



What's New in HePS!

Many parts of HePS have been redesigned and new functionality added. Here is a summary of some of the major changes.

A New Look: The HePS has a new look and new functionality that make using the system easier.

Colors & Formatting

Consistent use of colors and similar looking formatting on parts of the systems for overall consistency. Many functions have been rearranged to display in a logical fashion.

Step-by-Step Methodology

Addition of step-by-step labeling in the major creations processes (requisition, solicitation, award, etc.) to help new users follow the process in a logical manner.

SicommNet Inc.
Test and Demonstration Agency
2918 Fifth Avenue
Suite 210
San Diego, CA 92103

eRFQ Solicitation Header

STEP 1 DOCUMENT INFORMATION

Document Date:
WED OCT 21 2007 05:30:53 PM PDT

Document No.: D200801111

Optional Reference No.:

REQUISITIONER INFORMATION

Requested By:
DEFAULT AGENCY DEPARTMENT

Agent: FRANK PIERCE

Telephone No.: 808-341-8782

Fax No.:

Email Address: fpierce@sicomm.net

STEP 2 CONTACT INFORMATION

Search For Agency Users:

Enter a Last Name To Search By:

FRANK PIERCE

808-341-8782

Contact Fax No.:

fpierce@sicomm.net

STEP 3 PRODUCT OR SERVICE - DATES AND FREIGHT INFORMATION MANDATORY: *

REQUIRED DELIVERY DATE: * STEP 3-1

Required Delivery Date: MM/DD/YYYY

Priority: Normal

OR

LENGTH OF CONTRACT: * STEP 3-1

Start of Service Date: MM/DD/YYYY

End of Service Date: MM/DD/YYYY

FREIGHT: * STEP 3-2

Freight / Handling Included in Price

Destination:

FOB Location:

STEP 4 DELIVERY POINT INFORMATION MANDATORY: *

Deliver To:

Headquarters

STEP 5 BILLING INFORMATION MANDATORY: *

Bill To:

DEFAULT

STEP 6 OPTIONAL DOCUMENT TYPES (FOR INTERNAL USE ONLY) OPTIONAL

STEP 7 SAVE ALL and GET ITEMS >>

Collapsed Functionality

Mandatory and Optional functions are “closed” for view and can be opened by clicking on the link. Mandatory functions are plainly marked.

MANDATORY SOLICITATION SECTIONS (CLICK A LINK BELOW OR CLICK [here](#) TO TOGGLE ALL MANDATORY AREAS)

Review / Edit [Solicitation Release Information](#) STEP 1

Review / Edit [Billing And Shipping Locations](#) STEP 2

Review / Edit [Solicitation Vendor Instructions](#) STEP 3

OPTIONAL SOLICITATION SECTIONS

Review / Edit [Contact and Buyer Information](#)

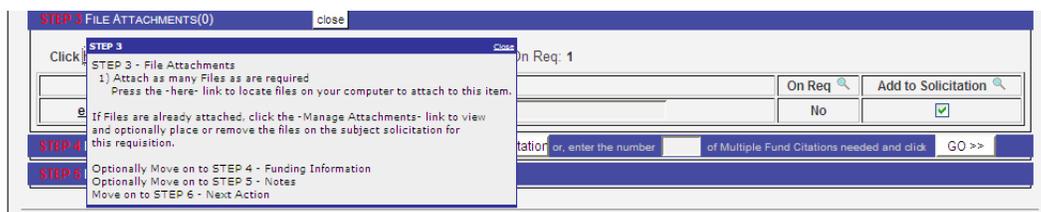
Review / Edit [Header Notes](#)

Review / Edit [Line Item\(s\) Quick Edit](#)

Establish / Review / Edit [Optional Solicitation Title and Description](#)

Crossover Help Functions

Functions have a small informational popup that appears as the mouse crosses over a functionality identified by a small magnifying glass icon. Information in the popup provides explanations, descriptions and/or definitions for the user.



User Access Adjustments

The System Administrator(s) can set which functions can be accessed by users (RFQ, RFB, RFP, Classics, Direct PO, Manual Abstract Entry, etc.). With these setting in place, you will not see options that you do not use, making the system simpler to navigate.

Enhanced Functionality: New ways to make existing functionality work better

Enhanced Approval Routes

Amendments to Solicitations, edits on Requisitions, and edits to Awards will be sent back through approval routing again for additional review.

If estimated dollar amounts change or commodity codes change in requisitions or solicitations, this could send documents to different approval routes than the original.

If the solicitation closing date has passed and the approver has not approved it yet, they can optionally adjust the closing date themselves or pass it back to the buyer for revision.

The DUE DATE(10/26/2007) for Solicitation Q200800433 has passed 10.68 days ago.
 Contact the buyer by [email](#) or at 619.294.9191, to extend the due date.

OR

Enter the **Solicitation Due Date** Here: Y NO LATER THAN 5:30 PM Override Close Time: 5:30 PM

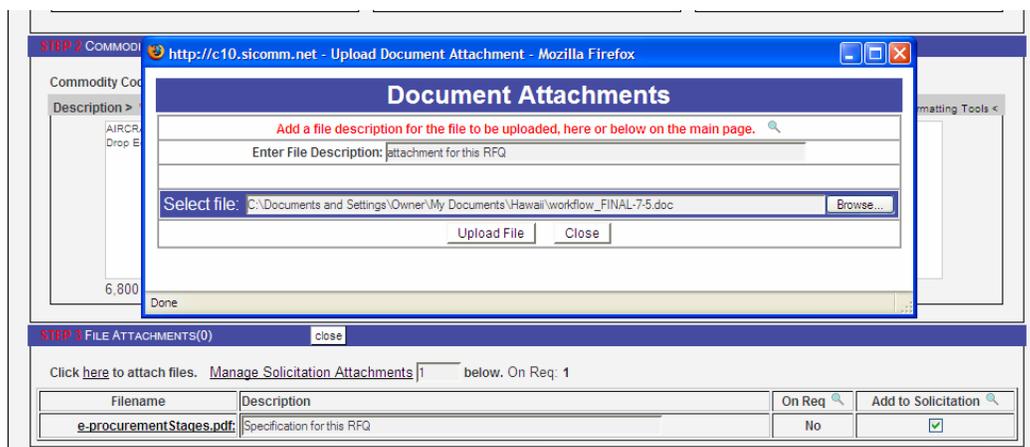
Solicitation Release Date: 10/05/2007<--Past (After This Approval) **Award Delivery Date:** 10/31/2007 **Award Contract Start Date:**

Enhanced File Attachments

A file description can be added when uploading attachments.

Enhanced attachment handling during solicitation creation process (adding or removing an attachment).

Attachments may be uploaded with spaces in the file names.



Classic Solicitations Enhanced

The creation of Classic solicitations has been enhanced to have the same look and feel of eRFx's, Classic solicitations can now be created from a Requisition.

Date of Issue on Solicitation and Amendments

The original solicitation date of issue and date of solicitation amendments now show to the buyer and the vendors

New Features:

Line Item Commodity Code Changes

You can now change a line item commodity code in the solicitation amendment process.

EDIT CURRENT ITEM	
Editing Document: D200801072 Item 1 Click here to continue with commodity 04008.	
OR	
CHOOSE A DIFFERENT COMMODITY BELOW	
Refine Item to Requisition: <input type="text"/>	Go (or press Enter) Find: Ctrl F
Enter Class & 00 to view all items in Class Enter Class only to see all subsequent classes	
Override 5 Digit Selection Directive: <input type="checkbox"/>	

Add/Delete Line Items

You can add or delete line items to a solicitation during the amendment process – formerly this could only be done at the requisition level.

Solicitation Q200800483 Items On the Internet: Select by clicking the button adjacent the required item. **Add Item 2**

View	Responses	Amend	Delete	Dept	User LName	Item	Est Amnt	Commodity	Short Description	Create Date
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	AGENCY	fpbuyer	001	12500	04008	Cages, Shelters, Animal and Marine Life (See Class 495 for Laboratory Type)	Wed Oct 17 2007

Questions & Answers

Buyers can allow for online vendor questions. The buyer can respond and save the answers. On the due date the responses will be sent to all participating vendors. A question may be emailed to another person for answering. This is the vendor’s view of questions they asked:

3Ms INCORPORATED Questions Manager for Solicitation Q200800370		
Question submitter name will not be displayed	Questions Deadline: 11/12/2007	Answers Due Date: 11/14/2007
Nbr	Question	Entered
1	Will you accept another brand of cat food than the one specified?	10/31/2007
2	Will dog food be okay?	10/31/2007
3	What is your anticipated budget for this contract?	10/31/2007
Click here to enter questions for solicitation Q200800370.		
Please Note:	Question's may be submitted up to the Question Deadline date. Question's, while not answered until Answers Due Date, become visible to all at Question Deadline date. Once submitted Questions may not be recalled and become part of your response.	

Pre-Bid Conference

Buyers can create a section on the solicitation that includes the date, location, and notes to the vendors. Vendors can register to attend the meeting. Buyers can view the vendors who have registered. This is the vendor’s view of the meeting announcement:

Pre-Bid Conference:		
Date	Location	Notes
Mon Nov 12, 2007 4:30 PM	SicommNet Inc. Test and Demonstration Agency 2918 Fifth Avenue Suite 210 San Diego, CA 92103	Interested bidders must attend this pre-bid conference or they will be toast
1 Attendees from 3Ms INCORPORATED registered to attend Pre-Bid Conference for Solicitation P200800157		
Manage/Add Attendees:	Registering Company Staff to attend a Pre-Bid Conference does not in any way obligate the company or attendee to actually attend the conference. The information is for planning purposes for use by the Buyer/Conference Manager only.	
Please Note:	This information will not be published prior to the scheduled conference date.	

Solicitation Title & Description

You can add a title to the solicitation to identify and describe the solicitation and generate vendor interest. This is the vendor’s view of the title and description appearing at the top of the solicitation:

Solicitation Title: CAGES FOR MARINE LIFE
Solicitation Description: Bid to supply cages for the trapping and sheltering of endangered monk seals.

Solicitation Nbr: Q200800483

Requisition Nbr: R200800654

Vendor Comments & Attachments Added to Award

Vendor line item comments and attachments can be added to the award by simply checking a box.

Line Item	Vendor Comments
Item 001: <input type="checkbox"/>	

Line Item File Attachments

Award Attachments(0 Line Items Have Attachments): Toggle All:

Solicitation Attachments(0 Line Items Have Attachments): Toggle All:

Vendor Attachments(0 Line Items Have Attachments): Toggle All:

Multiple Line Items Default Commodity Code

When creating a requisition or solicitation with multiple line items, the new line item search will automatically default to the same commodity class as the item previously chosen.

HCE Compliance Check:

HePS interfaces to the Hawaii Compliance Express (HCE) to automatically check HCE for vendor compliance when the Award button is selected. This view shows a vendor who is not registered with HCE:

The screenshot displays the HePS system interface with a pop-up window showing a HCE compliance report. The report is titled "Certificate of Compliance" from the "Dept. of Accounting and General Services" and is dated 11/13/2007 06:50:40. The vendor name is "THE SURF SHOP". The report status is "RECORD NOT FOUND. NOT COMPLIANT". The interface includes a navigation menu at the top with options like "Main", "Solicitation Manager", "Create", "Edit", "Awards Manager", "Award History", "Approvals Manager", and "Miscellaneous". The main content area shows details for the vendor, including their name, DBA/Trade Name, Issue Date, and Status. A table at the bottom lists line items with columns for Line Item, Quantity, and UOM.

Line Item	Quantity	UOM
001	25	EA

Vendor Improvements:

Entering a Price

When vendors enter their prices to a solicitation, the system now shows dollars and cents in both numbers and in text (check book style).

Item 001 Response		Recycle Status: <input type="text"/>		
Unit(CASE) Price in US DOLLARS and CENTS: \$	1209.99	Extended Price in US DOLLARS and CENTS: \$	6049.95	(Quantity * Unit Price)
One Thousand Two Hundred Nine Dollars and Ninety Nine cents		Unit Price Text		
Six Thousand Forty Nine Dollars and Ninety Five cents		Extended Price Text		

Downloading & Uploading Attachments

Instructions on how to view, download, and save an attachment have been added.

Click on a link below to view the file.
Right-click and click Save Target As (Internet Explorer) or Save Link As (Mozilla/Netscape) to save it to your computer.

File Attachments:
2 file(s) found.

Filename	Description
Blue hills.jpg	sdfgghgh
Winter.jpg	fvjvbjhn

A Help section for attaching files has been added for vendors.

The screenshot shows two browser windows. The left window is titled 'Upload File' and contains the following text: 'Each attachment file size MUST NOT exceed 4mb. Should you need to attach a file larger than 4mb, contact customer support at (800) 575-9955, at least 48 hours prior to the close of solicitation.' Below this is a form with a text input field, a 'Browse...' button, and 'Upload File', 'Close', and 'Help Me' buttons. Below the form is a table titled 'Item Number 1 Attached Files' with columns 'Browse', 'Nbr', 'Filename', and 'Delete'. The right window is titled 'Upload Wizard Help - Wind...' and contains instructions for using the upload wizard and rules for attachment files.

**** INSTRUCTIONS ****

Different Browsers and Operating Systems have their own naming conventions, button names may differ from the names described here.

1. Choose the file that you want to upload by clicking the CHOOSE button below (or BROWSE or CHOOSE FILE).
2. Browse your hard drive to find the document you wish to upload and click SELECT (or OPEN or CHOOSE).
3. The Chosen file name and it's path should now appear next to the CHOOSE button (or BROWSE or CHOOSE FILE).
4. Then click the UPLOAD FILE button to begin the upload process. Internet connection speeds differ so be sure to allow sufficient time for the file to upload.
5. When the file has been successfully uploaded, this window will automatically close and the Number of Current Attachments on the solicitation page will have increased by one.
6. To remove the (or any) attached file, click on the "Upload/Manage already uploaded files" radio button. The file name will be displayed in the list as well as the option to delete each file.

**** RULES FOR ATTACHMENT FILES ****

- Attachment files MUST NOT be **executables** or **media files** (.exe / .app / .mov / .mp3).
- Each attachment file size MUST NOT exceed 4mb.
- Attachment files, as named on your hard drive, MUST NOT contain **spaces** or **special characters** : (@ # % & * () - + = [] \ / < > : ; " ')
- If you need to attach a file larger than 4mb, contact customer support at (800) 575-9955, at least 48 hours prior to the close of solicitation.

Unit of Measure

For vendors, the unit of measure is now displayed as the full word instead of an abbreviation; i.e, EACH instead of EA, CASE instead of CS. Buyers still see abbreviations.

Date of Issue on Solicitation and Amendments

The solicitation now shows both the original date of issue and dates of amendment releases

Questions or comments? Contact Mara Smith at mara.smith@hawaii.gov (587-4704), Bonnie Kahakui at bonnie.a.kahakui@hawaii.gov (587-4702), or Frank Pierce at fpierce@sicomm.net (341-8782).

For more detailed information on HePS visit the SPO webpage, www.spo.hawaii.gov, and click on the Hawaii Electronic Procurement System (HePS) Procurement link.