

HANDS - Department Admin User Guide

User Management

The department admin will be able to manage users within their department. Only the State Procurement Office (SPO) system administrators can assign the department admin role (department must have a form SPO-060 on file with the SPO).

Add a User

1. The user must create an [eHawaii.gov](http://ehawaii.gov) Account and give you the email associated with their account
2. Go to: hands.ehawaii.gov
3. Login
4. Click 'User Management'
5. For 'Email' enter the email of the user you want to add
6. Click 'Search'
7. Click 'Add'
8. Enter all the required information:
 - a. Position Title
 - b. User Type:
 - i. Buyer
 1. This user will be a buyer in HANDS and HlePRO
 2. This user will be able to post notices & awards
 3. This user will be able to submit CPO requests if they are in the executive departments/agencies
 4. This user will be given buyer access to Hawaii Compliance Express
 5. You will need to fill in the following fields for this user's HlePRO related solicitations:
 - a. Methods of Procurement Allowed - choose all methods the user should be allowed for HlePRO solicitations
 - b. Receive Solicitation Requests - indicate whether the user should receive HlePRO solicitation requests from requesters
 - c. HlePRO Approval Paths - indicate whether an approval path should be assigned to this user when they create HlePRO solicitations and/or awards
 - ii. Requester
 1. This user will be a buyer in HANDS and a requester in HlePRO
 2. This user will be able to post notices & awards
 3. This user will be able to submit CPO requests if they are in the executive departments/agencies
 4. This user will be given buyer access to Hawaii Compliance Express
 5. You will need to fill in the following fields for this user's HlePRO related requests:
 - a. Methods of Procurement Allowed - choose all methods the user should be allowed for HlePRO requests
 - b. HlePRO Approval Paths - indicate whether an approval path should be assigned to this user when they create HlePRO requests
 - iii. Poster
 1. This user will only be able to post in HANDS and will not have a role in HlePRO
 2. This user will be able to post notices & awards
 3. This user will be able to submit CPO requests if they are in the executive departments/agencies
 4. HCE Access - you will need to indicate whether this user should have buyer access to Hawaii Compliance Express
 - iv. No Role (HCE access only)
 1. This user will not have a role in HANDS or HlePRO
 2. This user will be given buyer access to Hawaii Compliance Express

9. Click 'Save'
10. Logout

Edit a User

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'User Management'
4. For 'Email' enter the email of the user you want to edit
5. Click 'Search'
6. Click 'Edit'
7. Edit the fields that need to be updated
8. Click 'Save'
9. Logout

Deactivate a User

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'User Management'
4. For 'Email' enter the email of the user you want to deactivate
5. Click 'Search'
6. Click 'Deactivate'
7. Select 'Back to User Management'
8. Logout

Re-Activate a User

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'User Management'
4. For 'Email' enter the email of the user you want to re-activate
5. Click 'Search'
6. Check the box 'Show deactivated users'
7. Click 'Activate'
8. Select 'Back to User Management'
9. Logout

Put a User 'Out of Office'

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'User Management'
4. Search for the user via email
5. Click 'Out of Office'
6. Find the back up buyer in the list and select 'Backup Buyer'
7. Select 'Back to User Management'
8. Logout

Out of Office Functionality Notes:

- If an approver clicked 'Out of Office' then the backup assigned within the HlePRO approval path will replace them until they are back in office BUT you must still choose a backup buyer that will take over all the user's solicitations and awards while the user is out of office.
- If the approver does not have a backup assigned in the HlePRO approval path then the back up approver that is chosen will be the approver for all solicitations and awards that require approval. The back up buyer will also take over all the user's solicitations and awards while the user is out of office.
- If the approver is an approver for multiple approval paths and some of the paths have backups assigned

and some do not, when 'Out of Office' is clicked:

- **Approval Paths with no backup assigned:** A backup must be chosen. That one backup will be the backup for all the approval paths that do not have backups assigned.
- **Approval Paths with a backup assigned:** the assigned backup will be the approver for the approval paths they were assigned until the primary clicks 'Back in Office'

Put a User 'Back in Office'

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'User Management'
4. Search for the user via email
5. Click 'Back in Office'
6. Select 'Back to User Management'
7. Logout

Download a List of Users Within Your Department

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'User Management'
4. Select the 'User Role' from the drop down menu (ex. buyer, poster, requester)
5. Click 'Search'
6. Click 'Export to Excel'
7. View the file in Excel
8. Logout

HlePRO Approval Paths

The department admin will only be able to manage approval paths within their department. Any changes made to HlePRO approval paths within HANDS will be instantly updated in HlePRO as well. Therefore you will only need to make this change once and it will update in both systems.

Add an Approval Path

1. Go to: hands.ehawaii.gov.
2. Login
3. Click 'HlePRO Approval Paths'
4. Click 'Add Approval Path'
5. Enter the required information:
 - a. Solicitation/Award - choose whether this approval path will be for a solicitation or an award
 - b. Approval Path Name - enter a name for this approval path
 - c. Method of Procurement - select the method(s) of procurement this approval path will be for
 - d. Enter a price range if you want the approval path to only be applied if the solicitation is within a specific price range. If left blank then the approval path will apply to all amounts.
 - e. Select the primary approver
 - f. Select a backup (optional) - this person will be the approver for this approval path if the primary is out of office
 - g. Optional: select 'Add Another Approval' to add multiple approvers
6. Once all approvers have been added, click 'Submit'
7. Logout

Edit an Approval Path

1. Go to: hands.ehawaii.gov.
2. Login

3. Click 'HlePRO Approval Paths'
4. Find the approval path you want to edit
5. Click 'Edit'
6. Edit the fields that need to be updated
7. Click 'Update'
8. Logout

Remove an Approval Path

Note: The system will not allow you to delete an approval path if it is assigned to a user. Therefore, you will need to remove any buyers that are assigned to the approval path prior to deleting it.

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'HlePRO Approval Paths'
4. Find the approval path you want to delete
5. Click 'Edit'
6. Click 'Delete'
7. Logout

Assigning an Approval Path to an Existing Buyer

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'User Management'
4. Enter the last name of the buyer you want to edit
5. Click 'Edit'
6. To add an approval path, select the box next to the approval path
7. Add all applicable approval paths to the buyer
8. Click 'Save'
9. Logout

HlePRO Instructions

The department admin will only be able to manage instructions within their department. Any changes made to HlePRO instructions within HANDS will be instantly updated in HlePRO as well. Therefore you will only need to make this change once and it will update in both systems.

Add an Instruction

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'HlePRO Instructions'
4. Click 'New Instruction'
5. Enter all the required information:
 - a. Solicitation/Award - choose whether this instruction is for a solicitation or an award
 - b. Title - name the instruction
 - c. Content - enter all the information about the instruction
 - d. Procurement Method - choose the procurement methods that this instruction should be included on
 - e. Mandatory - check this box if the instruction is mandatory and is required on all solicitations/awards within the criteria you provided
 - f. Department - this will auto-fill with your department
6. Click 'Submit'
7. Logout

Edit an Instruction

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'HlePRO Instructions'
4. Find the Instruction you want to edit
5. Click 'Edit'
6. Edit the fields that need to be updated
7. Click 'Update'
8. Logout

Remove an Instruction

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'HlePRO Instructions'
4. Find the Instruction you want to remove
5. Click 'Remove'
6. Click 'Yes'
7. Logout

Re-Arranging Instructions

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'HlePRO Instructions'
4. In the 'Arrange' column click the down arrow to move an instruction down one row or click the up arrow to move an instruction up one row
5. Repeat #4 until all the instructions are in the order you want them in
6. Logout

Announcements

The department admin will only be able to send announcements to users within their department. When an announcement is sent it will be emailed to the user(s) AND it will be added to their dashboard notifications.

Send an Announcement

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Announcements'
4. Click 'Add New'
5. Enter all the required information:
 - a. User(s) - select the user(s) the announcement should go to
 - b. Department - this will auto-fill with your department
 - c. Subject - this will display in the 'Subject' field of the announcement email
 - d. Description - this will be the content of the announcement email
6. Select to either send the announcement now or select a date you want the announcement sent
7. Click 'Submit'
8. Logout

Edit an Announcement

You will only be able to edit announcements that have been scheduled for a future date & time. If you choose to 'Send Now' when you created the announcement then the announcement will be immediately sent and you will not be able to edit it.

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Announcements'
4. Select the announcement you want to edit
5. Click 'Edit'
6. Edit the fields that need to be updated
7. Click 'Update'
8. Logout

Cancel an Announcement

You will only be able to cancel announcements that have been scheduled for a future date & time. If you choose to 'Send Now' when you created the announcement then the announcement will be immediately sent and you will not be able to cancel it.

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Announcements'
4. Select the announcement you want to delete
5. Click 'Cancel'
6. Click 'Yes'
7. Logout

View Announcement History

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Announcements'
4. Click on an announcement from the list
5. Click the 'History' tab
6. Expand the accordion to view more information
7. Logout

View Users that Received an Announcement

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Announcements'
4. Click on an announcement from the list
5. Click 'User Details'
6. Click 'Download List'
7. View the list in excel
8. Logout

CPO Requests

Submit a CPO Request

CPO requests are for the executive departments/agencies only.

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'CPO Requests'
4. Click 'New Request'
5. Enter all the required fields:
 - a. Type of Request
 - b. Vendor/Provider

- c. Total Contract Amount
- d. Start Date
- e. End Date
 - i. You will need to estimate the contract end date for BEFORE the Fact Emergency requests
- f. Optional - Prior Request Number
- g. Division - Select from drop down
- h. Point of Contact Information - enter the POC's information
 - i. Note: Only POCs will receive email notifications about the request, not the submitter. If you want to receive notifications then add your name as a POC as well.
 - i. Optional - Click 'Add Another Contact' for all POCs you want to add
 - j. Optional - Comments
6. Upload the PDF of the SPO request form (ex. SPO-003, SPO-007) and any other supporting documents (ex. training records and delegation)
 - a. Add a title (optional)
 - b. Click 'Browse'
 - c. Select the document from your computer
 - d. Click 'Open'
 - i. You have the option to remove the document if needed
 - ii. You have the option to download/view the document if needed
7. Click 'Submit'
 - a. You will see a confirmation page after the CPO Request is successfully submitted.
 - b. After a CPO Request is submitted it will display in 'My Records.' You will not see any other requests that were submitted within your department. You will only see the requests that you submitted.
8. Logout

Hawaii Compliance Express

Search for Vendors in HCE

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Compliance'
4. Click 'Search'
5. Click 'Ok'
6. Search for the vendor in HCE as you normally would

Search Functionality

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Search'
4. Enter a keyword (ex. solicitation number, department, title, etc)
 - a. You can narrow your search by selecting one of the filters (ex. Solicitation, Award, Vendor, etc)
 - b. Archived awards: one year after the last contract end date the award will be put into archives. You will need to click 'Show Archived Awards' to include these in the results.
5. Select the item in the results to view more details
 - a. Note: if the item exists on another procurement platform the system will link you to the appropriate site.
6. Logout

Change the Owner of a Solicitation or Award

- As a dept admin you will see the 'change owner' button on any notices or awards within your department
- As a dept admin you will NOT see the 'change owner' button on any notices or awards in other departments
- As a dept admin if you click 'change owner' you will see a list of users within your department that you can assign the notice or award to (including yourself)

Steps:

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Search'
4. Enter a keyword (ex. solicitation number, department, title, etc)
 - a. You can narrow your search by selecting one of the filters (ex. Solicitation, Award, Vendor, etc)
5. Select the item in the results to view more details
6. Click 'Change Owner'
7. Select the new owner
8. Logout

Accessing Department Records

Solicitation Notices

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Search'
4. Enter your department name in the search
5. Select the 'Solicitation' filter
6. Click 'Export to Excel'
7. Logout

Award Notices

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Search'
4. Enter your department name in the search
5. Select the 'Award' filter
 - a. Note: one year after the last contract end date the award will be put into archives. You will need to click 'Show Archived Awards' to include these in the exported list.
6. Click 'Export to Excel'
7. Logout

CPO Requests

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'CPO Requests'
4. Enter your department name in the search
5. Click 'Export to Excel'
6. Logout

Department Reports

Edited Awards

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Reports'
4. Click 'Details' under 'Edited Awards'
5. Enter a date range
6. Click 'Search'
7. Click 'Export to Excel'
8. Logout

PCARD vs Contract/PO

1. Go to: hands.ehawaii.gov
2. Login
3. Click 'Reports'
4. Click 'Details' under 'PCARD vs Contract/PO #'
5. Enter a date range
6. Click 'Search'
7. Click 'Export to Excel'
8. Logout