



Invitation for Bid

Level 1 HePS Reference Guide

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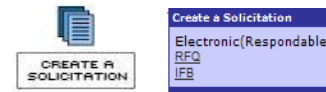
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Creating and Forwarding an IFB

This section covers filling out basic header information (contact, delivery/start/end dates, delivery and billing address), choosing and customizing the product or service (including attachments), selecting vendors, adding solicitation instructions and the response due date, and forwarding the solicitation to a BWS Level 3 Buyer for release to the Internet and subsequent awarding.

To begin, click on the **Create a Solicitation** icon and select **IFB** from the dropdown selection



The Solicitation Header has 7 initial Steps. Hovering your cursor over the **Step Number** provides a Step explanation in a pop-up window.

Step 1 – Contains a date, assigned Document number, and an Optional Reference Number/Text field

Step 2 - Defaults with the BWS Engineer/Project Manager and an option to add or edit Contact Person

Step 3 – Required Delivery date, Length of Contract (Start/End) Date, Number of Calendar Days After Receipt of Order, and defaulted Freight selections


Step 4 – Chose a Delivery Location or Create a new one from the dropdown menu. Click to View Delivery Point information

Step 5 – Chose a Billing Location or Create a new one from the dropdown menu. Click to View Billing Point information

Optional P-card information (usually assigned by Level 3 Buyer during the award process, if applicable)

Step 6 – Optional Internal Document Notes

Step 7 – Click Save All and Get Items

 Honolulu BWS Test Department 630 S. Beretania St. Honolulu, HI 96843		eIFB Solicitation Header	
STEP 1 DOCUMENT INFORMATION		REQUISITIONER INFORMATION	
Document Date: THU AUG 15, 2019 09:55:21 PM HST Document No.: D2020000177 Optional Reference No.		Requested By: Honolulu BWS Test Department Agent: MICHAEL MATSUMOTO Telephone No.: 808-371-4274 Fax No.: Email Address: michael.matsumoto@sicomm.net	
		STEP 2 CONTACT INFORMATION	
		Search For Agency Users: Enter a Last Name To Search By: <input type="text"/> <input type="button" value="search"/> MICHAEL MATSUMOTO 808-371-4274 Contact Fax No. michael.matsumoto@sicomm.net	
STEP 3 PRODUCT OR SERVICE - DATES AND FREIGHT INFORMATION MANDATORY: *			
STEP 3-1 REQUIRED DELIVERY DATE: * Required Delivery Date: MM/DD/YYYY <input type="text"/> <input type="button" value="calendar"/> -Priority- Normal		STEP 3-1 LENGTH OF CONTRACT: * Start of Service Date: MM/DD/YYYY <input type="text"/> <input type="button" value="calendar"/> End of Service Date: MM/DD/YYYY <input type="text"/> <input type="button" value="calendar"/> OR STEP 3-1 CCD ARO * <input type="text"/> <input type="button" value="calendar"/> Days After Receipt of Order	
		STEP 3-2 FREIGHT: * Freight / Handling Included in Price <input type="button" value="dropdown"/> Destination <input type="button" value="dropdown"/> FOB Location: <input type="text"/>	
STEP 4 DELIVERY POINT INFORMATION MANDATORY: *			
Deliver To: <input type="button" value="Choose a Delivery Location"/> <input type="button" value="View Delivery Point Information"/>			
STEP 5 BILLING INFORMATION MANDATORY: *			
Bill To: <input type="button" value="Choose a Billing Location"/> <input type="button" value="View Billing Point Information"/> <input type="button" value="Manage pCard Information"/>			
STEP 6 OPTIONAL DOCUMENT NOTES (FOR INTERNAL USE ONLY) OPTIONAL <input type="button" value="open"/>			
STEP 7 <input type="button" value="SAVE ALL and GET ITEMS >>"/>		<input type="button" value="Reset All Fields"/>	

After completion of Step 7, a pop-up occurs to **Continue now with this Solicitation:**

The screenshot shows the eIFB Solicitation Header form for the Honolulu BWS Test Department. The form is divided into several steps:

- STEP 1: DOCUMENT INFORMATION**
 - Document Date: SUN AUG 18, 2019 10:31:42 PM HST
 - Document No.: D2020000186
 - Optional Reference No.:
- STEP 2: CONTACT INFORMATION**
 - Requested By: Honolulu BWS Test Department
 - Agent: MICHAEL MATSUMOTO
 - Telephone No.: 808-371-4274
 - Fax No.:
 - Email Address: michael.matsumoto@sicomm.net
- STEP 3: PRODUCT OR SERVICE - DATES AND PRIORITY**
 - STEP 3-1: REQUIRED DELIVERY DATE:**
 - Required Delivery Date: MM/DD/YYYY
 - Priority: Normal
 - OR**
 - STEP 3-1: CCD ARO**
 - Days After Receipt of Order
- STEP 4: DELIVERY POINT INFORMATION**
 - Deliver To: HNL
 - < View Delivery Point Information
- STEP 5: BILLING INFORMATION**
 - Bill To: Bill To Delivery Point
 - < View Billing Point Information
 - Manage pCard Information
- STEP 6: OPTIONAL DOCUMENT NOTES** (FOR INTERNAL USE ONLY)
 - OPTIONAL
 - open

A pop-up dialog box is overlaid on the form, asking "Continue now with this Solicitation?" with "Cancel" and "OK" buttons.

Step 8 – Select a service or product by typing in a word or known commodity code and Click on **GO** or **press Enter**

This will display all the instances where either the word or commodity code appears within the NIGP Commodity coding system. NIGP commodity codes are used to identify which vendors/suppliers/contractors will be sent email notifications for their provided goods, products, or services

Step 8 continued – Select the appropriate NIGP Commodity Class and Item

The selected NIGP description will be placed into the solicitation form for your customization, it does not have to be exactly what you want at this time, just the right category of service or goods


NIGP Commodity Class codes 001 through 899 are goods/products

In the example below, Class 909 for New and Maintenance & Repair of Building Construction is desired

To view the entire NIGP Class for an item selection option, type in the Class number followed by zero zero, e.g., 90900

The screenshot shows a web application interface for selecting a commodity item. At the top is a navigation bar with tabs: Main, Solicitation Manager, Create, Edit, Awards Manager, Award History, Approvals Manager, and Miscellaneous. Below this is a sub-navigation bar with links: eRFx Solicitation, Line Items, Contact Us, Help, and Logout. The main content area is titled "STEP 8: CHOOSE COMMODITY ITEM(S)". It features a "Requisition Item:" field with the value "90900" highlighted by a red box. To the right of this field is a "Go" button and a note "(or press Enter)". Below the field is a link: "Enter text or a commodity number (a 3 digit number reviews Commodity Classes)". To the right of the "Go" button are two search options: "Drill Down search:" and "My Favorites search:". The main content area below these options is currently empty, showing only four horizontal grey bars. At the bottom of the page is a footer with copyright information: "© 1996-2019 ScommNet, Inc. All Rights Reserved. - cclListOMANREQ - Machine: sc15Sp_ProdAppV1c IP: 98.151.58.138 DB: unknownDB Mon, 19 Aug 2019 Agency ID: A00000000042 Dept ID: BWSTEST User ID: BWSTestbuyer".

The entire NIGP 909 Class item numbers (03-84) display, and Class 909 Item 21 for Industrial Building Construction is being selected:



Main
Solicitation Manager
Create
Edit
Awards Manager
Award History
Approvals Manager
Miscellaneous

eRFx Solicitation
Line Items
Contact Us
Help
Logout

STEP 6 CHOOSE COMMODITY ITEM(S)

Refine Item to Requisition: Go (or press Enter) Find: **Ctrl F**

Enter **Class & 00** to view all items in Class Enter **Class only** to see all subsequent classes
Override 5 Digit Selection Directive: ☐


Select	Class	Item	Description
<input type="radio"/>	909	03	Administration of Contracts: Summary of Work, Quality Control, Project Closeout, etc.
<input type="radio"/>	909	10	Airport Facility Construction
<input type="radio"/>	909	11	Airport Facility Maintenance and Repair
<input type="radio"/>	909	16	Athletic Facility Construction
<input type="radio"/>	909	17	Athletic Facility Maintenance and Repair
<input type="radio"/>	909	30	Building Construction (Not Otherwise Classified)
<input type="radio"/>	909	26	Building Construction, Agricultural
<input type="radio"/>	909	24	Building Construction, Commercial and Institutional
<input type="radio"/>	909	27	Building Construction, Educational
<input checked="" type="radio"/>	909	21	Building Construction, Industrial (Warehouse, etc.)
<input type="radio"/>	909	28	Building Construction, Medical
<input type="radio"/>	909	22	Building Construction, Non-Residential (Office Bldg., etc.)
<input type="radio"/>	909	25	Building Construction, Prefabricated (All Types)
<input type="radio"/>	909	29	Building Construction, Religious
<input type="radio"/>	909	23	Building Construction, Residential (Apartments, etc.)
<input type="radio"/>	909	31	Building Construction, Sustainable (Green)
<input type="radio"/>	909	33	Contractor Compliance Monitoring Services
<input type="radio"/>	909	34	Conveying Systems: Elevators, Lifts, etc.
<input type="radio"/>	909	37	Doors and Windows
<input type="radio"/>	909	45	Finishes: Flooring, Wall and Ceiling, etc.

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- req_handler_index - Machine: sc155p_ProdAppV1c IP: 98.151.58.138 DB:unknownDB Mon, 19 Aug 2019
Agency ID: A00000000042 Dept ID: BWSTEST User ID: BWSTestbuyer

Continue requisitioning Items by selecting the Item listed
in the Commodities Window.


Document Number: D2020000186 Item Number: 001

Steps 9 and 10:



[Main](#)
[Solicitation Manager](#)
[Create](#)
[Edit](#)
[Awards Manager](#)
[Award History](#)
[Approvals Manager](#)
[Miscellaneous](#)

[eRFx Solicitation](#)
[Line Items](#)
[Contact Us](#)
[Help](#)
[Logout](#)



Honolulu BWS Test Department
 630 S. Beretania St.
 Honolulu, HI 96843

eRFB Solicitation Item Information

Adding New Solicitation Item.

STEP 9
[close](#)
MANDATORY: *

Quantity :
 Quantity Needed *
 Select Unit of Measure *
 Alternate Line Item Delivery Point(0) >>

Estimated Price: MANDATORY Approvals
 \$ Estimated Price for this Item ONLY
 Total Estimated Price All Items: 0
 Allowable Variation in Quantity:
 0 %
 eg. .0875 = 8.75

Document Information :
 Document Nbr.: D2020000186
 Item No.: 001
 Reference Number:

STEP 10
COMMODITY INFORMATION
[close](#)

Commodity Code: 909-21--
 [Save Custom Description](#)
[Save A Line Item Graphic Image](#)

Description > *
[> Text Formatting Tools <](#)

BUILDING CONSTRUCTION SERVICES, NEW (INCL. MAINTENANCE AND REPAIR SERVICES)
 Building Construction, Industrial (Warehouse, etc.)

6,800 characters maximum 131
 [Resize Description Area: \(+\) \(-\)](#)
[View As HTML](#)

STEP 11
FILE ATTACHMENTS(0)
[close](#)

STEP 8
CHOOSE COMMODITY ITEM(S)

Refine Item to Requisition: [Go](#) (or press Enter) **Find: Ctrl F**
 Enter **Class & 00** to view all items in Class Enter **Class only** to see all subsequent classes
 Override 5 Digit Selection Directive: ☐

Select	Class	Item	Description
<input type="radio"/>	909	03	Administration of Contracts: Summary of Work, Quality Control, Project Closeout, etc.
<input type="radio"/>	909	10	Airport Facility Construction
<input type="radio"/>	909	11	Airport Facility Maintenance and Repair
<input type="radio"/>	909	16	Athletic Facility Construction
<input type="radio"/>	909	17	Athletic Facility Maintenance and Repair

Step 9 – Enter a Quantity and then select a Unit of Measure by using the drop-down menu selection

Note: Multiple quantities may be split for various locations – Click on the Alternate Line Item Delivery Point button to split quantities and assign new Delivery Point

- Enter the Estimated Total Price for the goods or service – this is for internal use only and not publicly seen
- Optional Allowable Variation in Quantity
- Optional Reference Line Item Tracking Number

Step 10 – Customize the description to specifically describe the desired goods, products, and/or services – about one page of a Word document may be used

- The custom description may be saved for future use by using the Save Custom Description drop down menu and selecting **Yes** to save
- If the NIGP commodity code is not correct you may choose a new search in the bottom frame

Honolulu BWS Test Department
630 S. Beretania St.
Honolulu, HI 96843

eRFB Solicitation Item Information

Adding New Solicitation Item.

STEP 9 **MANDATORY?**

Quantity : *

JOB (JOB) *

Alternate Line Item Delivery Point(0) >>

Estimated Price: **MANDATORY**

Approvals

\$ 34567

Total Estimated Price All Items: 34567

Allowable Variation in Quantity:

0 %

eg. .0875 = 8.75

Document Information :

Document Nbr.: D2020000186

Item No.: 001

Reference Number:

STEP 10 **COMMODITY INFORMATION**

Commodity Code: 909-21--

Description > *

Construction to Honolulu Board of Water Supply headquarters to include photovoltaic upgrades and parking lot structure. See attached specifications and plans.

6,800 characters maximum 158 Resize Description Area: (±) (—) View As HTML

STEP 8: CHOOSE COMMODITY ITEM(S)

Refine Item to Requisition: (or press Enter) Find: **Ctrl F**

Enter **Class & 00** to view all Items in Class Enter **Class only** to see all subsequent classes

Override 5 Digit Selection Directive: ☐

Select	Class	Item	Description
<input type="radio"/>	909	03	Administration of Contracts: Summary of Work, Quality Control, Project Closeout, etc.
<input type="radio"/>	909	10	Airport Facility Construction
<input type="radio"/>	909	11	Airport Facility Maintenance and Repair
<input type="radio"/>	909	16	Athletic Facility Construction
<input type="radio"/>	909	17	Athletic Facility Maintenance and Repair
<input type="radio"/>	909	20	Building Construction (Not Otherwise Classified)

Step 11 - Optionally, line item attachments may be added by clicking on the Click [here](#) to attach files link

1. Use **Browse or Select Files** to find your files
2. Enter **File Description** for the file to be uploaded
3. Click the **Upload File** button

The uploaded file will be indicated in the box and may be viewed or deleted by clicking on the **Manage Solicitation Attachments** link

- Additional files may be attached by clicking the link again
 - Any type of file may be uploaded except audio, video, or executable files (.exe)
 - Any size file may be uploaded by the buyer except for audio, video, and executable files
- Note: Depending on vendor/supplier/contractor internet capacity - large files may cause some difficulty for viewing or downloading
- Large files may either be zipped or broken into smaller files to ensure adequate vendor/supplier/contractor access
 - File descriptions may optionally be added

The screenshot shows a web form titled "Document Attachment(s)" with a blue header bar. Below the header, there is a red instruction: "Add a file description for the file to be uploaded, here or below on the main page." with a magnifying glass icon. The form contains three main sections: 1. "Enter File Description:" with a text input field containing "Honolulu Board of Water Supply Headquarters Upgrade Specifications". 2. "Select file:" with a "Choose File" button and a file name "1.1 MB.pdf". 3. A progress bar showing "0%". At the bottom, there are two buttons: "Upload File" and "Close". Red circular callouts with numbers 1, 2, and 3 point to the "Select file:" button, the "Enter File Description:" field, and the "Upload File" button respectively.

With the selected files uploaded, you may either manage them or add more files, as needed

Main
Solicitation Manager
Create
Edit
Awards Manager
Award History
Approvals Manager
Miscellaneous
eRFx Solicitation
Line Items
Contact Us
Help
Logout

Description > *
Text Formatting Tools <

Construction to Honolulu Board of Water Supply headquarters to include photovoltaic upgrades and parking lot structure. See attached specifications and plans.

6,800 characters maximum
159
Resize Description Area: (+) (-)
View As HTML

STEP 14 FILE ATTACHMENTS(0)
close

Click [here](#) to attach files.
Manage Solicitation Attachments
2
below. On Req: 2
Click [here](#) to download the **Catalog Spreadsheet Template**

Filename	Description	On Req	Add to Solicitation
1566204297-1.1 MB.pdf:	Honolulu Board of Water Supply Headquarters Upgrade Specifications	On Save	<input checked="" type="checkbox"/>
1566204369-10 MB File.docx:	Honolulu Board of Water Supply Headquarters Upgrade Plans	No	<input checked="" type="checkbox"/>

STEP 12 FUNDING INFORMATION
Click to enter a Single Fund Citation or, enter the number
of Multiple Fund Citations needed and click GO >>

STEP 13 NOTES | (FOR INTERNAL USE ONLY)
open

STEP 14
Select an
Select an ACTION below.
and
execute action >>
CLICK ONCE ONLY

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- ccc_bodyMANREQ.html (Revised: 2015.03.18) - Machine: sc155p_ProdAppV1c IP: 98.151.58.138 DB:unknownDB Mon, 19 Aug 2019
Agency ID: A00000000042 Dept ID: BWSTEST User ID: BWSTestbuyer

STEP 8 CHOOSE COMMODITY ITEM(S)

Refine Item to Requisition:
Go
(or press Enter)
Find: Ctrl F

Enter **Class & 00** to view all items in Class
Enter **Class only** to see all subsequent classes
Override 5 Digit Selection Directive:

Select	Class	Item	Description
<input type="radio"/>	909	03	Administration of Contracts: Summary of Work, Quality Control, Project Closeout, etc.
<input type="radio"/>	909	10	Airport Facility Construction
<input type="radio"/>	909	11	Airport Facility Maintenance and Repair
<input type="radio"/>	909	16	Athletic Facility Construction
<input type="radio"/>	909	17	Athletic Facility Maintenance and Repair
<input type="radio"/>	909	20	Building Construction (Not Otherwise Classified)

Step 12 - Optionally, you may add Account Coding/Fund Citations to the solicitation (currently not being used by BWS)

- Click **Open Single Fund Citation** button to open this area
- Enter coding - Coding may be saved for future use and will be displayed in a drop-down list called **Valid Cost** Accounts
- To enter more than one line of coding, start by entering the number of lines needed and then click **GO** – for example; the number 4 will produce 4 lines of coding information
- Multiple lines of accounting codes allow funds to be split by percentage, estimated dollars, or quantity

Step 13 – Optional internal notes may be added

Step 14 – Select an Action by choosing from the drop down:

- For multiple line items - **Save Item 001/Select Item 002** - back to Step 8 to add another item
- **Create eIFB/Save eIFB Item** – continues the solicitation creation process
- **Delete Document** – erases everything
- Click **Execute Action** to continue

The screenshot displays the eRFx Solicitation Manager interface. At the top, there is a navigation bar with tabs: Main, Solicitation Manager, Create, Edit, Awards Manager, Award History, Approvals Manager, and Miscellaneous. Below this, a sub-bar contains links: eRFx Solicitation, Line Items, Contact Us, Help, and Logout. The main content area is divided into several sections. The top section includes a field for 'Alternate Line Item Delivery Point(0) >>' and a 'Allowable Variation in Quantity' field with a value of 0 and a percentage sign. Below this is the 'STEP 13: COMMODITY INFORMATION' section, which includes a 'Commodity Code' field with the value '909-21--', a 'Save Custom Description' button, and a 'Save A Line Item Graphic Image' button. The 'Description' field contains the text: 'Construction to Honolulu Board of Water Supply Headquarters to include photovoltaic upgrades and a parking lot structure. See attached specifications and plans'. Below the description field is a '6,800 characters maximum' indicator and a 'Resize Description Area' button. The next section is 'STEP 13: FILE ATTACHMENTS(0)', which includes a 'Click here to attach files' link, a 'Manage Solicitation Attachments' button, and a 'Click here to download the Catalog Spreadsheet Template' link. Below this is the 'STEP 13: FUNDING INFORMATION' section, which includes a 'Click to enter a Single Fund Citation' link and a 'Click to enter the number of Multiple Fund Citations needed and click GO >>' link. The bottom section is 'STEP 13: NOTES (FOR INTERNAL USE ONLY)', which includes an 'open' button. At the bottom of the interface, a red box highlights the 'STEP 14' section, which contains a dropdown menu with the option 'Create eIFB / Save eIFB Item' and a 'CLICK ONCE ONLY' button. The red box also contains the text 'STEP 14 1 Select an' and '2'.


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- ccc_bodyMANREQ.html (Revised: 2015.03.18) - Machine: sc155g_ProdAppV1c IP: 98.151.58.138 DB: unknownDB Tue, 20 Aug 2019
Agency ID: A0000000042 Dept ID: BWS1551 User ID: BWS1551

Solicitation Creation

With Steps 1–14 completed, you created all the basic requisition elements. The requisition information is populated into a solicitation and may be edited at any time though the solicitation process. Creation of a Solicitation entails five more mandatory steps (numbered as **Steps 1-5**) and review or inclusion of seven optional solicitation sections.

This page uses collapsed functionality meaning that in order to review and edit the information you must click on the underlined links to open that area and clicking on the link again will close the area. In the Mandatory Solicitation Section Header, you may click on the word [here](#) to open all five Mandatory Step sections of review at once.

Main
Solicitation Manager
Create
Edit
Awards Manager
Award History
Approvals Manager
Miscellaneous
New
In Work
On Hold
On Internet
Awaiting Award
Awarded
Find
Contact Us
Help
Logout


Honolulu, HI 96843

Invitation for Bid

Mon Aug 19 2019 20:34:07 GMT-1000 (HST)

Open All Areas
Assign/Manage pCard
Scroll Down

Solicitation Nbr: B2020000083
Reference Number: BWS REF 001

Requisition Nbr: R2020000134
Document Nbr: D2020000186

MANDATORY SOLICITATION SECTIONS
(Click a Link Below or Click [here](#) to TOGGLE ALL MANDATORY AREAS)

Review / Edit Solicitation Release Information STEP 1

Review / Edit Billing And Shipping Locations STEP 2

Review / Edit Solicitation Vendor Instructions STEP 3

Establish / Review / Edit Custom Solicitation Title and Description STEP 4

Review / Edit Solicitation Geographic Location/Category STEP 5

Five Mandatory Steps Section

Click individual step link to open

OR

Click [here](#) to open all 5 Step sections at once

OPTIONAL SOLICITATION SECTIONS

Solicitation B2020000083 Items On Hold:
Select by clicking the button adjacent the required item.
Enable Auto Toggle: ☐
Add Item 2

View	Edit	Delete	Dept	User LName	Item	Est Amt	Commodity	Short Description	Create Date
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	BWSTEST	MATSUMOTO	001	34,567	90921	Construction to Honolulu Board of Water Supply headquarters to include photovolt	Sun Aug 18 2019

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 - buyerReqDetailList (Revised: 2015-02-11_dsl_dsl - Machine: sc155p_ProdAppV1c IP: 98.151.58.138 DB:unknownDB Tue, 20 Aug 2019
 Agency ID: A00000000042 Dept ID: BWSTEST User ID: BWSTestBuyer

Solicitation Release Information Mandatory Step 1:

MANDATORY SOLICITATION SECTIONS (Click a link below or [Click here](#) to toggle ALL MANDATORY AREAS.)

Review / Edit Solicitation Release Information STEP 1

Items Response: *

Items Response:

Est TTL Amount: **\$34567**

Additive Alternate:

Select Solicitation Recipients: *

[Review Above Recipients](#) [Help](#)

Click [here](#) to view Selected Certified list.

Solicitation Email Date: *

Solicitation Email Date: After Any Approvals

Solicitation Responses Due: *

NO LATER THAN **4:30** on:

(Override Close Time)

Solicitation Header File Attachments:

Click [here](#) to attach files.

[Manage Attachments](#) [below](#).

[and / or Review Standard Files for Inclusion](#)

Required Delivery Date: *

Delivery Date:

-Priority- Normal

Length Of Contract: *

Start of Contract:

End of Contract:

Freight: *

FOB Location:

OR

CCD ARO *

Days After Receipt of Order

[Close Solicitation Release Information](#)

Review / Edit Billing And Shipping Locations STEP 2

Solicitation B2020000083 Items On Hold: Enable Auto Toggle: ☐ [Add Item 2](#)

View	Edit	Delete	Dept	User LName	Item	Est Amnt	Commodity	Short Description	Create Date
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	BWSTEST	MATSUMOTO	001	34,567	90921	Construction to Honolulu Board of Water Supply headquarters to include photovolt	Sun Aug 18 2019

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 ~ buyerReqDetailList (Revised: 2015.02.11...del_dtl) ~ Machine: sc155p_ProdAppV1c IP: 98.151.58.138 DB:unknownDB Tue, 20 Aug 2019
 Agency ID: A00000000042 Dept ID: BWSTEST User ID: BWSTestbuyer

Item Response – The default is set at All or none item response. This is used for a majority of procurements. If the solicitation contains multiple line items you can set the system to require vendors to respond to all line items (**all or none**) or using the drop down menu, select **individual item response** which allows responding vendors to select which particular line item they want to bid on.

Select Solicitation Recipients – For IFBs, the default is set for **All Registered Vendors** (All registered vendors/suppliers/contractors within the HePS database to include mainland and foreign suppliers registered to do business in the United States. FYI - **Agency Domiciled Vendors** (Hawaii only) is the default for RFQs, going out as small purchase solicitations to applicable Hawaii address vendors/suppliers/contractors

Solicitation Email Date – This is defaulted with today’s date or optionally, the solicitation may be kept on hold until the date of its actual release to On Internet

Solicitation Responses Due - Enter a due date and time (closing date) – system default is 4:30 PM HST

Solicitation Header File Attachments – Solicitation Header file attachments are added in this option. Additionally, Standard header files such as Instruction to Bidders, final payment certification, etc. may be added to a solicitation by clicking on the No in the **On RFQ** column and changing the display status to Yes

Solicitation Email Date: *

Solicitation Email Date: ☒ Y After Any Approvals

Solicitation Responses Due: *

NO LATER THAN 4:30 on: Y
(Override Close Time)

Solicitation Header File Attachments:

Click [here](#) to attach files.
Manage Attachments to this Item

and / or Review Standard Files for Inclusion

Click on the No to change the display status to Yes
Standard File Attachments
Click here to Review Standard Files for Inclusion

On RFQ	File Name	Description
No	GTC Construction 2013 April version.pdf	GTC Construction 2013 April version
No	Instructions to Bidders Const April 2013.pdf	Instruction to Bidders Construction April 2013
No	final payment certification form.pdf	Final Payment Certification Form
No	acknowledgement of third party liability.pdf	Acknowledgement of Third Party Liability
No	GTC Goods and Services 2013 April version1.pdf	GTC Goods & Services 2013 April version
No	Instructions to BiddersGoodsServicesApr2013.pdf	Instruction to Bidder Goods and Services April 2013

Review the selected **Required Delivery Date/Length of Contract/#CCD ARO** and **Freight** information – edit if necessary

Billing and Shipping Locations Mandatory Step 2

Option to review and edit the **Bill To** and **Deliver To** information that was selected earlier

Review / Edit Billing And Shipping Locations **STEP 2**

Bill To:
 <-- Selected (Delivery Point), Click to view.

Deliver to:
 <-- Selected (HNL), Click to reset.


Solicitation Vendor Instructions Mandatory Step 3

At this time, Board of Water Supply has **13 mandatory IFB** instructions for vendors that will automatically post on your solicitation (questions, General Terms and Conditions, offer deemed firm, bid attachments, taxes, compliance, transaction fee). Management of the mandatory instructions is conducted by the BWS Procurement Office.

In addition, there are **10 optional** pre-built construction/goods and services instructions that may be added to the solicitation by simply clicking on the square box on the left side of the optional instruction

If an **additional instruction** or information is needed that is not previously identified, you may add needed instructions on the fly

Note: Should these needed additional instructions be applicable for future purposes, please contact the BWS system administrator and then may be added as either a future use mandatory or optional instructions

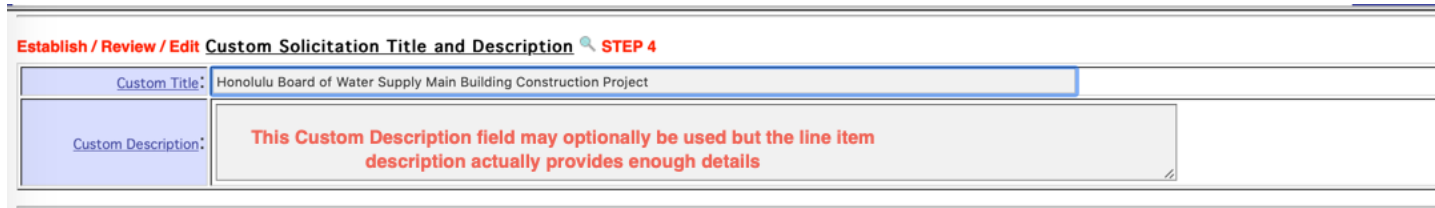
Review / Edit Solicitation Vendor Instructions  STEP 3	
Solicitation Instructions	
Mandatory Instructions are automatically included on the Solicitation	
Mandatory	Instruction(s)
1 (m-79)	QUESTIONS: Unless otherwise indicated, questions regarding this solicitation must be directed in writing to the Contact Person listed.
2 (m-80)	GENERAL TERMS AND CONDITIONS: All awardees for this solicitation are subject to and shall comply with the BWS019s General Terms and Conditions. It is the Vendor's responsibility to read and comply with these General Terms and Conditions and other documents or specifications for the solicitation whether attached or referenced.
3 (m-81)	OFFER DEEMED FIRM: Submission of an electronic response to the Board of Water Supply constitutes and shall be deemed an offer to sell the specified goods and/or services to the Board of Water Supply at the price shown in the response and under the Board of Water Supply019s Terms and Conditions. The electronic response submitter certifies that he/she is authorized to sign the response for the submitting vendor and that the response is made without connection with any person, firm, or corporation making a response for the same goods and/or services and is in all respects fair and without collusion or fraud.
4 (m-82)	Only responses submitted through HePS shall be considered for award.
5 (m-84)	APPARENT LOW BIDDER SUBMISSION OF ORIGINAL SIGNATURE BID DOCUMENTS: The apparent low bidder shall furnish all original hardcopy supporting bid documents, identical to the documents that were uploaded to HePS, with original signatures the Board of Water Supply within 10 calendar days from the close of bids. The failure to submit all valid documents on a timely basis for award of the contract may result in an otherwise responsive and responsible bidder not receiving the award. Bidder is responsible to submit all required documents by the stated deadlines. SUBMITTING ATTACHMENTS ON HePS: To upload/attach a document when submitting a solicitation response: <ul style="list-style-type: none">Click the radio button beside Upload/Manage Already Uploaded FilesA new window will appear. Click BrowseFind your file, select itClick Open
6 (m-85)	See the HePS IFB Checklist in the Supporting Bid Document attachment for the list of mandatory attachments. Submitted Bids shall be evaluated using the electronic documents uploaded by the offeror. Subject to this notice and pursuant to HAR 3-122-9, original hardcopy offers is not required and will not be accepted. Completed forms indicated on the HePS IFB Checklist only need to be uploaded with your electronic bid. It is the responsibility of the responding vendor/supplier/contractor to check each of their uploaded files to confirm the file integrity and that it can successfully be opened and is displayed correctly. Failure to upload the completed forms indicated on the HePS IFB Checklist by the deadline may be CAUSE for REJECTION OF THE BID.
7 (m-86)	Additional instructions/provisions are attached which apply to this Solicitation. BID ATTACHMENTS: This solicitation contains attachments that bidders must: <ul style="list-style-type: none">Download (open, save, or print document(s) on their own computer system;Enter pricing where indicated;Complete any other required information;Sign all appropriate forms; and,Attach (upload) the completed forms to the HePS online response.
8 (m-87)	See the HePS IFB Checklist in the Supporting Bid Document attachment for the list of mandatory attachments. Submitted Bids shall be evaluated using the electronic documents uploaded by the offeror.

Solicitation Vendor Instructions Mandatory Step 3 continued

Optional	Instruction(s)
<input type="checkbox"/> (o-93)	CONSTRUCTION BID DOCUMENT, INCLUDING DRAWINGS AND SPECIFICATIONS, AVAILABILITY: The bid document, including drawings and specifications, will be available on compact disk and can be obtained from _____, Honolulu, Hawaii 96813, telephone (808) xxx-xxxx at the expense of the contractor/vendor.
<input type="checkbox"/> (o-94)	QUESTIONS AND/OR: Vendors having questions regarding the project must submit them in writing to the Contact Person. Questions must be received no later than 10 calendar days prior to the bid closing date. The only official position of the Board of Water Supply is that which is stated in writing and issued in the solicitation as addenda thereto. All other means of communication, whether oral or written, shall not be formal or official responses/statements and may not be relied upon. Upon providing addenda, all bidders shall be deemed to be on notice of the information therein whether or not the addendum or bid clarifications is actually received. All addenda and bid clarifications so issued shall become part of the Contract Documents.
<input type="checkbox"/> (o-95)	STANDARD DOCUMENTS FOR IFB PROJECTS (CONSTRUCTION): The following standard documents for IFB projects are incorporated by reference and hereto made a part of this Solicitation: <ul style="list-style-type: none"> • General Terms and Conditions - Revised 4/2013 • Instructions to Bidders 013 Revised 8/2019 • Acknowledgement of Third Party Liability • Final Payment Certification Form • Water System Standards (2002) with Amendments <p>These documents are at the following BWS website: https://www.boardofwatersupply.com/customer-service/permits-and-applications/water-system-standards</p>
<input type="checkbox"/> (o-104)	STANDARD DOCUMENTS FOR IFB PROJECTS (GOODS AND SERVICES): The following standard documents for IFB projects are incorporated by reference and hereto made a part of this Solicitation: <ul style="list-style-type: none"> • General Terms and Conditions - Revised 4/2013 • Instructions to Bidders - Revised 8/2019 • Final Payment Certification Form
<input type="checkbox"/> (o-96)	CONTRACT DOCUMENTS TO THE AWARDED CONTRACTOR (CONSTRUCTION): Effective as of September 3, 2019, the BWS will no longer provide hard copies of the contract documents, plans, specifications and CDs to awarded Contractors. Contractors may order hard copies of plans and specifications directly from _____ the BWS contracted printing vendor at their own expense. Construction Contracts will be awarded and sent electronically. Awarded BWS Contractors shall return their executed contract documents by mail or courier to: Board of Water Supply Procurement Section, 630 S. Beretania Street, Room 201, Honolulu, Hawaii 96843
<input type="checkbox"/> (o-97)	PRE-BID CONFERENCE AND SITE VISIT(S): <ol style="list-style-type: none"> Bidders are encouraged to attend the pre-bid conference that will be held at the date, time and location indicated in this Solicitation and prior to the close of bids. Bidders may be required to sign-in at the start and at the conclusion of the conference to ensure full participation. No other pre-bid conference will be scheduled or allowed. Bidder is advised to print out a copy of this Solicitation, including project scope of work documents, for its use at the pre-bid conference. No copies of the project scope of work documents will be available at the pre-bid conference. Questions, regarding the scope of work or project schedule, may arise at the pre-bid conference, from project site visit(s), or at any time prior to the close of bids. Bidders shall submit questions or clarification requests in writing to the Contact Person listed in the solicitation. Questions and clarification requests must be submitted by the question deadline date indicated in this Solicitation. Clarifications and/or answers to questions will be distributed by amendments to this Solicitation.
<input type="checkbox"/> (o-98)	INTERPRETATION OF PLANS AND SPECIFICATIONS (CONSTRUCTION): Bidders are cautioned to review the Plans and Technical Specifications carefully and thoroughly. In instances where conflicts occur within the Plans and/or between the Plans and Technical Specifications and/or within the Technical Specifications, the more stringent requirement(s) shall be applied by the bidder when formulating its written quote. Failure by the bidder to apply/adhere to the more stringent requirement(s) shall not constitute the basis for price adjustment(s). Objections to or requests for clarification of the Plans and/or Technical Specifications shall be made to the Contact Person listed in the solicitation no later than the date and time designated in the NOTICE TO BIDDERS.
<input type="checkbox"/> (o-99)	INTERPRETATION OF PLANS AND SPECIFICATIONS (GOODS & SERVICES): Bidders are cautioned to review the Technical Specifications carefully and thoroughly. In instances where conflicts occur within the Plans and/or between the Plans and Technical Specifications and/or within the Technical Specifications, the more stringent requirement(s) shall be applied by the bidder when formulating its written quote. Failure by the bidder to apply/adhere to the more stringent requirement(s) shall not constitute the basis for price adjustment(s). Objections to or requests for clarification of the Plans and/or Technical Specifications shall be made to the Contact Person listed in the solicitation no later than the date and time designated in the NOTICE TO BIDDERS.
<input type="checkbox"/> (o-100)	SUBCONTRACTOR LIST (CONSTRUCTION) As indicated on the HePS IFB Checklist, the subcontractor list shall be submitted as a separate standalone file upload.
<input type="checkbox"/> (o-101)	ESTIMATED QUANTITIES: Quantities listed in this solicitation are estimates. No guarantee to purchase the exact amount is intended or implied. The Board of Water Supply reserves the right to purchase larger or smaller quantities at the prices quoted in this solicitation. In the event the actual requirements are less than estimated, such failure shall not constitute grounds for adjustment under this contract.
Additional Instruction (if entered will be displayed) <div>Text box for entry of additional "on the fly" instructions</div>	

Custom Solicitation Title and (optional) Description Mandatory Step 4

Enter a title for the solicitation – only the title is mandatory, the title description is optional



The screenshot shows a web form titled "Establish / Review / Edit Custom Solicitation Title and Description STEP 4". It has two main input fields. The first field, labeled "Custom Title:", contains the text "Honolulu Board of Water Supply Main Building Construction Project". The second field, labeled "Custom Description:", contains a red warning message: "This Custom Description field may optionally be used but the line item description actually provides enough details".

Solicitation Geographic Location/Category Mandatory Step 5

Use the drop down menu and select a category, then check the Honolulu county where the goods or services are to be delivered or provided.



The screenshot shows a web form titled "Review / Edit Solicitation Geographic Location/Category STEP 5". It features a "Counties:" section with checkboxes for "Statewide:", "Honolulu:", "Maui:", "Hawaii:", and "Kauai:". To the right of these is a blue arrow button and a "Category:" dropdown menu. The dropdown menu is open, showing options: "Choose A Category", "Goods & Services", "Construction", and "Health & Human Services". A red circle with the number "1" is placed above the "Category:" dropdown. A red circle with the number "2" is placed above the "OPTIONAL SOLICITATION SECTIONS" header at the bottom of the form.

Optional Solicitation Sections Optional Sections are singularly opened one at a time. The following areas are all optional features for building your solicitation:

Contact and Buyer Information – review and edit as necessary. Contact and buyer information are defaulted to be the same. The contact information is an editable field. When Level 1 buyers pass solicitations to Level 3 buyers, unless edited otherwise, the Level 1 buyer will be the Contact Person for the solicitation.

OPTIONAL SOLICITATION SECTIONS	
Review / Edit Contact and Buyer Information	
Contact Person: MICHAEL MATSUMOTO	Email Address: michael.matsumoto@sicomm.net
Phone Nbr: 808-371-4274	Fax Nbr:
Enter a Last Name To Search By: <input type="text"/> <input type="button" value="search"/>	
Buyer: MICHAEL MATSUMOTO	Email Address: michael.matsumoto@sicomm.net
Phone Nbr: 808-371-4274	Fax Nbr:

Header Notes – review and enter as necessary, once entered they are a permanent internal electronic record within the solicitation that is not publicly accessible

Review / Edit Header Notes

NOTES ARE FOR INTERNAL USE ONLY

Mon Aug 19 01:52:43 GMT-0700 (PDT) 2019
 BWSTestbuyer writes
 Changes successfully applied and Solicitation: B2020000083 (Document: D2020000186) saved.

Mon Aug 19 01:49:47 GMT-0700 (PDT) 2019
 No approval route found.
 Requisition **R2020000134** Created for Document **D2020000186**.
 Assigned for eIFB Solicitation creation.

Detail Item Updated
 Document: D2020000186 Item: 001 Qty: 1 UOM: JOB NIGP: 90921
 Total Est Amnt: \$34567 Item Est Amnt: \$34567 Created by: BWSTestbuyer

Mon Aug 19 01:44:57 GMT-0700 (PDT) 2019
 File **1566204297-1.1 MB.pdf** Attached to Document: D2020000186 Item: 001

Mon Aug 19 01:35:05 GMT-0700 (PDT) 2019
 Direct eIFB Solicitation Document: (D2020000186) created by: BWSTestbuyer
[View Full On-Disk Notepad](#)

Document Header Notes

**These Document Header notes are for internal use by and between buyers.
 They are internal records not publicly viewable but available to Agency buyers**

Close Header Notes

Line Item Quick Edit – allows you to change the line item reference number, quantities, unit of measure, estimated dollar amount, and line item description

Review / Edit Line Item(s) Quick Edit

Items Quick Edit		Select item from below frame for editing of: Fund Citations, Delivery Points, File Attachments, Descriptions, Notes Enter fields to change. Fields not being changed do not need to be re-entered, they will retain the values shown in red.				
Save Chges	Item	Reference Number	Quantity	UOM	Est Total Amnt \$	Orig: 34567
<input type="checkbox"/>	001	0	(1)	(JOB)	(34567)	Edit Desc:

Solicit Responses From Other Commodity Suppliers - This allows up to 40 additional NIGP commodity codes to be added to a solicitation to broaden its field of Solicitation recipients. BWS Level 3 Buyers will add the additional NIGP commodity codes

Establish / Review / Edit Solicit Responses From Other Commodity Suppliers

Commodity Codes: <--- Clear Commodities Approximate Batch Emails: 898

Search: Use the **Search** Button and select up to 40 Commodity Suppliers (other than the Line Item Commodities) from whom to solicit responses

Pre-Bid Conference – This is used for notifying vendors of a pre-bid conference or pre-site visit requirements – Select a date and time using the calendar and drop-down menu. For location you may use the Copy agency address or add a new location and save it to a library. When saved to a library, clicking on the library radio button will take you to the address library and you click on a selection box to have the saved address automatically display. The pre-bid conference Notes section also has a Save and Library functionality where specific instructions regarding attendance to the conference may be displayed.

Establish / Review / Edit Pre-Bid Conference

Date: 09/04/2019 Y Conference Time: 10:00 AM Responses Due: 09/20/2019 [Vendor Presentation Example](#)

Location: Honolulu BWS Test Department
630 S. Beretania St.
Honolulu, HI 96843

Copy Agency Address: ☒ Library: ☐ Save: ☐

Notes: This is the section to put in notes or special instructions for a pre-bid conference.

Library: ☒ Save: ☐

Click [here](#) to review Pre-Bid Conference Registered Attendees

Questions/Answer Section – allows for vendors to submit questions online by a prescribed date and identifies the due date for answers to be provided. Hawaii policy is to not display the vendor's name. Use the calendars to select a deadline for question submittal and a date when answers will be published to all vendors. When questions are submitted, buyers have a functionality to request assistance and forward questions to subject matter experts for their answers to be published.

Establish / Review / Edit Questions / Answer Section

Include Solicitation Questions Area on Solicitation: Yes: ☐ No: ☒ Responses Due: 09/20/2019 Today: Mon Aug 19, 2019

Vendor's name will be displayed with answers: Yes: ☐ No: ☒ Questions Deadline: MM/DD/YYYY Y Answers Published: MM/DD/YYYY Y

Notes Displayed to Vendors: Library: ☐ Save: ☐

Subcontractor Section - This option allows a Public Interested Vendors List section on the solicitation for vendors to acknowledge that they are interested in responding to an Agency solicitation. This serves as a Plan Shareholder like process and allows their sub-contractors to know which jobs or projects they may also participate with a General Contractor. After a solicitation is closed, buyers have the ability to display bidder attachments, such as a sub-contractor listing or other submitted files, as part of the public Abstract/Bid Tabulation. For BWS, this section is mandatory for all IFBs.

Establish / Review / Edit Sub Contractor Section

Use Sub-Contractor Section: ☒

While the Solicitation is on the Internet bidders will be able to see, and add/or remove themselves from a "Public Construction Interested Vendors List" At Solicitation Close Time, while the Solicitation is in "Awaiting Award" and after

1)Vendors will be able to see the "Public Construction Interested Vendors List".

2)You will be able to upload a "Detail Abstract / Information File" which will be available for all Vendors to access in their view of the Abstract either after the Award is made or at your discretion while the solicitation is in "Awaiting Award".

3)You will be able to set any Bidders Attachment(s) to be available for all vendors to open and review in their view of the Abstract.

After completing the mandatory and optional solicitation steps, there are three execution buttons displaying:

- **Preview Solicitation** - Rough Draft Version
- **File for Later Action** - Saves and Moves to On Hold
- **Close Solicitation No Action** – This deletes all previous work

Main | Solicitation Manager | **Create** | Awards Manager | Award History | Approvals Manager | Miscellaneous
eRF's Solicitation | Manual Requisition | Line Items | Contact Us | Help | Menu | Logout

Review / Edit Solicitation Geographic Location/Category - **STEP 5**

OPTIONAL SOLICITATION SECTIONS
Review / Edit Contact and Buyer Information
Review / Edit Header Notes
Review / Edit Line Item(s) Quick Edit
Establish / Review / Edit Solicit Responses From Other Commodity Suppliers
Establish / Review / Edit Pre-Bid Conference
Establish / Review / Edit Questions / Answer Section
Establish / Review / Edit Sub Contractor Section

2
The center button must be used to save your work to On Hold

Preview Vendor Solicitation B2020000016
File Solicitation B2020000016 for later action
Close Solicitation B2020000016 - no action

1
Three execution Buttons when Solicitation is first created

© 1996-2019 ScommNet, Inc. All Rights Reserved.
~ rf4dr (revised: 2015.08.29) ~ Machine: sc155p_ProdAppV1c IP: 98.151.58.138 DB: unknownDB Thu, 18 Jul 2019
Agency ID: A0000000000002 Dept ID: AGENCY User ID: Level1

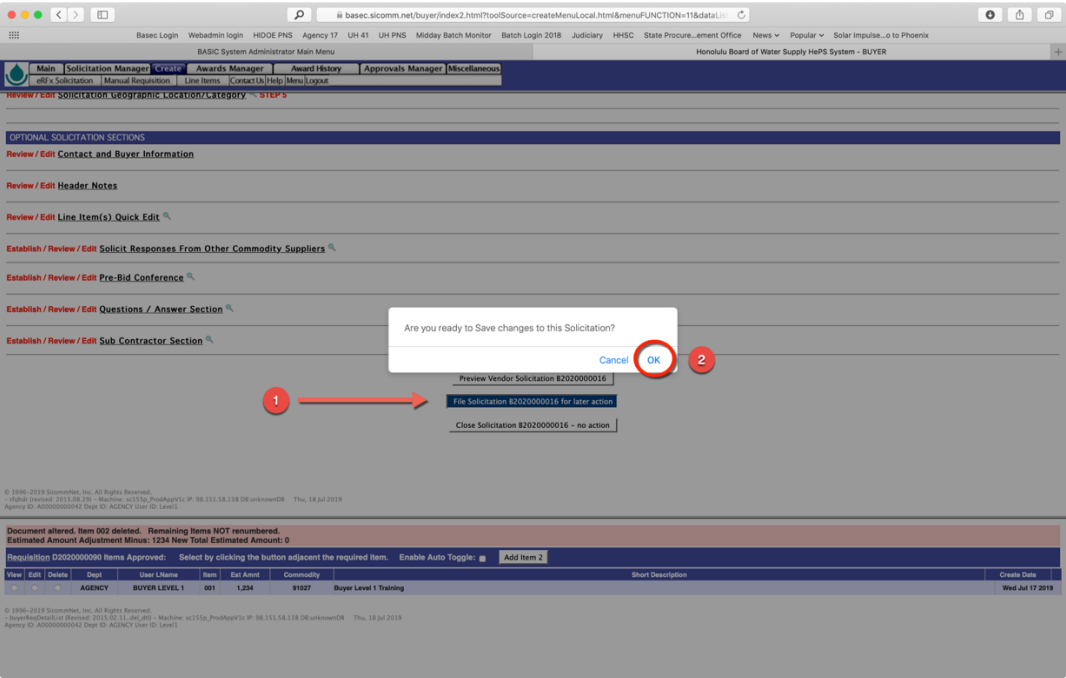
Document altered. Item 002 deleted. Remaining Items NOT renumbered.
Estimated Amount Adjustment Minus: 1234 New Total Estimated Amount: 0

Requisition D2020000090 Items Approved: Select by clicking the button adjacent the required item. Enable Auto Toggle: ☐ Add Item 2

View	Edit	Delete	Dept	User LName	Item	Est Amnt	Commodity	Short Description	Create Date
+	+	+	AGENCY	BUYER LEVEL 1	001	1,234	91027	Buyer Level 1 Training	Wed Jul 17 2019

© 1996-2019 ScommNet, Inc. All Rights Reserved.
~ buyerReqDetailLot (revised: 2015.02.11 - dnt_09) ~ Machine: sc155p_ProdAppV1c IP: 98.151.58.138 DB: unknownDB Thu, 18 Jul 2019
Agency ID: A0000000000002 Dept ID: AGENCY User ID: Level1

Click on **File** for later action and at the pop-up Press **OK**



Solicitation Manager/ On Hold

The saved solicitation is now in the **Solicitation Manager** tab and **On Hold** sub menu. To access the solicitation for viewing, continued work, or forwarding, click on the **Manage** radio button.

On Hold Solicitations: [Jump to a Specific Document](#) [B I P Q](#) [Toggle Detail](#) [Bottom](#) [Classics Only](#) [Exclude Classics](#)

Changes successfully applied and Solicitation: B2020000016 (Document: D2020000090) saved.

Manage	Reject	Dept	Originator	RFx Type	RFx Nbr	Requisition Nbr	Document Nbr	Items	NIGP
<input type="radio"/> (M)	<input type="radio"/> (R)	AGENCY	BUYER LEVEL 1 ETA: \$1,234	RFB	B2020000015	R2020000064	D2020000089	1	90927
NIGP / Description: 90927: Testing level 1									
Delivery/Contract Date(s): Wed Jul 31 2019									
Line Item Commodities: 90927,909,90900 for Solicitation response.									
<input type="radio"/> (M)	<input type="radio"/> (R)	AGENCY	BUYER LEVEL 1 ETA: \$1,234	RFB	B2020000016	R2020000066	D2020000090	1	91027
NIGP / Description: 91027: Buyer Level 1 Training									
Delivery/Contract Date(s): Wed Jul 31 2019									
Line Item Commodities: 91027,910,91000 for Solicitation response.									
<input type="radio"/> (M)	<input type="radio"/> (R)	AGENCY	BUYER LEVEL 1 ETA: \$123,456	RFQ	Q2019000011	R2019000045	D2019000049	1	90927
NIGP / Description: 90927: RFQ TVL test									
Delivery/Contract Date(s): Fri Mar 29 2019									
Targeted Vendor List: HIDOE Vendors (HIDOE Vendors4) (Click to view member list)									
Line Item Commodities: 90927,909,90900 for Solicitation response.									

On Hold Solicitations: [Jump to a Specific](#)

1 - 3 of 3
[Top Of Page](#)

Forward Document To Buyer

After first saving a solicitation, BWS Level 1 Branch Heads and Engineers now have the ability to forward the solicitation to BWS Level 3 Buyers by using the **Forward Document To** drop down menu.

Scrolling down to the bottom of the solicitation header sections, there are now four selection choices with the Forward Document To selection moving the complete solicitation to a BWS Level 3 Buyer.

Note: Whenever creating a solicitation, in order to immediately forward it to a BWS Level 3 Buyer, the solicitation **must first be saved**, using the **File for Later Action** button.

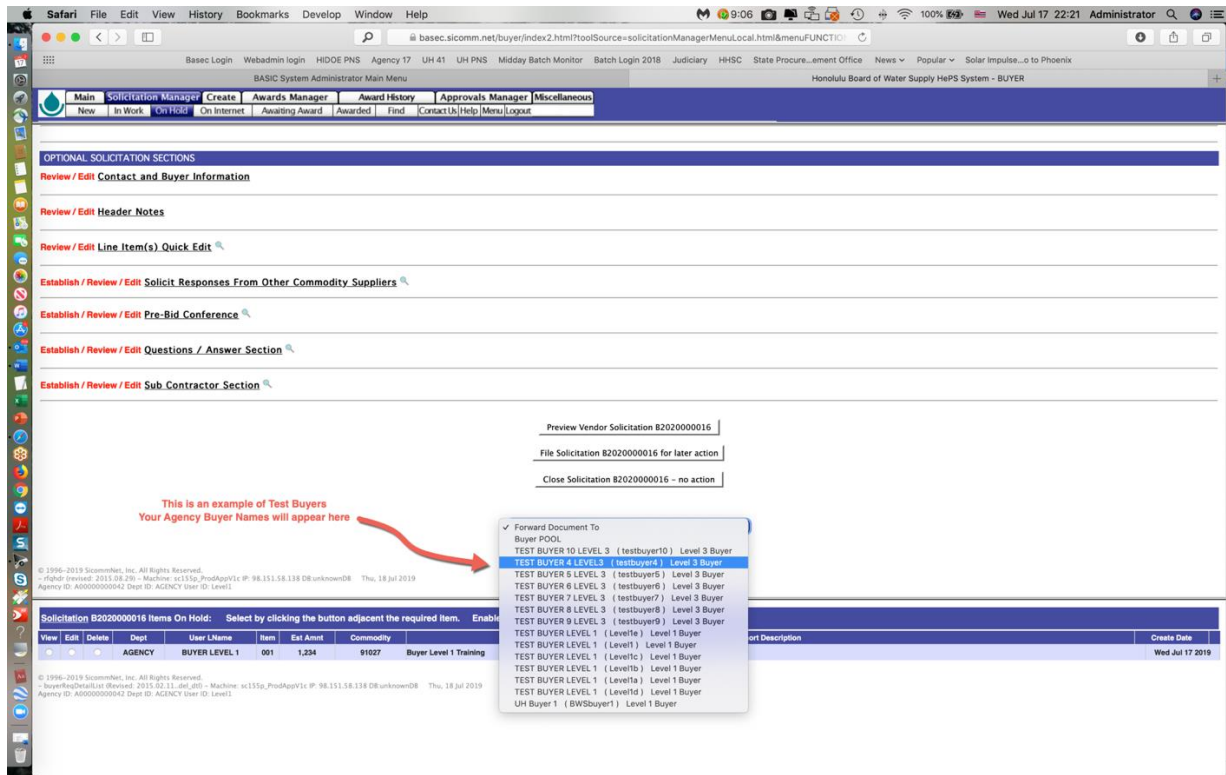
The screenshot displays the BWS Level 1 Branch Heads and Engineers interface. At the top, there is a navigation bar with links such as 'Main', 'Solicitation Manager', 'Create', 'Awards Manager', 'Award History', 'Approvals Manager', and 'Miscellaneous'. Below this, a section titled 'OPTIONAL SOLICITATION SECTIONS' contains several links for reviewing and editing solicitation details. A red arrow points to a 'Forward Document To' dropdown menu, which is highlighted with a red box. The dropdown menu is currently set to 'Forward Document To' and has a question mark icon next to it. Below the dropdown menu, there is a table with columns for 'View', 'Edit', 'Delete', 'User Name', 'Item', 'Est. Amount', 'Commodity', 'Short Description', and 'Create Date'. The table contains one row with the following data: 'AGENCY', 'BUYER LEVEL 1', '001', '1,234', '91027', 'Buyer Level 1 Training', and 'Wed Jul 17 2019'.

Forward Document To Drop Down Menu

Forward Document To ?

View	Edit	Delete	User Name	Item	Est. Amount	Commodity	Short Description	Create Date	
			AGENCY	BUYER LEVEL 1	001	1,234	91027	Buyer Level 1 Training	Wed Jul 17 2019

Using the **Forward Document To** drop down menu, the BWS Branch Head/Engineer selects the appropriate BWS Level 3 Buyer



Upon selection of a BWS Level 3 Buyer, a confirmation pop-up window displays.

Click **OK** to forward the solicitation to the selected buyer.

Note: The selected BWS Level 3 Buyer receives an automatic email notification that a solicitation has been forward for action.

OR

Click **Cancel** to return to the solicitation for continued editing and saving it back to **On Hold** sub menu.

The screenshot displays the 'Solicitation Manager' interface. At the top, there are tabs for 'Main', 'Solicitation Manager', 'Create', 'Awards Manager', 'Award History', 'Approvals Manager', and 'Miscellaneous'. Below these are sub-tabs: 'New', 'In Work', 'On Hold', 'On Internet', 'Awaiting Award', 'Awarded', and 'Find'. The main content area shows details for a solicitation, including 'Date: 07/22/2019', 'Conference Time: 12:00 PM', and 'Responses Due: 07/25/2019'. A 'Vendor Presentation Example' section is also visible. A 'Buyer Forwarding Pop-up Window' is overlaid on the screen, asking 'Are you sure you want to forward this document to TEST BUYER 10 LEVEL 3 (testbuyer10) Level 3 Buyer'. The pop-up has 'Cancel' and 'OK' buttons. Red arrows point from the 'OK' button to the 'Forward Document To' dropdown menu and from the 'Cancel' button to the 'File Solicitation B2020000016 for later action' button. The background interface includes sections for 'Establish / Review / Edit Questions / Answer Section' and 'Establish / Review / Edit Sub Contractor Section'. At the bottom, there is a table titled 'Solicitation B2020000016 Items On Hold' with columns for 'View', 'Edit', 'Delete', 'Dept', 'User LName', 'Item', 'Est Amt', 'Commodity', 'Short Description', and 'Create Date'. The table contains one row for 'BUYER LEVEL 1' with item '001' and amount '1,234'.

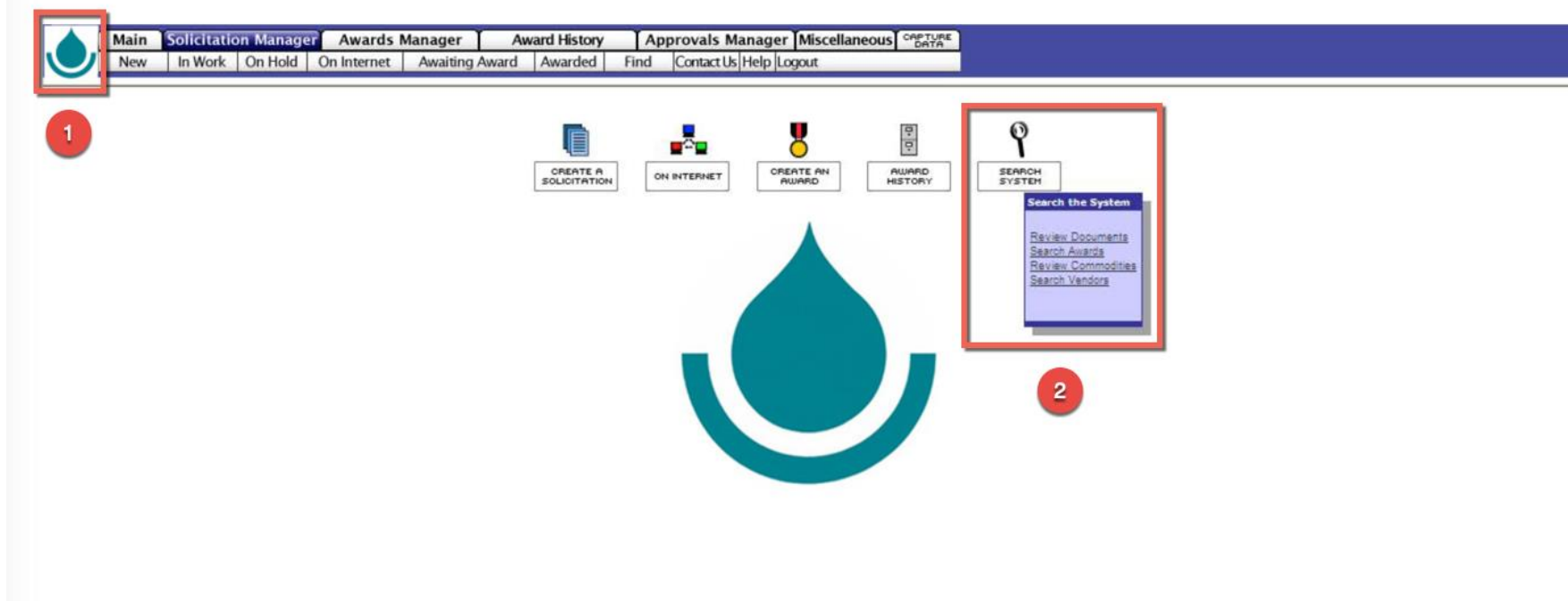
View	Edit	Delete	Dept	User LName	Item	Est Amt	Commodity	Short Description	Create Date
			AGENCY	BUYER LEVEL 1	001	1,234	91027	Buyer Level 1 Training	Wed Jul 17 2019

Search System

The Search System module provides buyers a database-wide search functionality for:

- Documents
- Awards
- Commodities
- Notepad
- Agency File Attachments
- Vendors
- Vendor File Attachments

To access the Search System from a buyer account either (1) click on the **small Agency logo** to the left of the Main tab **OR** (2) click on the **Search System** box below the magnifying glass icon



There are 7 search fields, all on this same page – scroll down to see each one. Search criteria is entered in the top frame and search results appear in the bottom frame.

Review Documents

- Enter a **document number** and click on **Get Document**

OR

- **Document Type**
 - Select a **document type** from the drop down menu
 - Enter a **From and To date range** using the calendar
 - Click on **Review Documents**

This example shows all Request for Bids between 8-1-07 to 12-14-07 - The bottom frame will show all documents found in your search criteria for the time specified. The first column provides a View and the fourth column will show the current status of the document.

View	Department	User Name	Status	RFQ Number	NIGP Code	Date Created	Short Description
	AGENCY	HAWAII BUYER 1	Awards Mgr -> Abstract	Q200800885	32525	Thu Aug 23, 2007	Cat Food
	DAGS	CYRUS WILSON	Awarded	Q2008009122	4251742265	Wed Dec 05, 2007	FURNITURE: OFFICE Data Processing Furniture, Metal and Plastic (for Storage Cab
	AGENCY	HAWAII APPROVER 1	In Approval	Q2008008764	70063	Wed Aug 15, 2007	PRINTING PLANT EQUIPMENT AND SUPPLIES (EXCEPT PAPERS) Paper and Chemistry for D
	DOH	ROBIN DENTON	Awards Mgr -> Abstract	Q2008008777	91004	Mon Aug 13, 2007	Air Duct Cleaning Services as per attached specifications
	DPS	DEANNA KAMA	Awarded	Q2008008788	2077290000	Wed Aug 15, 2007	toners - hp laserjet 1320
	DOH	HEIDI MATEO	Awarded	Q2008008785	4256030345	Wed Aug 15, 2007	FURNITURE: OFFICE Posture Chairs (Ergonomic) CHAIRS, ERGONOMIC, METAL, PROFESS

Review Commodities

Text/Number – Commodity searches may be conducted by either a word or a NIGP commodity code number. NIGP Classes are 3 digits and a NIGP Class Item number is 2 digits. NIGP commodity number searches are conducted with either three or 5 digits. To search an entire Class use the three digit Class number followed by 2 zeros.

After entering a word or NIGP commodity number, click on the **Review Commodities** button

To view the the NIGP Class listing click inside the **Show Classes From** radio button and then click on **Review Commodities** button. In the split screen below, a list of all the top level 3 digit NIGP Class commodity codes will display (approximately 260). For each NIGP Class number the Drill Down radio button will display all items listed with a single Class.

This example below shows a search by using the word – **construction**:

The screenshot displays the 'Review Commodities' web application. At the top, there is a search bar labeled 'Text / Nbr:' with the word 'construction' entered. Below this, there are several radio buttons for 'Index lookup:', 'Scan Index:', 'Show Classes (from):', 'Scan Classes (for):', and 'Drill Down:'. The 'Show Classes (from):' radio button is selected. Below these buttons, there are two buttons: 'Review Commodities' and 'Reset Commodity Parameters'. The 'Review Commodities' button is highlighted with a red box. Below the buttons, there is a section titled 'Select by Text or Nbr:' with a text input field and a red link '(press Enter to proceed)'. Below this, there is a section titled 'To review all Items within a Class click the LIST button'. The main part of the screenshot is a table with columns 'LIST', 'Class', 'Item', and 'Description'. The table lists various construction-related items, including 'BUILDER'S SUPPLIES', 'CONSTRUCTION WORKER PROTECTION SHORING BOXES', 'CONSTRUCTION MATERIALS (NOT OTHERWISE CLASSIFIED)', 'BUILDINGS AND STRUCTURES: FABRICATED AND PREFABRICATED', 'CONSTRUCTION SERVICES, BARRIERS AND ENCLOSURES', 'CONSTRUCTION TYPE FIELD OFFICES AND SHEDS', 'ELECTRICAL EQUIPMENT AND SUPPLIES (EXCEPT CABLE AND WIRE)', 'CONSTRUCTION EQUIPMENT LAMPS', 'FENCING', 'CONSTRUCTION FENCING, TEMPORARY', 'LUMBER, SIDING, AND RELATED PRODUCTS', 'CONSTRUCTION PLYWOOD', 'CONSTRUCTION TYPE TIMBERS', 'MARKERS, PLAQUES AND TRAFFIC CONTROL DEVICES', 'CONSTRUCTION GRADE REFLECTIVE SHEETING (SEE 801-49 FOR SIGN MATERIAL)', 'ROAD AND HIGHWAY EQUIPMENT (EXCEPT EQUIPMENT IN CLASSES 755 AND 760)', 'CONSTRUCTION EQUIPMENT HYDRAULIC ATTACHMENTS', 'SCHOOL EQUIPMENT, TEACHING AIDS, AND SUPPLIES', 'CONSTRUCTION PAPER, SCHOOLROOM', 'SIGNS, SIGN MATERIALS, SIGN MAKING EQUIPMENT, AND RELATED SUPPLIES', 'CONSTRUCTION SIGNS', and 'CONSTRUCTION SIGNS, WOOD'. The table is divided into two panes, with the left pane showing the 'LIST' column and the right pane showing the 'Description' column.

LIST	Class	Item	Description
<input type="radio"/>	150	*	BUILDER'S SUPPLIES
<input type="radio"/>	150	07	CONSTRUCTION WORKER PROTECTION SHORING BOXES
<input type="radio"/>	150	10	CONSTRUCTION MATERIALS (NOT OTHERWISE CLASSIFIED)
<input type="radio"/>	155	*	BUILDINGS AND STRUCTURES: FABRICATED AND PREFABRICATED
<input type="radio"/>	155	05	CONSTRUCTION SERVICES, BARRIERS AND ENCLOSURES
<input type="radio"/>	155	38	CONSTRUCTION TYPE FIELD OFFICES AND SHEDS
<input type="radio"/>	285	*	ELECTRICAL EQUIPMENT AND SUPPLIES (EXCEPT CABLE AND WIRE)
<input type="radio"/>	285	46	CONSTRUCTION EQUIPMENT LAMPS
<input type="radio"/>	330	*	FENCING
<input type="radio"/>	330	55	CONSTRUCTION FENCING, TEMPORARY
<input type="radio"/>	540	*	LUMBER, SIDING, AND RELATED PRODUCTS
<input type="radio"/>	540	62	CONSTRUCTION PLYWOOD
<input type="radio"/>	540	92	CONSTRUCTION TYPE TIMBERS
<input type="radio"/>	550	*	MARKERS, PLAQUES AND TRAFFIC CONTROL DEVICES
<input type="radio"/>	550	45	CONSTRUCTION GRADE REFLECTIVE SHEETING (SEE 801-49 FOR SIGN MATERIAL)
<input type="radio"/>	765	*	ROAD AND HIGHWAY EQUIPMENT (EXCEPT EQUIPMENT IN CLASSES 755 AND 760)
<input type="radio"/>	765	35	CONSTRUCTION EQUIPMENT HYDRAULIC ATTACHMENTS
<input type="radio"/>	785	*	SCHOOL EQUIPMENT, TEACHING AIDS, AND SUPPLIES
<input type="radio"/>	785	45	CONSTRUCTION PAPER, SCHOOLROOM
<input type="radio"/>	801	*	SIGNS, SIGN MATERIALS, SIGN MAKING EQUIPMENT, AND RELATED SUPPLIES
<input type="radio"/>	801	60	CONSTRUCTION SIGNS
<input type="radio"/>	801	97	CONSTRUCTION SIGNS, WOOD

Notepad – There are many opportunities for buyers to enter **internal document notes**. These notes are not publicly available. Saved internal document notes can be retrieved by entering in information within the search fields. Additional Vendors may be searched and internal notes about them may be entered.

- Search by Document and Line Item Number
- Search Other Notepad Name (entrie)
- Search Vendor Notepad

In the example below **(1)** Hawaii Vendors were searched. **(2)** Hawaii Vendor 1 was selected. **(3)** Internal notes on **Hawaii Vendor 1** that have been entered by buyers are displayed. **(4)** Buyers may enter new internal notes reagrding a vendor and click on **Save Note** to record their entry.

The screenshot displays the 'Notepad' application interface. At the top, there is a navigation bar with tabs: Main, Solicitation Manager, Create, Edit, Awards Manager, Award History, Approvals Manager, Miscellaneous, and a 'Help' button. Below this is a sub-menu bar with options: New, In Work, On Hold, Pre-Encumbrance Hold, On Internet, Awaiting Award, Awarded, Find, Consolidation Mgmt, Contact Us, Help, Menu, and Logout.

The main area is titled 'Notepad'. It contains search fields for 'Document & Line Item Number', 'OR Other Notepad Name', and 'OR Vendor Notepad (BASEC ID)'. There are buttons for 'Review Notepad Entries' and 'Create Notepad Entry'. A red circle with the number '1' highlights the 'Vendor BASEC ID/Notepad' search field.

Below the search fields is a table titled 'Agency Vendors: Get notepad by clicking name, Send email by clicking system number.' The table has columns for Name, City, State, and System Number. A red circle with the number '2' highlights the row for 'HAWAII VENDOR 1'.

A red circle with the number '3' highlights a pop-up window titled 'Vendor: HAWAII VENDOR 1 (P0000000003) System Notepad'. This window displays a list of notes with timestamps and user names. A red circle with the number '4' highlights the 'Save Note' button at the bottom of this window.

Name	City	State	System Number
HAWAII VENDOR	Anahola	HI	P000000000002
HAWAII VENDOR 1	Honolulu	HI	P000000000003
HAWAII VENDOR 3	Lahaina	HI	P000000000004
HAWAII VENDOR 3	Honolulu	HI	P000000000005
		CA	P000000000154
		HI	P000000000027
		State	System Number
		HI	P000000000030

Vendor: HAWAII VENDOR 1 (P0000000003) System Notepad

12/12/2007 04:00:30 PM
DDEDTOPHIA2VA
Vendor has the cleanest teeth in Honolulu!07/20/2007 05:12:10 PM
dhljarobinsao
vendor needs his job for toothpaste!06/27/2007 04:57:00 PM
LURENGOCHING
Vendor submits low prices06/20/2007 04:31:19 PM
hldotshpew11
Vendor forgot to use toothpaste today... VIKES!06/20/2007 04:31:07 PM
LURFORIBOSTO

Vendor: HAWAII VENDOR 1 (P0000000003) System Notepad

Back Print Find Save Note Reset CC: VENDOR (and save)

Review Vendors – The vendor database may be searched by various parameters. Simply select one, input the field and then click on **Review Vendors**. The **Reset Vendor Search Parameters** clears previous selections/settings.

- Vendor Name to include DBA name
- NIGP Commodity Code(s) within a Vendor's Commodity Profile
- By City, County, or combination of both
- By State
- By Zip Code

In the example below, **Honolulu** was typed inside of **County** and **Review Vendors** was clicked:

Review Vendors

Responses to Current Solicitations: ☐ or By Vendor ID:

OR

By Name: ☐ <-- Check to Search by Vendor DBA

OR

By Commodity:

AND / OR

By City: & / or County: Honolulu
Click for Counties / Cities review: ☐

AND State: OR Zip:

Vendor Listing as of Wed Aug 21 00:24:25 GMT-0700 (PDT) 2019

View	Vendor Name	Contact Name	Email	Phone	Fax
<input type="radio"/>	INTERNATIONAL CONVENTION & EVENT S	Daniel K Anderson	dander@attcoinc.com	808-836-1191	808-834-1046
<input type="radio"/>	ATTCO ENTERTAINMENT				
<input type="radio"/>	"AA" GREASE TRAP SERVICES	Wyrlo P Ver	aagt@hawaii.rr.com	808-456-2345	808-456-2345
<input type="radio"/>	2 G GROUP LLC	Kris N Gourlay	kriegourlay@gmail.com	808-864-0429	808-235-2458
<input type="radio"/>	2005 WORK SMART CORP	Robert M Vavul	bvavul@midcityre.com	808-845-5755	866-526-4903
<input type="radio"/>	MID CITY RESTAURANT SUPPLY				
<input type="radio"/>	208 TEST ACCOUNT	Sue Gemmill	sgemmill@sicomm.net	800-614-0563	
<input type="radio"/>	21ST CENTURY LIGHTING ENTERPRISES	Ruth Leau	21stlile@gmail.com	808-531-5483	808-528-0620
<input type="radio"/>	21ST CENTURY LIGHTING ENTERPRISES	Ruth Leau	21stlile@gmail.com	808-531-5483	808-528-0620
<input type="radio"/>	21ST CENTURY TECHNOLOGIES HAWAII, L	Toni Park	edison@smartenergyhawaii.com	808-373-4559	808-373-1740
<input type="radio"/>	SMART ENERGY HAWAII				
<input type="radio"/>	25-50 ELECTRIC	Jimmy V bangloy	jbangloy2550@gmail.com	808-630-6003	808-200-4808
<input type="radio"/>	25/50 ELECTRIC LLC	25/50 P 25/50	gervaclostephen@yahoo.com	808-260-6533	
<input type="radio"/>	25/50 ELECTRIC, LLC	Perfecto M Acosta	Electricalsitepma@gmail.com	808-388-5363	808-200-4808
<input type="radio"/>	298TH REGIMENT	Randall Callejo	randall.callejo@us.army.mil	808-672-1818	
<input type="radio"/>	3 & 4 MANAGEMENT SERVICES INC.	Amos Monford IV	amosmonford@hotmail.com	808-781-4483	
<input type="radio"/>	3 - D LANDSCAPING SERVICE LLC	Dustin L DeMello	demello_landscaping@yahoo.com	808-292-7339	
<input type="radio"/>	3 - D LANDSCAPING SERVICE LLC	Dustin L DeMello	demello_landscaping@yahoo.com	808-292-7339	
<input type="radio"/>	3-FOLD CRAFTSMAN CONSTRUCTION, INC.	Joseph S Sanchez	3fold@hawaii.rr.com	808-927-5408	808-941-4676

5404 records returned. 5404 In-State Vendors
Search Criteria: County: HONOLULU
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~ agency_buyer_vendor_lookup_handler.html (Revised: 2014.12.11) ~ Machine: sc155p_ProdAppV1c IP: 98.151.58.138 DB: unknownDB Wed, 21 Aug 2019
Agency ID: A0000000042 Dept ID: BWSTEST User ID: BWSTestbuyer

To access Vendor Profile details click on the radio button adjacent to the Vendor's name. The buyer's view of a vendor's profile will display. Note: In this example, within the vendor profile, in addition to vendor contact information there are four categories with radio buttons taking you to their information fields:

- **Award History** – History of vendor's awards within HePS
- **Commodities** – A listing of all the NIGP Commodity Codes for their provided goods and services
- **Vendor Notepad** – Historical internal notes associated to a vendor
- **Self-certified profile entries** - Licenses, Bonding, and Certifications uploaded by the vendor

Vendor Information	
Award History:	<input type="radio"/>
Commodities:	<input type="radio"/>
Vendor Notepad:	<input type="radio"/>
Self-certified profile entries:	<input type="radio"/>

Enterprise Information	
Enterprise ID:	P00000063111
Account Created:	Thu Sep 15, 2005
Enterprise Name 1:	Mangrove Tropicals Inc.
Name 2:	HePS Test Vendor 1
Name 3:	E XX,Old Due,Y-Ck Pr,OK CCDt
Enterprise Address 1:	56-1086 Marconi Road
Address 2:	
City:	Kahuku
State:	HI
County / Parish:	HONOLULU
Zip Code:	96731
Country:	USA
SSN or Fed ID:	xx-xxx3456
GET ID:	GE018-xxx-xxxx-xx

PRIMARY, Point of Contact	
First Name:	User
MI:	
Last Name:	Test07
Title / Position:	CORPORATE
Department:	CORPORATE
Email:	momknh3@mac.com
Telephone:	808-371-4274
FAX:	

Agency and Vendor File Attachments - Both types of files attachments may be searched for in a similar manner. In each case, you enter information within a search field and click on **Get File**. **Clear Fields** is used to vacant previous information and start anew search.

Agency File Attachments:

- Solicitation Number
- Award Number
- Attachment Name

Find/Review Agency File Attachments					
Access Attachments:	Solicitation Nbr:	Award Nbr:	Get File: <input type="checkbox"/>	Clear Fields	Help
Attachment Name:			Find	Found: Files...	

Vendor File Attachments:

- Vendor Account Number (needed for each search)
- Solicitation Number
- Addenda Number
- Line Item Number (not commonly used)
- Vendor Attachment Name

Find/Review Vendor File Attachments					
Display Vendor Attachments:	Vendor Account Nbr:	Solicitation Nbr:	Addenda Nbr:	Line Item Nbr:	
Question File: <input type="checkbox"/>	Vendor Attachment Name:	Get File: <input type="checkbox"/>		Clear Fields	Help
Toggle Window					

Miscellaneous/My Profile – Under the **Miscellaneous** Tab, the far left sub menu is **My Profile**. My Profile contains you contact information to include Name, Title/Position, Telephone number, and email address. Any editorial contact changes made in this profile will automatically populate as update to exisiting documents in work, solicitations, and awards. This sub menu is also used to change or update your password. Simply update the contact or PW information and click on **Update User Info**.

Main Solicitation Manager Create Edit Awards Manager Award History Approvals Manager Miscellaneous	
My Profile My Commodities Buyers Vendors Manage TVL User Logs History > RFB RFI RFP RFQ Session Info Contact Us Help Logout	

1

User Type: Level 3 Buyer

Buyer Code:

First Name: MICHAEL

MI

Last Name: MATSUMOTO

Title / Position: BWS Test Department Buyer

Department: BWS TEST

User ID: BWSTestbuyer

Password:

Verify Password:

Email Address: michael.matsumoto@sicomm.net

Telephone: 808-371-4274

FAX:

Alternate User Status:

A Workflow Alternate has not been assigned by the System Administrator. Click [here](#) to request assignment of a Workflow Alternate to me.

An Approval Responsibilities Alternate has not been assigned by the System Administrator. Click [here](#) to request assignment of an Approvals Responsibilities Alternate to me.

Auto Frames Default:

☐ Currently Auto Frames by default are **in-active** (rolling over the frame DOES NOT open/close the frame)

Default: File Attachments

Select If Default File Attachments Are Visible

Currently Default File Attachments by default are **Visible**

Default: 25

25

Currently the Max Number of Line Items of the Quick Line Item Edit Function is **25**

Approval Routes/Responsibilities Display:

Do not Show Routes or Responsibilities on Pages where available. Use Miscellaneous>Session Info

Approval Route Display For Multiple Documents:

NOTE: With alarge number of Documents the In-Line method results in a slower page load time

For Requisition Approvals:	As A Pop-UpWindow
For Solicitation Approvals:	In-Line
For Award Approvals:	In-Line

2

Update User Info

My Reports