

State Procurement Office
Department HiePRO Administrator Quick Reference

Table of Contents

Create an eHawaii.gov Account	1
Log in and out.....	2
Give a Buyer Access	3
Create an Approval Path.....	6
Assign an Approval Path to a Buyer.....	8
About HiePRO.....	9

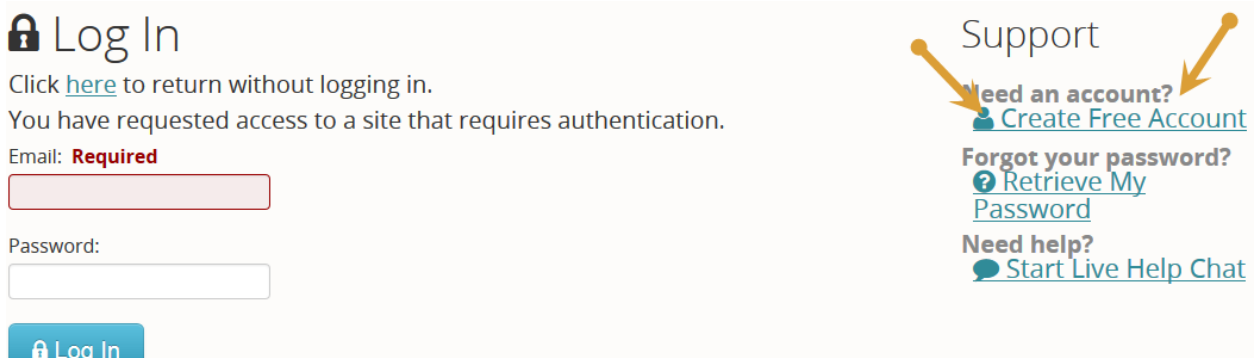
Create an eHawaii.gov Account

<http://hiepro.hawaii.gov>

1. Click login at the top of the page in the green line (next to Public Search)



2. Select **Create a free account**.
When creating your password, you will need at least 8 characters which must include: one letter, one number and one symbol



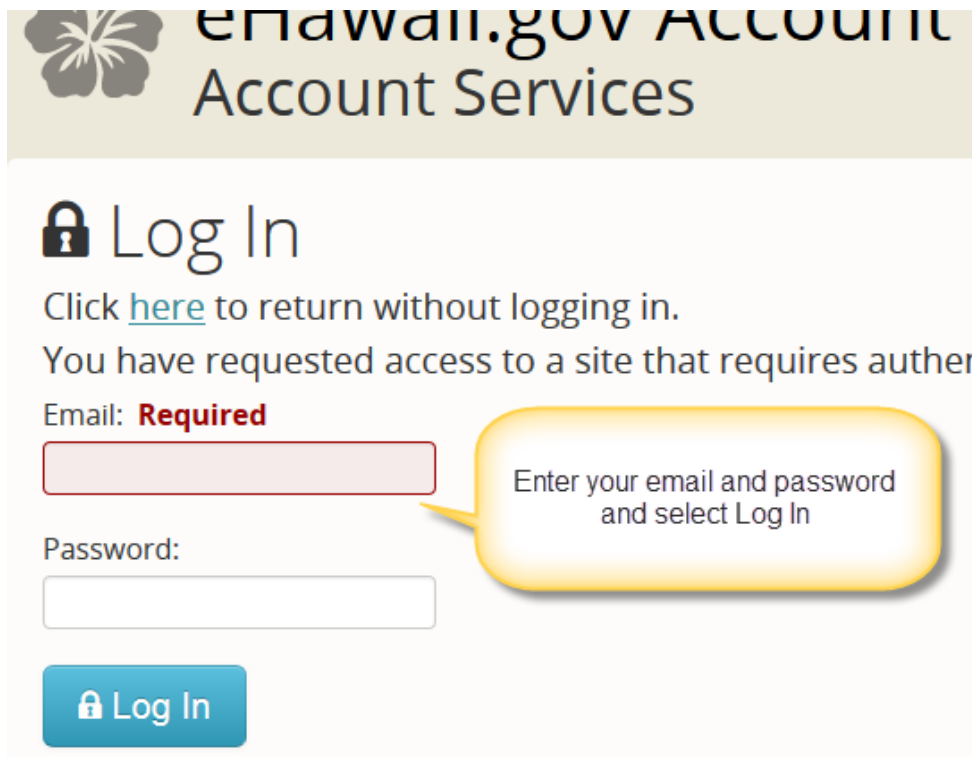
3. Send an email to SPO at the HiePRO email requesting access (hiepro@hawaii.gov). Include your position and your exact email.

Log In and Out

 Log in

<http://hiepro.hawaii.gov>

1. Select Log in
2. Enter your email and password
3. You will know you are logged in when you see your email and the dashboard.

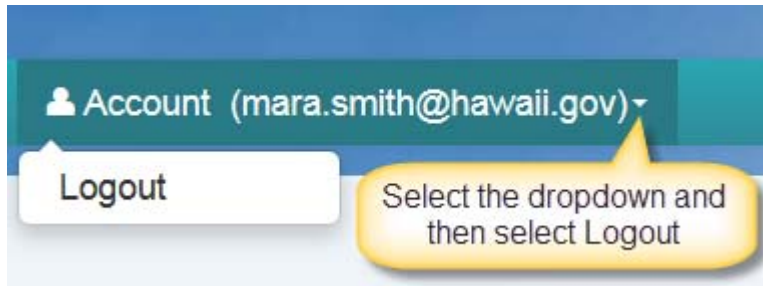


You know you are logged in when you see the Dashboard and your email address



Log Out

To log out, select the dropdown next to your email address and then select Logout



Give a User Access/Grant Permission to HIePRO



Log in and Select **Dashboard** if it doesn't appear.

1. Select **Buyer Management**.
2. In the *Search* enter the email of the user to which you want to give access.
Note: It must be the exact email. Do not enter anything in User Role or Name as it will not work. This is a security function.
3. When the name appears, click **Add** (under *Actions*).
4. Under *User Information*, enter the users position title.
5. Under *User Rules* select:
 - User Type (Buyer)
 - Method of Procurement (Small Purchase)
6. Under *Approval Paths*, select the approval path that will apply, if applicable.
Note: If the approval path has not been built yet you may add an approval path later by editing the user information in User Management.
7. Select **Save** at the bottom of the page.

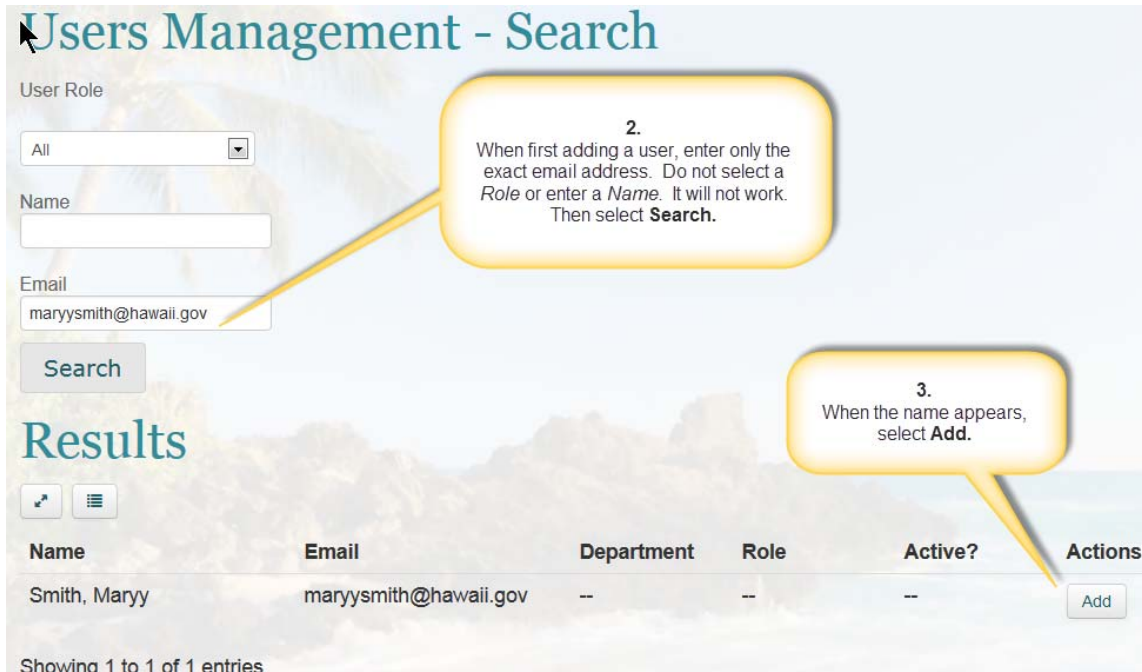
Forms You can Use to Obtain User Info

UserInfoHiepro (.xls)

ApprovalRoutesHiepro (.xls)

UserInfoandApprovalRteHiepro (.xls)

Located at <http://hawaii.gov/spo> > HePS-HIePRO >
HIePRO for State Procurement Personnel-Information



Add or Edit User

User Information

Name Smith, Maryy
Email marvsmith@hawaii.gov
Phone Number 555-1212

4. Enter the position title.

Position
Procurement and Supply Specialist II

User Rules

User Type

Buyer Requester No Role

5. Select the **User Type** and **Methods of Procurement Allowed**

Department

State Procurement Office

Methods of Procurement Allowed

Small Purchase RFQ Competitive Sealed Bidding (IFB) Competitive Sealed Proposals (RFP)

Approval Paths

Select	Id #	Solicitation / Award
<input type="checkbox"/>	1037	Award
<input type="checkbox"/>	1039	Award

6. Under **Approval Paths** select the check boxes of the approval paths that will apply to this buyer.
Note: Approval paths can be added later by editing the Buyer in Buyer Management.

Don't forget to select **Save**.

1034 Solicit

7. Select **Save**

Creating Approval Paths

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.

Approvers approve in sequence. If the first approver does not approve, the second approver does not see it to approve. |

If the first approver is out of the office and **selects the out of office button**, the backup, if assigned, will be inserted into the path and replaces that approver until the approver selects the **I have returned to the office** button.

To create an approval path, from the *Dashboard*, select **Approval Paths**.

Select **Add Approval Path**.

1. **Solicitation/Award**. Select whether this path will be for a solicitation or award.
2. **Name**. Enter a name for the approval path that will help you recognize it when you to assign it to a buyer.
Example: Use the division or office acronym plus a letter indicating whether it is for solicitation or award. (ACCTG-S; FHSD-A)
3. **Methods of procurement**. Select the methods of procurement to which this approval path will apply.
It is alright to select all the methods if you know all approvals for a unit will use this path. This will save you the time of having to edit or create a new path later. A Buyer will only be able to procure using the methods you assign to them in Buyer Management under *Rules*.
- 3A-**Amount**. If the approval path will apply only to a specific to a range of amounts, enter the range. Otherwise, leave blank. If left blank it will apply to all amounts. If using range amounts ensure paths that conflict are not assigned to the same buyer.
4. Select the **first approver** in the route.
- 4A-**Backup**. If you know who will be the backup or alternate for the approver when the approver is gone from the office you may select the back up. This does not have to be added when creating the path. It can be added later by editing the path.
Note: The backup is not activated unless the buyer selects the Out of Office button.
5. Select **Add Approval**. You will see another row in which you can add a second approver.
6. If this is the only approver in this path, select **Save**.

Add / Edit Approval Paths

1 Select if for Solicitation or award

Solicitation Award

Approval Path Name
ADM-S

2 Enter a Name for the route

Method of Procurement

3 select the methods of procurement

RFQ x IFB x RFP x

Approval required for amount within Range

3A If it is for a specific cost range enter it here. Otherwise, leave blank.

If left blank, this approval path will apply to all amounts.

Order	Primary	Backup	Arrange
1	Kashiwabara, Donn	Takaesu, Kevin S	Add Approval

6 Save the route

4 Select Approver

4A Backup/alternate

5 Select Add Approval

Save Delete Cancel

Adding a Second Approver in a Path

To add a second approver to an approval path, complete steps 1 through 5 above. (Do not select Save.) After you select **Add Approval**, you will see that row 2 appears that will allow you to add another approver to the path.

Add / Edit Approval Paths

Unique ID #
1040

Solicitation Award

Approval Path Name
Purchasing-S

Method of Procurement

RFQ x IFB x

Approval required for amount within Range

If left blank, this approval path will apply to all amounts.

Order	Primary	Backup	Arrange	Action
1	Kashiwabara, Donn	Takaesu, Kevin S	↑ ↓	Remove
2	--	--	Add Approval	

Change the sequence of the approvers

Add a second approver in the path

Select **Save** when the Approval

Save Delete Cancel

Assigning an Approval Path to a Buyer

Approval paths can be assigned to a buyer when you first grant access to the buyer or later by editing the buyer account.

Assigning an Approval Path to an Existing Buyer

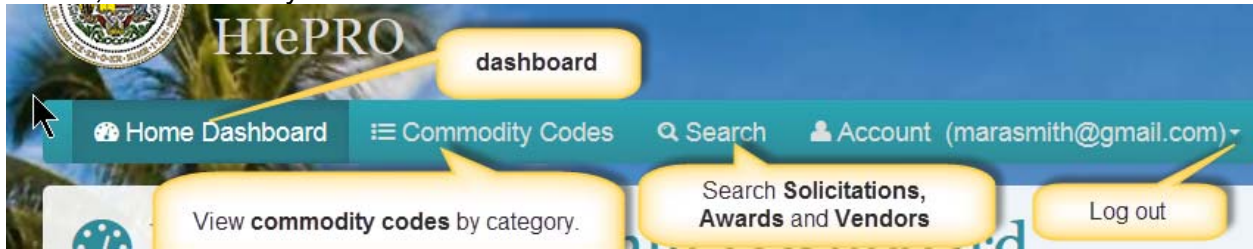
1. From the *Dashboard*, select *Buyer Management*.
2. In the search, select Buyer from buyer role to see all buyers in your Department.
You can also enter the last name of the buyer and search. Select **Edit**.
3. To add an approval path, select the checkbox next to the approval path.
4. When you have added all the approval paths to the buyer, select save.

Name	Email	Department	Role	Active?	Actions
Kashiwabara, Donn	donnkashiwabara@yahoo.co	SPO	Buyer	Yes	Edit Deactivate

Path ID	Path Name	Selected
1039	Award	<input type="checkbox"/>
1036	Award	<input checked="" type="checkbox"/>
1040	Solicitation	<input type="checkbox"/>
1038	Solicitation	<input checked="" type="checkbox"/>
1035	Solicitation	<input type="checkbox"/>
1034	Solicitation	<input type="checkbox"/>

A Little About HIePRO

On the **HIePRO** home page, (<http://hiepro.hawaii.gov>) If you look along the header where you selected Log In you will see several links: Home Dashboard, Commodity Codes, Search and your account.



Dashboard. If you are in a function (such as Buyer Management) and need to get back to the Dashboard to conduct another function (such as creating or editing an approval path) select the Dashboard link.

Commodity Codes. You may now view commodity codes by category. Select the category to expend and see the codes.

Search. Select Search and you will see 3 tabs enabling you to search Solicitations, Awards and Vendors. The vendor search is not visible to the public. The Public sees the notice of solicitation and award information.

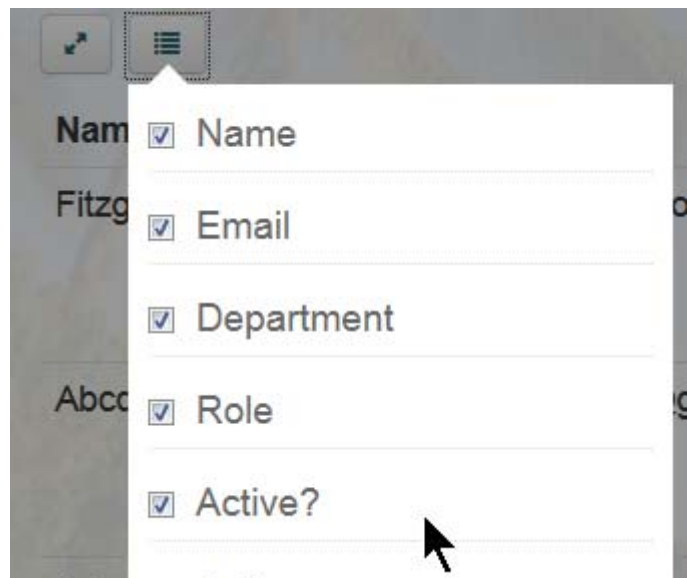
When you Search

On **HIePRO** when you search you will often see 2 buttons at the top of the Results. These buttons provide options in viewing the results of the search.



The button on the left controls how many records you see on a page.

The button on the right allows you to control which columns appear. The choices will differ depending on what you are searching. This is from Buyer Management.



Questions? Contact us:
hiepro@hawaii.gov or 808-586-0554