Hawaii State eProcurement
HIePRO
Quick Reference for Buyers
Part 1
http://hiepro.hawaii.gov

Table of Contents

Introduction

This reference is designed for use with the HIePRO Program Manual and the other training references developed to assist users. Note that training references will be amended periodically. Check online for updates each time you use

A Reminder: Buyer Responsibilities

1. Maintain security of HIePRO and its data.
2. Serve as point-of-contact with vendors for the solicitation.
3. Issue solicitations pursuant to the procurement statutes, Administrative Rules, Procurement Circulars and procedures , including departmental procedures, for the method of procurement utilized. (HIePRO does not do it for you.)
4. Provide clear written specifications, minimum qualifications, as applicable, and administrative requirements. (HIePRO doesn't do it for you.)
5. Adhere to the Procurement Code of Ethics.

*See the **HIePRO** Program Manual for more.*

Gaining Access to HIePRO

HIePRO is one of the services offered by the state's online Portal. All services on the portal are accessed with a single eHawaii.gov account (login/password).

Once the eHawaii.gov account is created, access or 'permission' is granted to access the appropriate service, in this case HIePRO. Your eAdministrator controls access to HIePRO. Each department has its own procedures for requesting access.

Therefore, gaining access to HIePRO is a 2 step process.

1. Create an eHawaii.gov Account if you do not already have one.
2. Follow departmental procedures to request permission to access HIePRO.

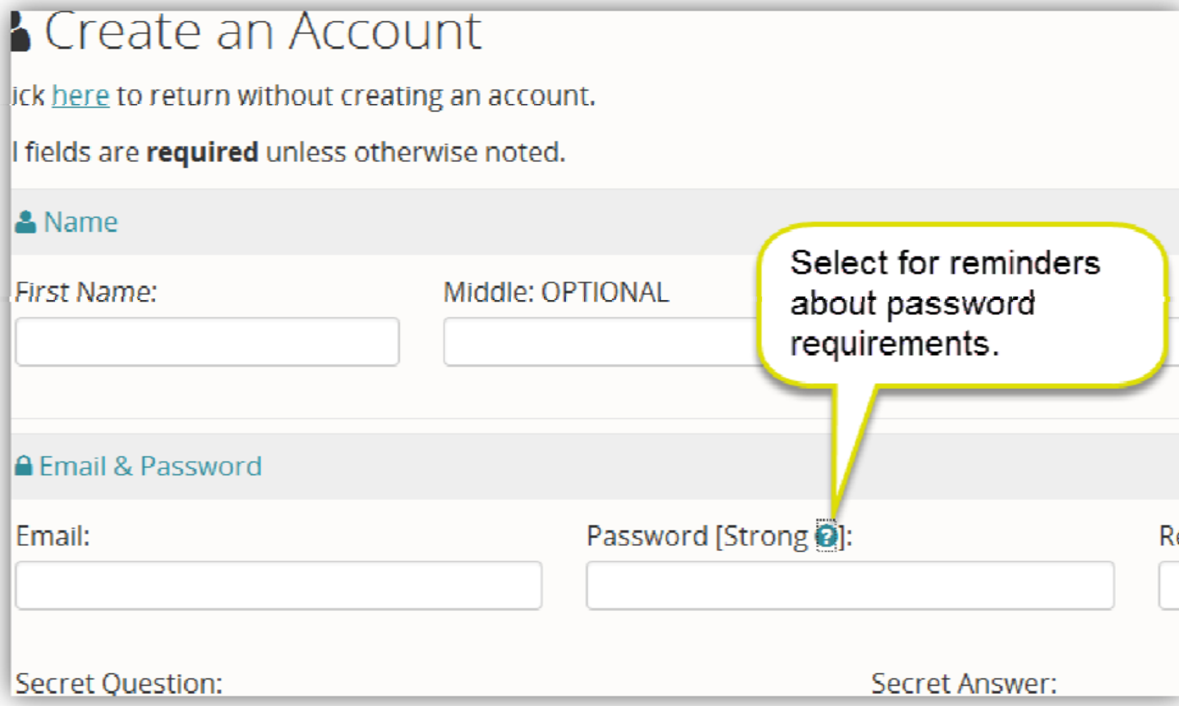
Finding your Department or CPO Jurisdiction eAdministrator

A listing of all eAdministrators and their alternates is on the SPO website at:
http://hawaii.gov/spo > For State & County Personnel > Dept/CPO Jurisdiction Contacts - SPO Programs

Create an eHawaii.gov Account

http://hiepro.hawaii.gov

1. Select **Sign** up (next to **Log in** Button)
2. Follow instructions. When creating your password, select the question mark icon above the password field to remind you of the password requirements. (8 characters, one letter, one number and one symbol)



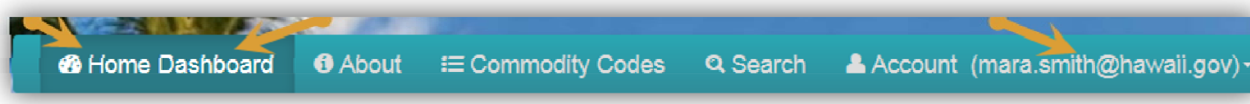
3. Follow your departmental procedures for requesting access to **HIePRO**. At a minimum, you will need to provide:
    1. Your exact email address; and
    2. Your position title.

Log In and Out

http://hiepro.hawaii.gov

1. Select the **Log in** button
2. Enter your email and password

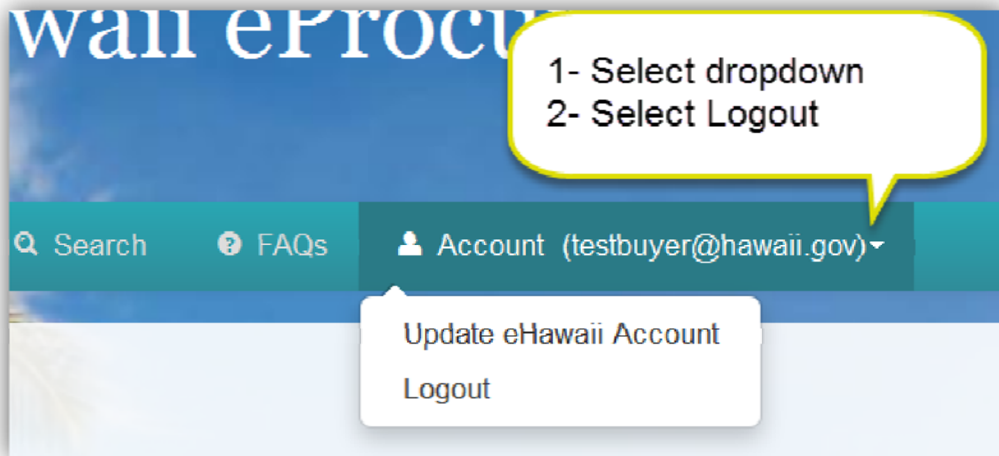
You know you are logged in when you see the Home Dashboard and your email address



Note: If the email address is visible but the dashboard link is not there, it means you do not have 'permission' to access HIePRO. Follow your departmental procedures.

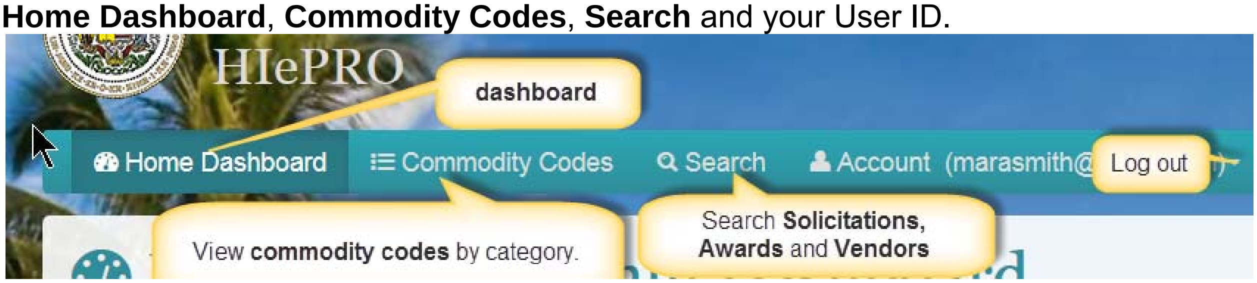
Log Out

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



About Navigating in HIePRO

On buyer dashboard page, along the header below the State seal are several links: **Home Dashboard**, **Commodity Codes**, **Search** and your User ID.



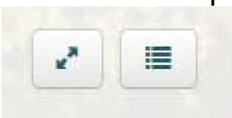
Home Dashboard. If you are in a function and need to get back to the **Dashboard** to conduct another function select the **Home Dashboard** link.

Commodity Codes. You may view commodity codes by class. Select the class to expand and view the commodity codes in the class.
Note: You do not need to log in to view commodity codes. They are on the public site.

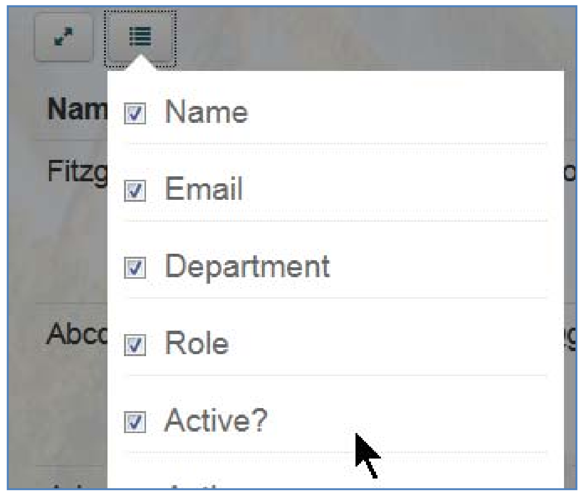
Search. When selecting **Search** and you will see 3 tabs enabling you to search **Solicitations**, **Awards** and **Vendors**.
Note: The vendor search is not visible to the public or vendors who are logged in. The Public site shows the notice of solicitation open to all vendors for current solicitations and all 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 with the diagonal arrows controls how many records appear on a page. The button with the bullets allows you to control which columns appear. The choices will differ depending on what you are searching.



Checklist: What is Needed to Create a Solicitation in HIePRO

(**HIePRO** does not do it for you.)

- □ Title of the goods/services/construction;
- □ Description and specifications of the goods/service/construction;
- □ Minimum qualifications of the vendor, as applicable;
- □ General and Special Provisions as applicable;
- □ Administrative requirements;
- □ Offer Forms, as appropriate;
- □ Timeline (dates/times for: issuance of solicitation, pre-offer conference, Q and A, submittal deadline, delivery/dates of service, etc.)
- □ Ensure appropriate vendors are in **HIePRO** and/or notified;and
- □ Commodity Code(s)

Search for Commodity Codes

About the NIGP Commodity Codes

Commodity codes were developed by the NIGP (Institute of Public Procurement) and are copyrighted. The State of Hawaii uses the 5-digit code.

- First 3 digits=class (over 300 classes)
- Second 2 digits=commodity (the goods, services or construction (over 7,000 codes)

The classes and codes are organized in alphabetical order for the most part.

Classes are organized in 2 major areas
001-899 = Goods
900-to 999 = Services (including Construction)

Viewing all the Codes
You can view the codes by Class on the HIePRO landing page (http://hiepro.hawaii.gov). You do not have to log in.

- Select Commodity Codes
- Select the class; all the codes within the class will open

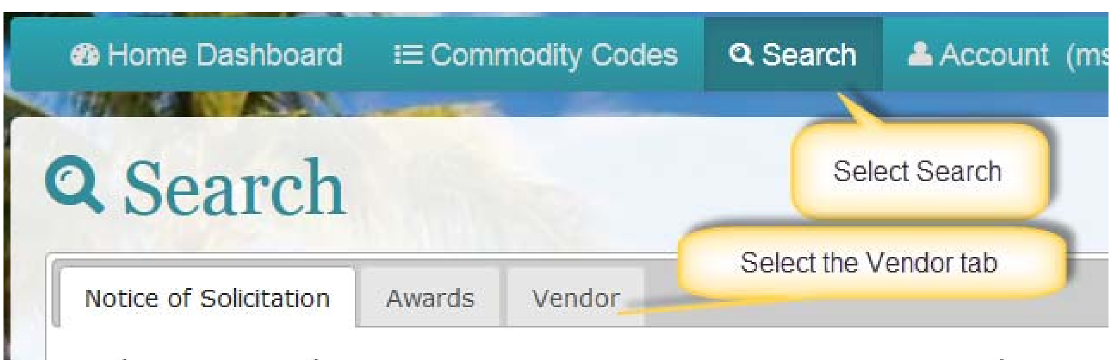
Searching Commodity Codes
You can search codes by using the browser search.
You can also search after logging in to HIePRO

- Log in.
- From the dashboard, select **Create New Solicitation.**
- Select the **Line Item** tab.
- Select **Add New Line Item.**
- Enter your search in the **commodity code field** (the first field)**.**

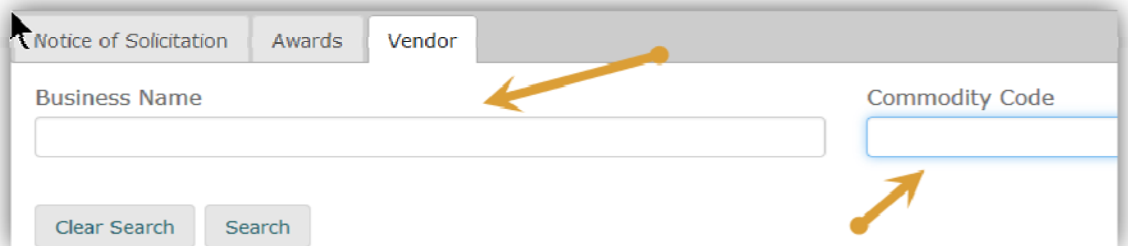
Search for Vendors

You can search for vendors by **vendor name** or **commodity code**.

- Log in
- Select the **Vendor** Tab
- Enter the **Business Name** or **Commodity Code** in the respective field and select **Search**
  Note: the commodity code search will also accept a word search.

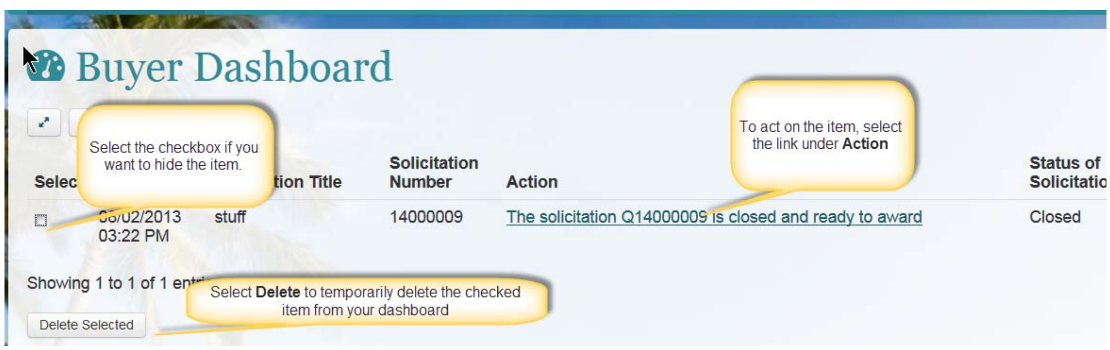


Enter the business name or commodity code



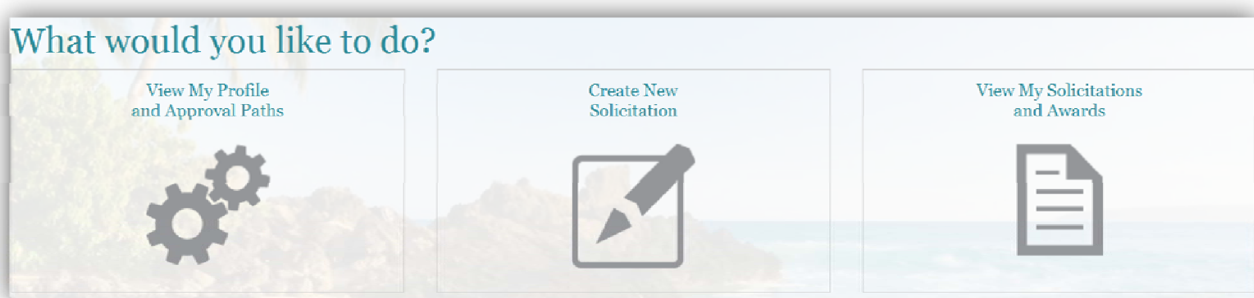
The Buyer Dashboard

Upon logging in you will see your dashboard. At the top is a listing of all items needing your attention. Sometimes the list will be long. The checkbox to the left of the item allows you to temporarily delete the item from the list. If the item is pending your action, it will appear again the next time you log in or select the Home **Dashboard** link. (When might you use the delete function? An example might be if you have a solicitation that has closed but cannot act on it and are waiting for something. If your list is long, you might want to temporarily delete that item so that you can attend to the other items on the list).



Below the items needing action, are 3 tiles:

1. **My profile and approval routes**
2. **Create New Solicitation.**
3. **View My Solicitations and Awards (**all the solicitations or awards you have issued).



- **My Profile and Approval Paths**
  This tile allows you to see some demographics about you (Name, phone, email). It also allows you to see any approval routes to which you are assigned, that is, that your solicitations or awards will travel when released. It will also show you approval routes in which you are an approver.
- **Create a Solicitation**
  Select this tile when you create a new solicitation
- **View My Solicitations and Awards**
  Select this tile to access your current drafts of solicitations, open soliciatations and awards and awards. You may also see your cancelled and closed solicitations by selecting the appropriate checkboxes.

Below the tiles, is an "I am out of Office" Button. This button is only to be used under the following circumstances:

- You are an approver
- You will be out of the office
- You have a backup approver assigned to your approval path (This is done by your eAdministrator)

Selecting this button will reroute all approvals waitng for your approval/disapproval to your backup.

Creating a Solicitation

From the home dashboard, select **Create a Solicitation**. You will see several tabs:

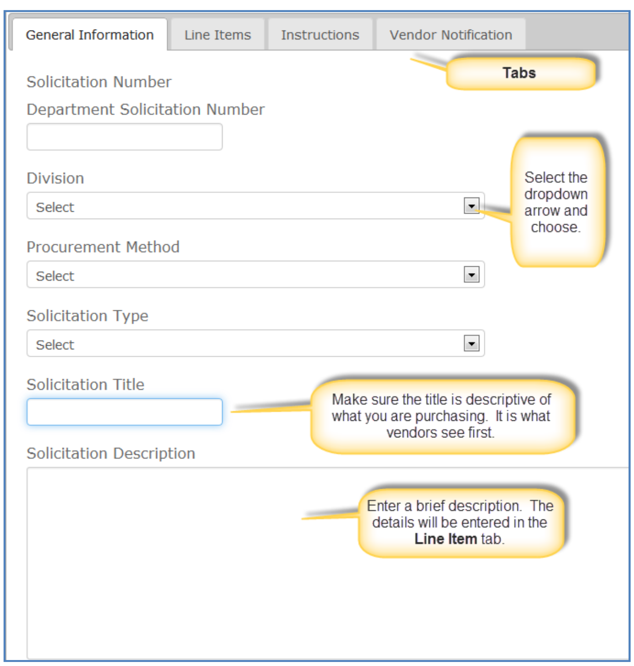
- **General Information:** Information that applies to all line items in the solicitation.
- **Line items:** The details of each line item are added here. Each solicitation must contain at least one least one line item.
- **Instructions:** General instructions for vendors, both mandatory and optional, statewide and department wide are here. The buyer may add an instruction, too.
- **Vendor Notification:** This tab may be used by buyers to notify vendors who are in HIePRO but have not included the commodity code being used for the solicitation.

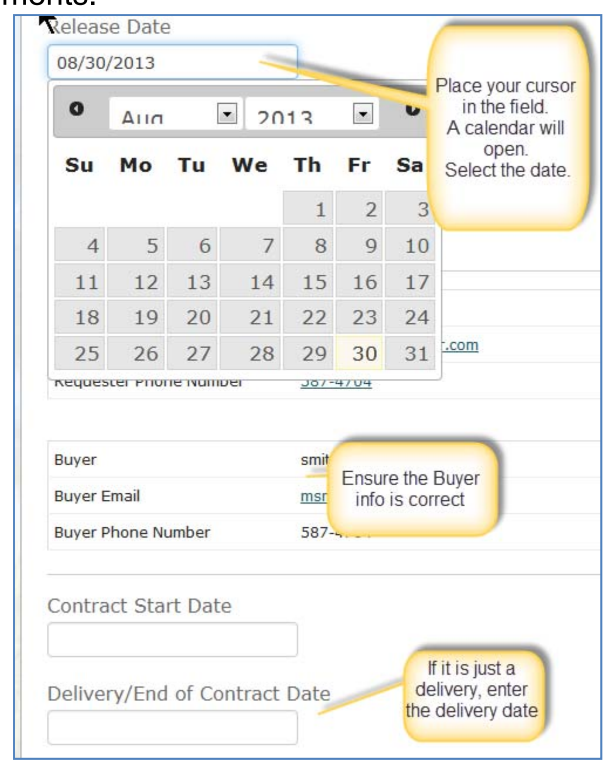
General Information

The **General Information** tab will be selected. Complete the fields:

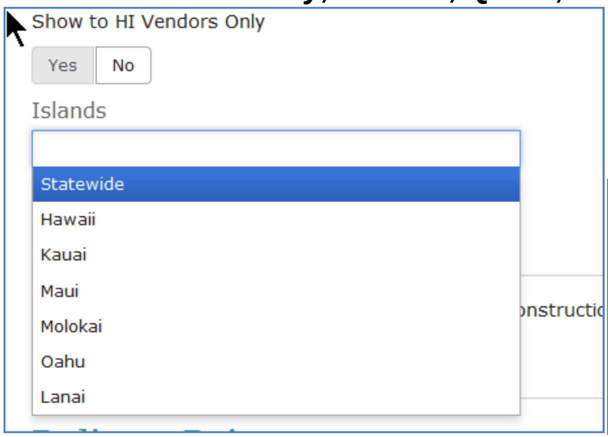
- **Department Solicitation Number:** Optional field
- **Division:** Select from dropdown.
- **Procurement Method: Select from dropdown** (usuallySmall Purchase RFQ).
- **Solicitation Type:** Select **Construction,** or **Goods and Services** as appropriate.
- **Solicitation Title:** Enter a brief but descriptive title of the goods, services or construction to be purchased. This is an important field. It is what vendors see first and they will use it to determine whether they will open and review the solicitation.
- **Solicitation Description:** Enter a brief description of the goods, services or construction to be purchased. This is not the line items tab or where specifications should go.

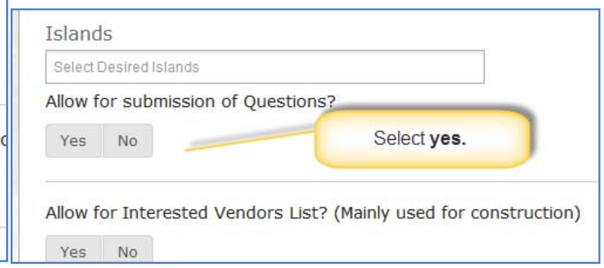
- **Release Date:** By default, the release date is the current date but it can be changed to the future.
- **Contract Start Date**: If procuring a service, enter the start date. If this is for a one-time delivery, or a short-term job, leave the start-date blank.
- **Delivery/End of Contract Date:** Enter the delivery date or end of contract date. This is a mandatory field.
- **Show to Hawaii Vendors Only:** If yes is selected, only vendors registered in HIePRO with a Hawaii address will be able to view and respond to the solicitation. **Note: If yes is selected, the solicitation will not appear on the public site. Vendors will have to log in to see it.** This option is available only for Small Purchase Request for Quotes method of procurement.
- **Islands:** Select the islands on which the goods or services are to be delivered.
- **Allow for Submission of Questions:** Select **Yes** and enter the dates.
- **Allow for Interested Vendors list:** Select **No**.
- **Delivery Points:**
    - o Select **Add new delivery point** to enter a delivery destination. More than one delivery point may be added.
    - o **There are various unknown delivery points.** Select **Yes** If there are many delivery points and you would prefer to include them with the specification attachments.
- **Billing Information:**
    - o Enter billing information; or
    - o Select the buyer address if the billing is to be submitted to the buyer; or
    - o Select **Various Options** if there are multiple billing addresses and include them with the specifications attachments.



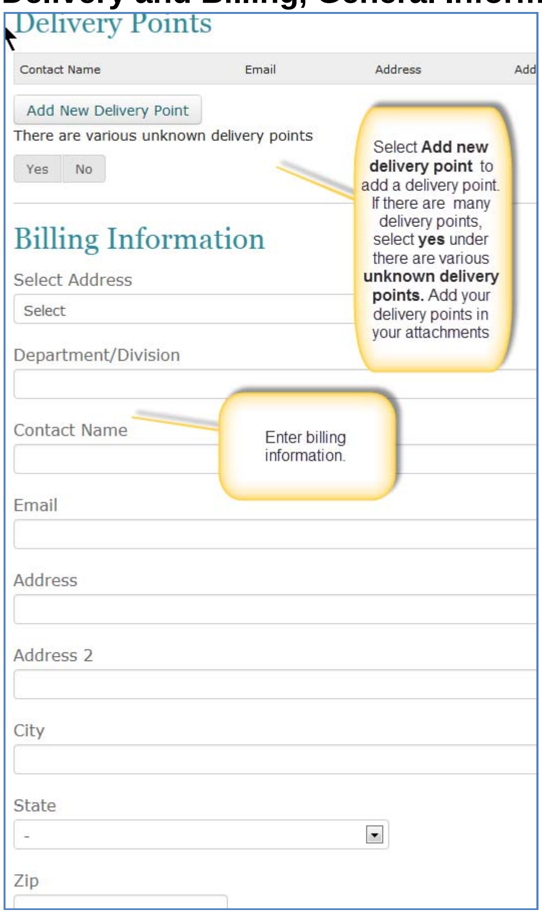


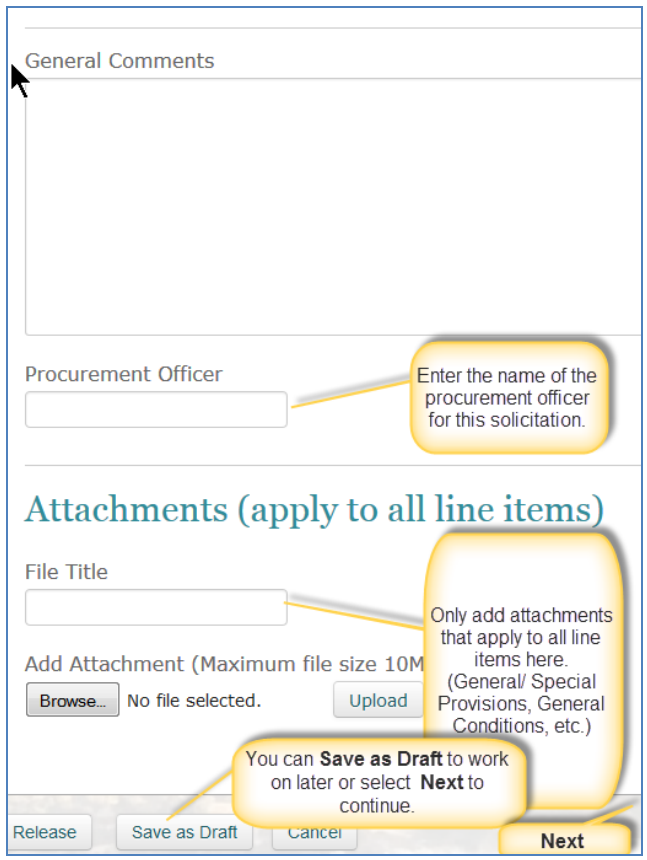
Hawaii Vendors Only, Islands, Q & A, Interested Vendors List





Delivery and Billing, General Information, General Comments, Attachments





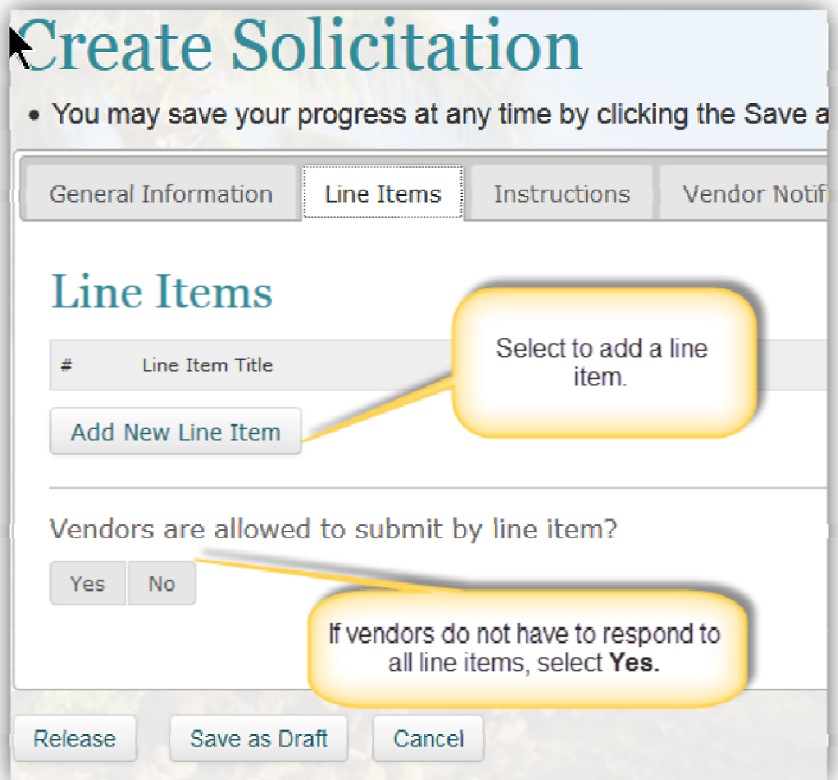
Note: You may select **Save as Draft** at any time to save your work and return to it. Saved drafts are found by selecting the **view my solicitations/awards** tile.

The **Release** button at the bottom of each page is to release the solicitation. An error message will be returned if you try to release without completing the mandatory fields.

Line items

To continue, select **Next** at the bottom of the page (you can also select the **Line items** Tab).

- **Add New Line item**: This is where the specifications and details of each line item are added
- **Vendors are allowed to submit by line item?** If vendors may respond to some but not all line items, select **Yes**. If there is only one line item, select either one. Yes no questions must be respon



Select **Add new line item.** Complete the fields.

- **Commodity code:** Enter the commodity code or a word that describes the goods, services or construction for the line item.
  Note: Although commodity codes are assigned by line item, only similar items should be grouped in a single solicitation. This will prevent a vendor from overlooking an item for which the vendor would submit an offer.
- **Quantity:** Enter the quantity or estimated quantity to be purchased. If the quantity is an estimate, be sure to state so in the specifications. Also include whether any minimum amount is guaranteed. This will affect the price quoted by the vendor.
- **Unit of Measure:** Enter the appropriate unit of measure. The purpose of this field is so that each vendor submits their offer in the same way and you are comparing

apples to apples. The vendor will submit the price of one unit of the unit of measure and HIePRO will extend the price.

- **Estimated price per unit:** Enter the estimated price per unit. (This is not shown to vendors.)
- **Make Estimated Price Public**: Do not select this button. It is used under certain circumstances for construction.
- Selecting any of the following buttons will create a field in HIePRO that the vendor must complete to submit an offer. (That is, the vendor will not be able to submit and offer without completing the field.) Select the button only if the vendor must provide the information in the HIePRO field.
  Note: If the vendor is to submit the information on an attached offer form, do not select these fields. If you do not know what the button is intended for, do not select it.
  - Manufacturer Name is Mandatory
  - Manufcturer ID is Mandatory
  - Manufacturer Part Number is Mandatory
  - Manufacturer URL is Mandatory
  - Item Identification ID is Mandatory
- **Line Item Title**: enter a unique descriptive title for the line item.
- **Line item Description**: Enter a description of the line item. If the specifications are brief you may enter them in this field. If specifications are in an attachment, refer to the attachments in the description (For instance after the brief description add 'See attached specifications.')
- **Attached Files**
  - Enter a title for the attachment
  - Select **Choose file**, find the file, select it and select **Open.**
  - When the file name appears next to Choose File, select **Upload.** If you do not select Upload, the file will not be uploaded. Once uploaded, the file name appears under **Attached files**.
  - To add additional files, repeat the 3 steps above.

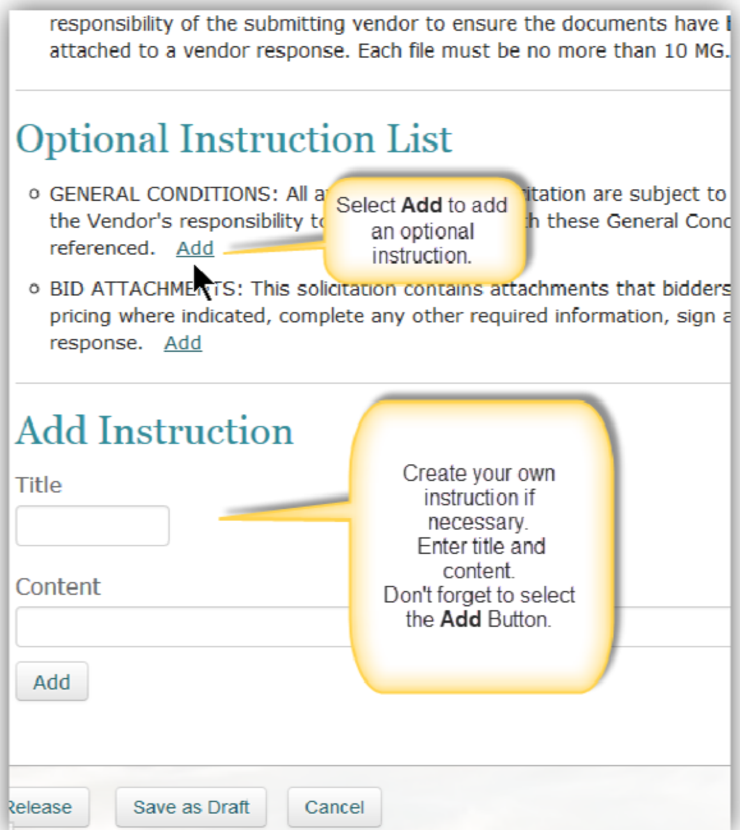
  Note: There is no limit to the number of files you may add. Each file has a size limit of 10 MB.
- When complete, select **Next** or the **Instructions** tab.

Instructions

Review all instructions. As a buyer, you are responsible for understanding instructions in your solicitation and ensuring there is no conflicting information in your specifications, administrative requirements or other documents.

Mandatory instructions: Listed first, these will appear on all solicitations.

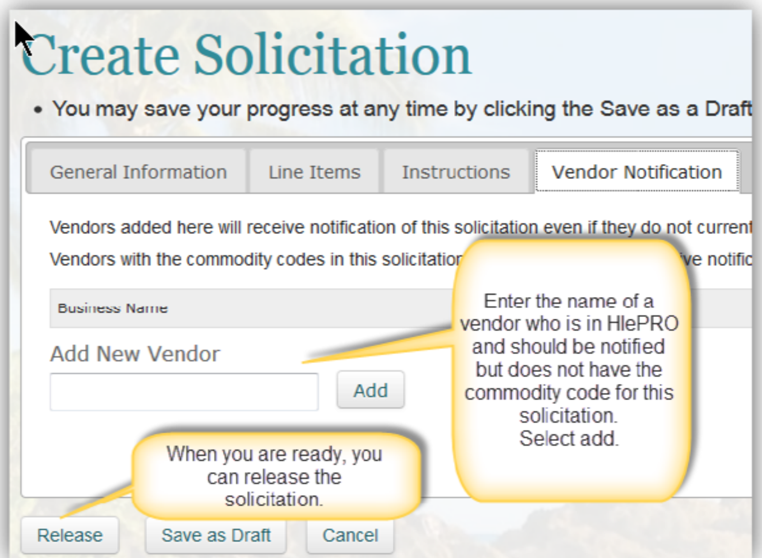
Optional instructions. To add an optional instruction, select the **Add** link at the end of the instruction.



Vendor Notification

There may be times when a vendor is in HIePRO but has not included the commodity codes you have selected for the solicitation. This page allows the buyer to include the vendor in the notification of the solicitation. It does not add the commodity code to the vendor's commodity code profile.

- In the add new vendor field, enter the vendor name or part of the name
- When it appears, select it, and select add.
- Repeat as needed.



Releasing the Solicitation

- When ready to release the solicitation for publication, select the **Release** button at the bottom of the page. If you have an approval route to which your solicitation is subject, it will not be released until approved. be sure to check the solicitation to ensure it was released in a timely manner. You can determine this from the **Approval Status** and **History** tabs.

Additional Tabs

Once the solicitation is submitted, you may view the solicitation by selecting the **View My Solicitations and Awards** tile. You will see some tabs in addition to General, Line Item, Instructions, and Vendor Notification. They will vary depending on the options the buyer selected when creating the solicitation. They include:

- **Questions and Answers**: If a question and answer section was included, you will be able to view and answer questions from this tab.
- **Approval Status:** If there is an approval path assigned to you for the circumstances of the solicitation, this tab will provide where the approval is on the path. Once an approver has approved, the date and time approved will appear.
- **Offers**. After the offer due date, this page shows vendor offers, attachments and comments. Prior to the offer due date, this tab will show vendors who have responded but not their offers or attachments.
- **Protests:** If there is a protest, this page is used to record the protest data and place the solicitation in protest mode. It is not used to file a protest. The protest

process continues: (but not quo to be conducted in the same manner it has in the past.

- **History:** The History tab is created once a solicitation is saved and records the history of the solicitation through award. Vendors also have a history tab but do not see other vendor information.

Be sure to explore these tabs. They can be helpful.

Vendor View
Vendors have a similar view as the buyer with the following exceptions:
- Offers tab shows only the account holders offer.
- Questions and answers shows only the account holders questions until the answers are released. Then it shows all answers (but not who asked the question.)
- **History** tab does not include actions by other vendors.
- There is no **Approval Status** or **Protest** tab

Buyers have a **Vendor View** button at the top of the page when a buyer is logged in and the solicitation is open.

Public View
Logging out will enable you to see the solicitation notice as the public sees it. It does not include the line items.
Note: Small purchase request for quotes in which the buyer has chosen to show to Hawaii vendors only will **not** appear on the public site. It would be too confusing for a non-Hawaii vendor to view a solicitation on the public site, log in and not even be able to find it.

Answering Questions

Once the solicitation is released, questions may be answered by selecting the Questions tab in the solicitation.
- Log in
- Select the **View My Solicitations and Awards** tile.
- From the **Solicitation** tab select the solicitation number.
- Select the **Questions & Answers** tab.

NOTE: Answers to questions will be released on the answer due date even if you have NOT answered all the questions. If the answer due date and time is near and you will not be able to answer all the questions in time, issue an addendum to extend the due date for answers. You may need to extend the offer due date to ensure vendors have adequate time in considering the answers to submit their offers.

Creating an Addendum

Log in. Select the **My Solicitations and Awards** tile.

- Select the solicitation number of the solicitation for which an addendum is to be created. It will open the solicitation.
- At the bottom of the page, select **Amend.**
- In the **reason**, enter a short summary of the change (examples:
  - changing offer due date from 9/19/14 to 9/30/14;
  - amending item #4 on the specifications attachment;
  - deleting line item for blue widgets.
- Be sure to enter the change in the solicitation as well. (For instance, if you do not actually change the offer due date when amending it, the solicitation will close on the original due date.)

Reviewing the Abstract

Once the solicitation closes, you may view the abstract by selecting the **Offers** tab.

- Log in.
- From the **Dashboard,** select the solicitation link under **Action.** The solicitation will open**.**
- Select the **Offers** tab.
- At the top of the page you will see the abstract for the solicitation. The abstract price includes prices for all line items and the total quantity. If you need to share the abstract with the procurement officer for the solicitation, select the Abstract Summary button at the bottom of the page.

Questions?

- http://**HIePRO**.hawaii.gov > Select Learn more about **HIePRO** (above Login)
  http://**HIePRO**.hawaii.gov > Select FAQs (in the Header)
- http://spo.hawaii.gov > Training for State and County Personnel > SPO 301 (2 parts) (available on demand)

- Contact your eAdministrator

- hiepro@hawaii.gov or 808-586-0554