Hawaii State eProcurement
HIePRO

Approver Training

SPO 305

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What Will be Covered

- Intro, Definitions, eProcurement and HIePRO
- Approver Responsibilities, Ethics and Security
- Other Roles and Responsibilities in HIePRO
- A Little About Commodity Codes
- How to Gain Access to HIePRO
- About Approvals and Approval Paths
- Common Mistakes in HIePRO
- Navigating in HIePRO
- Reviewing and Approving or Disapproving

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Resources and Training Materials

http://hiepro.hawaii.gov > Learn More about HIePRO

- HIePRO Program Manual
  - Overview, roles, your responsibilities, who may have access, and more.
- HIePRO Approver Quick Reference
  - Step-by-step guide to approving on HIePRO **providing** you:
    - Know the requirements for conducting the method of procurement;
    - Know the requirements of the goods, services or construction.
- SPO 305 Training Reference (PowerPoint)

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This Training is Designed for

State Personnel who:

- Have or will have written delegated authority to approve using eProcurement;
- Are given access to HIePRO by their Department eProcurement Administrator; or
- Are Department or CPO Jurisdiction eProcurement Administrators or Alternates.

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This Training is Intended to:

- Provide responsibilities of approvers when using HIePRO;
- Teach the mechanics of approving a solicitation in HIePRO;
- Provide some reminders about common mistakes when reviewing small purchase method of procurement using eProcurement.

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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 on the SPO website.
      - For State & County Personnel >> Dept/CPO Contacts – SPO Programs

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Definitions
Continued

- **RFQ** = small purchase method of procurement pursuant to HRS 103D-305
- **IFB** = invitation for bid using competitive sealed bidding method of procurement pursuant to HRS 103D-302. An IFB (Invitation for Bid) is also all the documents used to issue the solicitation for this method.

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

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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- offer conference, Q&A, addenda.
- Offers submitted.
- Upon logging in, vendors notified if not compliant in Hawaii Compliance Express(HCE).

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There are 2 HIePRO Sites

- The **Production** site
  where you enter your solicitations
  http://hiepro.hawaii.gov
  and
- The **training** site
  where buyers practice entering solicitations
  https://training-hiepro.ehawaii.gov/
- The sites are unrelated and the process for gaining access differs.

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The HIePRO Training Site
If You Would Like 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 (workshop number and date(s))
  - Your exact email address.
  - Your position title.
  - The department you are in.

Approver Responsibilities

1. Maintain security of HIePRO and its data.

2. Ensure procurement is conducted following the procurement procedures for the method of procurement. (HIePRO doesn't do it for the buyer.)

3. Ensure that there are clear written specifications, minimum qualifications as applicable, and administrative requirements. (HIePRO doesn't do it for the buyer.)

4. Follow the procurement code of ethics.

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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.

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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.
  - Keep up to date with changes.
  - For certain goods, services and construction there may be other statutes/rules/ procedures to be followed.

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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.
- Reference
  HRS 103D-101, HAR Chapter 131, Sec 131-1.02

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Approvers in HIePRO

- There is no separate approver role in HIePRO. Approvers are 'buyers' who are in an approval path.

- As an approver, you will have the same access to HIePRO as a buyer.

- Your responsibility: to conduct yourself on HIePRO in accordance with your delegation.

- If you are not delegated authority to conduct procurements as a buyer, do not do so.

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Other HIePRO Roles & Responsibilities

- **eAdministrator**
  - Oversees HIePRO program for the Department/CPO Jurisdiction.
  - 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, Hawaii Information Consortium, LLC (HIC).

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Other HIePRO Roles and Responsibilities
Continued

- Buyer
  - Conducts the solicitation.

- Requestor
  - New optional role (not a procurement role)- not all departments may choose to use this role.
  - Provides specifications & requirements for the goods/services for the buyer.

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About NIGP Commodity Codes

- Purpose of using commodity codes:
  - To connect the appropriate vendor with the solicitation
  - To conduct analysis of our spend

- Developed by **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

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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. Maintenance, Installation & Repair Services**
  - **910**39- janitorial/custodial services
  - 91027- garbage, trash removal
  - 91036- heating, air conditioning maintenance & repair
- **Class 988 – Roadside, Grounds, Recreational & Park Area Services**
  - **988**02- arborist services
  - 98888- tree trimming, pruning services

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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.

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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.

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Creating an eHawaii.gov Account

- Go to http://Hiepro.hawaii.gov
- Select the **Sign Up** link
- Follow instructions for creating account.

- Your email is your user ID (login). Use a work email.

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Getting Access/Permission to use HIePRO

- Only your eAdministrator can give you access to HIePRO and will need:
  - Your **exact** email address;
  - Your position title;
  - Approval path details
- Each department has its own procedures. Contact your department eAdministratorfor the procedures.

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About Approvals and Approvers

- Approvals are optional – Departmental decision to use them. A buyer should NOT approve him/herself.
- Approval paths are created by your eAdministrator.
- Must be created in advance of issuing a solicitation/award.

- **2 step Process**
  1. Create approval path
     - To be placed in an approval path, approvers must have a HIePRO account.
  2. Assign approval path to a buyer.

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If Your Delegation is for Approval Only

- Note: if you are only an approver and do not have written delegated authority to procure on HIePRO, (per the form SPO-036) do not use HIePRO to procure.
  - For approvers, having access does not mean you have authority to procure on HIePRO.

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Approval Path Requirements

- **Solicitation/Award**. whether this path will be for a solicitation or award**.**
- **Methods of procurement.** methods of procurement to which this approval path will apply (Small Purchase Request for Quote (RFQ), Competitive Sealed Bid (IFB).
- The approvers in the path in the order they shall approve.
  - There does not have to be more than one.

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Approval Path Options

- **Amount.** If the approval path will apply only to a specific to a range of amounts, (for instance $25,000-$100,000). Otherwise, leave blank. If left blank it will apply to all amounts. If using range amounts ensure that conflicting paths are not assigned to the same buyer.
  - Note: this only applies to the use of the approval path. HIePRO does NOT place a physical limit on the amount a buyer may procure/award.
- Back-up approvers

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**Back-Up Approvers
are by Approval Path**

- When an approval path is created in which you are an approver, you may have a back-up.
  - Back-ups are assigned by approval path.
    - Stan - your back-up in your approval Path for solicitations
    - Shawn - your back up for your approval path for awards.

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How to Utilize the
Back-Up Approver Function

- You are going to be out of the office.
    - Select the **I am Out of Office** button from your Dashboard.
    - All approvals are routed to your back-up for approval.
- You return to the office.
    - Select **I have Returned to the Office**.
    - Approvals are routed to you for approval.

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Approving a Solicitation

1. Log in. Select **Home Dashboard** if it does not appear.
   All items awaiting your approval will appear at the top of your Dashboard.
2. Select the link under the **Action** column to open the solicitation/award for your review and approval.
3. Select the tabs to review.
4. Select **approve** or **reject**.

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Common Issues/Items to Review

- **Solicitation and Line Item Titles and descriptions** make sense (clear and descriptive, no conflicts);
- Sufficient **time** between publishing and offer due date of solicitations;
- Clear **specifications, minimum qualifications, administrative requirements;**
- Correct **Commodity Code;**
- **Unit of Measure** and **Quantity** make sense;
- **No conflicts** (does not say one thing in an attachment and something else in another part of the solicitation.)

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In Summary

- HIePRO does not do the thinking for the buyer or approver.
  - Just because it is physically possible to do something in HIePRO does not mean it is permissible or allowable.
- HIePRO does not know what to buy. Commodity codes link solicitations with vendors.
  - Commodity codes are NOT specifications.
  - Commodity codes are not methods of procurement.
- Your approval is kept in HIePRO.

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

Contact your eAdministrator
SPO website
- **For State and County Personnel**
- **Dept./CPO Administrators Contacts – SPO Programs**

- **See also FAQs in the SPO website page header and the HIePRO website header**

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What's Next

- The HIePRO Landing page
- Home Dashboard

- Approving or Disapproving
  - a Solicitation
  - an Addendum
  - An Award

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