

**Hawaii State eProcurement
HIePRO
Quick Reference for Requesters**

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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, especially in the early implementation of HIePRO. Check online for updates each time you use

A Reminder: Requester Responsibilities

1. Maintain security of HIePRO and its data.
2. Provide clear written specifications, minimum qualifications, as applicable, administrative requirements as applicable and timelines. (HIePRO doesn't do it for you.)
3. 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. Each department has its own procedures for requesting access.

In summary, 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** as a requestor.

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** > [Department and CPO Jurisdiction Administrators, Managers or Contacts for SPO Programs](#)

Create an eHawaii.gov Account

<http://hiepro.hawaii.gov>

1. Select Log in (next to Public Search)
2. Select **Create Free account**.

When creating your password, you will need at least 8 characters which must include: one letter, one number and one symbol



Log In

Click [here](#) to return without logging in.

You have requested access to a site that requires authentication.

Email: **Required**

Password:

Support

Need an account?

[Create Free Account](#)

Forgot your password?

[Retrieve My Password](#)

Need help?

[Start Live Help Chat](#)

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

 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.



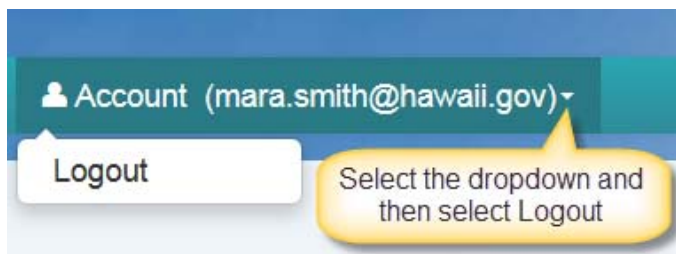
You know you are logged in when you see the Dashboard and your email address



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.

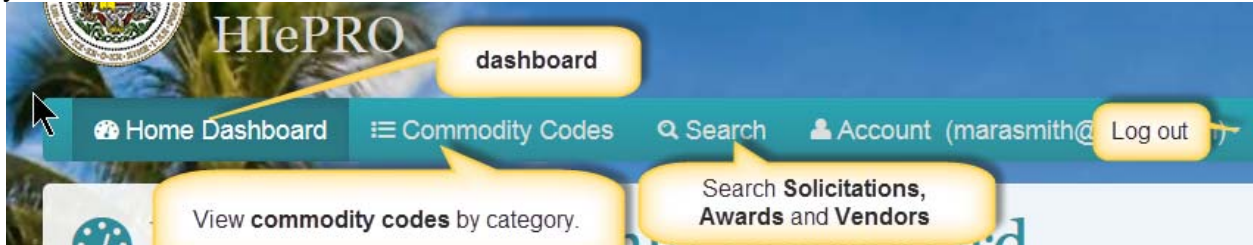
Log Out

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



A Little About HiePRO

On the **HiePRO** home page, (<http://hiepro.hawaii.gov>) along the header below the State seal are several links: **Home Dashboard**, **Commodity Codes**, **Search** and Log In or your Account.



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.

Search. When selecting **Search** and you will see 3 tabs enabling you to search **Solicitations, Awards and Vendors.**

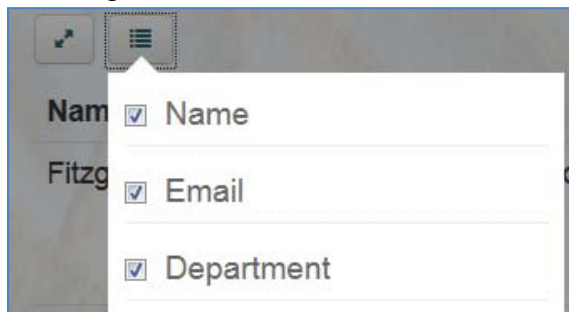
Note: The vendor search is not visible to the public or vendors who are logged in. The Public sees the notice of solicitation for current solicitations and award information. The public does not see all the tabs buyers see such as history, offers, approval status or protests tabs.

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 Request for Solicitation in HlePRO

(HlePRO 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;**
- Administrative requirements specific to the goods, services or construction to be purchased;**
- Timeline (dates/times for: issuance of solicitation, preoffer conference, Q and A, delivery/dates of service, etc.)**
- delivery points- (address, contact, etc. for deliver of the goods, services/construction)**
- Title of the line item;**
- General and Special Provisions as applicable;
- Offer Forms, if needed;
- Ensure appropriate vendors are in **HlePRO** and/or notified;
- Commodity Code(s) for line items

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

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

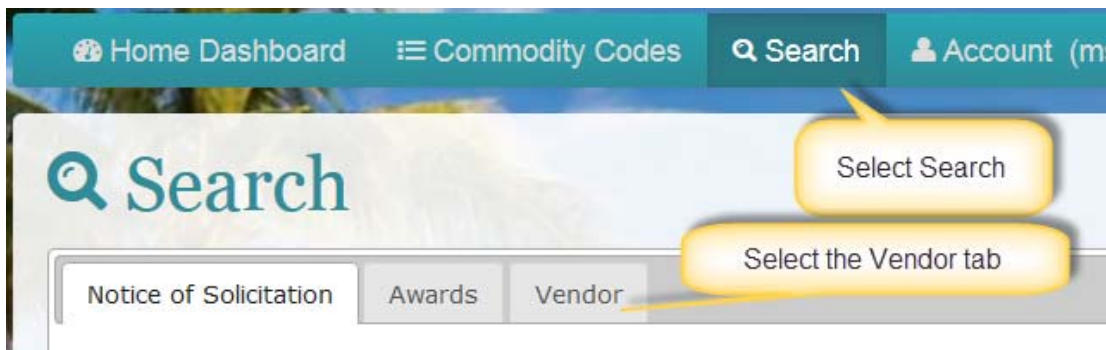
- Log in.
- From the dashboard, select **Create New Solicitation**.
- Select the **Line Item** tab.
- Select **Add New Line Item**.
- Enter your search in the **commodity code field** (the first field).

Search for Vendors

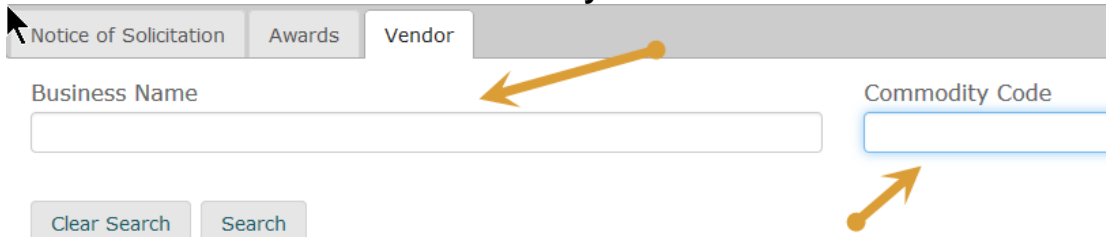
You can search for vendors by **vendor name** or **commodity code**.

- Log in
- Select **Search** (You can also select the **Search Solicitations, Awards and Vendors** tile).
- 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

A screenshot of the search input fields. At the top, there are three tabs: 'Notice of Solicitation', 'Awards', and 'Vendor'. Below the tabs are two input fields: 'Business Name' and 'Commodity Code'. The 'Business Name' field is a long, empty text box. The 'Commodity Code' field is a shorter, empty text box. Below the input fields are two buttons: 'Clear Search' and 'Search'. Two orange arrows point from the 'Business Name' field to the 'Search' button and from the 'Commodity Code' field to the 'Search' button.

The 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 request that has been returned for clarification 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. **View My Solicitations and Awards** (all the solicitations or awards you have issued).
2. **Create New Solicitation (Request)**.
3. **Search Solicitations, Awards and Vendors** (searches all solicitations, awards and vendors in HIePRO)

The screenshot shows the 'Requester Dashboard' interface. At the top, there is a navigation bar with 'Home Dashboard', 'Commodity Codes', 'Search', and 'Account (testrequester2@hawaii.gov)'. Below the navigation bar, the dashboard title 'Requester Dashboard' is displayed. A table lists items needing action, with columns for 'Select', 'Date', 'Solicitation Title', 'Solicitation Number', 'Action', and 'Status'. A callout points to the 'Log Out' link in the account menu. Another callout points to the 'Action' column, explaining that items needing action are listed there. A third callout points to the 'Delete Selected' button, explaining that it is used to temporarily hide items. Below the table, a section titled 'What would you like to do?' contains three tiles: 'View My Solicitations and Awards' (with a callout 'View your draft requests'), 'Create New Solicitation' (with a callout 'Create a new Request'), and 'Search Solicitations, Awards and Vendors' (with a callout 'Search all solicitations, Awards and Vendors').

Select	Date	Solicitation Title	Solicitation Number	Action	Status
<input type="checkbox"/>	10/16/2013 12:51 PM	widgets	14000084	The solicitation 14000084 has been returned to you by buyer.	Draft

Creating a Request

From the 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. These are the fields. At a minimum complete the fields that are in Green:

- **Department Solicitation Number:** Optional field
- **Division:** Select.
- **Procurement Method:** Small 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.
- **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:** This option is available only for Small Purchase Request for Quotes method of procurement. It is not available if competitive sealed bidding (IFB) or competitive sealed proposals (RFP) are conducted.
- **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:**
 - Select **Add new delivery point** to enter a delivery destination. More than one delivery point may be added.
 - **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:**
 - Enter billing information; or
 - Select the buyer address if the billing is to be submitted to the buyer; or
 - Select **Various Options** if there are multiple billing addresses and include them with the specifications attachments.

General Information | Line Items | Instructions | Vendor Notification

Solicitation Number

Department Solicitation Number

Division

Procurement Method

Solicitation Type

Solicitation Title

Solicitation Description

Tabs

Select the dropdown arrow and choose.

Make sure the title is descriptive of what you are purchasing. It is what vendors see first.

Enter a brief description. The details will be entered in the **Line Item** tab.

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

Show to HI Vendors Only

Yes No

Islands

Statewide

Hawaii

Kauai

Maui

Molokai

Oahu

Lanai

Islands

Select Desired Islands

Allow for submission of Questions?

Yes No

Select **yes.**

Allow for Interested Vendors List? (Mainly used for construction)

Yes No

Delivery and Billing, General Information, General Comments, Attachments

The screenshot shows a web form with several sections and callouts:

- Delivery Points:** A table with columns for Contact Name, Email, Address, and Add. Below it is an "Add New Delivery Point" button and a "There are various unknown delivery points" section with "Yes" and "No" radio buttons. A callout box explains: "Select **Add new delivery point** to add a delivery point. If there are many delivery points, select **yes** under there are various **unknown delivery points**. Add your delivery points in your attachments".
- Billing Information:** A section with fields for "Select Address", "Department/Division", "Contact Name", "Email", "Address", "Address 2", "City", "State", and "Zip". A callout box points to the "Contact Name" field: "Enter billing information.".
- General Comments:** A large text area for entering comments. A callout box points to the "Procurement Officer" field: "Enter the name of the procurement officer for this solicitation.".
- Attachments (apply to all line items):** A section with a "File Title" field, a "Browse..." button, and an "Upload" button. A callout box explains: "Only add attachments that apply to all line items here. (General/ Special Provisions, General Conditions, etc.)". Below this is a "No file selected." message and a "Browse..." button.
- Buttons:** At the bottom, there are "Release", "Save as Draft", "Cancel", and "Next" buttons. A callout box points to the "Save as Draft" button: "You can **Save as Draft** to work on later or select **Next** to continue.".

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 or 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**.

Create Solicitation

- You may save your progress at any time by clicking the Save a

General Information | Line Items | Instructions | Vendor Notif

Line Items

#	Line Item Title
<input type="button" value="Add New Line Item"/>	

Vendors are allowed to submit by line item?

Release | Save as Draft | Cancel

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 for construction after the award is made.
- 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 if the vendor must provide the 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
 - Manufacturer 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.

responsibility of the submitting vendor to ensure the documents have been attached to a vendor response. Each file must be no more than 10 MG.

Optional Instruction List

- GENERAL CONDITIONS: All attachments are subject to the Vendor's responsibility to ensure these General Conditions are referenced. [Add](#)
- BID ATTACHMENTS: This solicitation contains attachments that bidders pricing where indicated, complete any other required information, sign a response. [Add](#)

Select **Add** to add an optional instruction.

Add Instruction

Title

Content

Create your own instruction if necessary. Enter title and content. Don't forget to select the **Add** Button.

Vendor Notification

There may be times when a vendor is in HlePRO 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 vendors commodity code profile.

- In the add new vendor field, enter the vendor name
- Select add.
- Repeat as needed.

Create Solicitation

- You may save your progress at any time by clicking the Save as a Draft

General Information | Line Items | Instructions | **Vendor Notification**

Vendors added here will receive notification of this solicitation even if they do not currently have notification. Vendors with the commodity codes in this solicitation will receive notification.

Business Name

Add New Vendor

Enter the name of a vendor who is in HlePRO and should be notified but does not have the commodity code for this solicitation. Select add.

When you are ready, you can release the solicitation.

Releasing the Request

- When ready to release the request, select the **Release** button at the bottom of the page.
- There is a 5 minute lag for the release of documents. That is, they are released in 5 minute cycles.

FYI-

Vendor View

Once a solicitation is released, 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

Public View

Once the solicitation is released, you can see the solicitation notice as the public sees it.

Questions?

hiepro@hawaii.gov or 808-586-0554