State Procurement Office

Hawaii eProcurement System
HePS

Researching in HePS

Doing Your Homework

Workshop No. HePS 203

1

Researching in HePS: doing Your Homework (HePS 203)

Who this Workshop is For

- This workshop is designed for state personnel who:
  - have taken HePS 100; and
  - have written delegated authority to procure and to procure on HePS; and
  - are current HePS buyers and have conducted at least 3 procurements on; or
  - are Department or Jurisdiction HePS Administrators
- This workshop will:
  - Demonstrate how to conduct research in HePS so that you can conduct more efficient, effective procurements; and
  - Help you take advantage of the resources in HePS provided by other buyers.
- This workshop is not intended to:
  - teach you everything you need to know about procurement or award procedure. (There isn't enough time.) You must take the appropriate workshops for the method of procurement you are conducting.
  - Serve as a review of the basics of using HePS (Buyers should take HePS 100 if review is needed.)
  - Serve as the reason to reactivate a buyers account when the buyer was deactivated because they have not used HePS in over 1 year.

2

Researching in HePS

What Will be Covered

- About Webinars/Housekeeping, Reminders and Responsibilities
- Finding Commodity Codes
- Searching for Vendors
- Checking Your Approval Routes: Ensuring your Solicitation or Award Goes to Your Approver(s)
- Tracking your Document in Approval Routing
- Searching your Awards
- Reviewing other Solicitations
- Reviewing HePS Instructions
- Compliance Documentation, Hawaii Compliance Express (HCE) and HePS
- Finding vendor attachments for past procurements
- Finding buyer attachments
- (If time allows) Searching the SPO Awards Site
- Tools You Can Use
- Q & A

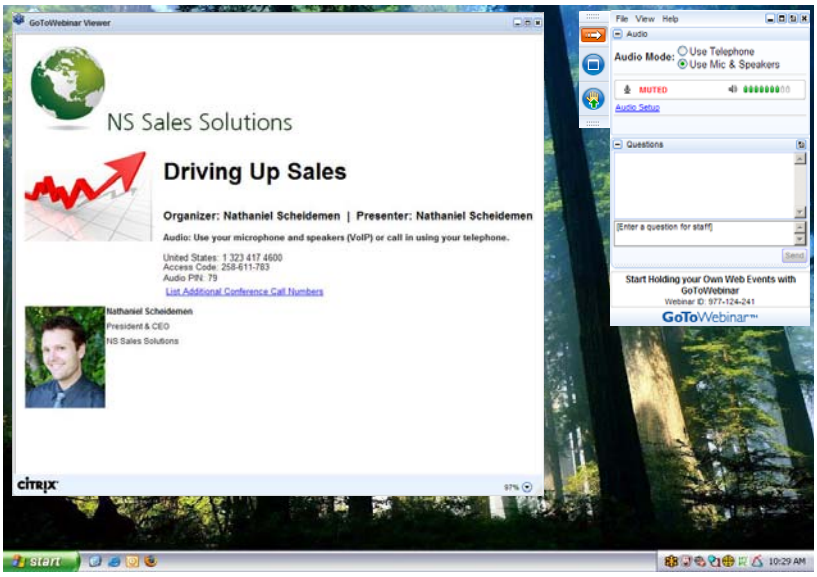
3

About SPO Webinars

- Participation encouraged.
- If we cannot get to all your questions we will provide answers at a later date (FAQ, etc.)
- If there is more than one person participating at a single computer.
  - Everyone registers for this webinar on the webinar website.
  - On the day of the webinar, the SPO Webinar Group Attendance form is placed on the SPO training schedule.
  - All attendees **in the group** including the person registered on the webinar site complete the SPO Webinar Group Attendance form, scan it in and send it to: state.procurement.office@hawaii.gov
  - **Send it in within 1 working day of the webinar**
- http://hawaii.gov/spo
  - Training and Informational Sessions
  - Training for State and County Personnel
- **DO NOT send in the signed form prior to the workshop.**

4

The GoToWebinar Attendee View



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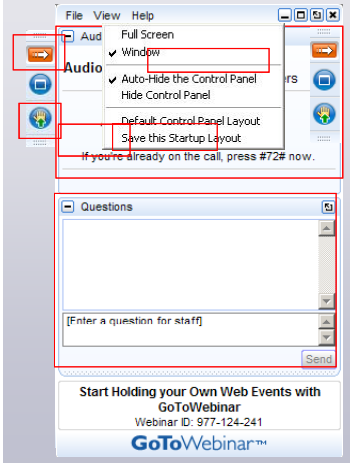
Webinar Viewer Window

- Having trouble seeing?
  - Maximize your viewer window; and/or
  - Increase the magnification in your viewer window (in lower right corner.)

- To exit full screen - GTW (GoToWebinar) control panel menu
  - 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**

6

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, Amendment 1. If a SPO Form SPO-036 has not been submitted to SPO you do not have delegated authority. Check with your ASO/BMO if you are unsure.
  - 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
  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?

8

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.**
  - Ensure you are in the Loop. 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.)
  - Know your internal policies and procedures (Jurisdiction, department, division, office, etc.)
- **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.
- *See also: User Responsibilities and General Information*
- *Reference:*
  Act 207 SLH 2010; codified as HRS 103D-101 Requirements of Ethical Public Procurement
  HAR Chapter 3-131 Compliance;
  HAR Section 3-131-1.02 Procurement Code of Ethic

9

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.

10

Before We Get to
Researching in HePS

Retrieving Your Password

- **If you forget your password:**
- Go to the HePS Login: http://hawaii.gov/spo
  - Hawaii eProcurement System
  - Buyer/Approver Login
  - Under "Forgot your Password?" enter your user ID or email (as it appears in HePS)
  - Your password will be emailed to you in about a minute.
- **Forgot your user ID?** Contact your Department/Jurisdiction HePS Administrator
- **If your email is incorrect in HePS:**
- Contact your Department/jurisdiction HePS Administrator

11

Prepare for Your HePS Solicitation

- Have your specifications ready (HePS doesn't provide them for you.)
  - Include minimum qualifications as appropriate
- Have any administrative requirements/general provisions ready.
  - Check the general instructions in HePS. Don't assume all administrative requirements are in the general instructions (Why aren't some admin requirements in HePS? May not always apply.)
- Use the search function in HePS to:
  - Find the correct commodity code
  - Ensure appropriate vendors are in HePS

12

Before you Start the HePS Solicitation

- Specifications and administrative requirements
- Commodity Code Category
- Are the appropriate vendors in HePS?
- Ensure the commodity code you have selected is congruent with/matches the appropriate vendors in HePS.

13

Once You Have Released the Solicitation

- If there is an approval path you should follow it to ensure it moves appropriately.
- Check the date actually released (after approvals):
  - Sufficient time for response
  - Sufficient time for Q&A section
  - Sufficient notice if pre-bid conference was scheduled.
- Check for responses.
- Check for questions.

See:

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

How Do I *Create a Question and Answer Section? (page 2)*

HePS Reference Guide *for Small Purchase Request for Quotes*

14

Commodity Codes

- **Purpose:** To connect vendors with the solicitations for which they may be able provide the goods, services or construction.
  - Vendors create a commodity code profile including all the codes for which they are interested in responding.
  - Buyers select a commodity code for their solicitation.
  - Vendors with the commodity code in their profile get a solicitation email notice and will see it in the default view upon logging in to their account.

15

Commodity Codes
(continued)

- Vendors can also view all solicitations via the **view all** button when logged into their account.
- **Exception:** When the buyer has **agency domiciled** as the solicitation recipients, only vendors in HePS with a Hawaii address will be able to see or respond. See Solicitation, Step 1, **Solicitation Recipients**.
- Buyers can ensure a vendor in HePS who hasn't selected the commodity code gets the email by searching in Step 1, **Solicitation Recipients** > **Review Above Recipients** and adding the vendor.

16

Commodity Codes (continued)

- The first 3 numbers of a commodity code are the class
- The second two numbers are the item
- When a vendor selects a commodity code with the item number 00 he is registering for every item in the class. (i.e. 56300)
- Classes 001 to 899 are goods
- Classes 900 and above are services

- If you select number of the class followed by 00 (i.e. 56300), the notice will only go the vendors who have selected 56300. If you select the specific commodity code (56327) it will go to vendors who included that commodity code as well as vendors who registered for the item (56327)

17

Searching Commodity Codes

- Icon - **Search System**
- Review Commodities
- Enter text or commodity class and/or
- Select a type of search
- Don’t forget to select Review Commodities

- If you cannot find it, and you know a vendor who provides what you are buying, scroll to vendors,
- Search for the vendor;
- Review the commodity codes the vendor has selected.

18

Searching Commodity Codes

- **Index lookup**
  - Begins with the text.
- **Scan Index**
  - Text is anywhere in the commodity code title
- **Show classes (3 digit) from-**
  - All classes from the text entered.
- **Scan Classes for**
  - Searches the class title (3 digit) for the text.
- **Drill Down**
  - Shows all classes with text in commodity code item
  - Allows you view all commodity code items in the class

19

Searching for Vendors

- Icon **Search System**
- Vendors

- Search parameters
  - Name or DBA
  - Commodity Code
  - City
  - County
  - State

20

Researching Vendors

- Look for vendors by commodity code
- Information on specific vendors
  - Award History in HePS;
  - Commodity Code Profile;
  - Self-certified profile entries;
    - Demographics such as: Number of employees; home Office location; Legal Structure: web site; primary contact.
    - Other profiles (optional for vendor and not verified) diversity; veteran; small disadvantaged business; 8(a) participant;
  - Vendor Notepad
    - Comments by buyers

21

Questions?

- Any questions?
- How are we doing so far?

- On to the HePS website
  - http://hawaii.gov/spo
  - Hawaii eProcurement System
  - Buyer/Approver Login

22

Find the Approval Routes to which your Solicitations or Awards are Subject

- Select the **Miscellaneous** tab and **Session Info** Subtab.
- Scroll down
- **Approval Responsibilities**: tells you which approval routes you are in. (It will not tell you who specifically you approve.)
- **Assigned Workflow Routes**: tells you who would approve any solicitations you issue as a buyer on HePS.

See:

How Do I *Check the Approvals my solicitations or notices of award are subject to in HePS?*

23

Finding Awards in HePS

- Find your awards.
  - Main Tab- **Award History**
  - Subtab- procurement method (**RFQ**/ **RFB**)
  - Select the **award number > Notice of Award Appears**
  - For more info scroll down to **dropdown**

- Find any HePS Award in the State of Hawaii account.
- Review solicitation and specifications.
- Review Award Summary Report

See the HePS How Do I's …

- *How Do I Find an Award in HePS?*

24

Finding Compliance Documentation for your Awards Issued

- Main Tab- **Award History**
- Subtab- procurement method (**RFQ**/ **RFB**)
- Select the **award number**
- Scroll down to the drop down box, select **Certificate of Vendor Compliance**
- Note: This is a snapshot of the certificate of vendor compliance on the date award was made in HePS. It is not updated after it is awarded. To obtain an updated compliance certificate you must log directly on to HCE.

25

Finding Attachments After Award

- To preserve data, once awarded you may be looking at a snapshot of the solicitation or vendor response.
- Attachments may be found in the **Search System** function.

- As appropriate, scroll to:
- **Find/Review Agency File Attachments**; or
- **Find/Review Vendor File Attachments**

See the HePS How Do I's…

– *How Do I Find Attachments After Award?*

26

Other Resources for Specifications

- SPO Awards Site
  - Each a award has a state contact person
  - Another way to search awards that may have be issued in HePS
  - Search for non-HePS awards and utilize the contact info.
- The internet!!!

27

Searching the SPO Awards Site

- http://hawaii.gov/spo
- Click **Awards**
- Click **Goods, Services and Construction** (or Health and Human Services, as appropriate)
- Click **Search**
- In the **Good/Services** search field enter 1 or 2 words; keep it simple, the more complex it is, the more it narrows the search.

28

Example of Search words
and the Number of Awards They May Return

Search Word(s)	No. of Awards Returned
trash pick-up	42
refuse	101
refuse, trash	112
refuse, removal	183

29

Before Procuring
Do Your Homework First

- Use Search functions
  - Check for commodity codes
  - Check for vendors
- Check your approval routes
- Check the HePS instructions to ensure there are no conflicts
- Have your docs –
  - Specifications (including minimum qualifications). HePS doesn't do it for you.
  - General provisions/administrative requirements?
  - Know the general instructions in HePS.
- Plan your timeline –
  - Allow time for Q & A, pre-bid conference, addenda, etc.
- Know the general instructions (in case you didn't see it above)

30

Compliance for Small Purchase Awards

- Effective 7/1/11 proof of Compliance for Contracts/Awards for Small Purchase Method of Procurement Contracts is required for all small purchase awards of $2,500 and above.
- Acceptable documentation of proof of compliance shall be the Hawaii Compliance Express (HCE) Certificate of Compliance .
- *Reference:*
  - *Procurement Circular 2011-02*

31

Posting Awards Requirement for Small Purchases

- Procurement Circular 2012-04 instructions requires posting of awards for small purchases of $2,500 and above on the Awards Reporting Site.
- Awards procured on HePS must be reported on the awards posting site. HePS does not automatically do it for you.

32

Quiz
Question # 1
Delegated Authority

- **If procuring on HePS, does a buyer need to have delegated authority per Procurement Circulars and form SPO-036?**

1. Yes. Buyer must have delegated authority before using HePS.
2. No, it is not required. HePS will make all the correct decisions.

33

Question # 2
Specifications

- **Does HePS prepare the specifications for the buyer?**

1. Yes. The buyer selects the commodity code and the specs will appear.
2. No. The buyer has to research and develop specifications.
   Note: The buyer can use HePS to research for specifications by looking at other solicitations that have been issued in HePS.

34

Question # 3
Searching for Commodity Codes

- **Can you search HePS for commodity codes before starting the solicitation?**

1. Yes- you can search for commodity codes by using Search System.
2. No- wait until you start creating the HePS solicitation.

35

Question # 4
Commodity Codes

- **What are some ways you can search for the correct commodity code?**

1. Enter a word in the **search commodities** textbox.
2. Roll dice and select a number at random.
3. Review commodity code profile of HePS vendor providing goods you seek.
   Note: Search for a vendor that you know provides the goods/services or construction you want and review their commodity code profile.
4. All of the above.
5. All of the above except #2

36

Question #5
Commodity Codes

- **A buyer selects 91256 as the commodity code. To which vendors will the email notice be sent?**

1. Vendors who have commodity code 91200 in their profile.
2. Vendors who have 91256 in their commodity profile.
3. Both.

37

Question 6
Attachments After Award

- **Where can you find Vendor attachments after award in HePS?**

1. Find the abstract in **Award History** and click the attachment name.
2. You cannot, so you better download or print it before you award.
3. Call the vendor and ask for a copy.
4. In **Search System**, use **Find/Review Agency File Attachments**
5. In **Search System**, use **Find/Review Vendor File Attachments**

38

Resources for HePS Users

- http://hawaii.gov/spo
- > HePS
- > HePS for State Procurement Personnel
- > HePS Toolbox: references/manuals/handbooks, etc.
  - How Do I's
  - Buyer FAQ
  - Check also More Info:
    - Small Purchase Method of Procurement
    - Competitive Sealed Bidding Method of Procurement
    - Procurement Code of Ethics
    - Procurement Delegation
    - For State and County Personnel

39

Other Useful Info on the SPO Website
http://hawaii.gov/spo

- For State and County Personnel *(bookmark this site)*
  - Posting Procurement Awards, Notices and Solicitations (PANS)
- Forms
- Information on Methods of Procurement and Online Procurement Manuals
- Awards Public Site
- Price and Vendor Lists
- Travel Services
- Inventory Management and Excess Property
- pCard Information
- Training for State and County Procurement Personnel
- Procurement References
  - Hawaii Revised Statutes & Hawaii Administrative Rules
  - Procurement Circulars

40

State Procurement Office

The end. Thanks for attending!

Remember to complete and email group attendance forms to
spo.training@hawaii.gov
within 1 working day of the webinar.

Questions?

http://hawaii.gov/spo

Click Hawaii eProcurement System (HePS)

HePS

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41

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42