

Prerequisite:
SPO 001 Procurement Basics

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Hawaii State eProcurement
HlePRO
Buyer Training
SPO 301 Part 1

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What Will be Covered

SPO 301 Part 1

- Intro, Resources & Training, Definitions, eProcurement and HlePRO
 - Buyer Responsibilities, Ethics and Security
 - Other Roles and Responsibilities in HlePRO
 - About Commodity Codes
 - Gaining Access to HlePRO
 - Retrieving a Forgotten Password
 - The HlePRO training site – a place to practice
 - Doing your Homework before you Procure
 - ❖ The HlePRO Landing Page, creating an eHawaii account, forgotten password, logging in, buyer home dashboard
 - Vendor Transaction Fees
 - About Approvals
 - Vendor Instructions
 - ❖ Creating and Releasing a Solicitation
 - ❖ Question and Answer Section
- Preview: SPO 301 Part 2**
- Reminders about Solicitation Addenda, Reviewing Vendor Responses/Offer, Creating a Notice of Award

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Resources and Training Materials

On the SPO website

HlePRO (header) » HlePRO for State and County Personnel *or*
Training for State & County Personnel >> Training Materials & References

- HlePRO Program Manual
 - Overview, roles, your responsibilities, who may have access, and more.
- HlePRO Buyer Quick Reference
 - Step-by-step guide to getting your solicitation on HlePRO **providing** you:
 - Know how to conduct the method of procurement;
 - Have specifications, minimum qualifications; and
 - Have Administrative requirements.
- Training Reference SPO 301 (Powerpoint handouts)

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This Training is Designed for

State Personnel who:

- Have or will have written delegated authority to procure and procure using eProcurement; **and**
- Have taken the required workshops for the method of procurement to be used (such as, Small Purchases Method of Procurement - SPO 120); **and**
- Are given access to HlePRO by their eAdministrator;
or
- Are Department or CPO Jurisdiction eAdministrators or Alternates.

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This Training is Intended to:

- Provide on overview of HlePRO;
- Provide responsibilities of buyers when using HlePRO;
- Teach the mechanics of placing a solicitation on HlePRO;
- Provide some reminders about common mistakes in conducting small purchase method of procurement using eProcurement.

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Before You Procure/Administer Contract: Written Delegated Authority and Training

Before you develop/draft/participate in a solicitation, review, approve, conduct, manage, or administer a procurement/contract, you must:

- **Have written delegated authority per signed and submitted (to SPO) Form SPO-036.**
Note: See Procurement Delegation Memorandum 2010-01, as amended.
 - On the SPO website
 - Manual for State & County Personnel
 - Delegation
- **Have taken all required training.**
Reference: Procurement Circular 2010-05, as amended
Note: Some requirements have changed. Check the website periodically.
 - On the SPO website
 - Training for State and County Personnel
 - Training Requirements

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Required Training HlePRO Buyer Training Level 2

- **Method of Procurement**
 - **SPO 120** - Small Purchase Method of Procurement, and/or
 - **SPO 100** - Competitive Sealed Bidding (CSB or IFB)
 - SPO 150 - Insurance Requirements for Contracts (Required for CSB)
- **SPO 001** – Procurement Basics
- **SPO 127** - Understanding, Detecting and Preventing Anti-Trust Violations (all methods of procurement)
- **SPO 301** – HlePRO Buyer Training (all parts)

- If procuring for **construction add** to the above:
 - **SPO 130** – Construction Procurements
 - **SPO 185** - Prevailing Wage, Certified Payroll and Contract Agency Responsibilities

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Definitions

- **Dept. eAdministrator/ eAdministrator / Dept. Administrator=**
 - the Department or CPO Jurisdiction eProcurement Administrator or their alternates.
 - There is only one eAdministrator for each Department/ CPO Jurisdiction. Each department may have up to 3 Alternate eAdministrators. Executive branch departments eAdministrators and alternates are delegated on form SPO-036. CPO Jurisdiction eAdministrators are delegated on form SPO-041
 - The listing of eAdministrators/alternates is on the SPO website.
 - For State & County Personnel >> Dept/CPO Contacts – SPO Programs

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Definitions

Continued

- **RFQ** = small purchase method of procurement pursuant to HRS 103D-305
- **IFB** = invitation for bid using competitive sealed bidding method of procurement pursuant to HRS 103D-302. An IFB (Invitation for Bid) is also all the documents used to issue the solicitation for this method.

- See also Definitions in the ***HlePRO Program Manual***

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What is eProcurement?

- Open & transparent system for vendors to compete for state contracts electronically.
- Online through the application:
 - Solicitations & addenda issued.
 - Vendors ask questions, buyers issue answers.
 - Vendors submit offers.
 - Bid or quote opening is virtual.
 - Once the solicitation due date/time is passed, vendors may log in **and see other vendors offers** entered in HlePRO.
 - Buyer issues Contract Award Notice.
 - Searchable

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Hawaii State eProcurement HlePRO

- Pronounced [hi-pro]
- Solicitation notices & awards- posted to public site automatically.
- Use of NIGP Commodity Codes for automatic courtesy email notifications to vendors.
- Pre- offer conference, Q&A, addenda.
- Offers submitted.
- Upon logging in, vendors notified if not compliant in Hawaii Compliance Express(HCE).

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Your role and responsibilities as a buyer...

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Buyer Responsibilities

1. Maintains security of HiePRO and its data.
2. Serves as point-of-contact with vendors for the solicitation.
3. Issues procurement by following the procurement procedures for the method of procurement. (HiePRO doesn't do it for you.)
4. Provides clear written specifications, minimum qualifications as applicable, and administrative requirements. (HiePRO doesn't do it for you.)
5. Follows the procurement code of ethics.

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Maintaining Security

- HlePRO accounts may NOT be 'shared'. Your name is on the account and its use is your responsibility.
 - Maintain security of your account (login/password)
- Data in HlePRO must also be kept secure.
 - Don't be casual about the information in HlePRO.
 - Log out of HlePRO before leaving your computer.
 - Procurement data is also subject to requirements for open information.
 - Make sure you know when information must be kept confidential and when it must be released.
 - Know what is on the public site.

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Follow Procurement Procedures

- For your protection
 - Hawaii Revised Statutes
 - Hawaii Administrative Rules
 - Procurement Circulars
 - Internal policies and procedures (Dept., Div., etc.)
- You must do more than attend training.
 - Know and follow procurement procedures.
 - Keep up to date with changes.
 - For certain goods, services and construction there may be other procedures you must follow.

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Point-of-Contact with Vendors

- It is the buyers responsibility to answer questions about the procurement.
- If you do not know the answer, advise the vendor you will get back to them. Then find the answer and get back to them.
- Exceptions:
 - Questions on the mechanics of HlePRO - provide them the HIC contact info.
 - Policy questions, provide them SPO contact info.

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Ethical Procurement

- Procurement Code of Ethics;
- Essential to the procurement process and public faith and perception;
- Affects everyone;
- No conflict of interest or appearance of.
 - You must be an employee of the state through the personnel process.
 - If you are a vendor to the state, you may not have access to HlePRO.
- Reference
HRS 103D-101, HAR Chapter 131, Sec 131-1.02

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Other HlePRO Roles and Their Responsibilities

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Other HlePRO Roles & Responsibilities

- **eAdministrator**
 - Oversees HlePRO program for the Department/CPO Jurisdiction.
 - HlePRO point-of-contact for buyers.
- **System Administrator**
 - Oversees HlePRO program for the state.
 - HlePRO point-of-contact with department administrators.
 - HlePRO point-of-contact with the vendor administering the HlePRO application, Hawaii Information Consortium, LLC (HIC).

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Other HlePRO Roles & Responsibilities

Continued

- **Approver**
 - Depends on how your dept. sets it up -check before you procure.
 - Approves solicitation & addenda.
 - Approves award & contract amendments.
 - In HlePRO, approver is a buyer who has been assigned to an approval path.
- **Requestor**
 - New optional role (not a procurement role)- may not be used by all departments.
 - Provides specifications & goods/services requirements for the buyer.

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About Commodity Codes

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Commodity Codes

- Purpose of using commodity codes:
 - To connect the appropriate vendor with the solicitation
 - To conduct analysis of our spend

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About NIGP Commodity Codes

- Developed by National Institute of Governmental Purchasing = Public Procurement Institute
 - First 3 digits - the class (300+)
 - Second 2 digits - the goods/service/construction (7,000+)
- Code numbering - somewhat alphabetical
 - **Classes up to 899 - goods**
 - **Classes 900 and above – services & construction**

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Commonly Used Commodity Codes

- **Class 071 – Automobiles, Sch. Buses, SUVs and Vans**
 - 07180- SUV type vehicles
 - 07190- Vans, cargo
- **Class 072 - Trucks**
 - 07201- truck, class 1, 6,000 lb
- **Class 910 – Bldg. Maintenance, Installation & Repair Services**
 - 91039- janitorial/custodial services
 - 91027- garbage, trash removal
 - 91036- heating, air conditioning maintenance & repair
- **Class 988 – Roadside, Grounds, Recreational & Park Area Services**
 - 98802- arborist services
 - 98888- tree trimming, pruning services

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Finding Commodity Codes

- Commodity codes by class available without logging in.
- Can search by key word (after logging in).
 - Keep it short, one word or part of a word.
- Searching vendors.
 - After selection, search for vendors by commodity code to verify; or
 - Can search for specific vendors and see the commodity codes in their profile.

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Commodity Codes are Not Procurement Methods

- Purpose of commodity codes is to link solicitations and vendors.
- Some commodity codes will have 'professional services' in their title. This is NOT the same as the professional services method of procurement.
 - At this time, professional services method of procurement is not conducted on HlePRO.
 - Some solicitations may only be conducted using professional services method of procurement.

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Getting Access to HlePRO

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Obtaining a HlePRO Account

- Two-step process;
 1. You must have an eHawaii.gov account (some may already have one);
 2. eAdministrator grants you access when they have certain information. Each department has it's own process (a supervisor approval is usually needed)
 - Check with your eAdministrator for the departmental procedures for obtaining an account.

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Not sure if you already have an eHawaii.gov account?

- You may already have an account if you log in to access HCE, eCrim (law enforcement), boating registration, etc.
- If you are not sure, create an account using your work email.
- If you already have an account you will receive the message one already exists for your email. Follow the instructions for retrieving your password if you have forgotten it.

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Getting Access/Permission to use HlePRO

- Only your e Administrator can give you access to HlePRO and will need:
 - Your **exact** email address;
 - Your position title;
 - The methods of procurement to which you may have access (use); and
 - Any approval paths to which you need to be subject.
- Each department has its own procedures. Contact your department for the procedures.

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Creating an eHawaii.gov Account

- Go to <http://Hiepro.hawaii.gov>
- Select the **Sign Up** link
- Your email is your user ID (login).
 - You must use a Hawaii.gov (or other clearly work) email to be a buyer in HlePRO.
- Follow instructions for creating account.

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Forget your Password?

- Go to the HlePRO site.
- Select Log In.
- To the right under **Support** you will see the section for retrieving forgotten password.
- Still having trouble? There is a video and transcript of the video if you are unsure how to go about retrieving your password.
- You will need the answer to your secret question to retrieve your password (established when you create your account.)

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There are 2 HlePRO Sites

- The **Production** site
where you enter your solicitations
<http://hiepro.hawaii.gov>
and
- The **training** site
where you practice entering solicitations
<https://training-hiepro.ehawaii.gov/>
- The sites are unrelated and the process for gaining access differs.

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The HlePRO Training Site

A Place to Practice Issuing Solicitations

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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 with the following information:
 - Statement that you have taken the HlePRO training (workshop number and date(s))
 - Your exact email address.
 - Your position title.
 - The department you are in.

When Using the HlePRO Training Site

- Vendors also have access to this site for training.
- Do not enter anything that must be kept confidential.
- No emails are sent out from this site.
 - You will not get the usual notification emails in the HlePRO Training site.)
- The HlePRO Training site is not connected to HCE.

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Before Entering a Solicitation in HlePRO

Research...

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Before Entering Your Solicitation Do Your Research

- HlePRO does **not** create specifications for you. Have your specifications ready when you create your solicitation in HlePRO.
 - Unit of Measure and Quantity or Estimated Quantity
 - Dates/Timeline
- Before creating your solicitation do your research on HlePRO to ensure the:
 - Appropriate correct **commodity code** is selected.
 - Vendors who are appropriate and you want to respond are in HlePRO.If they aren't, let them know you will be issuing a HlePRO solicitation and where to register and get help:
<http://hiepro.hawaii.gov>
 - On the right - **Helpful Information** section, Quick Reference, videos
ph: 808-695-4620

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To Enter a Solicitation in HlePRO

- Time line;
- Pre-offer conference;
- Delivery location and contact;
- Billing address and contact,
- Name of the Procurement Officer for the solicitation;
- Attachments;
- Administrative requirements;
- Commodity code(s);
- Unit of measure and quantity;
- Specifications;
- Minimum qualifications of vendor, as applicable;
- Estimated price;
- Whether vendors must respond to all line items;
- Other requirements specific to the goods, services or construction to be purchased;
- Instructions;
- Potential vendors.

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State Procurement Office
<http://hawaii.gov/spo>
Questions?

Contact your eAdministrator

SPO website

- **For State and County Personnel**
- **Dept./CPO Administrators Contacts – SPO Programs**

- **See also FAQs in the SPO website page header and the HlePRO website header**

hiepro@hawaii.gov ~ 586-0554

Bonnie Kahakui 587-4702

Stacey Kauleinamoku 586-0571

Mara Smith 587-4704

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Navigating HlePRO
An Introduction...

<http://HlePRO.hawaii.gov>

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Hawaii State eProcurement HlePRO

Buyer Training SPO 301 Part 1

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What Will be Covered

SPO 301 Part 1

First Section

- Intro, Resources & Training, Definitions, eProcurement and HlePRO
- Buyer Responsibilities, Ethics and Security
- Other Roles and Responsibilities in HlePRO
- About Commodity Codes
- How to Gain Access to HlePRO
- Retrieving a forgotten Password
- The HlePRO training site – a place to practice
- Doing your Homework before you Procure
- The HlePRO Landing Page, creating an eHawaii account, forgotten password, logging in, commodity codes, home dashboard

Second Section

- Vendor Transaction Fees
- About Approvals
- Vendor Instructions
- Creating and Releasing a Solicitation
- Question and Answer Section

Preview: SPO 301 Part 2

- Solicitation Addenda, Reviewing Vendor Responses, Creating an Award

2

Vendor Transaction Fees

How HlePRO is Funded

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Vendor Transaction Fee

- Transaction fee is .75% of the AWARD amount or **estimated** amount.
- Due upon notice of award 30 days net.
- There is a cap of \$5,000 per award per vendor.
- Vendor pays the contractor administering HlePRO, Hawaii Information Consortium, LLC (HIC)

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About Approvals and Approval Paths in HlePRO

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About Approval Paths

- An approval path is a pre-assigned path a solicitation or notice of award will follow for approvals before being released.
- May contain several levels of approval; (John, Jack, Jill)
- Always sequential: if John does not approve, it is stuck in the approval path, does not move to Jack.
- Created by eAdministrator (who is not psychic most of the time) - Follow your dept. procedure
- Approval paths are NOT required.
- Do **not** approve yourself.

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Building Approval Paths

Mandatory Criteria: Function and Procurement Method

- Function:
 - Solicitation (and Addenda)
 - Award (and Amendments)
 - Note: approval paths assigned to solicitations are also assigned to addenda; likewise for contract awards and contract amendments.
- Method of procurement:
 - Small purchase request for quote (RFQ);
 - Competitive sealed bidding (IFB);

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Building Approval Paths

Amount Range

- Amount Range of cost/award (from - to)
- Note: this only applies to the approval path, not to the ability of the buyer to issue a solicitation or award notice.
 - If an approval path for a solicitation is assigned to a buyer with a range amount of \$0 to \$100,000, it does not prevent the buyer from issuing a solicitation estimated at \$200,000. It will mean that the solicitation will not go through that approval path.

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Assigning Approval Paths

- Only users in HlePRO may be assigned as approvers
- Important last step:
Once an eAdministrator creates the path, it must be assigned to the appropriate buyer(s).

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Vendor Instructions

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HlePRO Vendor Instructions Mandatory & Optional

Two types of vendor instructions in HlePRO:

- **Mandatory:** - in all solicitations or awards
- **Optional** – buyer must select to include in the solicitation
 - Admin Created – select ADD
 - Buyer created –complete the text box and select add.
- **Instructions are created by**
 - System Administrator;
 - eAdministrators;
 - Buyer

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HlePRO Vendor Instructions Part of your Solicitation

- It is buyers responsibility to understand the mandatory & optional instructions.
 - Buyer is responsible for their solicitation including instructions.
 - Buyer is the point of contact with the vendor.
 - If you don't understand an instruction, ask. Do not send the vendor to find out. Makes the buyer, the office and the department appear unprofessional.

HlePRO Vendor Instructions

Continued

- Do not use optional instructions for items that should be in your specifications, general provisions, special provisions
 - It may not carry the same weight.
- If you have suggestions for optional instructions, contact your eAdministrator.

Questions and Answers

About the Questions & Answers Section

- SPO recommends utilizing this section for all solicitations.
- Answers are published on the date and time the buyer specifies when creating the solicitation.
- Answers are published even if all questions are not answered. Buyers can add answers to unanswered questions if the answers have already been published.
- If an answer to a question is a significant clarification, adds to the solicitation or changes information already in the solicitation, buyers should issue an **addenda** to the solicitation using the amendment process.

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Entering a Solicitation in HlePRO: Preparation

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To Enter a Solicitation in HlePRO: Plan Your Solicitation Timeline

- Date Released
- Pre-offer conference date and time;
- Question & answer due dates and times;
- Submittal due date and time;
- Delivery date or start and end dates of contract.
- Don't forget to consider
 - time it takes to execute a PO or contract, or
 - possible protest

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A Summary of Information Needed

- Delivery location and contact;
- Billing address and contact,
- Name of the Procurement Officer for the solicitation;
- Attachments;
- Administrative requirements;
- Commodity code(s);
- Unit of measure and quantity;
- Specifications;
- Minimum qualifications of vendor, as applicable;
- Estimated price;
- Whether vendors must respond to all line items;
- Other requirements specific to the goods, services or construction to be purchased;
- Instructions;
- Potential vendors.

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In Summary - 3 things

- 1. HlePRO does not do the thinking for the buyer.**
 - Just because it is physically possible to do something in HlePRO does not mean it is permissible or allowable. You need to know:
 - the requirements (statutes, rules, policies, procedures); and
 - good procurement practices.
- 2. HlePRO is not a method of procurement.**
 - It is a tool to make the procurement more open and efficient.
 - Buyer must know which procurement method to use and how to conduct it.
- 3. The buyer must know what is needed and it must be in writing (specifications).**
 - HlePRO does not know what you want to buy.
 - Commodity codes are NOT specifications.

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State Procurement Office <http://hawaii.gov/spo> Questions?

Contact your eAdministrator

SPO website: <http://spo.hawaii.gov>

- For State and County Personnel
- Dept./CPO Administrators Contacts – SPO Programs

hiepro@hawaii.gov ~ 586-0554

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Stacey Kauleinamoku 586-0571

Mara Smith 587-4704

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Entering a Solicitation into HlePRO and Answering Questions

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