

Hawaii eProcurement System HePS

How Do I... Track My Solicitations or Awards in Approval in HePS?

Tracking a Document in Approval Routing

Approval routing can be assigned at a number of points in the procurement cycle: 1) before a solicitation is released to the internet, or 2) before an award is released to a vendor. (Note: If a state agency has set up HePS to separate the requisition function, there can also be approvals before a requisition is forwarded to a buyer to create the solicitation.)

At each stage there can be up to a maximum of five (5) approvers who may be in your approval route to review and approve your document. As the document travels through approval routing you can track it and see which approver is currently reviewing your document.

1. Select the **Approvals Manager** tab on the Menu bar.
2. On the sub-menu select the appropriate document type:
My RFX's: In Approval
My PO's: In Approval
(Note: My REQ's: In Approval appear for requisitioners if that function is separated.)
3. When the list is displayed, select **View Approvals**.
4. Each approver in the route for that document is shown.

To Date: the date it was sent to the Approver
From Date: the date the Approver approved or disapproved it.
Status: Approved or disapproved.

The screenshot shows the HePS web interface. At the top, there is a navigation bar with tabs: Main, Solicitation Manager, Awards Manager, Award History, Approvals Manager, and Miscellaneous. The 'Approvals Manager' tab is active. Below the navigation bar, there is a header for the State of Hawaii, State Procurement Office, with the address: 1151 Punchbowl St., Room 230A, Honolulu, HI 96813.

The main content area displays a table of 'In Approval POs'. The table has columns: View, Edit, View Approvals, Delete, Dept, Originator, PO Nbr, Solicitation Nbr, Requisition Nbr, Document Nbr, Items, and NIGP. A row is highlighted with the following data: View Approvals (link), AGENCY, BUYER 1, DO2008001472, B2007003545, R2007002912, D2007003237, 1, 20034.

Below the table, there is a description: CLOTHING, ATHLETIC, CASUAL, DRESS, UNIFORM, WEATHER RELATED, and dates: Date Required: Thu May 31 2007, Scheduled Release Date: Wed Jul 11 2007.

An 'Approval Status' window is open, showing details for Award Number: DO2008001472 (Award Amount: 93860.00) and Current Stop: 1 of 1. The window contains a table with columns: Route Info, ID, Commodity, Dollars, and Stop. The 'Route Info' section shows: ID: 537, Commodity: All, Dollars: Equal or Greater: 1. The 'Stop' section shows a grid with columns for Stop 1 through Stop 5. The 'Approver ID' is h1approver1, and the 'Approval / CC' is Approval. The 'To Date' is Wed Jul 11 2007. There are fields for 'From Date' and 'Status'. At the bottom, there is a search field for 'Start Lastname search at:' and a 'Click to find user for info@email:' button.

Finding Approval Routes

Approval routing can affect you in two ways:

- The solicitations or awards you issue are sent through an approval route before release; or
- You may be an approver in an approval route.

You can check approval routing by following the directions below:

1. Select the **Miscellaneous** tab and then the **Session Info** sub-menu.
2. Scroll down. Approval routes, if any, are displayed.

Approval Responsibilities: displays the routes for which you are an approver.

Assigned Workflow Routes: displays the routes your solicitations or awards will follow.

Approval Responsibilities for hibuyer2															
Specifics						WorkFlow / Approval Routing									
ID	DeptID	DocType	Cmdty Code	Dollar Amt	UserType	Lvl 1	Type	Lvl 2	Type	Lvl 3	Type	Lvl 4	Type	Lvl 5	Type
553	AGENCY	DO	All	GT/EQ 0	Buyer 1	hibuyer2	Apprv								
702	AGENCY	RFQ	All	GT/EQ 0	Buyer 1	hiapprover1	Apprv	hibuyer2	Apprv	hiapprover7	Apprv				
703	AGENCY	RFP	All	GT/EQ 0	Buyer 1	hiapprover1	Apprv	hibuyer2	Apprv	hiapprover7	Apprv				
704	AGENCY	RFB	All	GT/EQ 0	Buyer 1	hiapprover1	Apprv	hibuyer2	Apprv	hiapprover7	Apprv				
705	AGENCY	RFI	All	GT/EQ 0	Buyer 1	hiapprover1	Apprv	hibuyer2	Apprv	hiapprover7	Apprv				

Assigned Workflow Routes															
Specifics					WorkFlow / Approval Routing										
Route	DocType	Cmdty Code	Dollar Amt		Lvl 1	Type	Lvl 2	Type	Lvl 3	Type	Lvl 4	Type	Lvl 5	Type	
702	Solicitation RFQ	All	GT/EQ 0		hiapprover1	Apprv	hibuyer2	Apprv	hiapprover7	Apprv					
703	Solicitation RFP	All	GT/EQ 0		hiapprover1	Apprv	hibuyer2	Apprv	hiapprover7	Apprv					
704	Solicitation RFB	All	GT/EQ 0		hiapprover1	Apprv	hibuyer2	Apprv	hiapprover7	Apprv					
705	RFI	All	GT/EQ 0		hiapprover1	Apprv	hibuyer2	Apprv	hiapprover7	Apprv					
543	Award(DO) Notice of Award for Definite Quantity Contract	All	GT/EQ ?		hiapprover2	Apprv									

Note: Your department system administrator now has the ability to run a new report identifying all buyers (or requisitioners, if any) assigned to an approval route.