(Point to offer deemed firm) **OFFER DEEMED FIRM** - This states that by submitting an offer the submitter is certifying they have the authority to submit for their company and they or the company is not in collusion.

(Scroll to Compliance instruction) **Compliance, Documentation and HCE** - this instruction talks about the requirement that vendors be compliant with statute and indicates they may demonstrate their compliance through HCE. Please note if a vendor is not in HCE, that alone is not justification for non-selection. Vendors have the right to submit paper documents. See Procurement circular 2011-02 Amendment 1, Guidance on HRS 103D-310(c).

(Scroll to Tax instruction) **HAWAII GENERAL EXCISE TAX** - This instruction informs vendors that taxes must be included in price offered. It does not hurt to also include it in your specifications. This instruction is also on the notice of award.

(Scroll to Optional Instructions point to Add link) Optional instructions are instructions in the system that you may add to the solicitation, they are not visible to vendors unless the buyer adds them. Both the system administrator and the department administrator may add mandatory or optional instructions. To add an optional instruction to your solicitation, scroll down to the optional section and select the Add link. You may also remove the instruction if you change your mind.

The buyer may also add instructions for the solicitation. To add an instruction, scroll to the Add Instruction Section, in the title field, enter a short but informative instruction title in capital letters. In the content field enter the content of your instruction. Be sure to select ADD or the instruction will not be added. You will know it has been added when it appears in the instruction list.

Note that the instruction section should not be used to enter specifications or administrative requirements - it is only instructions. We have tried to keep instructions short to encourage vendors to read them. You can emphasize certain key requirements here, if needed. Keep in mind if you add many or large instructions, they are less likely to be read.

(Select next) After you are done select the next button or select the Vendor Notification Tab.

(Type in vendor name and add) **Vendor Notification Tab**
Use this function when you know a vendor is in HIePRO but has not included the commodity code you are using in their commodity code profile. You can add a vendor by entering the first few letters of the vendor name, selecting the vendor from the list. When you are done with this page if you are almost ready to release your solicitation, the button is at the bottom of every page.
You should review your solicitation before you release it. You can view the tabs by clicking on them.
You can also save your solicitation as a draft. You will find it on your dashboard the next time you log in and in the View My Solicitations and Awards tile.

(Select submit) **Submit for Publication:** When you submit your solicitation for publication, you will see several new tabs appear in your solicitation, depending on the options you have chosen for your solicitation, Approval Status, Q&A, Offers, Protests and History.

Next we will talk about Tabs that become visible after the buyer submits for publication
(Select Approval status tab) **Approval Status Tab:** The approval status tab will show the status of your solicitation on the approval path. This solicitation is awaiting approval of MistiApproveTng YuenTng. Once MistiApproveTng approves the solicitation, a date will appear in the date approved column.

(Point to Q & A tab) **Questions & Answers Tab:** If you have included a Question and Answer section, it will be the next tab. This is where you will check for questions and be able to answer them. More about that later.

(Go to offers tab) **Offers Tab:** This is where you will see if anyone has submitted an offer. You will see the vendor names that have submitted offers here before the submittal due date and time. Once the offer due date and time have passed you will be able to see the offer as well.

Protests Tab: There is no protest function in HIePRO. That is, vendors may still protest but it is done the way they have always done it. This tab is being designed so you can input data should there be a protest and not have to use form

(Go to History tab) **History:** The history tab is a valuable one. You will be able to see all the significant dates/times for the solicitation as well as which vendors have looked at your solicitation and when. This is particularly useful if you have received no responses yet and are wondering if the vendors know about the solicitation. If you are subject to an approval route, this tells when your approver(s) approved your solicitation. It also tells you who looked at the solicitation and when.

You will be able to see when your solicitation was released vendors who have looked at the solicitation and when.

As you can see, if you are prepared, releasing a solicitation can take much less time, as little at 10 minutes (as long as you are not explaining every step to someone.)
In the next part of this course, we will learn about answering questions.

Answering questions. While your solicitation is open and on the internet you should check periodically for questions that have been submitted. You can begin answering them as they come in and they will automatically be released on the answer due date/time.
(Point to solicitation link in Dashboard)   Here is how to answer questions.
Log in. Find your solicitation by finding it on your dashboard or selecting the View My Solicitations and Awards tile. You may also see a link on your dashboard alerting you that a question has been asked. You may also select that.

(Select Q & A tab)   Once you have found and selected your solicitation, select the Questions & Answers tab. You will see questions that have been submitted.
(Enter "andnswer to question-See Section 3 Acceptable Breeds on Page 2 of the specifications attachment in this solicitation)   Enter the answer in the field below the question.
(Select **See vendor, show tab,** .Select the q&a tab again)   You may see the vendor who submitted the question by selecting the view vendor button. Vendors are not able to see who submitted the questions.
(Point to Save Answers and select)   When you are done answering questions select save answers and release on publish date.

Please note that the answers will go out automatically on the answer due date/time you have set, regardless of whether you have answered all the questions. If the due date for the answers is approaching and you will not be able to answer all the questions in time you can issue an addendum to extend the due date for answers. If you should do so, you should also consider whether the due date /time for offers should also be extended to allow vendors to consider the new information in the answers.

(Point to Amend button)   Also, if any of the answers cause a modification, that is, an addition or deletion to your solicitation, issue an addendum as well as answering the question. Answers to questions are not formal addenda.

You must also take SPO 301 Part 2. It is shorter than Part 1 and will cover:
Addenda
Offers & Abstract

Issuing Notice of Award In part 2 of SPO 301 we will look at:

- Amending a solicitation by issuing an addendum,
- viewing submitted offers and the abstract and
- issuing a notice of award.

Part 2 is shorter than part 1.