Hawaii State eProcurement
HIePRO

Buyer Training

SPO 301 Part A

What Will be Covered

- Intro, Definitions, eProcurement and HIePRO
- Transition from HePS
- Buyer Responsibilities, Ethics and Security
- Other Roles and Responsibilities in HIePRO
- Some Differences from HePS
- Finding Commodity Codes
- How to Gain Access to HIePRO
- Creating a Solicitation
- Add vendors to notification, release to Internet or for approval

Resources and Training Materials

http://Hawaii.gov/SPO > HEPS-HIePRO
> HIePRO for State Personnel

- HIePRO Program Manual
  - Overview, roles, your responsibilities, who may have access, and more.
- HIePRO Buyer Quick Reference
  - Step-by-step guide to getting your solicitation on HIePRO **providing** you:
    - Know how to conduct the method of procurement;
    - Have specifications, minimum qualifications; and
    - Have Administrative requirements.
- SPO 301 Training Reference (PowerPoint)

This Webinar is Designed for

State Personnel who:

- Have or will have written delegated authority to procure and procure using eProcurement;
- Have taken the required workshops for the method of procurement to be used (I.e. Small Purchases Method of Procurement - SPO 120);
- Are given access to HIePRO by their Department eProcurement Administrator; or
- Are Department or CPO Jurisdiction eProcurement Administrators or Alternates.

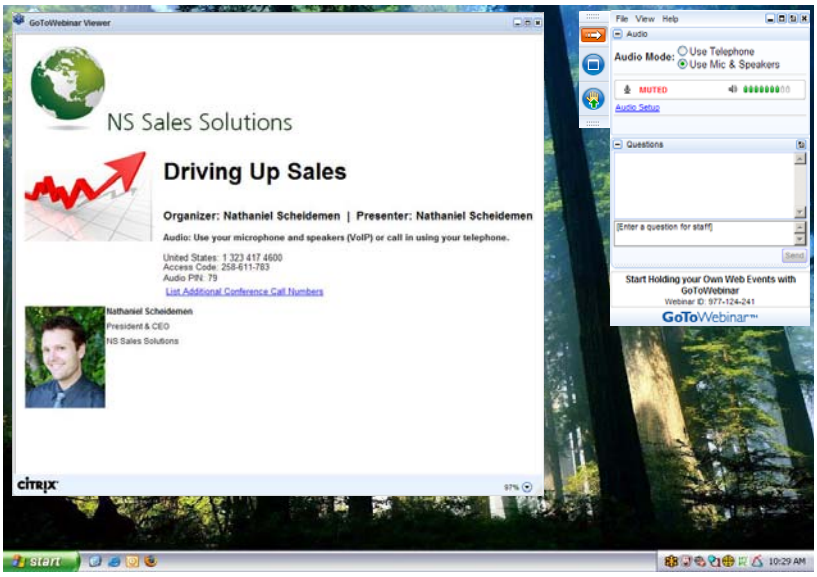
This Webinar is Intended to:

- Provide on overview of HIePRO;
- Provide responsibilities of buyers when using HIePRO;
- Teach the mechanics of placing a solicitation on HIePRO;
- Provide some reminders about common mistakes in conducting small purchase method of procurement using eProcurement.

This Webinar will Not:

- Teach everything needed to conduct procurement, awarding, contracting or contract administration. (There is not enough time. You must take the required workshops for the method of procurement or function.)
- Serve as a refresher on how to conduct procurement. You should take the class for the method of procurement again.
- Give anyone access to HIePRO. Only your Dept. e Administrator can do that. Not everyone should have access. (Security issue)

The GoToWebinar Attendee View



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  - Increase the magnification in your viewer window (in lower right corner.)

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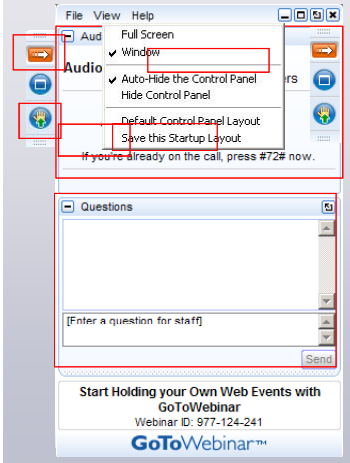
  - click the button with the square on the tab or
  - View > window
- Note: Attendee Quick Reference is available
  - http://hawaii.gov/spo
  - Click **Training for State and County Procurement Personnel**
  - Click **About SPO Webinars** or wherever '**webinar**' is a link
  - Click **FAQs and Quick Reference**

How to Participate Today



- Open and close your Panel
- View, Select, and Test your audio
- Submit text questions
- Raise your hand
- Q&A addressed at the end of today's session

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Before You Procure/Administer Contract: Written Delegated Authority and Training

Before you develop/draft/participate in a solicitation, review, approve, conduct, manage, or administer a procurement/contract, you must:

- **Have written delegated authority per signed and submitted (to SPO) Form SPO-036**.
  Note: See Procurement Delegation Memorandum 2010-01, as amended.
  - See : http://hawaii.gov/spo
    > For State & County Personnel
    > Required Procurement Delegation Authority (there is also a link to the required (mandatory) training requirements site)
- **Have taken all required training**.
  Reference: Procurement Circular 2010-05, as amended
  Note: Some requirements have changed. Check the website periodically.
  - See: http://hawaii.gov/spo
    >Training & Informational Sessions
    >Training for State and County Personnel
    >Training Requirements: Which Workshops Do I need to Take?

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Required Training

HIePRO Buyer Training

Level 2

- **Method of Procurement**
  - **SPO 120** - Small Purchase Method of Procurement, and/or
  - **SPO 100** - Competitive Sealed Bidding
    - SPO 150 - Insurance Requirements for Contracts
- **SPO 127** - Understanding, Detecting and Preventing Anti-Trust Violations
- **SPO 301** – HIePRO Buyer Training
- If procuring for **construction add** to the above:
  - **SPO 130** – Construction Procurements
  - **SPO 185** - Prevailing Wage, Certified Payroll and Contract Agency Responsibilities

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Definitions

- **Dept. eAdministrator/ eAdministrator / Dept. Administrator=**
  - the Department or CPO Jurisdiction eProcurement Administrator or their alternates.
  - There is only one eAdministrator for each Department/ CPO Jurisdiction. Each department may have up to 3 Alternate eAdministrators. Executive branch departments eAdministrators and alternates are delegated on form SPO-036. CPO Jurisdiction eAdministrators are delegated on form SPO-041
    - The listing of eAdministrators/alternates is at: http://hawaii.gov/SPO > for State & County Personnel > Administrators, Mgrs. & POCs for SPO Programs

Definitions
Continued

- **RFQ** = small purchase method of procurement pursuant to HRS 103D-305
- **IFB** = competitive sealed bidding method of procurement pursuant to HRS 103D-302

- See also Definitions in the ***HIePRO Program Manual***

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).

Transition from HePS to HIePRO
Why We are Changing

- Newer technology - Fewer conflicts with newer browsers.
- Faster.
- Mobile-friendly.
- Lower transaction fee.

Transition to HIePRO

Timeline

- September -November
  - Departments complete determining business process and enter info;
  - Ongoing training;
  - Buyers enter HIePRO solicitations as they are trained.
- December
  - Last solicitation in HePS
- January-February 2014
  - Retrieve data from HePS

Questions?

Buyer Responsibilities

1. Maintain security of HIePRO and its data.
2. Point-of-contact with vendors for the solicitation.
3. Issues procurement by following the procurement procedures for the method of procurement. (HIePRO doesn't do it for you.)
4. Provide clear written specifications, minimum qualifications as applicable, and administrative requirements. (HIePRO doesn't do it for you.)
5. Follow the procurement code of ethics.

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.

Follow Procurement Procedures

- For your protection
  - Hawaii Revised Statutes
  - Hawaii Administrative Rules
  - Procurement Circulars
  - Internal policies and procedures (Dept., Div., etc.)
- You must do more than attend training.
  - Know and follow procurement procedures.
  - Keep up to date with changes.
  - For certain goods, services and construction there may be other procedures you must follow
-

Point-of-Contact with Vendors

- It is the buyers responsibility to answer questions about the procurement.
- If you do not know the answer, advise the vendor you will get back to them. Then find the answer and get back to them.
- Exceptions:
  - Questions on the mechanics of HIePRO - provide them the HIC contact info.
  - Policy questions, provide them SPO contact info.

Ethical Procurement

- Procurement Code of Ethics;
- Essential to the procurement process and public faith and perception;
- Affects everyone;
- No conflict of interest or appearance of.
  - You must be an employee of the state through the personnel process.
  - If you are a vendor to the state, you may not have access to HIePRO.
- Ref: HRS 103D-101, HAR Chapter 131, Sec 131-1.02

Know your responsibilities

Questions?

Other HIePRO Roles & Responsibilities

- Department eProcurement Administrator/ **eAdministrator**
  - Oversees HIePRO program for the Department.
  - HIePRO point-of-contact for buyers.
- **System Administrator**
  - Oversees HIePRO program for the state.
  - HIePRO point-of-contact with department administrators.
  - HIePRO point-of-contact with the vendor administering the HIePRO application (HIC).

Other HIePRO Roles & Responsibilities

Continued

- **Approver**
  - Depends on how your dept. sets it up -check before you procure.
  - Approves solicitation & addenda.
  - Approves award & contract amendments.
  - In HIePRO, approver is a buyer who has been assigned to an approval path.
- **Requestor**
  - New optional role (not a procurement role)- may not be used by all departments.
  - Provides specifications & goods/services requirements for the buyer.

Differences in HIePRO

- email is user ID.
- For vendors:
  - No master and sub accounts. Vendors staff may have separate accounts.
  - Vendors are notified if they are not compliant in HCE each time they log in.
- Commodity codes
  - Select commodity code by line item.
  - No commodity codes ending in 00.
- Do not have 40,000 vendors in HIePRO.
  - Buyers must contact their vendors to make sure they know solicitation will be issued in HIePRO.

About NIGP Commodity Codes

- Developed by National Institute of Governmental Purchasing = **Public Procurement Institute**
  - First 3 digits - the class (300+)
  - Second 2 digits - the goods/service/construction (7,000+)
- Code numbering - somewhat alphabetical
  - Classes up to 899 - goods
  - Classes 900 and above - services

Finding Commodity Codes

- Commodity codes by class available without logging in.
- Can search by key word (after logging in).
  - Keep it short, one word or part of a word.
- Searching vendors.
  - After selection, search for vendors by commodity code to verify; or
  - Can search for specific vendors and see the commodity codes in their profile.

Commonly Used Commodity Codes

- **Class 071 – Automobiles, Sch. Buses, SUVs and Vans**
  - **O71**80- SUV type vehicles
  - 07190- Vans, cargo
- **Class 072 - Trucks**
  - **072**01- truck, class 1, 6,000 lb
- **Class 910 – Bldg. Maintence, Installation & Repair Svcs**
  - **910**39- janitorial/custodial services
  - 91027- garbage, trash removal
  - 91036- heating, air conditioning maintenance & repair
- **Class 988 – Roadside, Grounds, Recreational & Park Area Svcs.**
  - **988**02- arborist services
  - 98888- tree trimming, pruning services

Commodity Codes are Not Procurement Methods

- Purpose of commodity codes is to link solicitations and vendors.
- Some commodity codes will have professional services in their title. This is NOT the same as the professional services method of procurement.
  - At this time, professional services method of procurement is not conducted on HIePRO.
  - Some solicitations may only be conducted using professional services method of procurement.

About HIePRO Accounts

- Number of accounts per dept is limited. Not everyone should have an account. Security issue.
- Only your dept. eProcurement administrator (eAdministrator) has the ability to grant access to HIePRO. Check with your eAdministrator for the process for your dept.

Obtaining a HIePRO Account

- Two-step process;

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

- Check with your eAdministrator for the procedures for obtaining an account.

Creating an eHawaii.gov Account

- Go to http://Hiepro.hawaii.gov
- Select login
  - do **not** select Login & Register as a Vendor
- Select ***Create Free Account.***
- Your email is your user ID (login).
  - You must use a Hawaii.gov (or other clearly work) email to be a buyer in HIePRO.
- Follow instructions for creating account.

Not sure if you already have an eHawaii.gov account?

- You may already have an account if you log in to access HCE, eCrim (law enforcement), boating registration, etc.
- If you are not sure, create an account using your work email.
- If you already have an account you will receive the message one already exists for your email. Follow the instructions for retrieving your password if you have forgotten it.

Getting Access/Permission to use HIePRO

- Only your e Administrator can give you access to HIePRO and will need:
  - Your **exact** email address;
  - Your position title;
  - The methods of procurement to which you may have access (use); and
  - Any approval paths to which you need to be subject.
- Each department has its own procedures. Contact your department for the procedures.

Before Creating your Solicitation Do your Homework

- HIePRO does **not** create specifications for you. Have your specs ready when you create your solicitation in HIePRO.
- Before creating your solicitation search HIePRO to ensure the:
  - Appropriate correct **commodity code** is selected**.**
  - Vendors who are appropriate and you want to respond are in HIePRO.
    If they aren't, let them know you will be issuing a HIePRO and where to register and get help: http://hiepro.hawaii.gov. ph: 808-695-4620

Unit of Measure and Quantity

- Unit of measure is extremely important.
- Used to determines how vendors may respond in HePS.
- When vendors respond using the same unit of measure, you are comparing apples to apples- fair, straightforward, less likely to get protests. When they know the quantity (or estimated quantity) they have a better idea of how to price.
- The buyer determines the unit of measure. Vendors **cannot** change it.
- Most common units of measure:
  - Each
  - Job (for a one time service or construction)
  - Year
  - Month
  - Hour

Quantity

- The transaction fee is based on the price **at time of award.**
- Buyer must enter an estimated quantity.
- Estimates may be based on estimated or prior use.
- If the quantity is an estimate be sure to:
  - state so in the solicitation specifications, and
  - indicate if there are any guaranteed minimum amounts.

Questions?

Finally, on to HIePRO...

(You may want to take out your HIePRO Buyer Quick Reference)

http://HIePRO.hawaii.gov

To Enter a Solicitation in HIePRO: Needed for the Solicitation

- Specifications;
- Minimum qualifications of vendor;
- Administrative requirements;
- Timeline (prebid conf, Q & A, submital deadline, delivery);
- Estimated price;
- Potential vendors
- Other requirements specific to the goods, services or construction to be purchased.

In Summary - 3 things

1. **HIePRO does not do the thinking for the buyer.**
   - Just because it is physically possible to do something in HIePRO does not mean it is permissible or allowable.
2. **HIePRO is not a method of procurement.**
   - It is a tool to make the procurement more open and efficient.
   - Buyer must know which procurement method to use and how to conduct it.
3. **The buyer must have the Specifications.**
   - HIePRO does not know what you want to buy.
   - Commodity codes are NOT specifications.

To Enter a Solicitation in HIePRO: Buyer Requirements

- Written delegated authority;
- Taken all required training;
- ehawaii.gov account;
- HIePRO permissions/access from Dept. eAdministrator.

Getting Access to the HIePRO Training Site

1. You must have a separate **Training site eHawaii.gov** account
   - You can use the same work email – it is a separate system.
   - Go to https://training-hiepro.ehawaii.gov
   - Select **Create Free Account** and follow Instructions
2. Send an email to hiepro@hawaii.gov containing the following:
   - Your Name
   - Your Position Title
   - Your Department
   - The workshop number and date you took the workshop (for instance, SPO 301 - 10/22, & 10/24/13

When Using the HIePRO Training Site

- Vendors also have access to this site for training.
- Do not enter anything that must be kept confidential.
- No emails are sent out from this site.
  - You will not get the usual notification emails in the HIePRO Training site.)
- The HIePRO Training site is not connected to HCE.

State Procurement Office
http://hawaii.gov/spo

Questions?

Contact your eAdministrator

http://Hawaii.gov/SPO > HePS-HIePRO > HIePRO for State Personnel > **Department and CPO Jurisdiction eAdministrators**

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