Create an Event From Agency Submitted Request (DOP Only)
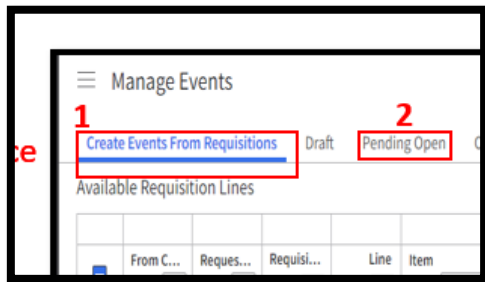
Luma Navigation Helps

A. Click in numerical sequence ie 1, 2 ,3… to complete the page
B. Fill in or click fields that have a ▭ around it or highlighted in yellow
C. If you make changes to a page, ensure you save it before moving on
D. Use the webpage back arrow to go to previous page.
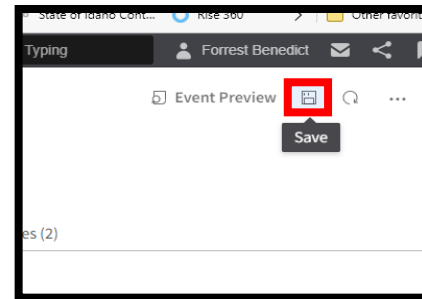E. Refresh webpage if change/item can't be seen

E

Upper Rt Page

A

B

C

Upper Rt Page

D
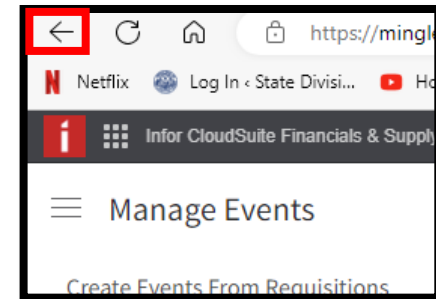
Upper Lt Page
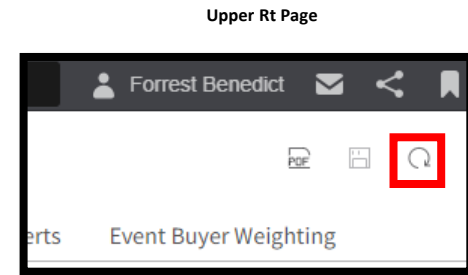
Let's get started

1. Log into Luma
2. https://www.sco.idaho.gov/LivePages/SCOHome.aspx
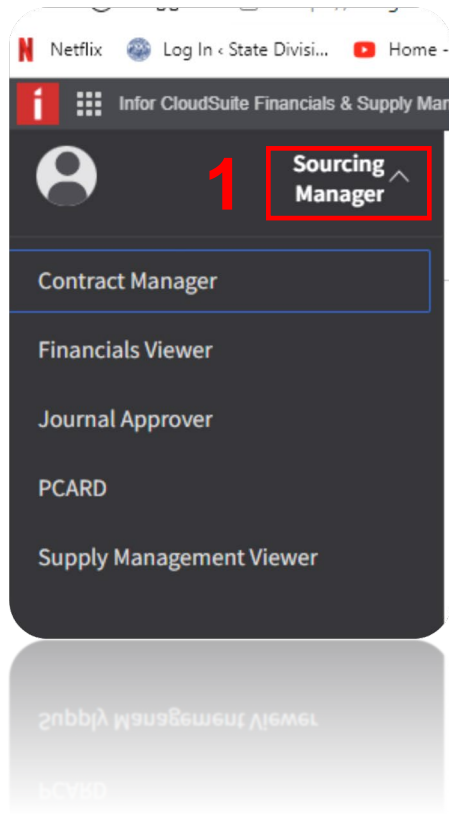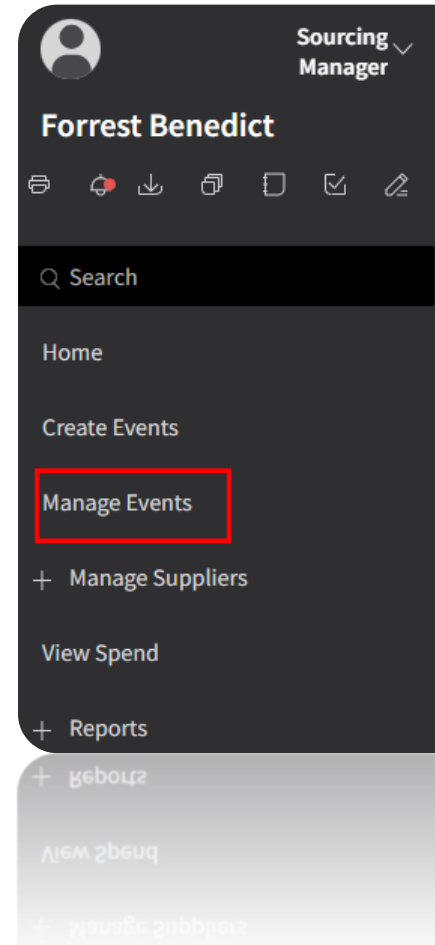
Purchasing Supervisor Step

- Supervisor will filter Agency Request and perform following:
  - Search on "Buyer Code" 70000
  - Change "Buyer" from 70000 to "Buyer" who is completing the Request
  - Change Category to "DOP Managed"
    - *Once Changed to "DOP Managed", Agencies can't view or change Event*

	Ev...	Name	Comp...	Type	Refer...	Buyer	Status	Open Date	First Close Date	Update Date
☐	58	Mando gloves	200	RFQ		70000	Draft			8/24/2023 9:52:32 AM
☐	59	Cows Milk	200	RFQ		70000	Draft			8/24/2023 11:18:41 AM
☐	63	REQUEST FOR QUOTE	200	RFQ		70000	Draft			8/25/2023 9:27:01 AM
☐	36	UI Pamphlets	240	RFQ		70000	Draft			8/1/2023 11:32:34 AM
☐	7	Category 4C Snow and Ice Control Chemicals	290	ITB		70000	Draft	8/16/2023 11:09:28 AM	8/31/2023 11:10:12 AM	7/25/2023 9:31:18 AM
☐	8	Category 1 Snow and Ice Control Chemicals	290	ITB		70000	Draft	9/1/2023 1:04:12 PM	10/2/2023 1:04:19 PM	7/25/2023 9:03:18 AM
☐	10	Micrometeorological Measurement Data processing Services	360	RFP		70000	Draft			7/19/2023 1:56:18 PM
☐	18	Tracy Warren	523	RFP		70000	Draft	8/8/2023 12:52:57 PM	8/25/2023 12:53:15 PM	7/25/2023 2:50:28 PM

Purchasing Supervisor Step

- Supervisor Will:
  - Change "Buyer" from 70000 to "Buyer" completing the Request
  - Change Category to "DOP Managed"
    - Once Changed to "DOP Managed", Agencies can't view or change Event

Creating Event From
Agency Request

Search for Events Assigned to you

Double Click Event to complete

Event Tab
(Top of Page)

- Fill out everything in **Yellow** or ☐

Event Tab
(Bottom of Page)

Dates

☐ Dates Not Required On Event

Open *	Close *	Dispute Close
7/28/2023 3:00:00 PM	9/6/2023 5:00:00 PM	

Q & A Open *	Q & A Close *	Preview
7/28/2023 3:01:00 PM	8/15/2023 5:00:00 PM	

Open Date must be in the future

Response Options

☐ Sealed Bid

Two Step Bidding
> Not Used

☐ Require Bid Bond

☐ Best and Final Offer   ☑ Require Full Quantity On Lines

Lowest Bid Option
> Not Used

☐ Allow Terms To Be Negotiated

☑ Require Response For All Lines   ☐ Display Lowest Bid Amount To Supplier   ☐ Allow Add On Charge   ☐ Allow Alternate Responses

Vendor Item Processing

☐ Require Supplier to Enter Delivery Date When Responding to Lines with PO Output

Line Defaults

Output Type   *Select Output type for this event*

Default Account

Ledger • To Agency • Project • Org Cost Center • Program • Appropriation Unit • Fund • Account • Location • Additional Reporting • Custodial Account • Funding Source • System Interagency

Asset	Asset Template

Response Alerts

Email Reminder

Yellow Alert		Red Alert	
5	Days before event close date	1	Days before event close date

Lines Tab

- Enter Line items according to your Event
- Remember, with Luma all items will need to be added, either here or in the contract
- For multiple line items you can have the Luma team upload them for you

Lines Tab
(Cont.)

Event Lines

Save · Save/New Line · **Save And Close** · Delete · ...

Event — 51-0 - SKE Antenna
Line
Name
Status

1 — **Line** · Weighting · Questions · Comments · Line Source · Attachments

Item

Item Type **a**

Service Code — Not A Service Item

a Special = Commodity
Service = Service

Item Description *

Item Description 2

Name

Long Item Description

Commodity Code

Description

| Normal Text | B | *i* | U | S | A | | | | " | | | 🔗 | | HTML |

Manufacturer Code

Quantity

Per Unit Estimate

Manufacturer Number

Unit of Measure

Response Options
Output Type

☑ Require Response   ☐ Allow Price Breaks   ☐ Allow Alternate Responses   ☑ Require Full Quantity

☐ Allow Add On Charge

Lowest Bid Option

☐ Display Lowest Bid Amount To Supplier

UNSPSC

GTIN

Distribution Type

Distribution Code

10

Questions Tab

- These are the Default number of questions for an RFQ
- Double Click on question to Edit or Add files per your Event

Terms Tab

Meetings Tab

Event 51   Get Suppliers   → Release   ⤴ Event Preview   ▶   💾   ↺   ⋯

Company	Event #	Version	Name *	Status
200	51		SKE Antenna	Draft

Event   Weighting   Lines   Questions (5)   Terms   **Meetings**   Attachments (1)   Contacts   Comments   Notifications   Event Commodity Codes   ▼

1 (highlighting Meetings)

Sourcing Event Meetings

2   🗂   📂   🗑   ☰   ⋯

Meeting	Location Name	Required	Meeting Date
[A] ▼	[A] ▼	▼	= ▼

No Data Available

- • Add Meeting(s) associated with Event

- • Fill out information related to the type of meeting

Sourcing Event Meeting

Save   💾   📑   🗑   ↺   ⋯
Save/New

Meeting *

Event
51-0 - SKE Antenna

• Once Saved, Click the back arrow in Browser

Description *

Meeting Date	Location Name	Meeting URL

Call In Number	Meeting ID	Meeting Password

☐ Required

Meeting Address

Country/Jurisdiction

13

Attachments Tab

Contacts Tab

Event 51

Company	Event #	Version	Name *		Status
200	51		SKE Antenna		Draft

1

Event | Weighting | Lines | Questions (5) | Terms | Meetings | Attachments (1) | **Contacts** | Comments | Notifications | Event Commodity Codes

Sourcing Event Contacts

2

Employee	Name	Contact Type	Phone Number	Email Address	Primary Con

Create Ad Hoc Contact

Create Contact From Employee

No Data Available

Sourcing Event Contact

Event
51-0 - SKE Antenna

Employee

Contact Details

Contact Type   ☐ Primary Contact

☐ Allow Supplier to View in Portal

Country/Jurisdiction

Type

Latitude

Longitude

Altitude

Cancel   **3** **Submit**

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Comments Tab

Event 51

Get Suppliers   Release   Event Preview
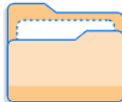
Company	Event #	Version	Name *	Status
200	51		SKE Antenna	Draft

1

Event   Weighting   Lines   Questions (5)   Terms   Meetings   Attachments (1)   Contacts   **Comments**   Notifications   Event Commodity Codes

Sourcing Event Comments

2

Title	Type	CM Comment	Allow Supplier to View in Portal	Attachment
[A]				

After the event is awarded, the comment flows to a purchase order or to the vendor contract output. Each comment type does not flow to each output type. Comments that are displayed on an output depend on attachments to event headers or lines and the selected output type. Comments from Requisitions can be viewed using Drill Around.

Sourcing Event Comment

Save   Save/New

Event #	Event Name
51-0	SKE Antenna
Buyer	Buyer Name
266840	BENEDICT II, FORREST T.

•   Once Saved, Click the back arrow in Browser

Title *

Type

Print On Internal Documents
Print On Purchase Order
Print On Purchase Order Trailer
Print On Delivery Ticket
Print On Receiving Document
Invoice Comments
Display Only
Event

A ▼ | HTML

Attachment   **Optional**

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Add Event Commodity Codes Tab

Add Suppliers to Event

Get Suppliers For Event Commodity Codes

☐ Only Retrieve Suppliers With Approved Commodity Codes

☐ Only Retrieve Validated Suppliers

2

| Cancel | **Submit** |

- Leave Options Blank
- Leave all options blank and click Submit
  - Suppliers will be added per commodity Code(s) used for the Event

☰ Event 592

Get Suppliers →] Release Event Preview ◁ ▷ 💾 ↻ ⋯

1

| Company | Event # | Version | Name * | Status |
| 260 | 592 | | CleaningServices_BJD | Draft |

Event   Weighting   Lines *   Questions (5)   Terms *   Meetings (1)   Attachments (2)   Contacts (1)   Comments   Notifications   **Event Commodity Codes (1)**

Commodity Codes   🗑 ≡ ≡ ⋯

Commodity Code	Description
[A]▼ ⌕	[A]▼
76-11-15-01	Building cleaning services

|◁ ◁ ▷ ▷| 20 ▼

- **Added suppliers show up here**
  - It may take several minutes for suppliers to show up
  - *You can still release the event, as suppliers will continue to be added after being released*

Manually Add Additional Suppliers to Event
Optional

Submit Request

- **Once you have completed the template:**
  - *Click on Release (1)*
  - *Event will route for approval*