

Hawaii State eProcurement  
**HlePRO**  
Department Administrator Training  
**SPO 371**

**What will Be Covered**

- Overview
- Update
- Training
- Roles and Responsibilities
- Business Process
- Administrator Taskings
- Some Differences Between HlePRO and HePS
- The HlePRO Site
- Getting an eHawaii.gov Account: Registering & Gaining Access
- Giving Access to Users
- Building Approval Routes
- Building Instructions
- Review
- Q & A

## Overview of HlePRO

- Pronounced [HI-PRO]
- (Production) Site: <http://hiepro.hawaii.gov>
- Application built specifically for the State.
- Testing has been conducted and will continue.
- Application will change over time.  
(HePS took 6 years to get to the current state.)
- Enhanced security, cleaner interface.
- Lessons learned.
- Training: enhanced approach.
- New role (optional): Requestor
- General program manual.

## Overview Training

- Types of training:
  - Webinars
  - Videos
  - Training Modules
- Eliminate the rush to take training ‘just in case’;
- Less time lapse between training and issuing HlePRO solicitation;
- Mitigate users misusing the site.

## Update

- **May-June- July**
  - Testing and Revisions.
- **August- Sept**
  - Ongoing testing;
  - Vendor notification and registration  
20,000 + vendors notified;
  - Ongoing Training;
  - Department Administrators meet with dept.  
personnel , decide on business process for  
HlePRO, establish internal procedures.

## HlePRO Update

- **September-October**
  - Department HlePRO Administrators continue  
establishing procedures, accounts, instructions,  
approval routes;
  - Ongoing Training;
  - 9/15 Begin using HlePRO;
  - Buyer video.

Questions?

## Roles and Responsibilities

- System Administrator
- Department Administrator
- Dept. Alternate Administrator
- Buyer
- Approver
- Requestor
- Vendor

### **System Administrator Responsibilities**

- General oversight of the HlePRO program & security;
- Point-of-Contact with Dept. Administrators;
- Point-of-Contact with HlePRO vendor, Hawaii Information Consortium, LLC (HIC);
- Develops & maintains training materials;
- Provides consultation to Dept. Administrators on business process with regard to HlePRO;
- Develops & maintains statewide mandatory and optional instructions;
- Notifies Dept. Administrators of updates/changes;
- Updates application as needed;
- Annual reports.

### **Department Administrator Responsibilities (Primary)**

- General oversight of HlePRO program & security for Dept.
- Point-of-contact with department users;
- Point-of-contact with System Administrator(s);
- Gateway for Department users
  - ensures users are appropriate;
  - activates/deactivates accounts;
  - Assigns roles (buyer; requestor, approver) & methods of procurement;
- Establishes approval routes and assigns to buyers;
- Establishes backups/alternates;
- Established department wide mandatory & optional instructions
- Provides reports to department personnel as needed.

### **Alternate Department Administrator Responsibilities**

- Acts in the absence of the Dept. Administrator;
- May assist with duties of the primary administrator. However, administrator retains primary responsibility.
- If there is more than one alternate, make sure you have a policy for next in line.
- Departments may have up to 3 Alternate Administrators, as needed.

### **Buyer Responsibilities**

- Conducts the solicitation and award;
- Point-of-contact with Vendor;
- Complies with statutes, rules, procurement circulars procedures relevant to the procurement:
  - Written delegated authority
  - Attend mandatory training;
  - Keeps abreast with current Statutes, Rules, procurement procedures
- Complies with Procurement Code of Ethics, has no conflict of interest

### **Approver Responsibilities**

- Ensures solicitation/award is procured/awarded in accordance with statutes, rules, procurement circulars and procedures and policies specific to the department;
- Delegated Authority and required training;
- Complies with Procurement Code of Ethics, has no conflict of interest.

### **Requestor Responsibilities**

- Provides complete, clear and concise specifications and other required data;
- Complies with Procurement Code of Ethics, has no conflict of interest.

## **Business Process Considerations**

- Determining how Department will implement eProcurement;
- Use of roles: Approvers, Requestors, Buyers:
  - Approvers - checks and balances
  - Requestors – centralization & efficiency
- Approval routes
  - Solicitations
  - Awards
  - Amounts

## **A Few Differences Between HlePRO and HePS**

- An approver is a buyer that is assigned to an approval route.  
(In HePS it could be the same or “other staff”)
- Approver Alternates/Backups are assigned by approval route.
- Awards (and solicitations) are automatically posted to a public site.
- Commodity codes are assigned by line item.
- Users complete their info by creating an eHawaii.gov account.
- Administrators enter user position.
- User ID/login is the user email address.
- General program manual for HlePRO (in addition to Administrator, Buyer, Approver manuals.)
- Videos & Training modules



## Registering & Gaining Access

- How the State Portal works:
  1. Create an ehawaii.gov account
  2. Permission for various services (HCE, HlePRO, etc.)
- If you already have an eHawaii.gov account, skip step 1.  
(If you access HCE, you have an ehawaii.gov account.)

## Access to HlePRO For Dept Administrators

- <http://hiepro.hawaii.gov>
  1. Click login at the top of the page in the green line (next to Public Search), then select 'Create a free account.'
  2. Send an email to SPO at the HlePRO email requesting access (hiepro@hawaii.gov). Include your position and your exact email.

## Access to HlePRO for Dept. Users

- <http://hiepro.hawaii.gov>
- 1. Click login at the top of the page in the green line (next to Public Search), then select 'Create a free account.'
- 2. Instruct users to send you an email and include their position and exact email address. Some ways you may notify users that access has been granted:
  - send an email when access is given; or
  - access will be granted after x amount of time; or
  - If they submit via form, contact the submitter of the form.

## Getting Dept. Users in HlePRO

- Log in
- Select **Dashboard** if it doesn't appear.
- Select User Management.
- Enter the email of the user to which you want to give access.
- When the name appears, click **Add** (under *Actions*).
- Under User Rules select:
  - user type (Buyer)
  - Method of procurement (Small Purchase)
  - Approval path if applicable

## Forms You can Use to Get User Info

- UserInfoHiepro (.xls)
- ApprovalRoutesHiepro (.xls)
- UserInfoandApprovalRteHiepro (.xls)
  
- Located at  
<http://hawaii.gov/spo> > HePS-HlePRO >  
[HlePRO for State Procurement Personnel-  
Information](#)

## Creating Approval Paths

- To create an approval path you must have 'buyers' in the department to assign to the approval path first. Give access to your approvers.
- From the dashboard, select **Approval Paths**.
- Select **Add Approval Path**.
- Select whether this path will be for a **solicitation** or **award**.

## Creating Approval Paths *continued*

- Create a name for the approval path that will help you recognize it.
- Select the method of procurement to which the approval path will apply. You can select more than one.
- If you want the path to apply to a specific amount range, enter it.
- From the dropdown, select the name of the person who will be the first approver.
- As applicable, select the person who will be the backup/alternate; this can be added at any time.
- Select **Add**.

## Creating Approval Paths *continued*

- If there is to be a second approver, from the dropdown in row 2, select the name from the dropdown.
- Continue as for the first approver.
- When the approval path is complete, select **Save**.

## Building Instructions

- From the dashboard, select **Instructions**
- **New Instruction.**
- **Title:** enter a brief title.
- **Content:** enter the instruction.
- From the dropdown, select whether the instruction applies to a **solicitation** or **award**.
- Select the checkbox if the instruction is **mandatory**, that is, it will automatically appear on every solicitation or award.
- Select **Submit**.
- To edit an instruction, select **edit**.

## Review /Tasks

- Establish Procedures for:
  - Requesting access as a buyer, approver or requestor;
  - Approval routes including: for solicitations or awards, method of procurement and the approvers (and backups) in the route.
- Grant access to users.
- Create approval routes and assign to buyers.
- Create mandatory and optional instructions.
- Establish start date.

**The HlePRO Training site**  
**<https://training-hiepro.ehawaii.gov/>**

- Training site is not connected to the rest of eHawaii.gov or the production HlePRO site. You need to create a separate eHawaii.gov account. Use your work email. See instructions under 'Gaining Access.'
- Vendors also use the training site.
  - Do NOT place confidential information on the training site.
  - Be careful what you procure. This is a public site. Whenever releasing a solicitation include a statement that the solicitation/award is for test/training purposes and that no responses should be submitted.

**The HlePRO Training Site**  
**Gaining Access**

- Go to the HlePRO training site
  - <https://training-hiepro.ehawaii.gov/>
- Select Log in.
- Select **Create Free ehawaii.gov** account and follow the instructions.
- Once completed, send an email to [hiepro@hawaii.gov](mailto:hiepro@hawaii.gov) with the following information:
  - Statement that you have taken the HlePRO training (name the training)
  - Your exact email address.
  - Your position title.
  - The department you are in.

Questions?

### More Info

- <http://hawaii.gov/spo> > HePS-HlePRO > [HlePRO for State Procurement Personnel-Information](#)
- To log in: <http://hiepro.hawaii.gov> > Select **Log In** next to **Public Search**  
(You can also select the **Log in and Register** button)

## Thanks for attending!

Questions on eProcurement?

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