Hawaii State eProcurement
HIePRO
Quick Reference for Buyers
Part 1

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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: Buyer Responsibilities

1. Maintain security of HIePRO and its data.
2. Serve as point-of-contact with vendors for the solicitation.
3. Issue solicitations pursuant to the procurement Statutes, Administrative Rules, Procurement Circulars and procedures , including departmental procedures, for the method of procurement utilized. (HIePRO does not do it for you.)
4. Provide clear written specifications, minimum qualifications, as applicable, and administrative requirements. (HIePRO doesn't do it for you.)
5. 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.

Therefore, 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.

# 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
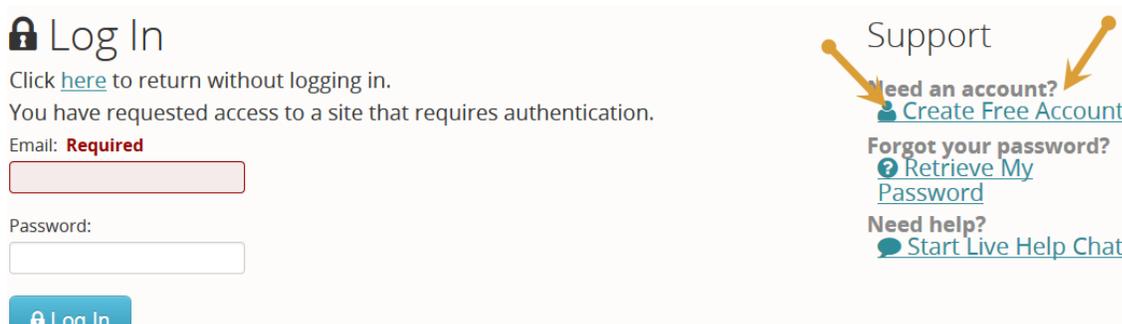
3. Follow your departmental procedures for requesting access to **HIePRO**. At a minimum, you will need to provide:
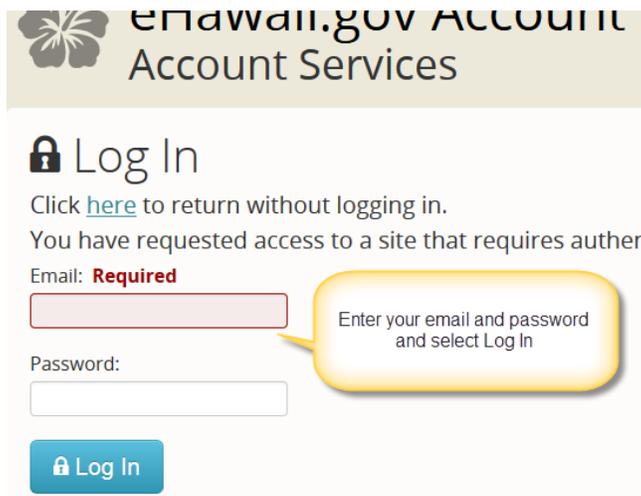   1. Your exact email address; and
    2. Your position title.

Log In and Out

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**

Select the dropdown and then select Logout
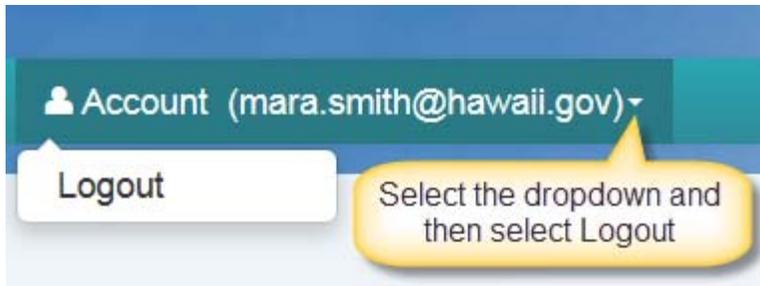
A Little About HIePRO

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 login ID if you are logged in.

dashboard

View **commodity codes** by category.

Search **Solicitations, Awards** and **Vendors**
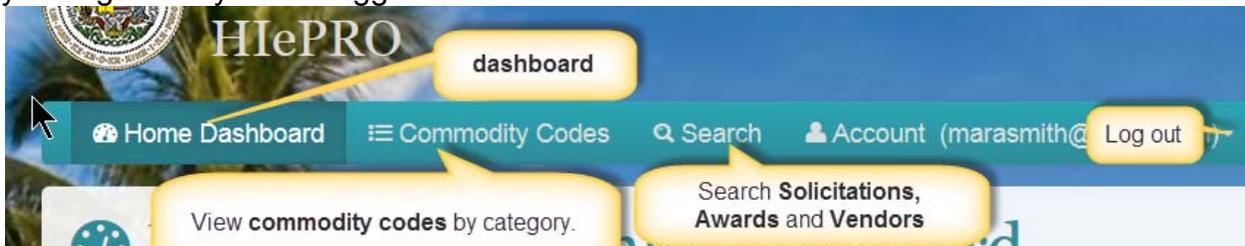
Dashboard. If you are in a function and need to get back to the **Dashboard** to conduct another function select the Home Dashboard link.

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** (once logged in) 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.

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.
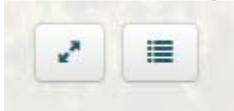
The button with the diagonal arrows controls how many records appear on a page.
The button with the bullets allows you to control which columns appear. The choices will differ depending on what you are searching.
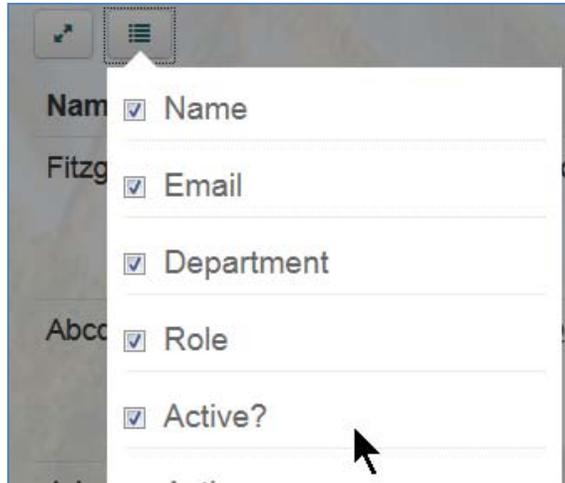
Checklist: What is Needed to Create a Solicitation in HIePRO

(**HIePRO** 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;
- □ General and Special Provisions as applicable;
- □ Administrative requirements;
- □ Offer Forms, as appropriate;
- □ Timeline (dates/times for: issuance of solicitation, prebid conference, Q and A, submittal deadline, delivery/dates of service, etc.)
- □ Delivery and billing addresses/contacts
- □ Ensure appropriate vendors are in **HIePRO** and/or notified;
- □ Commodity Code(s)

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.
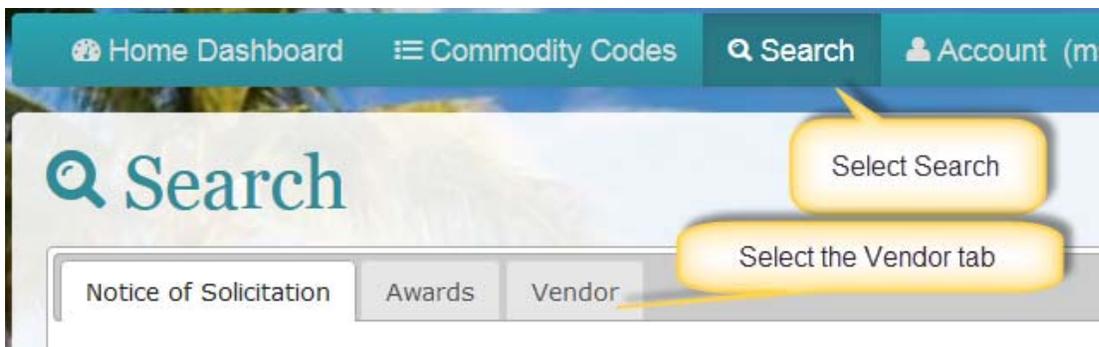
**Enter the business name or commodity code**

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 solicitation that has closed 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.**
3. **Search Solicitations, Awards and Vendors** (searches all solicitations, awards and vendors in HIePRO)
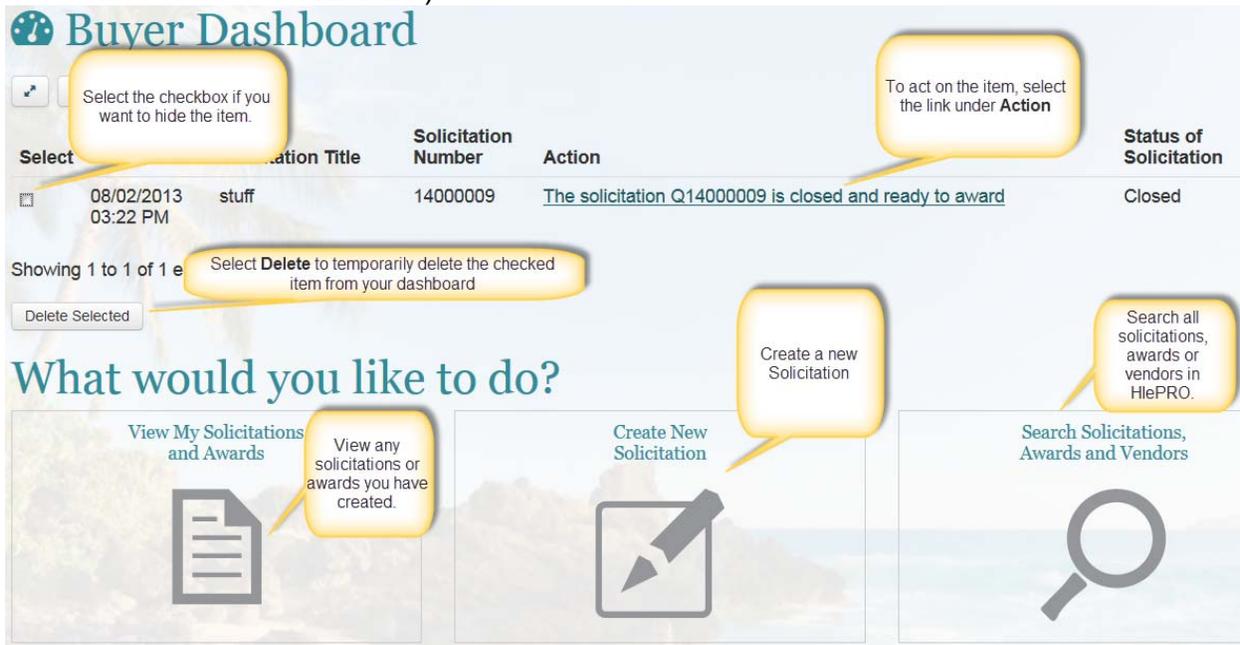
Creating a Solicitation

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. Complete the fields:
- **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
- **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

o Select **Various Options** if there are multiple billing addresses and include them with the specifications attachments.

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

Delivery and Billing, General Information, General Comments, Attachments

Delivery Points

Contact Name	Email	Address	Add

Add New Delivery Point

There are various unknown delivery points

Yes No

*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

Select Address

Select

Department/Division

Contact Name

Enter billing information.

Email

Address

Address 2

City

State

-

Zip

General Comments

Procurement Officer

Enter the name of the procurement officer for this solicitation.

Attachments (apply to all line items)

File Title

Add Attachment (Maximum file size 10M

Browse... No file selected. Upload

Only add attachments that apply to all line items here. (General/ Special Provisions, General Conditions, etc.)

*You can **Save as Draft** to work on later or select **Next** to continue.*

Release Save as Draft Cancel Next

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**.

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.

- o Manufacturer Name is Mandatory
- o Manufcturer ID is Mandatory
- o Manufacturer Part Number is Mandatory
- o Manufacturer URL is Mandatory
- o 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**
    - o Enter a title for the attachment
    - o Select **Choose file**, find the file, select it and select **Open.**
    - o 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**.
    - o 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.

You may also add your own instruction. **NOTE:** Instructions should not be used to enter specifications, contractual general or special provisions.

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

Optional Instruction List

- GENERAL CONDITIONS: All a[   ]itation are subject to
  the Vendor's responsibility t[   ]h these General Cond
  referenced. Add

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

- BID ATTACHMENTS: This solicitation contains attachments that bidders
  pricing where indicated, complete any other required information, sign a
  response. Add

Add Instruction

Title

[   ]

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

Content

[   ]

[Add]

[Release] [Save as Draft] [Cancel]

Vendor Notification

There may be times when a vendor is in HIePRO 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 coder 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 current
Vendors with the commodity codes in this solicitatio[   ]ve notific

Business Name

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

Add New Vendor

[   ] [Add]

When you are ready, you can release the solicitation.

[Release] [Save as Draft] [Cancel]

Releasing the Solicitation

- When ready to release the solicitation, select the **Release** button at the bottom of the page.
- There is a 5 minute lag between the time a solicitation, addenda or award is released.

Vendor View

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

Logging out will enable you to see the solicitation notice as the public sees it. It does not include the line items.

Additional Tabs

Once the solicitation is released, you may view the solicitation by selecting the **View My Solicitations and Awards** tile. You will see some tabs in addition to General, Line Item, Instructions, and Vendor Notification. They include:

Questions and Answers: If a Question and answer section was included, you will be able to view and answer questions from this tab.

Approval Status: If there is an approval path assigned to you for the circumstances of the solicitation, this tab will provide who the approvers are and when they approved/disapproved.

Offers: Prior to the submittal date, this tab will show vendors who have responded (but not quotes or bids). After the submittal due date, this page shows responses and becomes the abstract.

Protests: If there is a protest, this page is used to record the protest data and place the solicitation in protest mode. It is not used to file a protest. The protest process continues to be conducted in the same manner it has in the past.

History: The History tab is created once a solicitation is saved and records the history of the solicitation through award. Vendors also have a history tab but do not see other vendor information.

Creating an Addendum

Log in. Select the **My Solicitations and Awards** tile
- Select the solicitation number of the solicitation for which an addendum is to be created. It will open the solicitation.
- At the bottom of the page, select **Amend.**
- In the **reason**, enter a short summary of the change (examples:
  - changing submittal due date from 9/22/13 to 9/30/13;
  - amending item #4 on the specifications attachment;
  - deleting line item for blue widgets.
- Be sure to enter the change in the solicitation as well. (For instance, if you do not actually change the submittal due date when amending it, the solicitation will close on the original due date.)

Answering Questions

Once the solicitation is released, questions may be answered by selecting the questions tab in the solicitation.
- Log in
- Select the **View My Solicitations and Awards** tile.
- From the **Solicitation** tab select the solicitation number.
- Select the **Questions & Answers** tab.

Review the Abstract

Once the solicitation closes, you may view the abstract by selecting the **Offers** tab.
- Log in.
- From the **Dashboard,** select the link under **Action.** The solicitation will open**.**
- Select the **Offers** tab.
- Select **Details** to see the details of each offer.

Questions?
hiepro@hawaii.gov or 808-586-0554