

State Procurement Office (SPO)
Hawaii State eProcurement
HIePRO
Program Manual
<http://hiepro.hawaii.gov>

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The purpose of this manual is to provide requirements and general guidance to implement the eProcurement Program. In addition to this Manual there will be manuals/ Quick References and other aids specifically for Administrators, Buyers, Approvers and Requestors on the mechanics of issuing a solicitation on HIePRO.

Overview

eProcurement is designed to facilitate a transparent procurement process, ensure vendors have an open and fair opportunity to compete for State contracts, and maximize competition and value for the State. eProcurement helps to do that in a number of ways.

- Vendors and the public may search and view solicitation notices in and see awards
- When solicitations or notices of award are released, they appear within minutes on the **public search** on HIePRO site.
- As a convenience, vendors are notified by email of solicitations which the vendor has included the commodity code profile. Vendors who submit offers are also notified by email of the award.

HIePRO is a procurement application and is not merely a mechanism to post solicitations. Buyers in HIePRO are responsible for the solicitations they issue and must have 1) written delegated authority and 2) taken all required training prior to issuing any solicitations in HIePRO.

Definitions

Approval Path: Path created by an eAdministrator which, when assigned to a buyer, causes a solicitation, addenda, award, amendment to be approved by an identified approver or succession of approvers before being released.

Approver: The user responsible for approving a HIePRO solicitation/award in HIePRO, that is, in a HIePRO approval path.

Buyer: The user who conducts a procurement in HIePRO.

CPO Jurisdiction: For the purposes of HIEPRO eAdministrators, jurisdictions in which the Chief Procurement Officer pursuant to HRS Section HRS 103D-203 is defined as CPO other than the SPO administrator.

eAdministrator/Department Administrator/Dept. eAdministrator/HIEPRO

Administrator: The eProcurement Administrator for the Executive Department or CPO Jurisdiction, or their alternates, delegated in writing and submitted to SPO. eAdministrators have oversight responsibility for the Executive Department or CPO Jurisdiction.

IFB: (Invitation for Bid) The Competitive Sealed Bidding method of procurement pursuant to Section HRS 103D-302.

(HIEPRO) Instructions: General mandatory or optional instructions to vendors about responding to solicitations. Instructions do not replace specifications, general or special conditions or provisions.

Primary eAdministrator/Primary HIEPRO Administrator: The eAdministrator having primary responsibility for the eProcurement program for the Department or CPO Jurisdiction. There can be only one primary eAdministrator for each Department/CPO jurisdiction.

Alternate Administrator/Alternate eAdministrator: Serves as the primary eAdministrator in the absence of the primary eAdministrator. May also assist the primary eAdministrator in their duties. There must be at least one Alternate eAdministrator for each Department or CPO Jurisdiction.

Procurement Officer: The individual with responsibility for the procurement, as defined in HRS Section 103D-104. A Procurement Officer is not required to be a HIEPRO user.

Requestor: a new role in eProcurement in which an individual makes the request for goods, services, or construction in HIEPRO, providing information related to the need such as specifications, when the goods are needed, location for delivery. The requestor does not issue the solicitation and it is not issued until a buyer selects, completes, and issues the solicitation.

RFQ: Small Purchase Request for Quotation method of procurement pursuant to Section HRS 103D-305.

System Administrator: The SPO eProcurement administrator and alternates responsible for oversight of HIEPRO for the state.

About Users in HIEPRO and Conditions for Use

There are several types of users in HIEPRO, all of which have access to vendor information and procurement information while the procurement is in process.

Conditions for use:

- Only users who are state or county employees may have access to HIEPRO.
- To prevent a conflict of interest or appearance of conflict of interest, users may not be vendors to the state.

- Users must have written delegated authority to procure for the method of procurement and to procure on HIePRO, as appropriate; and
- Users must take all required training prior using HIePRO.
- Buyers who have not logged in to HIePRO for one year shall be deactivated by the eAdministrator until the buyer takes SPO 301 again.

Roles and Responsibilities

There are several types of users or roles. The system administrator oversee the overall eProcurement program and controls access for eAdministrators. eAdministrators oversee the program for their respective Departments/CPO Jurisdictions and control access for users within the department. Buyers conduct the procurement. Approvers oversee specific procurements/awards and ensure they are completed correctly are authorized to be issued. Requestors, a new role, have the ability to create a request for goods, services or construction by creating the specifications and other information but do not issue the solicitation. The purpose of the Requestor role is to make the system more efficient by helping to centralize the procurement function. A Requestor provides the specifications of the goods, services or construction to be purchased, while the Buyer is the procurement specialist.

Both Approvers and Requestors are optional roles and departments make the decision as to whether to use them.

The maximum number of active Buyers each department shall be based on past usage. Buyers who have not logged in to HIePRO in twelve months shall be deactivated by the eAdministrator until the buyer takes SPO 301 again. eAdministrators may make exceptions under appropriate circumstances, such as when an experienced buyer conducts many procurements but does so on a cycle that is longer than one year.

There will be no limit to number of Approvers or Requestors, if those roles are utilized.

User Roles

System Administrator

The eProcurement HIePRO System Administrator and Alternates, located in SPO, oversee the eProcurement program. Responsibilities include:

- Statewide oversight of the HIePRO program;
- Statewide oversight of HIePRO security;
- Serve as point-of-contact with eAdministrators;
- Serve as point-of-contact to the vendor powering the HIePRO application, Hawaii Information Consortium, LLC(HIC).
- Provide access to eAdministrators and their alternates;
- Enter and update mandatory and optional statewide HIePRO instructions;
- Provide training;

- Answer HIePRO general or policy questions from vendors; vendors are directed to the buyer for questions about specific solicitations.
- Assist eAdministrators with business process issues in utilizing eProcurement and complex procurement issues in HIePRO.

eAdministrators

Department or CPO Jurisdiction eAdministrators are responsible for the oversight of the HIePRO program for their Department. Each department shall have one (Primary) eAdministrator and one Alternate eAdministrator. The Alternate eAdministrator acts in the absence of the eAdministrator. Alternates may also assist in the duties of the eAdministrator, however, Primary eAdministrators retain responsibility for the program for their department. Departments may have up to three (3) Alternate eAdministrators, as needed. eAdministrators responsibilities include:

- Oversight of HIePRO for the department;
- Oversight of HIePRO security;
- Serve as point-of-contact for department users;
- Serve as departmental point-of-contact with the System Administrator.
- Provide access for department users;
- Establish procedures for the department to:
 - establish new users and their roles,
 - establish and assign approval paths,
 - deactivate users who no longer need or should have access;
 - utilize Requestors.
- Maintain documentation that users are aware of the responsibilities and requirements for using HIePRO;
- Create and maintain approval routes;
- Create and maintain department-wide mandatory and optional instructions;
- Ensure users are deactivated when they no longer use the system or have not logged in for a year.
- Print and distribute reports, as needed, to the various divisions/office for the department.

Buyer

The Buyer is an important key to eProcurement and conducts the solicitation on HIePRO. Note that this is not merely a posting function. Each buyer assigned an account must be delegated authority for both the method of procurement they conduct and use of HIePRO and be fully trained, having completed all required training for both the method of procurement and HIePRO. The buyer is also responsible for being 'in the loop' and keeping abreast of changes in procurement statutes/administrative rules and eProcurement policies. The best way to do that is to check the Procurement Circulars and training references prior to conducting each solicitation. Buyers responsibilities include:

- Maintain HIePRO security;
- Serve as point-of-contact with vendors on matters pertaining to the solicitation;

- Conduct the procurement in accordance with HRS, HAR, procurement circulars and procedures including departmental procedures;
 - Enter the specifications, minimum qualifications and administrative requirements, or if Requestors are utilized, ensuring they are complete and properly entered;
 - Select/enter the appropriate unit of measure and quantity, instructions, release and submittal due dates; question and answer due dates/times, pre-bid conference dates/times and locations;
 - Select appropriate commodity codes.
- Attending required training and ensure they have authority to procure (written delegated authority);
- Ensure appropriate vendors are notified if not in HIePRO or not registered for the commodity code;
- Ensure the Q&A are completed appropriately prior to the answer deadline established;
- Issue addenda (as appropriate);
- Issue Notice of Award;
- Enter protest data (as appropriate); and
- Adhere to the Procurement Code of Ethics.

Approver

Approvers provide oversight for specific procurements. Departments may utilize them in different capacities. Approver responsibilities include

- Maintain security of HIePRO.
- Ensure the solicitation or award is conducted in accordance with HRS, HAR, procurement circulars, procurement procedures and departmental requirements.
- Attending required training and ensure they have appropriate written delegation;
- Review of solicitations or awards in a timely manner, approving or disapproving them.
- If disapproved, provide adequate explanation so the buyer knows what needs to be modified to resubmit or to cancel.
 - Note:** If an approver fails to approve or disapprove, the solicitation or award is not issued and remains awaiting action.
- Adhere to the Procurement Code of Ethics.

Approvers are not required in HIePRO. A buyer should not be his own approver. It is unnecessary and not an efficient use of the application.

Requestor

This is a new role in HIePRO and may be phased in as needed. Requestors enter a request to purchase goods and services, including all the relevant information for the goods, services or construction to be purchased. After a Requestor completes their request, it resides in a holding area where it may be accessed by departmental buyers. A buyer may select and review the request, complete any other requirements, prepare and conducts the solicitation. The Requestor is an optional role in **HIePRO**. Requestor responsibilities include:

- Maintain HIePRO security.
- Attending required training:
- Enter description and specifications, minimum qualifications of the vendor, as appropriate;
- Enter quantity and unit of measure;
- Enter dates for delivery or start and end services;
- Enter the delivery location for the goods, services or construction;
- Enter Billing address, billing contact information;
- Enter administrative requirements that may be specifically related to the goods, services or construction;
- Adhere to the Procurement Code of Ethics.

Functions

It is helpful to view each of the parts of the eProcurement process/functions so users are aware of the requirements and how the components work together.

Request

The request is an optional function intended to be used when centralizing procurement within a department. It is not required. When not used, the buyer completes all fields in the solicitation. When used, the buyer accesses a holding area for open requests, selects and completes it, revising where necessary. The Requestor completes the following:

- Division/office needing the goods/services/construction;
- Point(s) of delivery;
- Billing information;
- Delivery date or start and end of contract;
- Quantity and unit of measure;
- Specifications for each line item;
- Minimum qualifications;
- Administrative requirements;
- Attachments

Note: Departments must establish procedures for buyers to select and complete solicitations if using the Requestor role/request function..

Solicitation

The solicitation is created by the buyer either by accessing a Request or entering all the information. If a Request is used, the buyer shall review all fields to ensure they are complete and correct. In addition to the above, the following information is completed by the buyer:

- Procurement Method
- Solicitation type (goods and services, construction, etc.)
- Offer submittal date (offer due date)
- Pre-bid conference (date/time/location)
- Q & A (submittal date/time, date answers published)

- Procurement Officer Name for the solicitation
- Whether vendors may submit by responding to only one or some line items;
- Instructions;
- Attachments.

Addenda

It may be necessary to amend a solicitation. Any changes to a solicitation shall be issued as an addendum in HIePRO. Addenda include:

- Reason for the addenda (summary of what is being changed);
- Date released,
- Attachments (as appropriate) and of course,
- The change(s) (for instance, changing the submittal due date and time.).

Note that addenda are subject to the same approval paths assigned to the buyer for solicitations, if any.

Abstract

When the solicitation closes, the buyer has access to all offers and reviews them. An abstract is automatically created by HIePRO, though the level of detail may vary depending on how the line items are created by the buyer. The abstract and vendor attachments may be printed to be reviewed by the procurement officer.

Notice of Award/Non-award

The buyer issues the Notice of Award in HIePRO. The buyer may include attachments in the notice sent to the awardee. Attachments may include a contract and instructions to the vendor on completing and returning the signed contract and any other required documentation.

Notices are also automatically sent to vendors who submitted offers but were not awarded. The notices to non- awarded vendors include: the number and title of the solicitation, the vendor awarded, the amount awarded and number of units.

HIePRO also posts the award information to its award site which is available to the public at <http://hiepro.hawaii.gov> select **Public Search** and the **Awards** Tab.

Award Amendments

Awards may need to be amended. An example is a contract extension. Amendments are completed in HIePRO. Note that award amendments are subject to approval paths for awards assigned to the vendor.

Approvals and Approval Paths

Approval paths may be created for either solicitations or awards. They are created by the eAdministrator who establishes procedures to request an approval path be established. Required criteria for an approval path include:

The function:

- solicitation or
- award

Method of procurement:

- small purchase request for quote (RFQ)e
- Competitive sealed bidding (IFB)

One optional criterion may also be included: cost/award range (for instance, \$25,000 to \$100,000)

Note that applying a range to an approval path applies only to whether the approval path is utilized. It does not limit a buyer from issuing solicitations or awards outside of the range.

History

Each solicitation has a History tab indicating significant actions in HIePRO.

Search

Buyers, Approvers and eAdministrators may search for solicitations, awards and vendors. The public may search current solicitations and awards.

About Using eProcurement

eProcurement is not a separate method of procurement. It is merely a tool to make issuing procurements and awards a more efficient and transparent process. Hawaii Revised Statutes, Hawaii Administrative Rules and Procurement Circulars apply to procurements issued on HIePRO. Additionally, HIePRO does not determine whether an action is allowable or not. The buyer must possess the procurement knowledge and apply it in all aspects of the procurement process. The buyer role is not simply a posting role as it may be when posting a solicitation on the procurement notices for solicitation site.

Questions?

<http://hawaii.gov/spo> > HePS-HIePRO > HIePRO for State Procurement Personnel
hiepro@hawaii.gov
808-586-0554