State Procurement Office

Hawaii eProcurement System

HePS
Basic Buyer Training

SPO Workshop No. HePS 100
Part 3 of 3

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Basic Buyer Training Section 3 (HePS 100-3)
What will be Covered

- Quick Review
- Doing your homework before procuring
- Where did my solicitation go?
- Use the **HePS Request for Quotation Small Purchase Reference for Buyers!**
- The Production (real) site
- Reviewing your profile/approval routes
- A little on finding commodity codes and vendors
- Finding your Award History – Award Summary reports
- Reminders
- The SPO website
- Q & A

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A Preparing for Your Solicitation:

Make sure you:

- Have written delegated authority
  - signed submitted to SPO via your department head SPO-036.
- Have taken **all required** training.
- Check procurement circulars for updates to statutes, administrative rules, policies, and procedures.
- Check related statutes (recycled paper, energy efficient vehicles, etc.)
- Are there additional requirements administrative or in your specifications?
- Check within your department/division, etc. for internal policies/procedures.
- Know what you are buying. Create your specifications and minimum requirements first.
- Decide how vendors are to respond
  - unit of measure; and
  - Quantity
  - Exact quantity =definite quantity (ID) or
  - an estimate of quantity=indefinite quantity(DO)

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Checklist
Before Entering Your Solicitation in HePS

- ✓ Required Written Procurement Delegation Authority Form SPO-036)
- ✓ Taken all required training
- ✓ Method of Procurement! (Select the right one: RFQ or IFB)
- ✓ Procurement circulars - updates to circulars, statutes, administrative rules
- ✓ Specifications
  - ✓ Include minimum qualifications as applicable
  - ✓ Check for new or revised statutes/rules for the goods and services you are purchasing
- ✓ Administrative Requirements included but not limited to:
  - ✓ Required licenses/ certification/compliance;
  - ✓ Where awards will be posted (Awards Reporting Site)
    - ✓ Direct them to the public site, (not where you log in): http://hawaii.gov/spo click **Contract Awards and Info**;
  - ✓ Procedures for protests and the name and address to send the protest.
    - ✓ CPO has delegated to HOPA, HOPA delegated further in accordance with written delegated procurement authority. (Usually the procurement officer for the solicitation)
- ✓ If using an offer form, the offer form should be in a separate attachment and should be fillable.
- ✓ Unit of measure and quantity
- ✓ Check for approval routes to which your solicitation/award is subject.
- ✓ Timeline
- ✓ Commodity code
- ✓ Verify appropriate and desired vendors are in HePS.

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Review Approval Routes Before you Release your Solicitation!

- *Tab* **Miscellaneous**
  Subtab **Session Info**

See How Do I…

..Check the Approvals my solicitations or notices of award are subject to in HePS?

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Review of issuing a Solicitation

(HePS Reference Guide - RFQs, page 4)

- Log in
- Icon > *Create a solicitation* > From pop-up Select Method of Procurement (for instance: *RFQ*)
- Must complete:
- 3-1 Required delivery date or length of contract.
- 4 Delivery Point address
- 5 Bill to address
- 7 Select **Save all and get items**

(HePS Reference Guide RFQs, page 5)

- Enter the **commodity code** and select it in the list (lower frame)
  - If it is the right class but wrong item, you can enter 00 after the 3 digit class number in the search to find a more appropriate commodity code.
  - The goal is to match vendors who are likely to sell the goods/services/construction in your solicitation.
- New page appears for information on the line item

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Review – Line item

(Continued)

(HePS Reference Guide - RFQs, pages 6 - 8)

- **9** Enter:
  - quantity and unit of measure
  - Estimated price (for total count)
- **10 Delete** commodity code **description** and
  - enter information/specifications for the goods, services or construction.
  - If specs are too long and using an attachment is needed, enter brief description and refer to attachment (for example: Repair public bathroom at XYZ park. *See specifications as per attached*)
- **11** If needed, upload and name attachments.
- **14** Select an action
  - **Create RFQ/ Save eRFQ item** > **Execute action**

Note: You have only created the **requisition** at this point.
You are not done yet! You still need to create the rest of the solicitation.

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Review – Solicitation

(continued)

(HePS Reference Guide -RFQs, pages 9 and 10)

- **1 Solicitation Release Information**
  - **Item Response** –only one item > ***all or none***
  - **Select Solicitation Recipients** –
    - for small purchases only (RFQ) there is a choice
      - **Hawaii only (agency domiciled)** or
      - **all registered** vendors.
    - Select **Review Above Recipients**. Make sure they are correct. If needed, add recipients who are in HePS but not on the list.
  - Enter **Solicitation Responses Due date**
  - Review **delivery** or **start and end of contract** dates.

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Review - Solicitation - Required
(continued)

(HePS Reference Guide - RFQs, page 11)

- **2** Review Billing and Shipping Locations.
- **3** Review **Solicitation Vendor Instructions**
  - Ensure there is no conflicting/confusing info.
  - Add additional instructions, if needed.
- **4** Custom Solicitation Title and Description
  - Enter custom title (description not needed/recommended)
- **5** Solicitation Geographic Location/Category
  - Select the location and category

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Review - Solicitation - Optional
(continued)

- Solicit Responses From Other Commodity Suppliers, (other commodity codes) if needed

(HePS Reference Guide - RFQs, page 12)

- Pre-bid Conference, if needed.
  - Date, time, notes
- Question and Answer Section (recommended)
  - Questions Due Date
  - Answers Due Date (recommend at least 3 days before response submittal)
  - Notes
  - Select Vendor name shall **no**t appear with question (protect vendor confidentiality)
- **Release to the internet or for approvals;** or
- **File for later action to** work on it another time.

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Questions:

For Pre-Bid Conference and Q & A: 'Save' and 'Library'

- **Purpose** = saves time and retyping.
- **Save** = saves the address or note you entered.
- **Library** = a library of notes for vendors or pre-bid addresses you have previously saved.

- When you save, save it to your personal library, **not** the universal library.

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Where Did My Solicitation Go?

- If, in the process of creating your solicitation, you get disconnected or you need to come back to it at a later time:
- Master Tab – **Solicitation Manager**
- Subtab –
  - **New** (where it is most of he time); or
  - **In work** or
  - **On Hold** (where it is if you completed it up to the point of ready to release but saved it for later instead of releasing it.
- More recent documents are at the bottom of the list.
- If you are sure you released it but it is not on the internet…

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Where Did My Solicitation Go?
In Approval

- It may be **in approval**. You can track where it is in the approval routing.
  - Master Tab – **Approvals Manager**
  - Subtab - **My RFXs**… **In Approval**

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Checking Approval Routes

- **Prior to conducting procurement, issuing award**
  - Do I have any approval routes? - (Assigned Workflow Rtes.).
  - Am I an approver in any routes? Approval responsibilities
- **While solicitations/awards are in approval**
  - Where is the solicitation/award in the route?

See How Do I
...Track My Solicitations or Notices of Award in Approval on HePS?

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Questions?

http://hawaii.gov/spo

Issuing a solicitation on HePS can be very fast **if** you are prepared.

It is the prep that takes all the work.

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Commodity Codes and Vendors

(HePS Reference Guide - RFQs, page 40)

- The purpose of commodity codes is to ensure you connect with the right vendors.
  - Determines which vendors to which email notices are sent.
- Use commodity codes to find vendors; and /or
- Use vendors you know who deliver the goods, services or construction to find the commodity code.

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Finding Your Closed Solicitations

(HePS Reference Guide - RFQs, page 20)

- Log in. Do one of the following
- To ***view*** solicitations that have closed:
  - Tab **Solicitation Manager,** Subtab **Awaiting Award**
- To ***award*** solicitations that have closed:
  - Tab **Awards Manager,** Subtab **Abstract (RFQ, RFB or RFP)**
    Or
  - Select the **Create an Award icon,** and **RFQ, RFB** or **RFP** from the pop-up.

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Finding Your Awards
Most Often Needed Info

- Select the dropdown box arrow:
  - **Review Abstract >**
    Calls up the abstract
  - **Certificate of Vendor Compliance** >
    A snapshot of the vendor compliance info in Hawaii Compliance Express on the date of the HePS award
  - **Award Summary Report >**
    Summary of the solicitation, award, amendments. Must be submitted with PO for small purchase request for quotations.
- See **HOW DO I Find Awards** for more methods and details and searching all awards.
  - http://hawaii.gov/spo
    - HePS
    - *HePS for State Personnel*
    - *HePS Toolbox*
    - *How Do I…*

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Review Your Profile
When Your Account is Opened/Reinstated
and thereafter 4 Times/Year

- *Tab* **Miscellaneous**
  Subtab **My Profile**
- Check:
  - Email address!!!!
  - Phone number
  - Address
  - Position/Title

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Finding Solicitation Attachments After Award

(How Do I… Find Attachments After Award)

- Select the **Search System** icon and click anywhere in the popup.
- Scroll to **Find/Review Agency File Attachments**
- To search for **solicitation attachments,**
  - enter the HePS solicitation number next to *Solicitation* and
  - Select **Solicitation**

See the How Do I's…
Find Attachments After Awards

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Finding Vendor Attachments after Award

- Select the **Search System** icon and click anywhere in the popup.
- Scroll to **Find/Review Vendor File Attachments**
- Enter the **HePS solicitation number** after Solicitation **and**
- Select **solicitation.**
  All vendor attachments for the solicitation will appear.

Note: In a similar fashion, the search can be conducted with the following parameters:

- addenda and line item number (if there are any), or
- vendor ID; (a number starting with a P); or
- attachment name.

See the How Do I's…
Find Attachments After Awards

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Finding Award Attachments

- If the buyer has placed attachments in the notice of award, they can be accessed in a similar fashion.
- To search for **award attachments,**
  - Enter the HePS award number next to *Award* and
  - Select **Award**

See the How Do I's…
Find Attachments After Award

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Questions?

On to the Production Site

http://hawaii.gov/spo

Your Profile

Searching for Commodity Codes

Searching for Vendors

Finding Attachments after Award

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It Doesn't Stop at the Award

- Someone must be responsible for managing the award to ensure the State receives what it contracts for (including purchases by purchase orders or pCards).
  - Commonly known as contract administrator.
  - Just because there is no formal contract (AG form) it is still a contract and must be managed.
    - Ensure the state gets what it solicited for.
    - Payment was in accordance with the quote.

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Before You Procure
Do Your Homework First

- Written delegated procurement authority per form SPO-036.
- Taken all required training.
- Stay in the loop.
  - Check procurement circulars for updates to statutes, administrative rules, policies, and procedures.
  - Check related statutes (recycled paper, energy efficient vehicles, etc.)
- Check within within your department/division, etc. for internal policies/procedures.
- Check for appropriate commodity codes.
- Check for and ensure your vendors are in HePS.

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HePS is a Tool

- HePS is **not** a method of Procurement
  - It is a tool to make your procurement more efficient and transparent)
- It does not know all the statutes and rules.
  - You have to know them.
- It does not know specifications.
  - That is also your job.
- It is not artificial intelligence. To HePS, text is text.
  - Your intelligence is what counts.

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Buyer Responsibilities

- **Security-**
  - Change your password when you first get it.
  - Logins/passwords are not for sharing.
  - Keep your login/password secure.
- **Comply with statutes/admin rules, etc.**
  - Keep up to date. Check procurement circulars regularly. Check manuals, references, program guides, etc.
  - Ensure you have written delegated authority.
  - Ensure you have taken all required training. (Requirements change, check the website.)
- **Adhere to code of ethics-**
  - Effective 7/6/10 - HRS 103D-101 Requirements of ethical public procurement
  - Redundant of HAR Procurement Code of Ethics in HAR Chapter 3-131.
  - No conflict of interest or appearance of conflict of interest.
    - Buyers have access to vendor information. Buyers cannot also be vendors to the state because of this access.
- *Reference:*
  Act 207 SLH 2010;
  HAR Chapter 3-131 Compliance;
  HAR Section 3-131-1.02 Procurement Code of Ethic

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Before You Procure/Administer a 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. Previous forms are no longer in effect.
  - 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.
  - http://hawaii.gov/spo
  - Training and Informational Sessions > Training for State and County Personnel
  - Training Requirements: Which Workshops Do I Need to Take?

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Resources for HePS Buyers

- http://hawaii.gov/spo
- Click HePS
- click HePS for State Personnel
  - HePS Toolbox-references/manuals/handbooks
  - How Do I's
  - Buyer FAQ
  - Check also **References**
    - Procurement Delegation
    - Procurement Circulars
    - Procurement Code of Ethics
    - More Information on Small Purchase Method of Procurement
    - For State and County Personnel webpage

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State Procurement Office

The end. Thanks for attending!

Remember to complete any group attendance forms and email them to state.procurement.office@hawaii.gov within 1 working day of the webinar.

Questions?

http://hawaii.gov/spo

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