

SPO 371 – HlePRO Dept Administrator Training

Good morning everyone. This is the HlePRO eAdministrator training. This training is for departmental eAdministrators. If you are not going to be the administrator for the department that is overseeing the eProcurement program HlePRO for the entire department then this training is not for you and is a waste of your time.

So today we'll go over very basically what is eProcurement for those of you who don't know. We'll give you an update on where we are. We'll talk a little bit about training. We'll talk about roles and responsibilities and most importantly to you what the business process is going to be for your department because that will affect what you do. We'll talk about what your jobs are as eAdministrators and some help that we'll be giving you. Some differences between HlePRO and HePS for those of you who are familiar with HePS. A little bit about the HlePRO site. I'll give an overview of that. How do you get an eHawaii.gov account? You need that to get access to HlePRO and so do your users. We'll talk about how do you give access to users, that is the buyers and approvers. We'll talk about building approval routes. And you can also have the ability, much like you did in HePS, to build instructions. Then I'll do a quick review and from time to time I will stop and ask questions.

First of all, you notice that we pronounce it HlePRO even though it's spelled HI-E-PRO. What happened was we found we had a hard time with the extra E. And it ended up becoming HEPRO. So we're just going to go ahead and pronounce it HI-PRO, but I do need you to know that it's spelled HIEPRO because if you type in HIPRO, you're not going to get to the site. This application was built specifically for the State of Hawaii. This is not an off the shelf. Testing's been conducted. It's pretty much over, but as with any application testing needs to continue. This application will change over time. Those of you who remember HePS when we first started, it looked very different now than it did when we first started. With this HlePRO, we'll have enhanced security. It's a much cleaner interface. We've learned some lessons. We're going to take an enhanced approach to training, not once every quarter. And we'll be creating videos and eventually a training module. And there is a new optional role and that is the role of the requestor. We also have a general program manual. And you can access that manual online. At the end of this workshop I'll show you where all of that is. Everybody is responsible for the program manual. My recommendation to you is that you require your users to sign off something saying they read the program manual, they're aware of the quick reference for their method of procurement, and will follow this.

A little bit about training. We'll continue to do webinars, we will also put together some videos and ultimately our goal is to put together a training module, which will differ a little bit from a video. Right now where working out the details of what will we do with the videos. We can put a video up there but we have no way of knowing who's viewed it or not and whether they've actually viewed it. Whereas with a webinar you have to sign in and we have that kind of documentation. We also know when you sign out and how much attention you paid. But by having these other things, there should be less of a time lapse between the time they actually take training and the time a buyer actually issues a HlePRO solicitation. That should mitigate some of the problem. It should also mitigate users misusing the site. Because you don't have to give everybody use now who might someday maybe do a solicitation. Only give access to those who you know are going to use it.

A little bit about roles and responsibilities. There's a number of different roles. Some of them are similar to HePS. Some of them are a little bit different. System Administrator, the Department Administrator. Since we created this, we've already done this training once, since we've created this training, one of the

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things we've decided to call the department and CPO jurisdiction administrators, eAdministrators. The reason we have decided of that is it takes a long time to get those words out and when you're doing a PowerPoint, it uses up a whole bullet. So we'll have eAdministrators. We'll have Department Alternate Administrators who are also eAdministrators. We'll have buyers. These are the people who actually conduct a solicitation. And then we have two optional roles and that is the role of the approver, the role of the requestor. And then of course there are vendors. Not really an optional role for us. Although it is for the vendor. And already we have I think it's about 1,100 vendors registered in HlePRO.

A little bit about the system administrator. The system administrator and alternates who reside in SPO have general oversight of the program and the securities of the program for the State. We are the point of contact with the eAdministrators. And we are also the point of contact with the HlePRO vendor, that is the vendor powering HlePRO and that is Hawaii Information Consortium LLC, many of you know them as HIC. They are the vendor for our State portal and this is one of the services that they are delivering. The System Administrator develops and maintains the training materials, provides consultation to eAdministrators on the business process with regard to HlePRO like you'll get questions from your department, can we do it this way or can we do it this way. If you're not sure, come to us. Or if you have a problem and you're looking for an answer, come to us. We don't guarantee an answer, but we'll show you as many workarounds as we can. We develop the statewide mandatory and optional instructions. There are also department-wide instructions that you can develop for your department or CPO jurisdiction and you can also make mandatory and optional instructions. If any of the statewide mandatory instructions are a problem for you just let me know and we'll find a way to turn it off for you. We also notify our eAdministrators of any updates and changes. We update the application if needed. Then we produce some annual report.

This is you guys, the department administrator responsibilities. Now notice we have the word primary because you can have only one department administrator for each department and you must have one if you want to participate in HlePRO and you must have at least one alternate although you can have up to 3 and more if there is a justification for it. So the department primary administrator is responsible for the oversight of the HlePRO program and again security for the department. You're the point of contact for the department users. You're the point of contact with system administrator, that is SPO. You are really the gateway for department users. You ensure that the users are the right users. You're not giving access to people who don't belong in HlePRO. You activate and deactivate the accounts. You assign the roles whether they're a buyer, a requestor, or they're going to be in an approval path. And you will determine which methods of procurement. Now I know that each of you don't individually make that determination. So those are the things you need to set up the procedures for with your division. You establish approval routes and you assign them to buyers. You establish any backups or alternates. You establish as I said earlier department-wide mandatory and optional instructions and you will be able to provide reports to your departmental personnel as needed. I do want to add at this point that Hawaii Information Consortium has offered to assist with getting your information in. So if you have a bunch of approval routes you need to create as long as you give us the appropriate information, we'll be able to put them in for you. But again you have to determine what the information is, you'll have to filter it from what you get from your division and put it in a format that makes sense for HlePRO because some people are just not going to understand.

The alternate department administrator or the alternate eAdministrator acts in the absence of the department administrator but they also assist with the duties of the primary administrator. However the

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primary administrator retains the primary responsibility. So that's why we make the distinction. Once we create you as eAdministrators in HlePRO, it all looks the same. There isn't a role called an alternate administrator. This is a policy issue not a new role. If there's more than one alternate, one of the things you'll need to do is make sure there's a policy for who's next in line if the primary administrator is not there. And again, departments may have up to 3 alternate eAdministrators and most departments will not need them anyway. But you must have at least one.

Some buyer responsibilities. Well the main thing the buyer does is they have to conduct the solicitation and the award. They're the ones who have to conduct a solicitation. They're the ones who have to award it. They have to do that in compliance with the statutes, rules, procurement circulars, procedures relevant to the procurement. They also must have written delegated authority, have attended all mandatory training and keep abreast with the current statutes, rules, procurement circulars, procurement procedures, etc. They are also the primary point of contact with the vendor. In the past we've had some problems where a vendor asked the buyer a question, the buyer didn't know the answer, and the buyer sent the vendor to SPO. That's inappropriate. The buyer needs to answer the question and needs to know the information. It is after all the buyer's solicitation. And then of course the buyer responsibilities imply complying with or adhering to the Procurement Code of Ethics and not having a conflict of interest that's something that you want to watch over.

Approver responsibilities. They kind of vary from department in how you implement the approver responsibilities. In some departments, they want the approver just to approve to make sure the money is there. In other departments, they want the approver to actually do the approval and review the solicitation. The assumption is that they will be reviewing the solicitation or the award before they approve it and their name goes on it as though they did. So I want to caution you to caution your approvers to be very careful. They may think they don't need to know it but by golly their name is on it. We live in a very litigious society these days. So you want to be careful because their name is going to be on as approved a particular solicitation or award. Again approvers need to have delegated authority and have taken the required training and of course they need to comply with the procurement code of ethics and ensure that they have no conflict of interest before you give them access.

Requestor responsibilities. This is a new role and what the requestor will do will be to fill out most of the solicitation, but the requestor doesn't necessarily have to be a procurement person. We'll show them how to put in the data and then what will happen is it will go on a route and the route will go to a particular buyer, you'll establish the route, and the buyer will review the requestor's request, fix it up so that it is compliant with procurement, and the buyer will issue it. So the requestor doesn't need to know as much. All the fields will be optional, and the buyer has the ability to reject the requestor, send it back and say you didn't give me this information, or this isn't clear enough. So it's a new role. The goal is to ensure that we're able to centralize when we need to and to provide more centralized procurement so that we have a few people who are kind of experts in procurement and then the rest can just make a request. We'll bring this role in later. My recommendation to you right now is to put in the buyers who actually buy and worry about the requestors a little later on but explain to your department that this role will exist so that you don't get as many requests for them to be buyers, have key buyers in each department or division.

Business process considerations. What are some of the things you're going to need to work out? Well how are you going to use the roles: approvers, requestors, buyers. Approvers and requestors. Approvers

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are your check and balance. Your requestors you would use when you want to centralize and improve efficiency and cut down on time and it will certainly be less work for you to have requestors rather than just a gazillion buyers. However, the approver role and the requestor role are both optional. You don't have to have approvers in HePS so please if a buyer is not going to have an approver, don't make the buyer his own approver. That's just silly. If the buyer is experienced enough, you choose not to have approvers in HlePRO just go ahead and leave that particular buyer without an approval route. If you are using an approval route, and I see I wrote routes here, HlePRO calls them approval paths. So I apologize for that. You'll have to decide whether it'll be for a solicitation or award, the method of procurement it will apply to, and right now the 3 methods of procurement in HlePRO are small purchase request for quote, IFB competitive sealed bidding, and we also have a button for RFP's. When you're creating the approval path and you're pretty sure that route will apply to all 3 when we use all 3, go ahead and put in all 3 so you don't have to come back later, but when you're creating a buyer, don't add the request for proposals at this point. SPO wants to work with the request for proposals function and make sure that it is as simple as it needs to be and is mistake free in terms of hitting the wrong button because certainly RFPs are much more complex. Also with approval routes we have the option of assigning an amount range to an approval route. And I'll talk about that a little bit later.

A few differences between HlePRO and HePS. Well in HlePRO, an approver is not a separate defined role. In HePS we could either make them a buyer or another role that we called other staff. And what we found was they didn't want the approver role, that other staff role, because they didn't see as much. So in order to keep things simple approvers in HlePRO are simply buyers that are assigned to a particular approval path. So if you have someone who is an approver and you don't want them to buy, you need to tell them don't buy. We also have an option for an approver alternate or a backup and they are assigned by a particular approval route or path. So when you're creating an approval path, you'll be able to assign the approver and then create a backup for that approver and then when that approver goes out of the office and hits a certain button in their account called I am out of the office, all approvals will automatically go to the backup. So that's very nice and it's especially good because it's assigned by approval route. HePS the alternates were assigned by just the person. So there could be one person who backed up another person in all their approval routes. Both awards and solicitations are automatically posted to a public site. It is not the PANS site, it is a different site but it will alleviate our need to post to PANS. Currently in HePS, solicitations are posted to a public site but not awards and this will eliminate the need to have to post to PANS. In HlePRO commodity codes, and this is for buyers, are assigned by line item rather than the whole procurement and that has certain advantages and disadvantages. Also in HlePRO, and this applies to you, you don't have to create the whole account. What happens is a user completes most of their info by creating an eHawaii.gov account. Then you search for them in HlePRO by typing in their exact email address and the only thing you have to add is their position title and then you have to add what they'll have access to. Are they going to be a buyer, are they going to be a requestor, and I think the department administrators is already identified and I will show you that later. The user ID and login is the user's e-mail address, and the users will be able to request if they forget they're password, they will be able to request another one without having to go through you. There is now a general program manual for HlePRO in addition to be the eAdministrator, buyer, and approver quick references. And I'll make that distinction we'll call them a quick reference. And there will be videos and training modules, which we didn't have for HePS.

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Alright, how do we register and gain access. It's basically a two-step process. We are using the state portal as a service. The way the state portal works is there is one account that you create and then you have to be given permission to access the various services. For instance, if you are able to access Hawaii Compliance Express and look at the status of various vendors then you have an eHawaii.gov account. The only thing I will need to do is for department eAdministrators is be notified by you that you have an eHawaii.gov account and I will look for you and create an account for you. So HCE, HlePRO, if you're with Public Safety or maybe Attorney General's office, I think eCrim also requires a State of Hawaii account. If you're with DLNR and you have something to do with boating registration, I think that one has an eHawaii.gov account and if you're not sure I'll show you what to do later but don't worry about it if you're not sure. So if you already have an eHawaii.gov account for the production site you can skip step one. We do now have a training site. You don't get to skip step one for the training site and I will explain that to you at the end of this training so don't get confused. Again, if you have access to HCE, you already have an eHawaii.gov account. If you're not sure whether you have an eHawaii.gov account go through the process to create one and I'll show you how to do that in a minute. It may tell you and you must use your work e-mail address if you already have an account it will tell you you already have one and there will be a link that you can click on to retrieve your password and actually what it does is it gives you a new one.

So to access HlePRO for department administrators you're going to go to our web site, click on login at the top of the page in that green line next to Public Search and then create a free account. That will take you to the eHawaii.gov account. Then you need to send an e-mail to SPO at our HlePRO e-mail address requesting access. Now last time I did the training I tried to go into HlePRO and I pretty much gave access to everybody that I could find. There may be a couple that already had an eHawaii.gov address or I didn't know your position or your exact e-mail address so if you don't have access to the production site, the real site, let me know and send an e-mail to hiepro@hawaii.gov. Make sure you include your position and your exact e-mail address. What I mean by exact email address is john.q.administrator@hawaii.gov. Don't tell me that you're John Q at DAGS or that you're the Administrator because I may not know what department you're the administrator for, although for most of you I do.

For department users, you're going to tell them to do the same thing when you're telling them to create. Then you're going to instruct the users to either send you an e-mail and include their position and exact e-mail address. Or you may want to notify users that access has been granted by sending them an e-mail when access is given, or you maybe tell them that access will be granted after x amount of time and do it once a week, or you can have your divisions submit the information that's needed via a form and we've created one for you. You don't have to use it. And then contact the submitter of the form. So what you might want to do is tell your division give me a list of all people who needs to have access as buyers, use this form, have them send you the form and once they do if you need assistance getting that data put in, send it to us, we will contact HIC, they'll put it in for you and then you get to tell the submitter of the form, okay all your people are in and you won't have to do it yourself.

I'm going to show you how to get a user into HlePRO, but I just want to show you that it's very very short. Counting logging in, it's maybe 5 steps. And it takes less than a minute. You just need to know the right data like under user roles, you need to select what type of user. Is this guy going to be a buyer or a requestor? Well right now you're only going to put in buyers. The method of procurement. Right now you're going to select small purchase. And then if you're going to create approval paths you can create

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them first and then at the bottom of the page where you have all the approval paths, you click on the approval path that is going to apply to the buyer.

Forms that you can use. UserinfoHiepro that's where you get all the user info you want. You can have another one for creating approval routes. Or I also created another option where you can put it all in one form. It's a little redundant but it gets you there. All of these forms are located on the SPO site. If you go to our main SPO site and click on HePS-HiePRO and then HiePRO for State Procurement Personnel- Information, scroll towards the bottom of the page. There's a subheading that says forms you can use.

When you create an approval path, you already have to have the person who's going to be the approver in the department in HiePRO so you have to give them access as a buyer first. And then create the approval path. So it seems like the most efficient way to do it is to say give me a list of all the approvers, create them as buyers, create the approval path, and then create your buyers so you don't have to go back in and then assign approval paths to buyers. That said, it may not happen that way. So to create an approval path, you're just going to go to the buyer dashboard, select Approval Paths. And then select Add Approval Path. This stuff is pretty simple. Select whether a path will be for a solicitation or an award.

Then you're going to create a name for the path and I asked them to put this in so that you can see the name and recognize it and it would be easier for you to identify the approval path and what they'll apply to. The approval paths will have number assigned to them but I found it really hard to remember the number and which one. So by giving it a name you could say for instance it's XYZ division, you know, division FHSD-MCH, Family Health Services Division, Maternal and Child Health Branch, and that way you'll know how your paths are. You have the option of deciding whether you want the path to apply to a specific amount range and that is for instance if you want it to apply, one approval path to apply to all solicitations from 0 to 100,000 dollars and all solicitations you can do that just know that even though the path is limited to that amount that's all this is an indicator for the path. It doesn't keep the buyer from buying something greater than 100,000. It just means it won't go through the path. Be careful when using this. Also people tend to get really involved when they create this optional range and sometimes they create conflicting paths and when you create conflicting paths and assign them to a particular buyer, there's no telling where it's going to go. So be very careful if you're going to use this amount range. Also as applicable at the time you create the approval path you'll be able to create a backup or alternate. That said you can create the approval path without a backup and at any time go in and add the backup or change the path in any way. So if you want to create a path that's only applicable to small purchases and then you start enabling people to do competitive sealed bids and it turns out it's the same path, you can then go in, edit the path and add competitive sealed bids. If you know that it's going to be one path that's going to apply to everything, I would apply all of them, even competitive sealed proposals, as long as you don't enable competitive sealed proposal for a buyer, then you don't have to go back in and add it when you do add RFPs. If there is to be a second approver, that is, in succession, there'll be a drop down from row 2, you can select the name from the drop down and add a second approver and you just do the same thing all over again. Once the approval path is complete you select save. Now in HePS you had a limit of 5 approvers. Believe it or not, there were some departments, who actually used all 5 and they will be happy to attest to you that that's not always the greatest idea because it takes forever for a solicitation to get out because the approvers don't always pay attention,

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they don't always go in and approve. So you want to make sure that you're going to have an efficient system. You don't, as I've said, have to use approval paths. Some departments use a paper process.

When you build instructions, it's going to be pretty straight forward. You're going to go to the dashboard, you're going to select Instructions. You're going to click on New Instruction. You need to enter a brief title for the instruction. And then there'll be a content field which is a big text box, you'll enter the instruction and from the dropdown you'll have whether the instruction applies to a solicitation or award. And then you'll be able to select a check box if the instruction will be mandatory that is, it will automatically appear on every solicitation or award, whatever you assigned it to in your department or if you don't select mandatory then it will be optional and the users, the buyers, will have an option of selecting it or not as applicable. When you're done you select submit. Any time you need to edit an instruction you can select edit. At this time, it's okay to use edit, but once you have people entering solicitations and they close check back with me before you edit an instruction because we need to past instructions to save the instruction as it was at that time so be careful. Also once you have solicitations going out and you edit an existing instruction you need to tell your buyers that may have a solicitation out or an award in process that the instruction has been edited and they'll need to do an addendum to say see amended instruction.

Let's go to the site. So the first place we're going to go to is the production site. As I mentioned earlier today we now also have a training site and the real advantage of the training site, I know some of you have some apprehension. You don't like to give them access until they are already trained and in order to practice and stuff they needed to have access to get into the training site. We now have a training site that is entirely separate and by entirely I mean really entirely. They also have to create a new eHawaii.gov account on the training site. SPO will take responsibility for getting access to people in the training site. Because we have turned off all emails and we didn't build a public notice site for the training site we're pretty much giving it to whoever requests one. What I've told them the procedure is at the training is after you've completed the training you need to send an e-mail to HlePRO and tell us that you've established your account. Tell us that you've taken the training and give us your position title and your exact email address and it's been working successfully so far. Whatever they do in training stays in training. The only thing is the training site is also open to vendors. So what you don't want to use the training site for is putting up your actual specifications for solicitations that you plan to do because any vendor who registers in the training site can also see it as this is also open for vendors to register and practice. And also we tell buyers when they're using the training site and they're putting out a solicitation that there's a statement they need to put in the title and the description and general comments that says this is a test solicitation for training purposes only, do not respond, because I've already done some on the training site and I had one vendor respond. Now I'm assuming the vendor knows that that's the training site but I have to call him and make sure and I don't want to have to run into that later on. So we tell buyers be careful on the training site. Be careful not only what you practice procuring, but also be careful what they write, even if it's something that doesn't go out to the public or isn't available to other vendors there, you want it to go out and you want it to be politically correct even if it's an internal field like we have one field in buyers for internal comment. Most of the stuff once you close the solicitation is open to FOIA, that is Office of Information Practices. So we need to make sure that everything that's in there as long as the vendors don't know about a particular field that's one thing, but if you have a vendor who knows about the field or says I need to see everything that you have in HlePRO about this solicitation I believe that there's not very much that we can keep from them. So

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here we are. This is the real site. And so what I want to do is start with the thin black row at the very top. See Hawaii.gov? That is a link to the Hawaii.gov, that is the State Portal. And I really really recommend you go there and take a look at it and especially take a look at the business link. There are a lot of information, connection to all the different kinds of things that are there. And I'm really impressed and we all know I'm not easily impressed. The next link is the SPO home and that's our homepage. The next thing over you see you have the ability to adjust the size. You can make it smaller, you can make it larger. You can make it really big like more mature folks need to see. And then you can hit the reset to send it back to where it was. A little bit over to the right you'll see help chat online. Now the help chat online is primarily for vendors. It is not for users as a rule. There are sometimes when you will be able to use it. The help chat online links to Hawaii Information Consortium. They know about this application. They know how it works. What they do not know is how procurement works. So please don't connect to them and say, "I need help issuing this procurement." What you can do is, "I forgot my password, remind me how I can retrieve it." You can use it for, "I was on this site the other day and I saw this screen and now I can't find it." They can help you with that. But anything else related to procurement or a policy thing, that you're going to have to call SPO for. And then the very last link, all the way to the right where it says Stay Connected. That brings you to the portal, the page that has all the links to all the departments and all the legislature and stuff like that. Below that you'll see our State Seal you see it says State of Hawaii eProcurement, underneath that it says HlePRO, and then all the way to the right you see those pretty pictures. When I first saw them I clicked on them because I thought that was something that we were supposed to click on. What it's telling you is that this site is mobile friendly. You can view it on a laptop, you can view it on your smart phone and you can also view it on a tablet. I use my iPad quite a bit and I do a lot of things on this on my iPad, but again this is a website so someone asked me the other day well what about Android? I don't think it should be any different on an Android. I don't tend to look at it on my cell phone a whole lot because I'm old and I can't see, but one of you younger folks who uses your cell phone a lot might look at this and it should arrange in the right way. Below that you will see, to me it's kind of green, but it may be a teal line, and it says Home, Commodity Codes, Public Search, and Log In. Home takes you to this page. This is what we call the landing page for HlePRO. Notice that it is largely kind of focused on vendors. We will be adding some more things for us. But in order to get the vendors in here we wanted to leave it simple at least at first so that vendors know where to go. Vendors also have a two-step process. They create an eHawaii.gov account and then they have to click see that black button below where it says, Have an eHawaii Account? Click login and register as a vendor? You never want to click that because then you'll be registering as a vendor and we can't change it. The other thing you need to know about this is you know how we told you only need one account to access all the services, you just need to be granted access to the services, is your email is your account name, is your account user ID. So you can't have more than one. So please don't create yourself as a vendor because you'll have a heck of a time un-creating yourself. So next to Home, you'll see a link called commodity codes and if you click on the commodity codes link what will come up are all the commodity codes. We are using the NIGP commodity codes. They are a five digit commodity code. The first three digits are the class of the commodity code and the second two digits are the actual commodity, goods or services. The commodity codes have numbers from up until number 899 will be goods, that is stuff. And once you hit the 900s, you're looking at services. So if you have to be an approver, you would look at the commodity code somebody is using and if you're doing something that is clearly a service but the commodity code is not in the 900s, then you know that person has selected the wrong commodity codes. Why are commodity codes important? Well commodity codes are

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important because the vendor fills out, when a vendor registers, he fills completes what is called a commodity code profile and he selects the commodity codes for the goods and services he's interested in delivering to the State. When a buyer creates a solicitation they also select a commodity code when that's relevant to what they're buying. When they submit that solicitation and it's entered on the internet, emails go out to all vendors who have that particular commodity code in their profile. So it's a notification device so you want to make sure that you get it right. The commodity codes are basically alphabetical that is they go alphabetical for stuff from 0 to 899. You see 898 is x-ray and other radiological equipment. And then the 900s, the alphabet starts all over. It starts with aircraft and airport operation services. So it is basically alphabetical, but look at the 912, 913, 914, we have construction services-general, construction services-heavy, and construction services-trade. But then if you go up a little bit higher you'll see in 909, look at, building construction new. If I were doing this code I would call it construction services-building, new. So it's not 100% alphabetical. The other thing I want to indicate to you is in both goods and services, there is one class called miscellaneous. And if you scroll down to miscellaneous in services, we actually have two, miscellaneous 1 and miscellaneous 2, and that's where if you click on the class, you get to see all the commodity codes, this is where they put all the things that didn't fit in any of the other classes. And over the years they've kind of grown. So you can see all of them in here. You can also search for commodity codes by using a word but you have to be inside the system in order to do that. Just a word about commodity codes, you don't have to login to look at them. You can sort of search for them here by using your browser. So if you hit Control F, then put in a word, you can search. 9 times out of 10 it works. Occasionally I find it will skip one. There, see, it's selecting computers but a couple of times I haven't seen it highlight. Other times it does so you can search. So that's about commodity codes. So let's go back to that landing page. You see it's still there. And next to Commodity Codes, you'll see Public Search. This is what the public sees. Now we don't have anything on the production site so there really isn't a whole lot to see. The public will be able to see notices of solicitation and awards. They'll be able to see current notices of solicitations with one exception. When a buyer selects Hawaii Only, it's not going to show on the public site because when a buyer selects that they should be shown or responded from Hawaii only vendors it wouldn't be fair to put it on a public site and say oh yeah you can't respond to this one. So we don't put it on the procurement notices. That option is only there for small purchases. Once you get to bids or RFPs it can only go out to all registered vendors and it will be visible on the notice of solicitation site. Things that are available on the notice of solicitation public site are pretty much anything that's in general information. They get to know the title and a general description of the solicitation but they don't get to see the line items or any of the attachments. Awards, no real difference in awards. Once we put up the award information everything that's available to us in the internal awards site is also, I believe, available on the public site. These are all the items you can search. So after all of that you can simply. That's what's on the public site. Then on the bottom of the page you will see way down at the bottom you will see links to Hawaii Compliance Express. Doing Business with the State, the SPO page called Doing Business with the State. Again the State Procurement Office. And I think that Feedback button is to HIC, how does this program work. So let's say you don't have an eHawaii.gov account. You're going to come to this site, to the landing page. And in the green bar you're going to either log in and I think you could also Create eHawaii Account, either one. The only one you want to be careful not to select is Login and Register. So click on Login. And you'll see a page all the way to the right you see Create Free Account. That's where you'll go to create free account. Click on it. And you'll see it's very very standard. When you create your password, click on that little green button next to create password. Little green question mark. That tells you what you

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need to have in your password. I'm sitting there writing, I'm going, hey how come it's not letting me go on. It needs at least 8 characters or which one has to be a letter, one has to be a number, and darn it one has to be a symbol and I put in my usual password and I had to create one with a symbol. And then after you put in your password until you retype the password in there it has a little message that says oh the passwords don't match. So don't worry if you see that before you even put in your password. Don't worry about it. Once you put it in it will tell you it's nice and strong. You'll need to have a secret question. Make sure you put in your secret question and that you keep the answers someplace because when you go to retrieve your password, you will need to answer your secret question. Then down below that it asks for your information, your address, you put in all your work stuff. This is the same account that vendors have so vendors have the option to have a subscriber account, which has certain kinds of advantages and they can link it to that. We do not have subscriber accounts, just click on I agree to the Terms of Use and click Create Account. Once you do it will tell you. You know what go ahead and put in my name, my email address. Yeah put in my email address. I'll show you what it looks like when it tells you you already have an account. Let's see if it lets us go without, aw no it's making me fill out all the other stuff. Alright. Anyway what comes up after you fill it out is it says there's already an account with this email address and it gives you a link where you can click here to retrieve the password and you have to type in your email address and then it asks you what your secret question is it says what is your mother's maiden name. You have to type in and you'll get a message that says reset has been sent to your email and the resent will be a random password that it generate and you'll be able to change it after that. Okay, so that's how you create the eHawaii.gov account. Go on back to the landing page. As I've said once you created the eHawaii.gov account you don't automatically get access. Then you have to have permission to get in here if you haven't create one. I don't have one for you so send an email. It's better to send the email to the HlePRO email. I get hundreds of emails a day and it takes me forever to get through them, whereas the HlePRO, they're pretty specific. Also I have help with the HlePRO account so if I don't get to it, somebody else does, so it's much more likely to get a response quickly in the HlePRO email account. And again that email is hiepro@hawaii.gov. Alright so this is the real site and now what I want to do is show you the training site. You see that the real site has that pretty picture in the back. Look at the difference between the training site. Training site is plain and instead of HlePRO State Procurement Office, it says HlePRO Training Site. That's so you know that you're in training. Now I've already logged in but you know what I logged in more than twenty minutes ago so click on User Management and what it's going to do is it's probably going to log me out but if I click on Log In, it automatically logs me back in. So if you're sitting there and it's been more than 15 minutes, you just click on Log In again and it will log you back in. I know that some people are having some debates about that, how secure is that, so that may change, but that's how it works now. So the first thing I want to show is how do you enable a buyer. Notice that your dashboard, before I do that, has a number of tiles on it? If there's something that's waiting for you to do and this won't occur so much in the System Admin dashboard. Usually it will be at the top, but for most System Administrators there usually isn't something pending other than what you know. But the three things that you need to do are User Management, Approval Paths, and Instructions so you don't have to worry about that. You do have access to a Buyer Dashboard, but that function hasn't been enabled yet. They had some glitches with it. So as a System Administrator you cannot also be a buyer at this point. That will be fixed later on. So let's go ahead and enable a user. I'm going to click on User Management and somebody sent us an email and her name is jeri.m.kahana@hawaii.gov and in a minute I'm going to show you her email and tell you why I don't think it's a great idea for you to have them send you just an email. Okay there she is. I've put in

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the exact email, I have to search all. When you're first enabling a user you can only search by their exact email and the reason for that is security because you're searching all of the eHawaii.gov portal and there are a lot of accounts. So only the exact email does. You search her name shows up so my action is I'm going to click the Add button and the first thing that pops up is her user information. Notice that the position you can't put anything there and that's because you haven't put in a user type. So scroll down to User Rules and select Buyer. And now I selected Buyer and now we can put in her, and she's an Administrator, okay in the Department of Agriculture. Okay so I'm going to type in Administrator. And then because I am the System Administrator I have to select a department, but you won't have to do that. The department will already be selected. This is Department of Agriculture. That will already be selected and the Methods of Procurement Allowed we will enable her only for Small Purchase. And I have some sample approval paths below that so we won't select them for her but once you create your approval path you can have it. Now this is the training site and I have access to the training site, the test site, the production site and I get really confused easily so I put tng in all my training site names and approvals. That's why that's there. And I called it approver but I don't really need that. I called it the ABC Branch and I called this one award and this one I didn't call anything because I realized that you can see right from the beginning is this for solicitation or award, what's the name of the approval path, that's the approval path you're going to enter, who's the first approver in that path in case you forget or you're not really sure which one it is, the amount range, and the procurement method you're using, and of course you're not going to see the department because you're only going to see the ones for your department. When I'm done adding everything, I simply click save and that person is now in there. Now that she's in there, I can search for her. If I need to deactivate her because she's leaving, I simply click on Deactivate. If I now want to add an approval path I select Edit. Let's say time goes on and she takes the IFB training I want to add competitive sealed bidding, I just have to select it and click save. So don't click it. Let's go back and take competitive sealed bidding out before she gets the idea that she can do it. And then again click save. If I want to add the approval path, I just click on the approval path. Once you have activated somebody then you can search for them either by the user role which will be buyer or department. You can look at vendors. You can't do anything. So you can look at your buyers and requestors and your department administrators. I don't think you'll see system administrators in the department accounts. And there you'll see Jeri, the reason Jeri only came up is because her name was in the email. So we're going to delete that. Now I'll search. Now all the buyers that are in the training site are here. And as long as I'm here, let me show you these two buttons: the diagonal angle and the other one that looks like bullets. You'll see these whenever you have a search and whenever the results might be very long, if you click on the diagonal button that controls how many records you can see. So I can change it to 25 or 50 or all. And once I do you see all, there's only 23 in there. The other button controls which columns appear so let's say it's got very busy and I don't need to see whether they're active or not. I don't care about Department because I know what department they're in. So I can take out department and just look at their name and email. So that's what that's for. So that's how easy it is to establish a buyer and edit their information. Go back to the Dashboard. Okay so now we've done User Management. Now we can move on to Approval Paths. To create a new approval path, really hard stuff. Come in to the approval path again if you have a bunch of them. The two little buttons are there where you can look at what you need to look at. I've only created two in the training site. To add a new approval path, click on add approval path. That top one is the approval path name. I'm sorry, we have to select whether it's for solicitation or award and you have to have separate ones for solicitations or awards. Whereas for method of procurement you can select all three of them. I've asked them to

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change that so that's on the list but for now if you want one for both solicitation and award, you have to create two paths and that may prove more useful in the end. You may want it that way. So then we need to type in a name. Let's try SPO Admin and put in training - tng - so that we know it's training. You are not going to have Department. I only have it because I'm the system administrator. So let's look for SPO. And then the method of procurement again you get to select, select RFQ for small purchase. If I want to also give access for IFBs I can select IFB. For the approval paths you can put in the RFP also if it's going to be the same no matter what the method of procurement is. The only thing we ask that you not do at this time is enable buyers to have access as an RFP. If you're going to have an amount range for this approval path, you put it in there. Otherwise leave it blank if it's for everything. Now come down to the first line where it says Order, Primary. Click on the drop down box. Everybody that is in your department, every buyer that's in your department can be an approver. So we'll make Bonnie the first approver, Bonnie Kahakui, and who's going to be her backup? We'll make Sean her backup and that's all you need to do. So you're going to add that approval. Now notice a second line now appears. If you need to have a second approver in that approval path you're going to add the second approver and you can add a backup or not add a backup, not required. And select add approval. And so on. Yeah we noticed it jumped to the top of the page. They're working on that. We don't have to select any more but if you're only going to have two that's great. Let's say that after a while I decide, you know what, I want Bonnie to be the second approver on the list, not the first. So watch. We can arrange Bonnie so that she moves down. Isn't that nice? In HePS we had to copy and paste. Once you're done and you're happy with the approval path, you have to remember to select Save. If you don't guess what happens to all your work. It goes away. So go ahead and select Save. And now we have three approval paths. Notice that they are awarded numbers so if you want to stick with the numbers, you're welcome to them and they're default numbers, but the approval path name is there for you to do anything you want to do. If I want to edit an approval path, all I have to do is select the edit button. And it comes up. I want to change the sequence, I want to change who's in the path, it lets me do that. The only thing you need to watch out for is when something is already out, that is a buyer has a solicitation that's out, I think once it's out and it's in the approval path, I don't think changing the approval path will affect it. I think it will stay. Once it's in the approval path, stays in the approval path that it already is. Let's go back to the dashboard. And let's work on the last thing - the instructions. Whenever you create a new instruction, you'll need to put in a short title. For instance we have one about transaction fees. In the content you put in all vendors are subject to a transaction fee of .75% of the award payable upon the award, blah, blah, blah. I would put this in both the solicitation and award. So I'm going to create this twice. Actually I don't have to do that. I get to select the method of procurement that it's applicable to and again I can have it applicable to more than one so I don't have to select more than one. And I can say whether it's mandatory or not. Now for you, you're not going to have department there because it will be applicable to your department but you can see that I can change it now. Now I have everything applicable to all departments. If there's some reason why one of the general instructions doesn't work for you let me know and I will do it and apply it to department by department. If you click that drop down, all, you can see I can do it individually for a department. What I really need is for except a certain department but go ahead and hit submit.

So what are you going to have to do? You're going to need to establish procedures for requesting access as a buyer, approver or requestor and I would hold off on the requestor for a while. You're also going to need your approval paths. And again, I've created some forms for you, you can use them, you can change them, whatever you want to do. Then you're going to have to get access to the users. We're

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going to have to create approval routes. Remember you have to have a user in order to create the approval route so might be better to create the approvers first. And then you're going to have to create mandatory and optional instructions and establish a start date for your department. So that, September 15 is SPO saying don't do it before then, but you can establish whatever start date you would like. Please don't hold off until December. People need the experience in learning how to use HlePRO and we don't want a mass exodus in December, but a number of people have taken the training. They seem pretty happy with it, we had a lot of questions in the first training, but most of the questions had to do with not knowing procurement rather than using HlePRO.

We do have a training site, which I've already told you about. The training site is totally unconnected to the rest of HlePRO so that you will have to go to the training site and create another eHawaii.gov account. You can use your same email because it's a totally isolated site. So follow the same instructions but do remind your buyers that vendors also use the training site. I'm not sure there's much use for me creating you as an Administrator in the training site since we'll be giving the access to most of the people, but if that's what you prefer, let me know. Otherwise just go ahead to the training site, create an account and let me know whether you want to be a Department Administrator or a buyer in the training site. I don't know there's much you need to practice per say. It's more like workload. I don't know that it's very hard, but giving you access to the training site as a buyer will be helpful to you if you need to help somebody. Be careful what your people procure because again that training site is visible to vendor so if you want to fool around and create a solicitation be careful what you create it for. Use politically correct language. Try not to buy explosives and things like that.

To gain access to the real HlePRO site, pretty much the same thing except you're doing it on the real, that is the production HlePRO site. Statement that you have taken the HlePRO training. I'm sorry this is still on the training site. If you want to go the real HlePRO site, same thing for you.

So you're going to create two accounts one on the training site, one on the real HlePRO site.

More info including the manual is on the SPO website. There is a link called HePS-HlePRO, click on that, then scroll down to HlePRO for State Procurement Personnel - Information and you'll find the manuals, the eAdministrator quick reference, and the PowerPoint from today's presentation. If you want to login to the real site. Go to <http://hiepro.hawaii.gov>. Now once you go there you will notice that a different site will come up, a different URL will come up. This is a redirect. It was easiest for us to give this out to the public but if something happens and it doesn't go there you can go directly to the site and that site is <https://hiepro.ehawaii.gov>. Similar to this, but a little bit different and you will find it there so you click on this link and it's down it's because the State of Hawaii server that the router is on is down, but the actual site resides someplace else.

Alright thank you very much. Thanks to everybody if you need any assistance with your business process in establishing how or you have some questions on how it can work or somebody has an issue with how to use HlePRO, don't hesitate to give us a call. Again thank you very much for attending and I'll see you soon.