HePS IFB Manual Contents
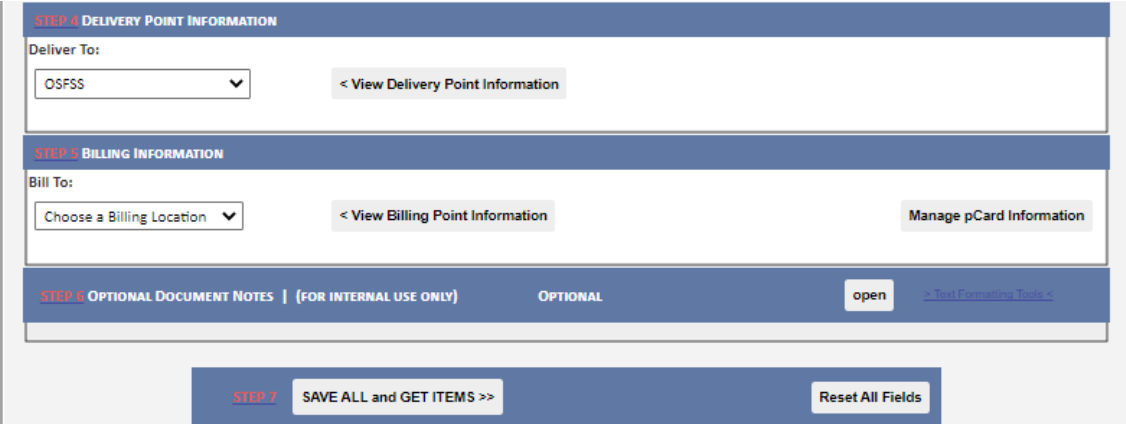
Part 1 - Creating and Releasing an IFB

This section covers filling out basic header information (due 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 releasing the solicitation to the internet

Action	Illustration
To begin, click on the **Create a Solicitation** Icon and choose IFB from the popup **Delivery Date** The Solicitation Header has 7 Steps. Placing your cursor on the **Step number** will provide an explanation in a popup. Steps 1-7: Contract Duration & Due Dates / Delivery **Step 1** – Optional Document Tracker Information – numbers or text **Step 2** – Optional Contact person for this solicitation – buyer is the default **Step 3** – Required Delivery Date or Start and End of Contract **Step 3-1 – CCD ARO** - Number of Calendar Days After Receipt of Order Optional Priority – Normal or Rush flag will appear on emails to approvers Freight and FOB information, the standard default is already set	

Action	Illustration
Steps 1-7 continued: Delivery & Billing Points **Step 4** – Choose a Delivery Point or Create a New One from the drop down – Click on button to view info **Step 5** – Choose a Billing Point or Create a New One from the drop down – Click on button to view info - Optional P-Card Information **Step 6** - Optional Internal Notes **Step 7** – Save and Get Items	

Action	Illustration
Step 8: Commodity / Services Search Choose a product or service that you are procuring by typing in a word and clicking on GO (or enter) This will display all the instances where the word appears in the commodity coding system. Codes are used to identify which vendors will be sent notification of the solicitation You may also enter the commodity code number if you know what it is. **Step 8 continued** – Select the appropriate item or service. The description you have chosen will be placed back into the form for your customization, it does not have to be exactly what you want at this time, just the right general category Commodity Codes 001 through 899 are products – Commodity Codes 900 through 999 are services. The purpose of the coding is for the system to identify which vendors will get the email notification. Each commodity class is further broken down by a 2-digit number which distinguishes item or service.	

Action	Illustration
### Step 9: Quantity / Description Enter a Quantity and Unit of Measure – you may change the unit of measure using a drop-down list Now that a quantity has been entered you can split the items to various delivery locations – Click on the Alternate Line-Item Delivery Point button to split quantities and assign new Delivery Points Enter the Estimated Total Price of the item or service – for internal use only, not seen by vendors Optional Allowable variation in Quantity may be entered Optional tracking number for the item may be entered ### Step 10: Commodity Info Customize the description, up to 6,800 characters may be used (about one page in a word document) to describe the item or service The custom description may be saved for future use by using the Save Custom Description drop down - ***Select YES to save*** If the commodity code is not correct, you may choose another one by starting a new search in the bottom frame.	

| Action	Illustration
Step 11: Attachments Optionally, you may add attachments by clicking on the Click here to attach files link Click Browse and find your files Enter in a description for the file in the space indicated 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 executable files (exe) Any size file may be uploaded by the buyer but large files exceeding 4MBs are not recommended as vendors may have difficulty viewing and downloading them – large files may be broken up into smaller files if necessary File descriptions may optionally be added. If a file with the same name has already been upload there will be a popup warning. Rename the file before uploading	
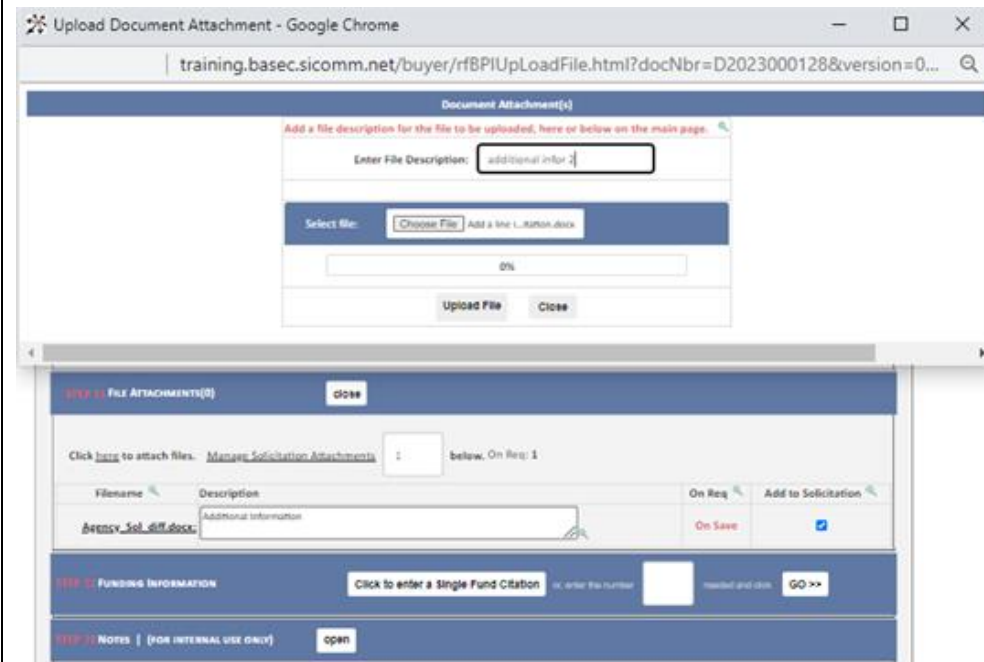
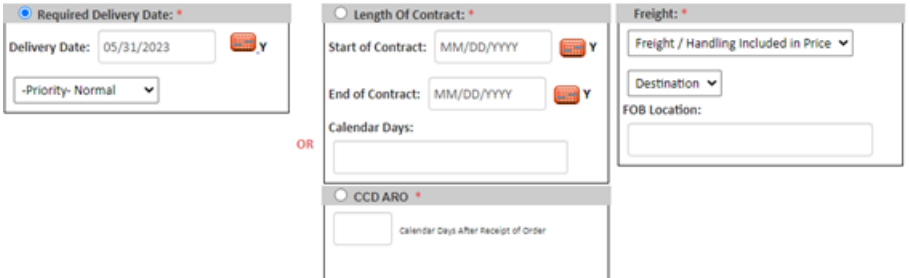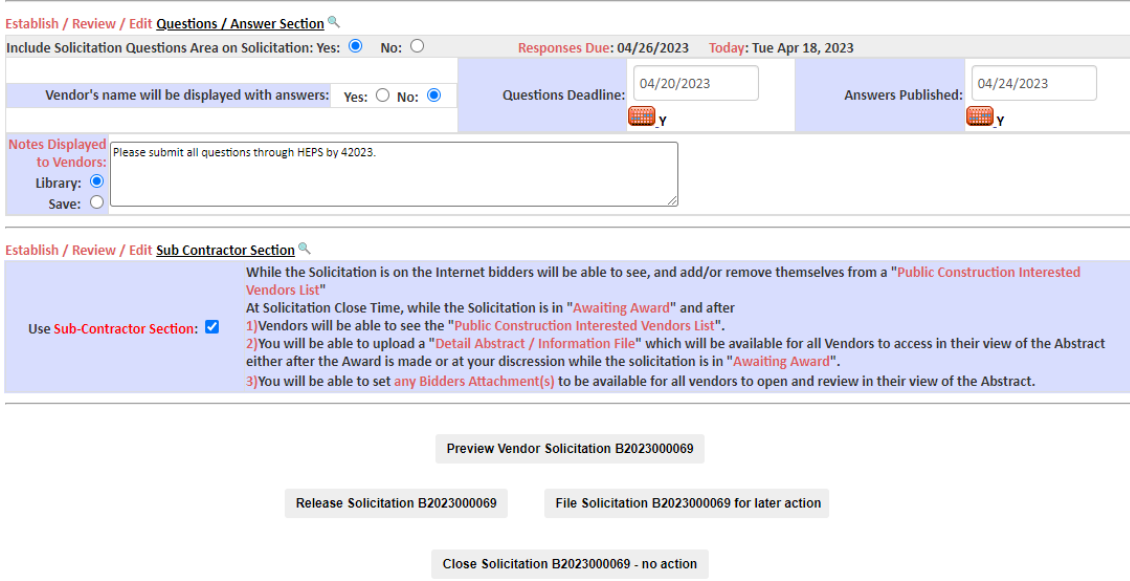| Action	Illustration
Step 12: Fund Citations Optionally, you may add Account Coding/Fund Citations to the solicitation ***Click Open Single Fund Citation*** button to open this area Enter coding - Coding may be saved for future use and will be displayed in a drop-down list called ***Valid Cost Accounts*** 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 coding allow funds to be split by percentage, estimated dollars, or quantity **Step 13: Notes** Optional internal notes may be added **Step 14 : Select an Action** Select an Action by choosing from the drop down: **Save Item 001/Select Item 002** - back to Step 8 to add another item **Create eIFB/Save eIFB Item** – continues the solicitation creation process Click **Execute** to continue	

Action	Illustration
In **Steps 1–14** you have created all the elements found in a basic requisition In order to turn this information into a Solicitation there are 5 more mandatory steps (numbered as **Steps 1-5** on this page) and a few optional ones You may also review and edit all information entered so far 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 – clicking on the link again will close the area – clicking on the button called **Open All Areas** in the upper right will open all areas of review at once To review and edit the information on the line item click on the Edit button in the bottom frame – this will be covered a few pages later **Mandatory Steps 1-5** are detailed on the next page	Mon Apr 17 2023 13:08:10 GMT-0400 (Eastern Daylight Time) Open All Areas Assign/Manage pCard Scroll Down No approval route found. Requisition R2023000122 Created for Document D2023000128. Assigned for eIFB Solicitation creation. Detail Item Updated Document: D2023000128 Item: 001 Qty: 1 UOM: EA NIGP: 96203 Total Est Amnt: $2000 Item Est Amnt: $2000 Created by: doebuyer3 Solicitation Nbr: B2023000069 Requisition Nbr: R2023000122 Reference Number: Document Nbr: D2023000128 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 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 Preview Vendor Solicitation B2023000069 Release Solicitation B2023000069 File Solicitation B2023000069 for later action Close Solicitation B2023000069 - no action

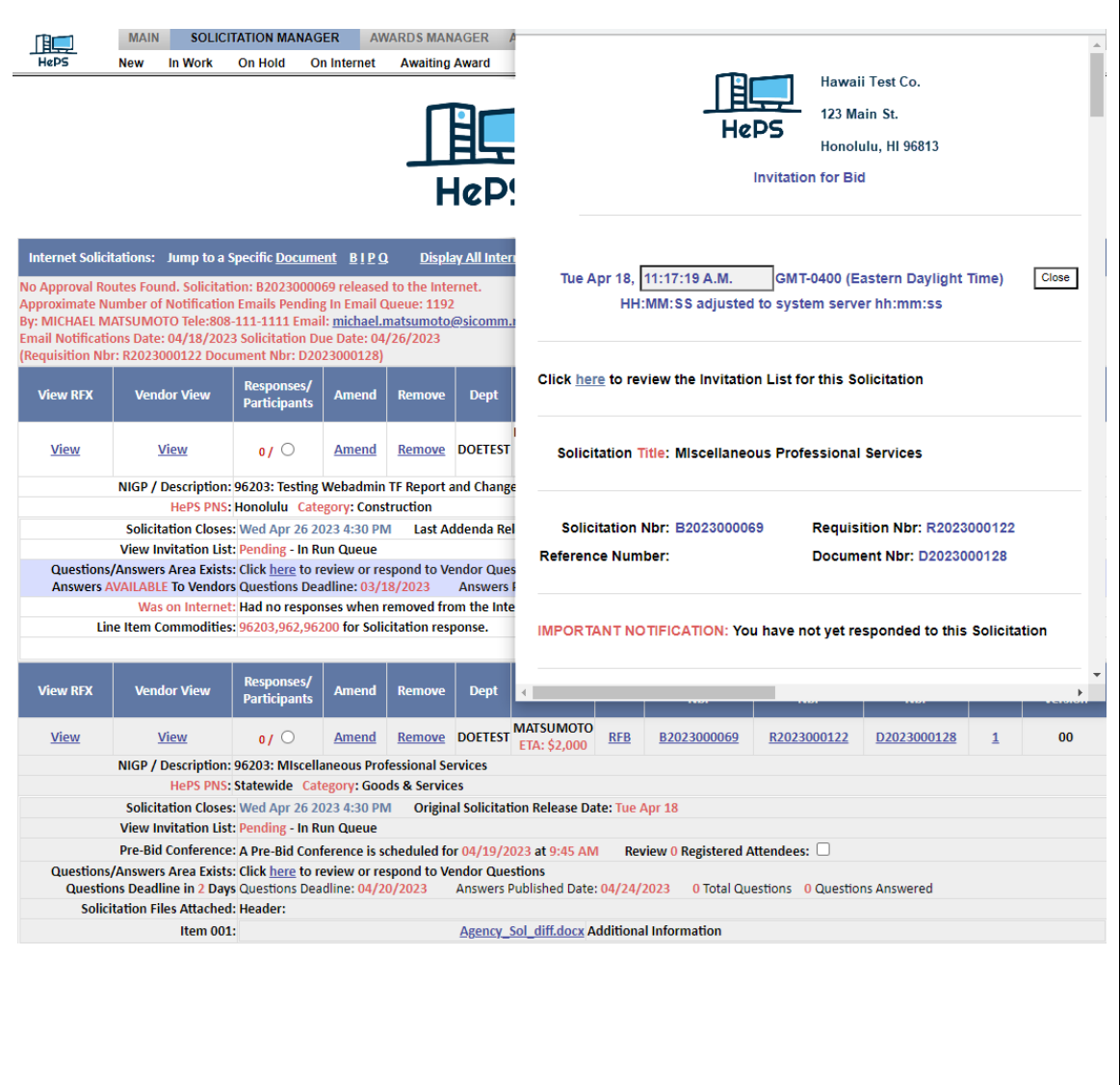| Action	Illustration
Mandatory Step 1 **Item Response** - if the solicitation has multiple line items you can set the system to require vendors to respond to all line item (all or none) or allow for individual response using the drop-down selection Control Amount/Additive Alternate: Displays on the abstract. Negotiated internally to add addt'l to job for ex 400,000 additive alt 90,000 so the total in the control field is 490,000 Select Solicitation Recipients - vendors may be selected using either Agency Domiciled Vendors (meaning Hawaii only) or All Registered Vendors (entire system including the mainland and foreign countries) – selected vendors maybe viewed by clicking on the Review Above Recipients button – there is an option to add additional registered vendors to this list Solicitation Email Date - optionally, the solicitation may be kept on hold until the date entered for its release – the default is today's date Solicitation Responses Due - Enter a due date and time (closing date) – system default is 4:30 PM HST Solicitation Header File Attachments/ Standard file attachments – optionally, header files may be added – these are not the same as the line-item files you may have added earlier	

Action	Illustration
Review **Required Delivery Date** or **Length of Contract and Freight info** – edit if necessary **Calendar Days-** Contract Duration / Total number of days **CCD ARO -** Number of Calendar Days After Receipt of Order	

Action	Illustration
Mandatory Step 2 Review and edit if necessary, the Bill To and Deliver To information that was selected earlier **Mandatory Step 3** Choose Solicitation Instructions – there are a number of mandatory instructions for vendors that will automatically appear on your solicitation (transaction fee, tax requirements, upload and download instructions, etc.) In addition, there may be a number of optional pre-built instructions that you may choose to add to the solicitation by clicking on the square box on the left side of the instruction There is also a box for you to enter in additional instructions or information that you may need – please contact your system administrator if you would like to have additional mandatory or optional instructions added to the list for future use **Mandatory Step 4** Enter a title for the solicitation – only the title is mandatory, the title description is optional **Mandatory Step 5** Check the counties(s) where the goods or services are to be delivered. Chose a category from the dropdown selection.	Review / Edit **Billing And Shipping Locations** 🔍 STEP 2 Bill To: [Delivery Point ▾] View <--- Selected (**Delivery Point**), Click to view. Deliver to: [OSFSS ▾] View <--- Selected (OSFSS), Click to reset. Review / Edit **Solicitation Vendor Instructions** 🔍 STEP 3 **Solicitation Instructions** **Mandatory Instructions are automatically included on the Solicitation** Mandatory Instruction(s) 1 (m-23) Unless otherwise indicated, questions regarding this solicitation must be directed, via email or phone, to the Contact Person listed. 2 (m-44) TRANSACTION FEES: In accordance with the SOSA for HePS, the Awarded Vendor shall pay a Transaction Fee of 0.725% (.00725), capped at $5,000, to SicommNet on the total dollar amount of goods or services purchased through the Hawaii Electronic Procurement System (HePS). Unless otherwise indicated in this solicitation, the Transaction Fee shall apply to all purchases, whether through the Purchase Order, Contract, or eCatalog regardless of the quantity or dollar amount of the purchase. Payment shall be made by the Awarded Vendor to SicommNet within thirty (30) days from receipt of invoice. The SOSA is hereby incorporated by reference into this Electronic Solicitation as if set forth herein in its entirety, and is located on the Internet at www.sicomm.net. Failure by any Vendor to obtain a copy of the SOSA shall in no way constitute or be deemed a waiver by the HePS Contractor or the Department of Education for a vendor's failure to consider this document in its response to the Electronic Solicitation. 3 (m-58) OFFER DEEMED FIRM: Submission of an electronic response to the State of Hawaii constitutes and shall be deemed an offer to sell the specified goods and/or services to the State of Hawaii at the price shown in the response and under the State's 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. Establish / Review / Edit **Custom Solicitation Title and Description** 🔍 STEP 4 Custom Title: [MIscellaneous Professional Services] Custom Description: [ ] Review / Edit **Solicitation Geographic Location/Category** 🔍 STEP 5 Counties: Statewide: ☑ Honolulu: ☑ Maui: ☑ Hawaii: ☑ Kauai: ☑ → Category: [Choose A Category ▾] Choose A Category Goods & Services Construction Health & Human Services OPTIONAL SOLICITATION SECTIONS Review / Edit **Contact and Buyer Information**

Action	Illustration
Optional Solicitation Sections The following areas are all optional features that may be used in creating your solicitation: **Contact and Buyer Information** –review and edit as necessary **Header Notes** – review and edit as necessary **Line-Item Quick Edit** – allows you to change quantities, unit of measure, and estimated dollar amount, but not description **Solicit Responses from other Commodity Suppliers** – ability to search for up to 20 additional commodity codes in addition to the line-item code **Optional Solicitation Tile and Description** – may be added **Pre-Bid Conference** – used for notifying vendors of a pre-bid conference or pre-site visit requirements – choose a date, time, place, and add notes	Review / Edit **Header Notes** 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: 2000 🔍 ☐ / 001 / () / (1) / (EA) / (2000) / Edit Desc: ○ 🔍 Establish / Review / Edit **Solicit Responses From Other Commodity Suppliers** 🔍 Commodity Codes: Search: ○ — 96200 — <--- Clear Commodities — 1 of 20 Alternate Commodities Entered Computing Approximate Batch Emails Use the Search Button and select up to 20 Commodity Suppliers(other than the Line Item Commodities) from whom to solicit responses Establish / Review / Edit **Pre-Bid Conference** 🔍 Date: 04/19/2023 📅 Y Conference Time: 9:45 AM ▼ Responses Due: 04/26/2023 Vendor Presentation Example Location: Office of School Facilities and Sup 1037 S. Beretania St, Honolulu, HI 96813 Copy Agency Address: ● Library: ○ Save: ○ Notes: Attendance is not mandatory but highly recommended. Library: ○ Save: ○ Click here to review Pre-Bid Conference Registered Attendees

Action	Illustration
Questions/Answer Section – allows for vendors to submit questions online – choose to show the vendors name, a deadline for question submittal, and a time at which your answers will be published to all vendors **Sub Contractor Section** 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 up any Bidders Attachment(s) to be available for all vendors to open and review in their view of the Abstract. be reviewed and edited also – see the next page for information or to complete the solicitation choose: **Release Solicitation** - sends it to approval routing or to the internet **File Solicitation for later action** –will save and place it in Solicitation Manager/On Hold for future edits	Establish / Review / Edit Questions / Answer Section Include Solicitation Questions Area on Solicitation: Yes: ● No: ○ Responses Due: 04/26/2023 Today: Tue Apr 18, 2023 Vendor's name will be displayed with answers: Yes: ○ No: ● Questions Deadline: 04/20/2023 Y Answers Published: 04/24/2023 Y Notes Displayed to Vendors: Library: ● Please submit all questions through HEPS by 42023. Save: ○ 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 discression 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. Preview Vendor Solicitation B2023000069 Release Solicitation B2023000069 File Solicitation B2023000069 for later action Close Solicitation B2023000069 - no action

Action	Illustration
Line Item Edit Prior to release of the solicitation the line items(s) may be reviewed and edit if necessary – the options include changing the quantity, unit of measure, editing the description, editing attachments, changing the commodity code, and adding additional line items Click on the Edit button in the bottom frame in the line-item area. The process is the same as **Steps 9-14**. **Editing the Existing Line Item** – click on the Click **here** to continue with commodity number which will open a different window with the same **Steps 9-14** **Choose a Different Commodity** – Click **here** to choose a different commodity - allows you to select a new commodity code to replace the existing one – the process is the same as in **Steps 8-14** **Adding Another Line Item** – Click on the Add Item 2 button in the center of the bottom frame – the process is the same as Steps **8-14**	

Action	Illustration
Once you click ok on the Approval routes check pop-up, when all reviews and edits are done, click the **Release Solicitation** B202300069 button in the upper frame. The solicitation will be checked for approval routing. The solicitation will be displayed on the **On Interne**t page. The **Vendor View** of the solicitation will appear as separate window and allow you to see your solicitation as the vendor sees it. The pink area will contain information about whether the solicitation has been released to the internet or has been sent to approval touting. If in approval routing, you will get an email confirmation that the solicitation has been released when the last approver has approved it. The **On Internet** page displays information about the solicitation including number of responses, list of vendors emailed, questions and answers, pre-bid conference. It is where amendments are done (**Amend**) and when a solicitation can be cancelled (**Remove**). It has a link to the actual view that a vendor sees (**Vendor View**).	(screenshot of HePS Solicitation Manager with Invitation for Bid pop-up)

Part 2 – Amending and Managing your Solicitation

This section covers how to amend a solicitation that is on the internet. It allows for every aspect of the solicitation to be reviewed and edited as necessary. Vendors are notified by email of all amendments and the system tracks all changes

To begin, click on the **On Internet Icon** 🌐 ON INTERNET

Action	Illustration
Amending a Solicitation All parts of a solicitation may be reviewed, edited, or amended as necessary – in addition this page contains this information: Click on the **small round button** next the number of responses to view names of vendors who have responded – prices are not displayed **Pre-Bid Conference** – vendors may optionally sign up to attend. Click on the **check box** to view attendees **Question/Answer Period** – Click <u>here</u> to view and respond to vendor questions **Vendors** – if Agency Domiciled Vendor option was chosen, click on here to review that list **Solicitation Files** – click on the link to view your attachments To begin amending a solicitation, click on the word **<u>Amend</u>** which is a link.	

Action	Illustration
Amending a solicitation continued.. Before you begin the amendment, a separate popup window will appear called the Vendor Response Tracker. It shows: • Vendors who have already responded • Vendors who were emailed the solicitation (**Review Email Recipients button**) • Vendor who have opened their email or logged in and viewed the solicitation (**Review Vendors Who Viewed Solicitation Detail button**) To continue the amendment process, close this informational window. This window can be opened at any time by clicking on the **Toggle Respondees View** button.	

Action	Illustration
Mandatory Step 1 Before anything can be changed on the page you must first enter in a reason for the amendment by typing in your reason in the **REASON TEXT** box. This information is included on email notifications to the vendor regarding your amendment. **Mandatory Steps 2-6** may be reviewed and edited. Click on the text links to open those areas.	

Action	Illustration
Optional Solicitation Sections may be opened by clicking on the text links. To amend information on the line item (quantity, unit of measure, description, attachments, commodity code) click on the **Amend** button in the lower frame. The process is the same as when you were editing the original solicitation. To add another line item, click on the **Add Item 2** button in the center of the page in the lower frame. The process is the same as described earlier in **Steps 8-14**. To finish and release the amendment, click on the **Release Amended Solicitation** button or you may choose to save your changes and **File Amended Solicitation for Future Release.**	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 Additional Commodities Exist Establish / Review / Edit Pre-Bid Conference The Bid Conference has passed. Pre-Bid Conference Exists Establish / Review / Edit Questions / Answer Section Q & A's Exist Establish / Review / Edit Sub Contractor Section Sub Contractor Requirements Exist Preview Vendor Solicitation B2023000069 - 01 Release Amended Solicitation B2023000069 - 01 File Amended Solicitation B2023000069 - 01 Save for Future Release Close Solicitation B2023000069 - 01 - no action

Solicitation B2023000069 Items On the Internet: Select by clicking the button adjacent the required item.   Enable Auto Toggle: ☐   Add Item 2

View	Responses	Amend	Delete	Dept	Name	Item	Est Amnt	Commodity	Short Description	Create Date
○	2 / ○	○	○	DOETEST	MATSUMOTO	001	2,000	96203	MISCELLANEOUS SERVICES, NO. 2 (NOT OTHERWISE CLASSIFIED) Actor/Thespian Service	Mon Apr 17 2023

Action	Illustration
The amended solicitation may be checked for approval routing just like the original release depending upon your internal setup. If approval routing is found, you will receive an email notification when it is approved and released. It will again be displayed on the **On Internet** page. Notice that the **Current Version** has changed to **01**. The small magnifying glass icon opens a display of the previous version reasons	

Action	Illustration
Deleting or removing a solicitation that is on the internet is done by clicking on the word Remove. The **Remove** functions are: **Permanently Delete this Solicitation** - will remove the solicitation from the internet and delete all documents **Stage this solicitation for re- release to On-Hold** – vendor responses will be lost **Temporarily take this solicitation offline** – vendor responses will be saved and will display when the solicitation is re-released **Close for Award –** this will close a solicitation prematurely before the scheduled closing date and should not be used with notifying the vendors of such action using the email section or by amending the solicitation **Cancel Remove Action** It has an optional **email** to vendors that can be used to notify them of your actions. If using, the email must be completed first before any action is taken.	

Action	Illustration
Close for Award Closing a solicitation for award is the process in which a solicitation is removed from the internet and staged in the **Awards Manager/Abstract** area so that a buyer may view the responses and create an award. The closing date and time for a solicitation is preset by the buyer prior to releasing the solicitation. At the prescribed time of closing the vendor can no longer access the solicitation and enter a response. However, the solicitation remains on the internet (with a message it is closed and blocked access) until the system processes it and moves the responses to the **Awards Manager/Abstract** area. This process can happen at five (5) different times: 1. When the evening system batch process occurs 2. When **logging in** to the system 3. When clicking on the **Awards Manager** tab 4. When clicking on the **Create an Award** quick link icon and **Close Scheduled On Net Solicitations** link 5. When clicking on the Session Summary Awaiting Award link Each time one of these methods is used you will get a display telling you if any solicitations were closed for you.	

Part 3 - Creating an Award

This section covers how to view vendor responses, select a vendor for award, and create the award notification. To begin, click on the **Create an Award** Icon and click on **Close Scheduled OnNet Solicitations** link first and then on the **IFB** link

Click to Create An Award...

Close Scheduled OnNet Solicitations
Electronic(With Prices)
RFQ
IFB
RFP

Classic Postings
RFI

CREATE AN AWARD

Action	Illustration
Closed solicitations appear as a list in the bottom frame. To open the solicitation and view the responses click on the Lump Sum button. **Line Item (Split Awards)** will be covered on page 34. Optionally, you may choose to move the solicitation to **On Hold** where you can edit and re-release it or **Delete** the solicitation. This most commonly used when there are no vendor responses. Enter a check mark in the **first square box** next to the number of responses to move the solicitation on-hold or the **second box** to delete the solicitation. If choosing to delete, you will prompt to enter a reason. The third box allows you to use the Hide feature, select the 'Hidden' check box. This will prompt a popup to appear that indicated the solicitation has been hidden Then click on the **Move Selected Solicitations to On Hold/Delete/Hidden** button. In addition, you may send an optional email to notify vendors of your actions by completing the email in the upper frame. Confirmation popup messages will appear with an explanation of the actions you are taking.	(illustration of Awards Manager screen — see below)

Illustration contents

MAIN   SOLICITATION MANAGER   **AWARDS MANAGER**   AWARDS HISTORY   MISCELLANEOUS

Abstract >   **RFB**   RFP   RFQ   Classic >   RFB   RFI   RFP   PO Generator   Auto Release   My pCard Docs   Intent To Award

Optional Vendor Notification of Cancelled Solicitation

Solicitation: B2019000246

Subject: _____   Will: ☑   Will Not: ☐ be re-solicited. (optional entry)

Email body:

Copy Deletion Reason: ☐
Copy (0) Deletion Reason: ☐
Clear Email Body: ☐

Characters: 0

Email ALL Vendors(0): ☐   Email ALL Reviewing Vendors(0): ☐   Email ALL Responding Vendors(0): ☑   cc self: ☐

Status: Select a solicitation, enter a subject, body and select a recipient to send.

Clear ALL FIELDS   Review Email   Document Status Report

Instructions: This option is only available when a SINGLE document is moved to "On Hold" or deleted. EMAILS MUST BE ENTERED PRIOR TO PRESSING "Move Selected Solicitations to On Hold / Delete".

IFB Nbr	Delivery Date	View Responses			Responses / Move To On Hold / Delete / Hidden	Line Items For Award / Awarded	Close Date	Commodity	Short Description
		Lump Sum	Line Item	TVL					
B2019000246 - 00	Tue Jan 31 2023	LS: ○	N/A		0 ☐ ☑ ☐	1 / 0	MON JAN 30 2023 12:30:00	96203	Pre bid notes web link te
	Deletion Reason: 1000 chars max								
B2022000007 - 00	Fri Apr 29 2022	LS: ○	N/A		0 ☐ ☐ ☐	1 / 0	FRI APR 15 2022 10:30:00	96203	Testing DSR notes for Pro
B2022000008 - 00	Mon Nov 02 2020	LS: ○	N/A		0 ☐ ☐ ☐	1 / 0	THU SEP 24 2020 16:30:00	96203	Buyer level 1to level 3 p
B2023000059 - 00	Fri Mar 31 2023	LS: ○	N/A		0 ☐ ☐ ☐	1 / 0	FRI MAR 24 2023 16:30:00	96203	testing
B2023000069 - 01	Wed May 31 2023	LS: ○	N/A		2 ☐ ☐ ☐	1 / 0	WED APR 26 2023 16:30:00	96203	MIscellaneous Professiona

Action	Illustration
Vendor responses are displayed on the Abstract page arranged in order from lowest to highest cost. Responses are separated by a dark blue line. At the bottom of the page you may click to create the abstract page as an Excel file (cvs). The page shows all relevant information about the vendor and their bid and has buttons or websites that have information about pre-bid conference, Professional and Vocational Licensing (DCCA), Federal Excluded Parties List, vendor response tracking, questions and answers and the ability to upload vendor attachments. **Publish Selected Vendor Attachments** Upon solicitation closure, the Construction Bid Module allows Buyers the Vendor Abstract options to: 1. Publicly display specific or all vendor/contractor submitted file attachments 2. Publicly display additional files, such as redacted vendor/contractor submitted file attachments 3. Click on Publish selected Vendor File Attachments for Abstract Review Link	

Action	Illustration
Intent to Award – opens an email system where you may send a notification of intent or ask for additional documents (Compliance documents). There is also an optional email that can be sent to the non-selected vendors. **Award** – is where you choose the awarded vendor and create the award notification. The vendor's name is a link to their profile information. Vendor comments and file attachments will appear if a vendor submits that info.	

Action	Illustration
If using the Intent to Award email Clicking on **Intent to Award** will open an email system where you may send a notification of intent or ask for additional documents. Compliance documents are the most common so wording has already been entered for you but may be edited as needed. There is also a second optional email that can be sent information to the non-selected vendors. Scroll down to the pink email area to access it. To disable the emails to the non- selected vendors, **remove the check mark** next to their names in the bottom frame. To fully use this feature another short lesson is available. To send the emails to the vendor choose a response **due date** from the calendar and click on the **Send Intent to Award Emails** button. Once you have confirmed the email the **Intent to Award** will be staged in the **Awards Manager** – Intent to Award sub menu. From there you may record the date of the vendor response, create the award, or cancel the intent to award and send it back to the **Abstract** stage.	

Action	Illustration
If not using the Intent to Award When you have selected your vendor and are ready to award, click on the **Award** button. HePS will automatically access the **Hawaii Compliance Express (HCE)** system to check for vendor compliance and show you the results. In this example, the vendor is compliant in 3 areas only and not the 4th area, so they are **not compliant**. If compliancy is not required for this award notification you may optionally continue the award process by clicking on the Award button. You may also just **Close** this window and go back to the Abstract page view. The results of the HCE check are placed on the Abstract page directly below the vendor's response.	

Action	Illustration
Hawaii Compliance Express – continued This page shows the results when a vendor is not a part of the HCE system. The vendor will be displayed as Not Complaint and you have options to continue with the award (**Create the Award**) or **Try Again Later**) or contact the vendor by using the **Create an Intent to Award** email system. You may also **Close** this window and go back to the Abstract page view. If the HCE system is unavailable a message will appear (not pictured).	

Action	Illustration
Once a vendor has been selected by choosing the Award button, you will be taken to the **Award Input page.** **Mandatory Award Section** **Step 1** - Click the link to open this area and choose the • **1-1 Award Type** • **Award Instructions** • **Optional Agency Award Number** • **1-2 Basis of Award** • **1-3 Competition Type** • **Competition Comments** • **1-4 Signed By** Optionally, you can **Assign/Manage pCard** and add **Competition Comments** that can be seen by approvers and auditors. **Optional Award Sections** - Click on the links to open these areas and enter optional information on the award. **Lag Days** – set a future release date for this award and add header attachments **Contract Templates** – Prefilled forms which can be added to the award header section. **General Comments** – add comments **Line-Item Attachments** – add or remove attachments **Line-Item** Award Instructions Internal Comments Area **Award Email Distribution** – allows you to send a copy of the award to other people	Complete the Award of (B2023000069- 01) Show ApprovalRoutes Enter the Awarded Vendors Agency Vendor Number: [_____] ? **MANDATORY AWARD SECTION** Review / Edit Award Type - Award Basis - Competition Type 🔍 STEP 1 Award Type: [_____ ▾] STEP 1-1 [Award Instructions] Agency Award Nbr: [_____] [HCE Compliancy] [Assign/Manage pCard] Basis of Award: [Adequate Price Competition ▾] STEP 1-2 Competition Type: [Open Competition ▾] STEP 1-3 Competition Comments: Not displayed on Award review — The low bid was not selected because: low bidder did not meet specs Signed By: [MICHAEL MATSUMOTO DOE Test Buyer 3 ▾] STEP 1-4 **OPTIONAL AWARD SECTIONS** Lag Days/Release Dates - ARRA - Line Items Review - Estimated Total Price - Shipping Info - Award Header Attachments 🔍 General Comments Area 🔍 [Review Vendor Line Item Comments] Line Item File Attachments 🔍 Line Item Award Instructions / Internal Comments Area: 🔍 Award Email Distribution 🔍 **COMPLETE AWARD** [Select an action. ▾] and [Execute Action] OR: [Review / Edit Award] [Document Status Report]

Action	Illustration
The final step before releasing the Award Notification is to click on **the Review/Edit Award** button on the lower right of the page. All parts of the award are available for review and editing as needed. Pay special attention to the **delivery** or **state/end of service** dates to be sure they are accurate. Optionally you may add line items, delete line items, add comments, change descriptions and attachments, and adjust quantities and pricing if necessary to complete the award. The bottom of the page has a link to open an optional email to notify vendors of any significant changes you made to the award. Choose the **Close No Action** button is no changes were made or the **Save Changes** button on the bottom of the page. *Popup confirmations* will appear. You will be returned to the **Award Input** page for final release action. Click on **Select an Action**, choose **Complete Award** and click on **Execute Action.**	 **OPTIONAL AWARD SECTIONS** Lag Days/Release Dates - ARRA - Line Items Review - Estimated Total Price - Shipping Info - Award Header Attachments General Comments Area Review Vendor Line Item Comments Line Item File Attachments Line Item Award Instructions / Internal Comments Area: Award Email Distribution Select an action. Complete Award Cancel Award Action **COMPLETE AWARD** Select an action. ▼ and Execute Action OR: Review / Edit Award Document Status Report THIS NUMBER MUST APPEAR ON ALL DOCUMENTS **Bill To:** Hawaii Test Co 123 Main St. Honolulu, HI 96813 **HePS** Notice of Award for Definite Quantity Contract DO2023000024 Notice of Award for Definite Quantity Contract MIscellaneous Professional Services DELIVER TO: Department of Education State of Hawaii School Facilities and Support Svcs 1037 S. Beretania Street Honolulu, HI 96813 osfss@hawaii.gov Date: Mon May 01, 2023 Quoted By: John Kauwe F.O.B.: Destination Terms: VENDOR: Kauwe And Sons KAUWE AND SONS EMAIL TEST 2500 Dole Street Honolulu, HI 96801 Attn: Owner marcelo.rafanan@sicomm.net Phone: 123 123-1234 Fax: 123 123-1233 eCommerce ID: P00000058505 Required Wed May 31, 2023 Delivery Date: RFQ#: B2023000069 DOC#: D2023000128 Contact: MICHAEL MATSUMOTO 808-111-1111 Buyer: MICHAEL MATSUMOTO 808-111-1111

Item No	Description	Quantity UOM	Unit Price	Extension
001	MISCELLANEOUS SERVICES, NO. 2 (NOT OTHERWISE CLASSIFIED) Actor/Thespian Services (962-03) (nt)	1 EA	$3,000.00	$3,000.00
	Account: 2023 - 5650 - 012 - PR12345 - 02 - 022			
	Subtotal:			$3,000.00
	Total:			$3,000.00
Transaction Fee	SicommNet will bill, via separate invoice, the 0.725% (0.00725) Transaction Fee, capped at $5000, applicable to this award in accordance with the **Solicitation Instructions and Terms and Conditions**, and the SicommNet SOSA referenced in the solicitation. Payment should be made to Sicommnet, Inc., and is due within 30 days from receipt of invoice..	21.75		

Action	Illustration
The completed **Award Notification** will be displayed. A popup will indicate if the award is being sent to approval routing or if it is being released to the vendor. The actual email of the award to the vendor does not go out until the nightly batch process. The award can be edited at any time before the batch is processed. Non-selected vendors who had responded get an email telling them who was awarded. The bottom of the page has a **Print Button** if you wish to have a hard copy of the award. The award can be found again in **Award History**.	

Action	Illustration
To create awards by **Line Item (Split Awards)** go to the **Awards Manager/IFB** page as before and select **Line Item** instead of **Lump Sum**. The line items will be displayed in the bottom frame. You can select which item to work on. It will be marked as **In Work** and the Abstract will display the prices for that line item only. There are two options for awarding by line item. 1. You can select a vendor for a line item and complete that award, then do another, or; 2. You may select the vendors for all the line items first and then create the awards.	

Action	Illustration
After reviewing the abstract information, check the box next to **In Work** on the line items to want to award to a vendor Then select the awarded vendor from the drop down list in the center of the bottom frame, **Award Checked To**: Click the **Go** button. This will assign the line item(s) you have selected to the vendor you have chosen. They system will also check the HCE for compliance.	

Action	Illustration
Confirm your choice of this vendor selection in the popup. You will then be asked if you wish to award this line item now (**OK**) or continue selecting vendors for the other line items (**Cancel**). Normally it is best to continue to select all the vendors for each line item first, then do the awards later. If you choose to do the award for one line item only, the other line items will remain in the abstract waiting for you to process. Your first line item will be marked as and you can select the second line item **Awarded** (**In Work**) and choose a vendor from the drop down exactly as before.	

Action	Illustration
When all line items have been reviewed and a vendor selected for award on each of them, go to the **PO Generator** sub tab on the menu bar. Your selections will be displayed in a list. Choose to either **Create** or **Un- Award**. **Create** will take you to the Awards Input page where you process the award in the normal fashion described earlier. **Un-Award** will cancel your vendor selection and move the line item back to the abstracts page.	

Part 4 – Finding and Managing Awards

This section will describe how to find your awards and manage them, including editing or cancelling an award, multiple awards, cancel and re-stage for award to another vendor, change orders, copying and reusing the IFB used for the award, and printing of the PO Summary Report. You can access your awards by using the Award History tab, All RFB listing or by the Award History icon, Search Awards link.
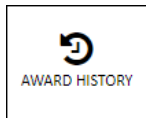
Action	Illustration
All Awards List Click on **Awards History** tab and then on **RFB** sub menu to display all awards from an **IFB/RFB**. The most current is on top. **Search Awards** **Within date Range** – The default is 31 days but can be changed up to 9999. If you change the number of days, select **GO** and allow time for the sorting. The choose from the drop down **Select an Award from the List** Box **By Award Number –** You can enter the award number in the **Get Award for Document** area. **By Text Within Date Range –** choose the dare range and enter in words that appear in the line item description on the award you are searching for. Click on Find by Text. A list of awards will display **Note**: You can search your awards only or those of the whole agency.	

Action	Illustration
Your award or the award of others if you had chosen to show awards from others will be displayed. Scroll to the bottom to access other functionalities.	

Action	Illustration
Scroll to the bottom and us the Select an Action drop down to view all available functions The primary areas you will access are: **Create a New Solicitation** – will copy the original IFB so you can use it again **Create Change Order** – Change Order, Contract Modification, Amendment, or Extension **Print Document** **Email Document to Below** – enter in any valid email address in the space provided **Re-email Document to Vendor** **Modify Document Description** – cancel the award, create a multiple award, re-stage for award to another vendor **Certificate of Vendor Compliance** – view and print a copy of HCE compliance certificates **AWARD Summary Report** – a full history of the procurement from first creation to final award, has all the details needed for approvers and auditors Click from the drop down and click on **Execute Action** to open that functionality	

Part 5 – Approvals Manager

This section will describe how to find and view your approval routes and how to check on the status of a solicitation or award that is in approval routing. To begin click the **Approvals Manager** tab.

Action	Illustration
Awaiting My Approval – are documents that you are the approver for. Click on the sub-tab to display a list for your approval. **My RFx's** – are your IFBs that need approved by someone else. Click In Approval to see those still waiting for approval. Click Dis-Approved to work on those that have returned to you as rejected by your approver. **MY POs** – are your awards that need approved by someone else. Click In Approval to see those still waiting for approval. Click Dis-Approved to work on those that have returned to you as rejected by your approver. This is a sample that shows an award that is still waiting for approval. To see this type of info click on the View Approvals button in the blue area on the left of the popup. This is the info for this one particular award, Additionally, you can review all the routes assigned to you by clicking on the white Show Approval Routes in the center, this shows all routes assigned to you.	

Part 6 – Search System

This section will describe how to use the search functions in the system. It includes Review Documents, Review Commodities, Review Notepad, and Review Vendors.

To begin click the **Search System** Icon and choose anything on the popup display.

Action	Illustration
There are 4 searches all on this same page – scroll down to see each one. Search criteria is entered in the top frame and results appear in the bottom. **Review Documents** **Document Type** - Pick a document type from the drop down **From and To** - Select search dates Click on **Review Documents** The bottom frame will show all documents found in your search criteria for the time specified The fourth column will show the current status of the document	

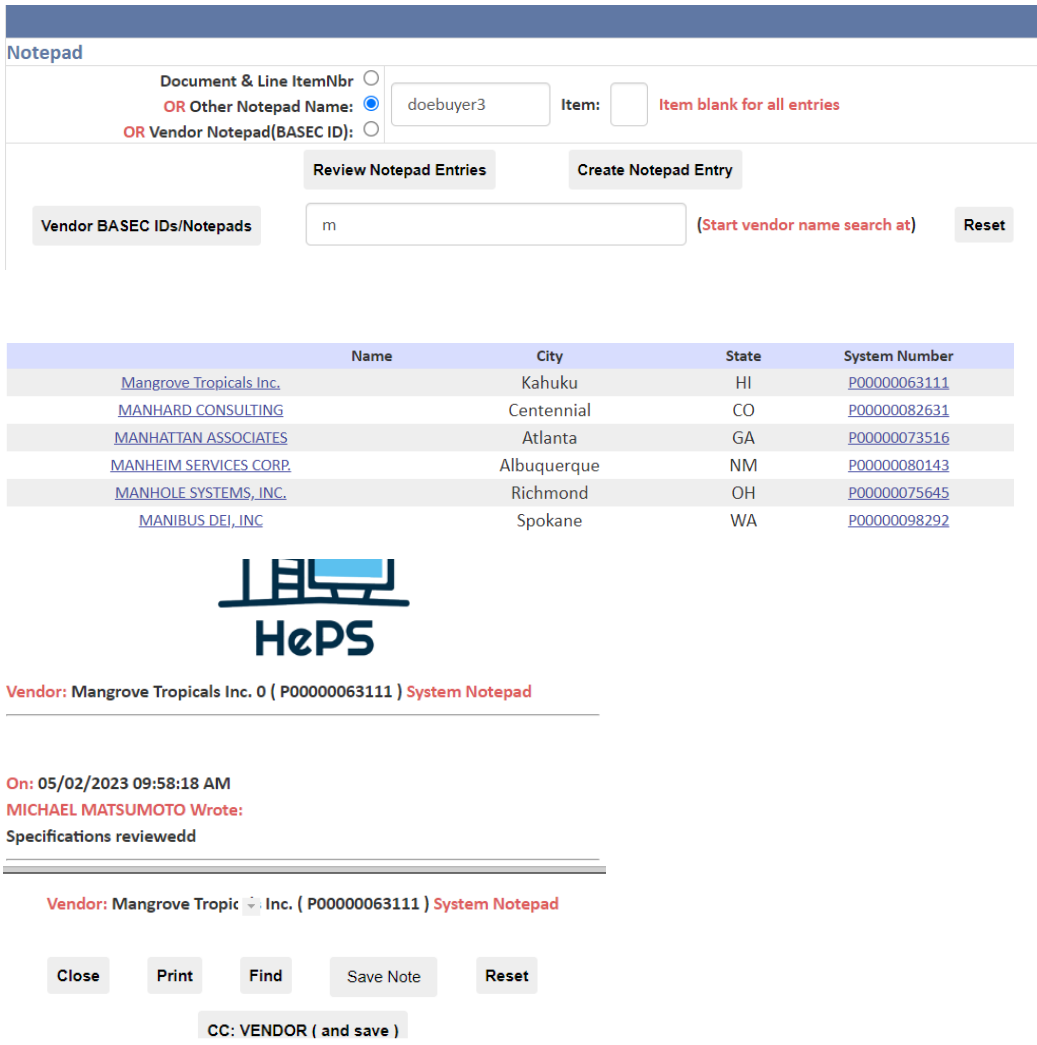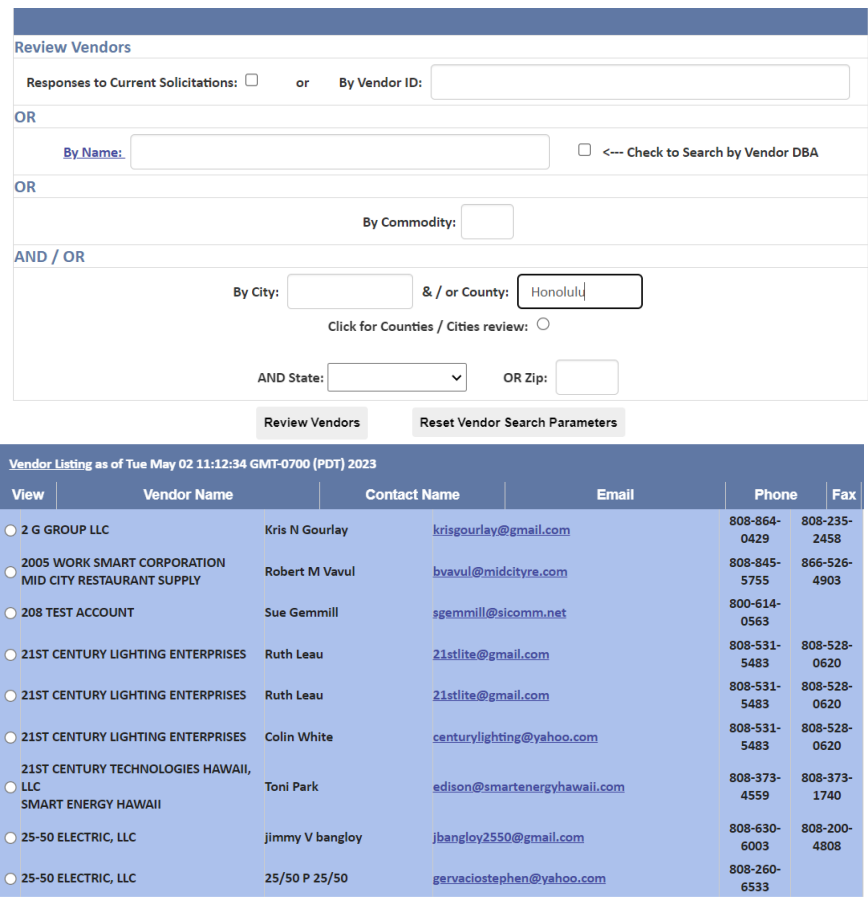| Action	Illustration
Review Commodities **Text/Number** – enter either a word or the commodity code number and select **Review Commodities** button **Show Classes From** – click on the button below Show Classes from to see a complete list of all the top level 3-digit class codes (approximately 260). Click on **Review Commodities** button This example shows a search all commodities that contain the word "water"	

Review Commodities

Text / Nbr: Water

AND / OR

Index lookup:	Scan Index:	Show Classes (from):	Scan Classes (for):	Drill Down:
○	○	○	○	○

Review Commodities   Reset Commodity Parameters

Select by Text or Nbr: [_____]   (press Enter to proceed)

To review all items within a Class click the LIST button
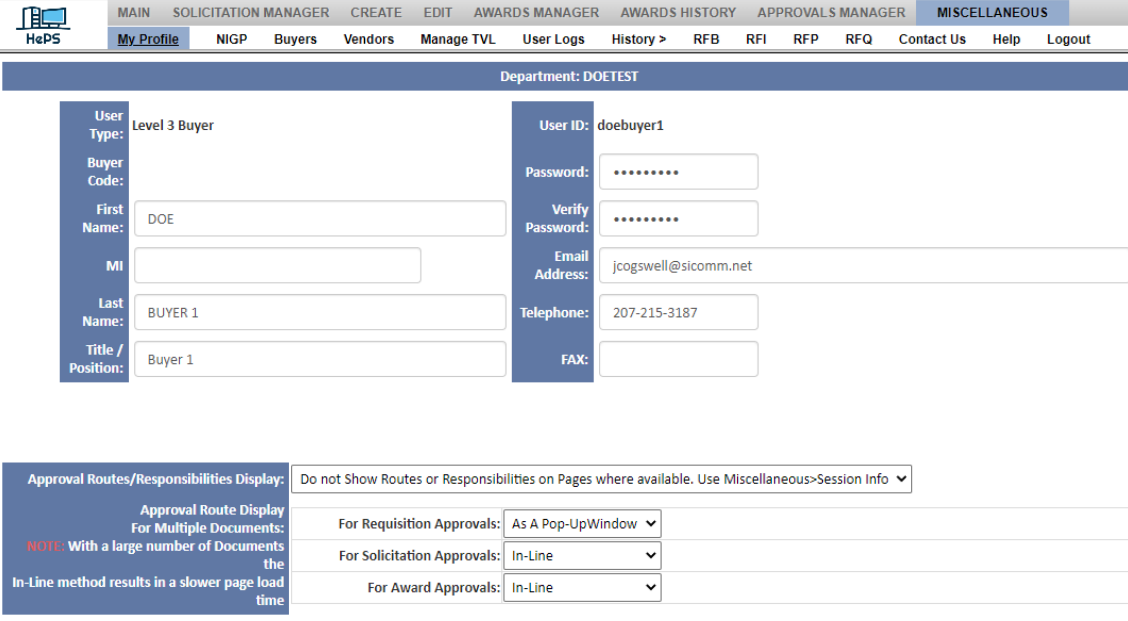
LIST	Class	Item	Description
○	031	*	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SEE CLASS 740 ALSO)
	031	14	WATER SYSTEMS, CHILLED (PORTABLE)
	031	24	WATER TREATMENT CONTROLS, COOLING TOWER
	031	27	WATER TREATMENT, COOLING TOWER
○	045	*	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE
	045	95	WATER SOFTENERS
○	050	*	ART EQUIPMENT AND SUPPLIES
	050	40	WATERCOLORS
○	052	*	ART OBJECTS
	052	56	WATER COLOR PAINTINGS, ORIGINAL
○	060	*	AUTOMOTIVE AND TRAILER EQUIPMENT AND PARTS
	060	35	WATER PUMPS, AUTOMOTIVE
	060	42	WATER FILTERS, AUTOMOTIVE
○	065	*	AUTOMOTIVE AND TRAILER BODIES, BODY ACCESSORIES, AND PARTS
	065	92	WATER TANK BODIES FOR TRUCKS
○	075	*	AUTOMOTIVE SHOP AND RELATED EQUIPMENT AND SUPPLIES

Action	Illustration
Notepad Saved notes can be retrieved by entering in information in the search area Search by Document and Line-Item Notes, other notepad entries, or by Vendor Notepad This example shows notes on Hawaii Vendor 1 that have been entered by buyers You may enter a new notepad entry and click on **Save Note** in the bottom of the popup window.	

Notepad

Document & Line ItemNbr ○
OR Other Notepad Name: ◉ doebuyer3   Item: [ ] Item blank for all entries
OR Vendor Notepad(BASEC ID): ○

Review Notepad Entries   Create Notepad Entry

Vendor BASEC IDs/Notepads   m   (Start vendor name search at)   Reset

	Name	City	State	System Number
	Mangrove Tropicals Inc.	Kahuku	HI	P00000063111
	MANHARD CONSULTING	Centennial	CO	P00000082631
	MANHATTAN ASSOCIATES	Atlanta	GA	P00000073516
	MANHEIM SERVICES CORP.	Albuquerque	NM	P00000080143
	MANHOLE SYSTEMS, INC.	Richmond	OH	P00000075645
	MANIBUS DEI, INC	Spokane	WA	P00000098292

HePS

Vendor: Mangrove Tropicals Inc. 0 (P00000063111) System Notepad

On: 05/02/2023 09:58:18 AM
MICHAEL MATSUMOTO Wrote:
Specifications reviewedd

Vendor: Mangrove Tropic⇕ Inc. (P00000063111) System Notepad

Close   Print   Find   Save Note   Reset

CC: VENDOR (and save)

Action	Illustration
Review Vendors The vendor database may be searched by: • **Name** • **Commodity Code (a number from the search above)** • **City** • **County** • **State** • **Zip** Click on **Review Vendors** to see the results alphabetically in the bottom frame This example shows vendors for Honolulu County. Click on **View** to see more information on the specific vendor, including name, address, email, awards, commodity codes, notepad, and profile.	

Part 7 – Miscellaneous

This section will describe how to use change your User Profile and Password and find documents you have saved and need to open and work on again.

Action	Illustration
My Profile Profile and Password information is found under Miscellaneous/My Profiles on the Menu bar. Passwords must be at least 7 digits long, contain a minimum of 2 capital letters and 2 numbers. Click on the Update User Info button to apply changes.	

Finding Documents

When creating a solicitation, you may have inadvertently left the process or lost internet connectivity at some point. When that happens, the system will save as much of the document as it can, and it will be found again as a partial requisition under **Solicitation Manager/New**. It is not a IFB yet, only a requisition. Click on **Manage** to open and continue working on this document and turn it into an IFB.

After a solicitation has been created there is an option to File IFB for Later Action. Your solicitation can be found again under **Solicitation Manager/On** Hold. Click **Manage** to open and continue working on this document.
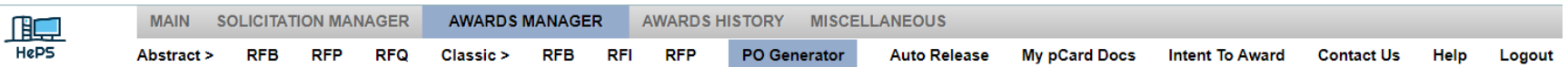
If you leave the **Award Input** page while creating a Notice of Award, your vendor selection is saved under **Awards Manager/PO Generator**. Options are to continue to **Create** the award or **Un-Create** the vendor selection and return it to the Abstracts page.