State of Hawaii eProcurement System HIePRO

Orientation for CPO Jurisdictions

What will Be Covered

- Intro and Overview
- Training
- Roles and Responsibilities
- Business Process
- eAdministrator Taskings
- The HIePRO Site
- Getting an eHawaii.gov Account: Registering & Gaining Access
- Giving Access to Users
- Approval Paths
- Instructions
- Review and Next Steps
- Q & A

Purpose of Today's Meeting

- This webinar will provide:
  - Overview of eProcurement & HIePRO.
  - Overview of requirements and considerations for enabling your jurisdiction in HIePRO.
- This webinar will not:
  - Enable your CPO Jurisdiction to begin using HIePRO immediately.
  - There will be further training on the How-To's.

What is eProcurement?

- Open & transparent system for vendors to compete for state contracts electronically.
- Online through the application:
  - Solicitations & addenda issued.
  - Vendors ask questions, buyers issue answers.
  - Vendors submit offers.
  - Bid (or quote) opening is virtual.
  - Buyer issues Contract Award Notice.

Hawaii State eProcurement
HIePRO

- Pronounced [hi-pro]
- Solicitation notices & awards- posted to public site automatically.
- Use of NIGP Commodity Codes for automatic courtesy email notifications to vendors.
- Pre-bid conference, Q&A, addenda.
- Offers submitted.
- Upon logging in, vendors notified if not compliant in Hawaii Compliance Express(HCE).

Overview of HIePRO

- (Production) Site: http://hiepro.hawaii.gov
- Application built specifically for the State.
- Testing has been conducted and will continue.
- Application will change over time.
  (HePS took 6 years to get to the current state.)
- Enhanced security, cleaner interface.
- Lessons learned.
- Training: enhanced approach.
- New role (optional): Requestor
- General program manual.

Advantages

- More efficient
- Solicitation notices and Awards are posted automatically to public site. No more manual posting of awards.
- Less posting > fewer data entry mistakes > fewer procurement problems.
- More user friendly. Cleaner looking.
- Advanced options built so they are not overwhelming to newer users.

Overview

Training

- Types of training:
  - Webinars
  - Videos
  - Training Modules
- Eliminate the rush to take training 'just in case';
- Less time lapse between training and issuing HIePRO solicitation;
- Mitigate users misusing the site.

Roles and Responsibilities

- System Administrator
- CPO Jurisdiction Administrator (eAdministrator)
- Alternate CPO Jurisdiction Administrator (eAdministrator)
- Buyer
- Approver
- Requestor
- Vendor

System Administrator Responsibilities

- General oversight of the HIePRO program & security;
- Point-of-Contact with Dept. and CPO Jurisdiction eAdministrators;
- Point-of-Contact with HIePRO vendor, Hawaii Information Consortium, LLC (HIC);
- Develops & maintains training materials;
- Provides consultation to CPO Jurisdiction eAdministrators on business process with regard to HIePRO;
- Develops & maintains statewide mandatory and optional instructions;
- Notifies CPO Jurisdiction eAdministrators of updates/changes;
- Coordinates updates of the application as needed;
- Annual reports.

CPO Jurisdiction eAdministrator Responsibilities (Primary)

- General oversight of HIePRO program & security for CPO Jurisdiction.
- Point-of-contact with CPO Jurisdiction users;
- Point-of-contact with System Administrator(s);
- Gateway for CPO Jurisdiction users
  - ensures users are appropriate;
  - activates/deactivates accounts;
  - Assigns roles (buyer; requestor, approver) & methods of procurement;
- Establishes approval routes and assigns to buyers;
- Establishes backups/alternates;
- Established CPO Jurisdiction-wide mandatory & optional instructions;
- Provides reports to CPO Jurisdiction personnel as needed.

Alternate CPO Jurisdiction eAdministrator Responsibilities

- Acts in the absence of the Primary eAdministrator;
- May assist with duties of the primary eAdministrator. However, the Primary eAdministrator retains primary responsibility.
- If there is more than one alternate, make sure you have a policy for next in line.
- CPO Jurisdictions may have up to 3 Alternate eAdministrators, as needed.

Buyer Responsibilities

- Conducts the solicitation and award;
- Point-of-contact with Vendor;
- Complies with statutes, rules, procurement circulars procedures relevant to the procurement:
  - Written delegated authority
  - Attend mandatory training;
  - Keeps abreast with current Statutes, Rules, procurement procedures
- Mantains security of HIeRO an its data;
- Complies with Procurement Code of Ethics, has no conflict of interest

Approver Responsibilities

- Ensures solicitation/award is procured/awarded in accordance with statutes, rules, procurement circulars and procedures and policies specific to the department;
- Delegated Authority and required training;
- Maintains security;
- Complies with Procurement Code of Ethics, has no conflict of interest.

Requestor Responsibilities

- Provides complete, clear and concise specifications and other required data;
- Maintains security of HIePRO and its data.
- Complies with Procurement Code of Ethics, has no conflict of interest.

Business Process Considerations

- Determining how Department will implement eProcurement;
- Use of roles: Approvers, Requestors, Buyers:
  - Approvers - checks and balances (optional)
  - Requestors – centralization & efficiency (optional)
- Approval paths
  - Solicitations and /or Awards
  - Methods of Procurement (Small Purchase Request for Quote and/or Competitive Sealed Bidding (IFB)
  - Amount ranges (optional)
  - Approval paths are optional a buyer should not approve him/herself.

Maintaining Security

- HIePRO accounts may NOT be 'shared'. Your name is on the account and its use is your responsibility.
  - Maintain security of your account (login/password)
- Data in HIePRO must also be kept secure.
  - Don't be casual about the information in HIePRO.
    - Log out of HIePRO before leaving your computer.
  - Procurement data is also subject to requirements for open information.
    - Make sure you know when information must be kept confidential and when it must be released.
    - Know what is on the public site.

eAdministrator Tasks

- Establish Procedures for:
  - Requesting access as a buyer, approver or requestor;
  - Approval routes including: for solicitations or awards, method of procurement and the approvers (and backups) in the route.
- Grant access to users.
- Create approval paths and assign to buyers.
- Create mandatory and optional instructions.
- Establish start date.

Questions?

About HIePRO Accounts

- Not everyone should have an account. Security issue.
- Only CPO Jurisdiction eAdministrator grants access to HIePRO to Jurisdiction users.
- For CPO Jurisdiction eAdministrators, the System Administrator grants access after SPO receives the completed, signed and emailed form SPO-041 (See Procurement Circular 2013-06for details).

Obtaining a HIePRO Account

- Two-step process;

1. User must have an eHawaii.gov account (some may already have one);
2. eAdministrator grants users access when they provide:
   - User exact email address; and
   - User position title.

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The HIePRO Training site https://training-hiepro.ehawaii.gov/

- Training site is not connected to the rest of eHawaii.gov or the production HIePRO site. You need to create a separate eHawaii.gov account. Use your work email. See instructions under 'Gaining Access.'
- Vendors also use the training site.
  - Do NOT place confidential information on the training site.
  - Be careful what you procure. This is a public site. Whenever releasing a solicitation include a statement that the solicitation/award is for test/training purposes and that no responses should be submitted.

The HIePRO Training Site
Gaining Access

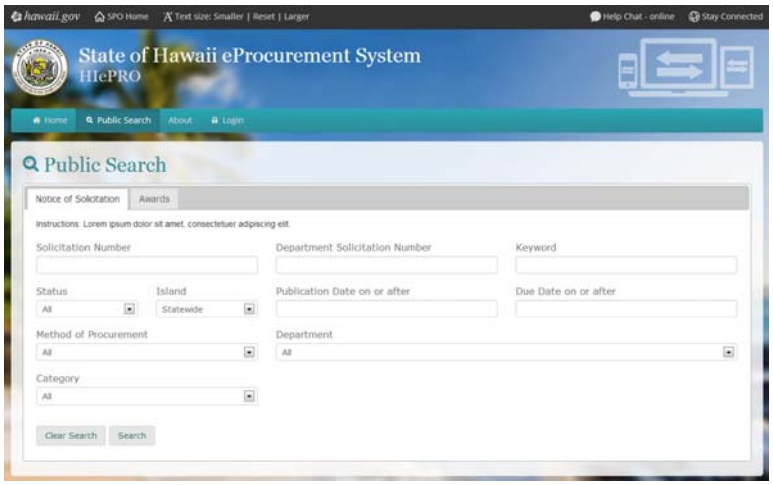
- Go to the HIePRO training site
  - https://training-hiepro.ehawaii.gov/
- Select Log in.
- Select **Create Free ehawaii.gov** account and follow the instructions.
- Once completed, send an email to hiepro@hawaii.gov with the following information:
  - Statement that you have taken the HIePRO training (name the training)
  - Your exact email address.
  - Your position title.
  - The department you are in.

Questions?

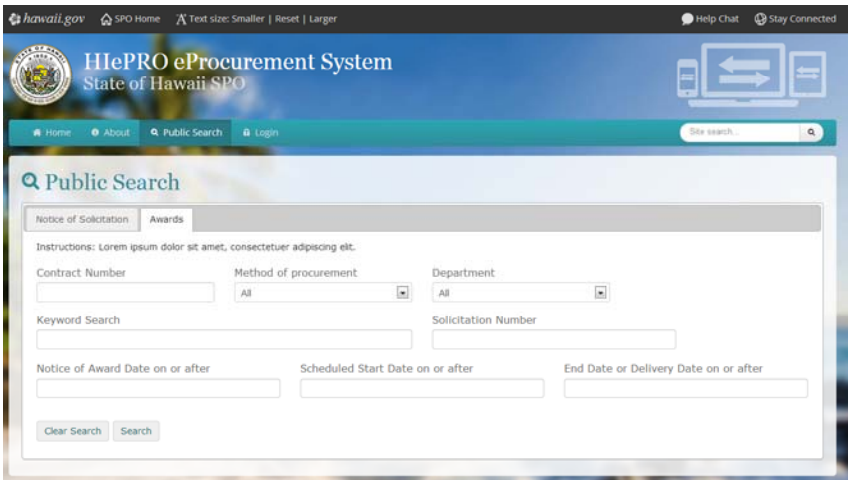
On to the HIePRO site….

http://hiepro.hawaii.gov

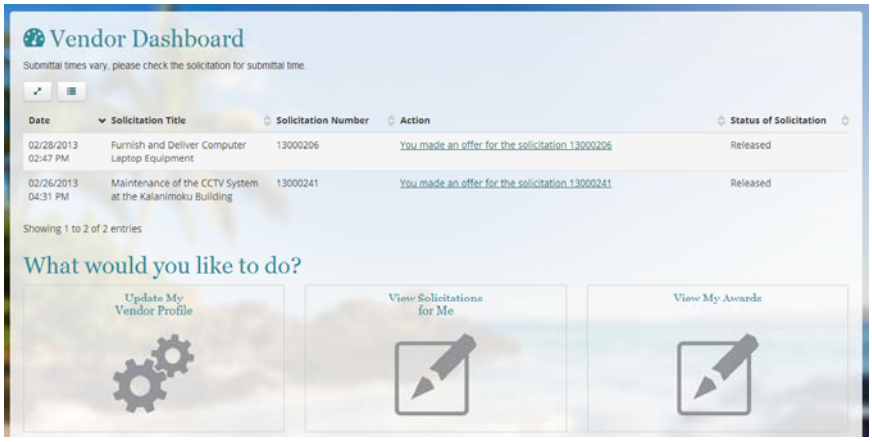
Public Search for Solicitations



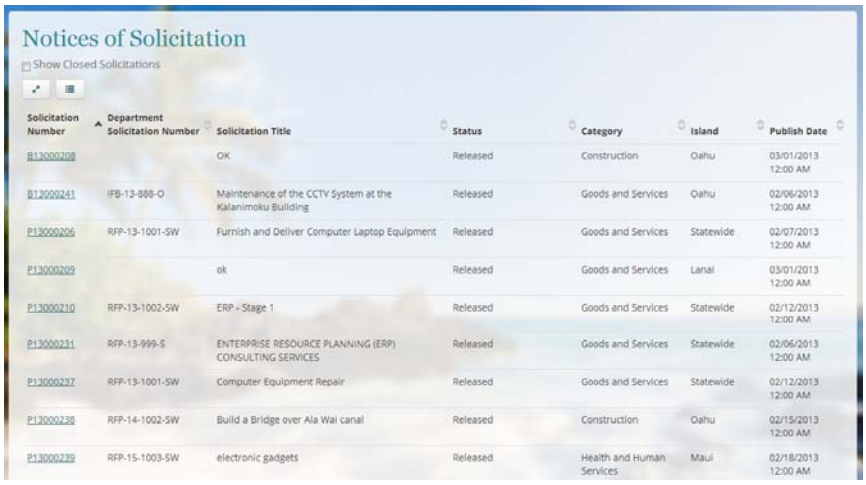
Public Search for Awards



Vendor Dashboard

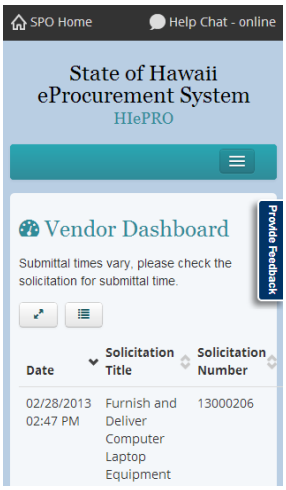


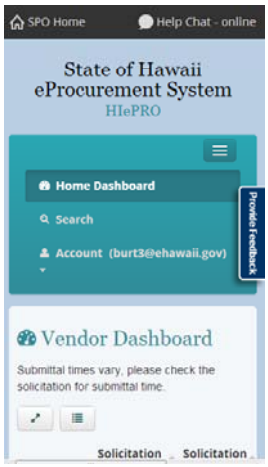
Solicitations



User Preferences
Especially Handy for Mobile Devices

Mobile





Transitioning to HIePRO
Using Lessons Learned

- Keep lines of communication/information clear.
  - eAdministrators are Point-of-contact with SPO.
  - User questions will go to eAdministrators.

HIePRO Efficiency

- Ensure staff are trained in a timely manner.
  - Training schedule on the SPO website.
- Consolidate the purchasing function for efficacy.
  - Fewer buyers > issue more solicitations > more experienced > fewer mistakes/problems > more efficient & effective.
- eAdministrators de-activate buyers who do not log in or issue eProcurement solicitations for a year until the buyer retakes training.
  - Exceptions may be made by eAdministrator for buyers who issue many solicitations on a cycle longer than 13 months.
- Training guides, references, FAQs and videos will be available for users.
  - Short videos as reminders.
  - Eventually, (January) basic training for eProcurement function will be available via video.

eAdministrators and Alternates

- Required: one (primary) eAdministrator
  - Only one CPO Jurisdiction Administrator.
- Required: one Alternate CPO Jurisdiction Administrator
  - May have up to three Alternate eAdministrators.
- An Alternate acts in the absence of the Administrator.
  - Remember to establish hierarchy/procedures if there is more than one Alternate.
- Alternates may also assist the Primary eAdministrator, however, the Primary eAdministrator retains primary responsibility.

eAdministrator Tasks: Initial Start Up

- Delegation as eAdministrator or alternate, pursuant to Procurement Circular 2013-06 as amended.
  - Form SPO-041 signed by eAdministrator and CPO.
- Give users permission/rights (their role).
  - Users set up their own account in terms of email and password.
  - User ID is the user's email address.
  - eAdministrators need to know
    - the email address
    - Position title
- Business process
  - Use of Approvers (optional).
  - Use of Requestors (optional).
  - Approval paths.
  - Departmental Instructions.

Questions?

Thanks for attending!

Questions on eProcurement?

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