Create an Event From Requisition *(Agency)*

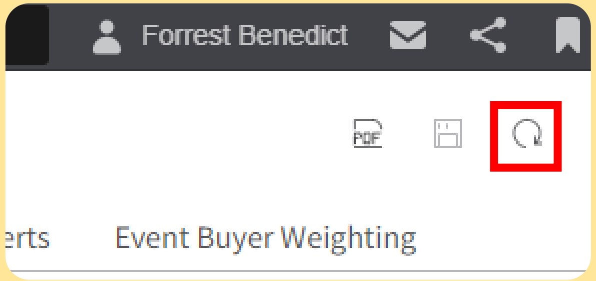
(Every Event Needs a Requisition before being Created)

Creating a Requisition Found on Page 26

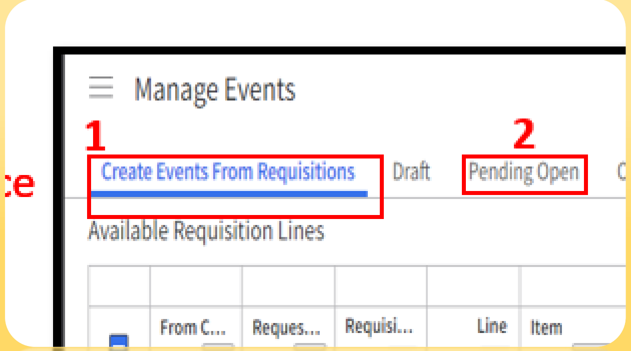
Luma Navigation Helps

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

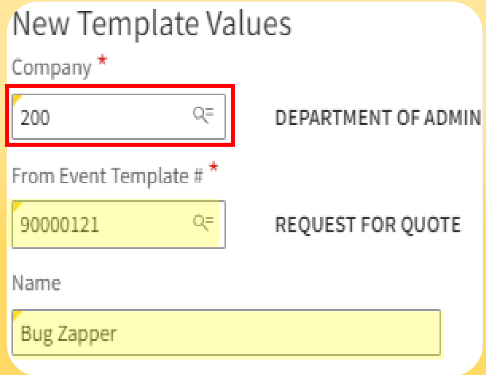
E


Forrest Benedict
PDF
erts
Event Buyer Weighting

A


Manage Events
1
2
Create Events From Requisitions
Draft
Pending Open
Available Requisition Lines
From C...
Reques...
Requisi...
Line
Item

B

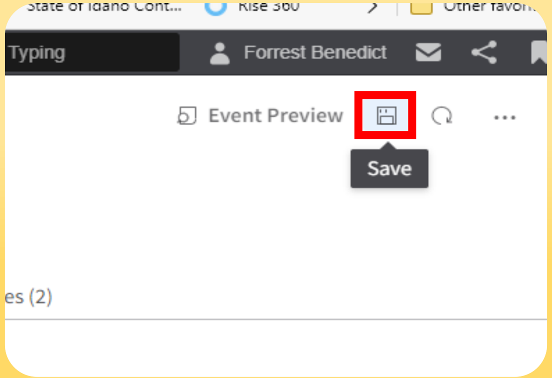

New Template Values

Company *
200
DEPARTMENT OF ADMIN

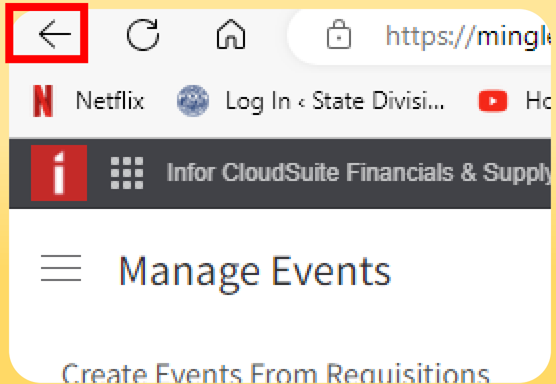
From Event Template # *
90000121
REQUEST FOR QUOTE

Name
Bug Zapper

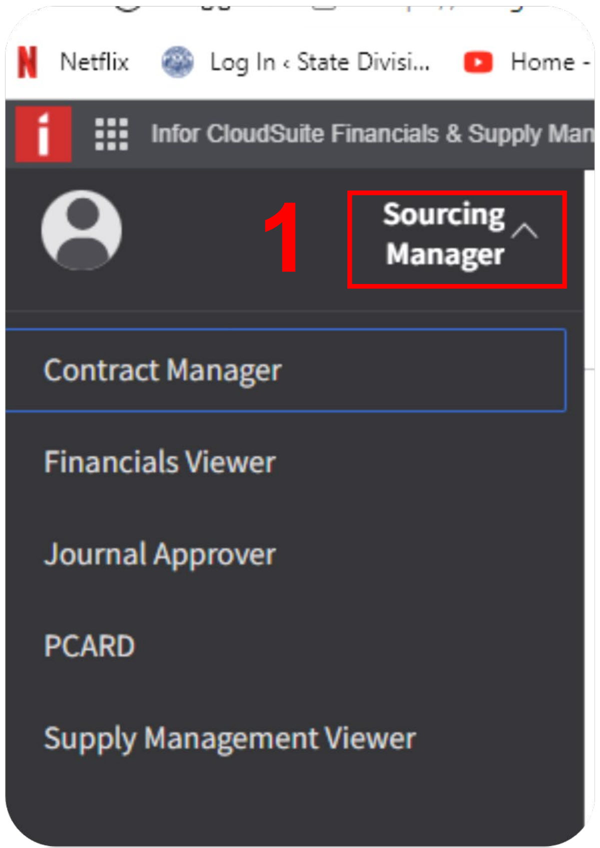
C

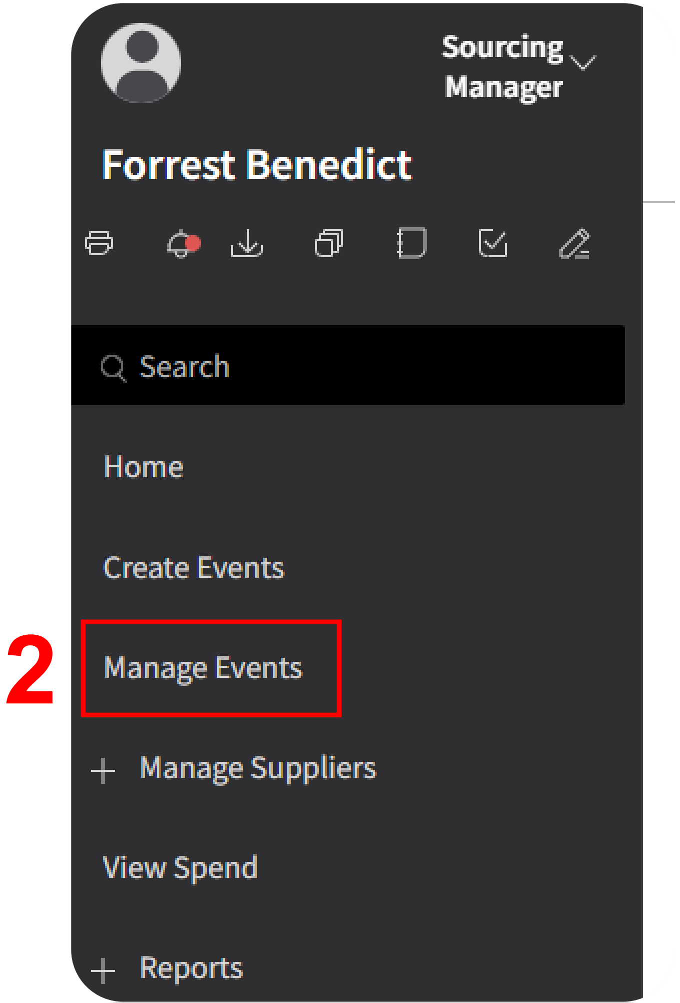

State of Idaho Cont...
Rise 360
Other favor...
Typing
Forrest Benedict
Event Preview
Save
es (2)

D


https://mingle
Netflix
Log In ‹ State Divisi...
Infor CloudSuite Financials & Supply
Manage Events
Create Events From Requisitions

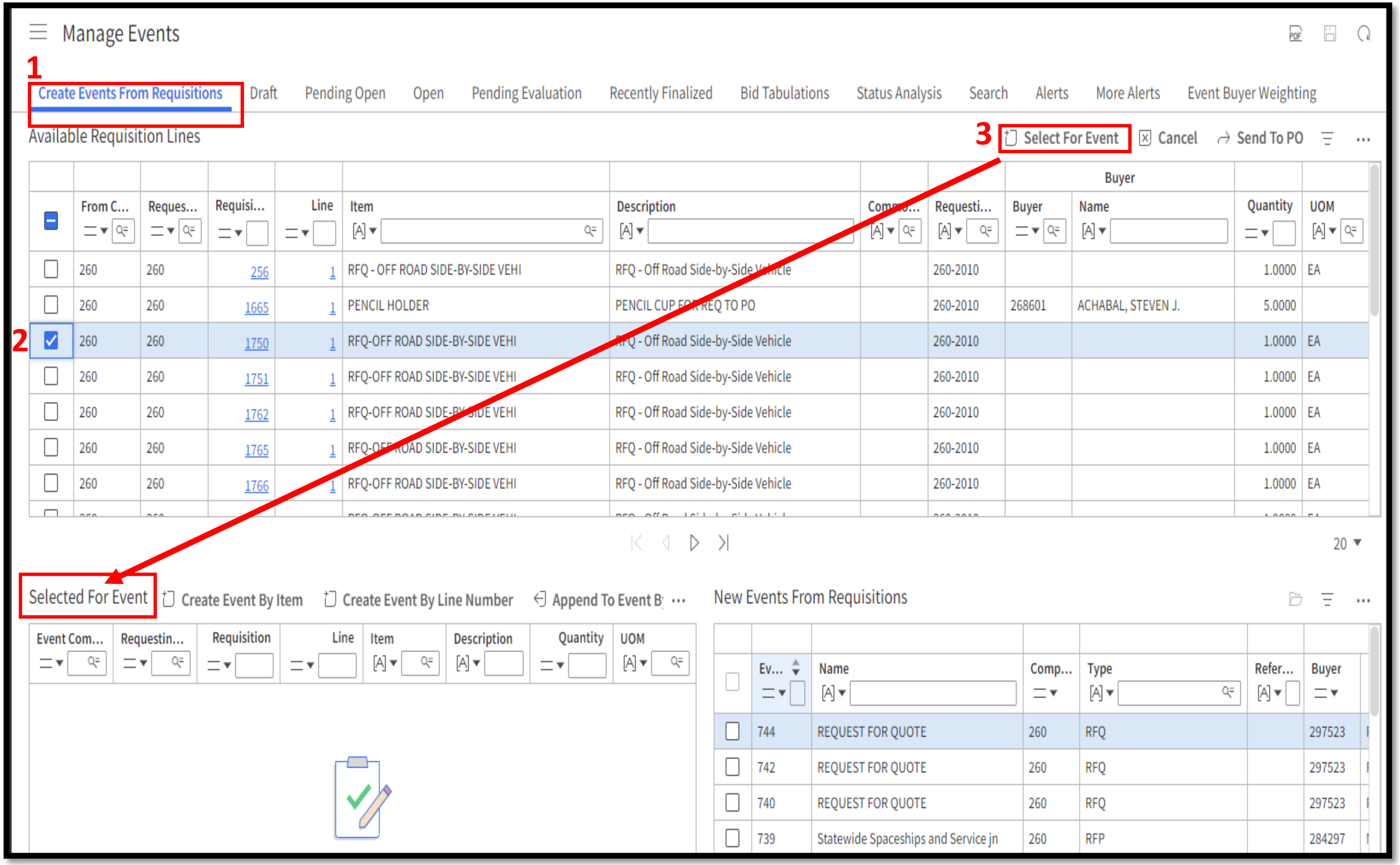
Let's get started


Netflix
Log In ‹ State Divisi...
Home -
Infor CloudSuite Financials & Supply Man
1
Sourcing Manager
Contract Manager
Financials Viewer
Journal Approver
PCARD
Supply Management Viewer


Sourcing Manager
Forrest Benedict
Search
Home
Create Events
2
Manage Events
Manage Suppliers
View Spend
Reports

1 Select
2 Select your assigned line item / Requisition

3 Click Select for Event
- Event will show up under “Select For Event” section


Manage Events
1
Create Events From Requisitions
Draft
Pending Open
Open
Pending Evaluation
Recently Finalized
Bid Tabulations
Status Analysis
Search
Alerts
More Alerts
Event Buyer Weighting
3
Select For Event
Cancel
Send To PO
2
20
Selected For Event
Create Event By Item
Create Event By Line Number
Append To Event B
New Events From Requisitions

Available Requisition Lines

									Buyer			
	From C...	Reques...	Requisi...	Line	Item	Description	Commo...	Requesti...	Buyer	Name	Quantity	UOM
☐	260	260	256	1	RFQ - OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1665	1	PENCIL HOLDER	PENCIL CUP FOR REQ TO PO		260-2010	268601	ACHABAL, STEVEN J.	5.0000	
☑	260	260	1750	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1751	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1762	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1765	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1766	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA

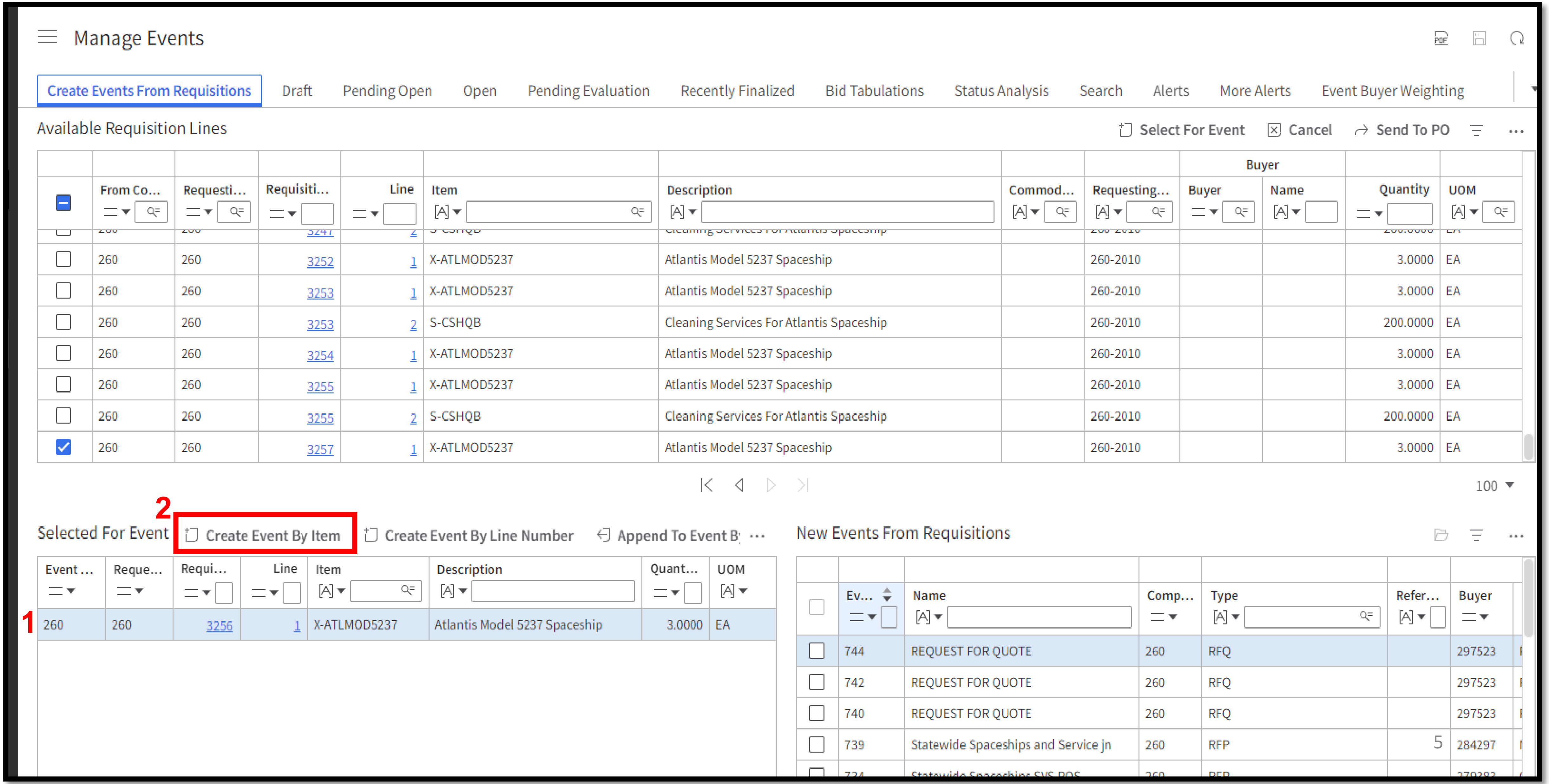
Selected For Event

Event Com...	Requestin...	Requisition	Line	Item	Description	Quantity	UOM

New Events From Requisitions

	Ev...	Name	Comp...	Type	Refer...	Buyer
☐	744	REQUEST FOR QUOTE	260	RFQ		297523
☐	742	REQUEST FOR QUOTE	260	RFQ		297523
☐	740	REQUEST FOR QUOTE	260	RFQ		297523
☐	739	Statewide Spaceships and Service jn	260	RFP		284297

1 Highlight desired item
2 Click Create Event By Item



Manage Events
Create Events From Requisitions
Draft
Pending Open
Open
Pending Evaluation
Recently Finalized
Bid Tabulations
Status Analysis
Search
Alerts
More Alerts
Event Buyer Weighting
Select For Event
Cancel
Send To PO
100

Available Requisition Lines

	From Co...	Requesti...	Requisiti...	Line	Item	Description	Commod...	Requesting...	Buyer		Quantity	UOM
									Buyer	Name		
☐	260	260	3252	1	X-ATLMOD5237	Atlantis Model 5237 Spaceship		260-2010			3.0000	EA
☐	260	260	3253	1	X-ATLMOD5237	Atlantis Model 5237 Spaceship		260-2010			3.0000	EA
☐	260	260	3253	2	S-CSHQB	Cleaning Services For Atlantis Spaceship		260-2010			200.0000	EA
☐	260	260	3254	1	X-ATLMOD5237	Atlantis Model 5237 Spaceship		260-2010			3.0000	EA
☐	260	260	3255	1	X-ATLMOD5237	Atlantis Model 5237 Spaceship		260-2010			3.0000	EA
☐	260	260	3255	2	S-CSHQB	Cleaning Services For Atlantis Spaceship		260-2010			200.0000	EA
☑	260	260	3257	1	X-ATLMOD5237	Atlantis Model 5237 Spaceship		260-2010			3.0000	EA

Selected For Event

2

Create Event By Item

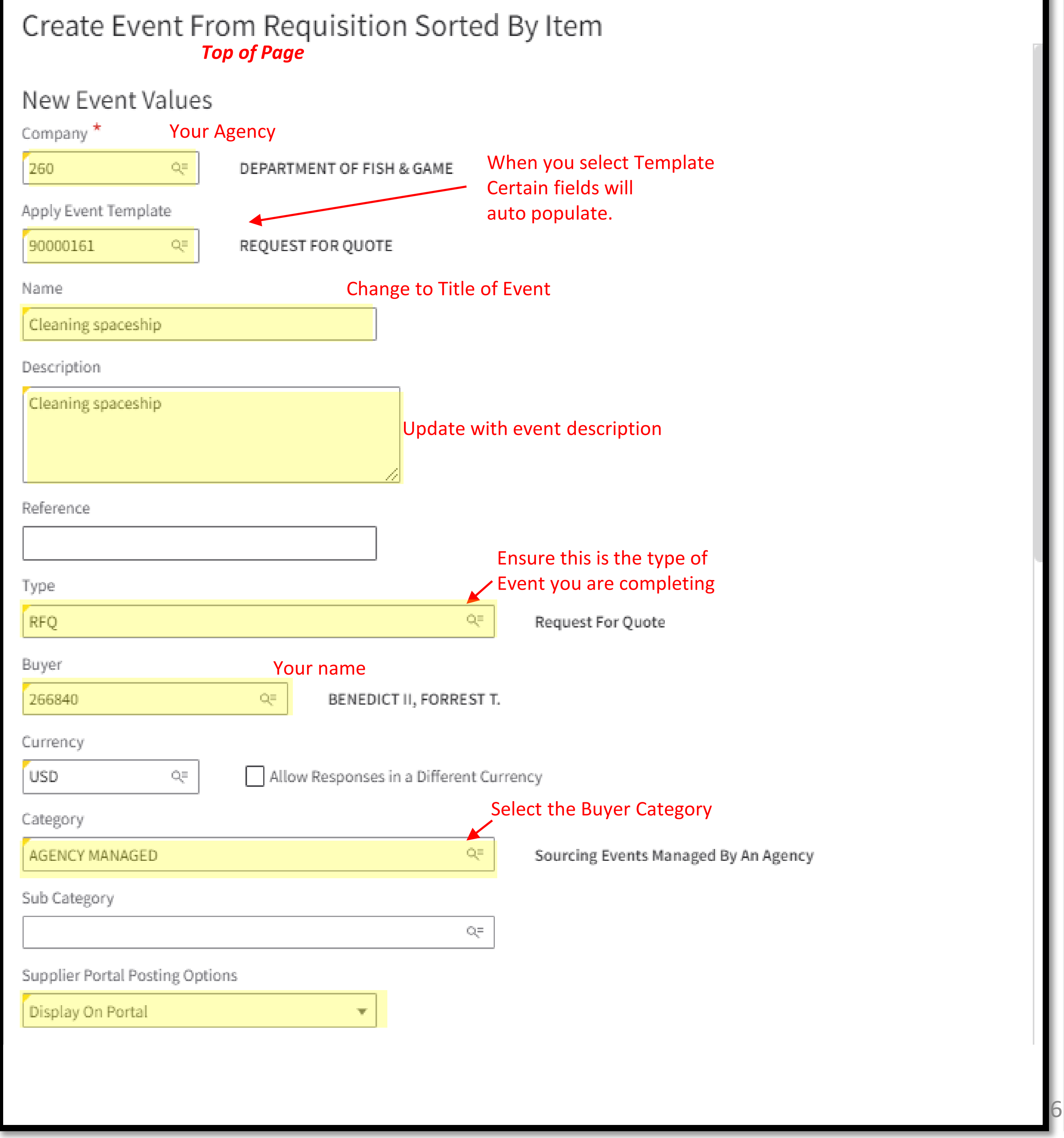
Create Event By Line Number
Append To Event B

Event ...	Reque...	Requi...	Line	Item	Description	Quant...	UOM
260	260	3256	1	X-ATLMOD5237	Atlantis Model 5237 Spaceship	3.0000	EA

1

New Events From Requisitions

	Ev...	Name	Comp...	Type	Refer...	Buyer
☐	744	REQUEST FOR QUOTE	260	RFQ		297523
☐	742	REQUEST FOR QUOTE	260	RFQ		297523
☐	740	REQUEST FOR QUOTE	260	RFQ		297523
☐	739	Statewide Spaceships and Service jn	260	RFP		284297



Create Event From Requisition Sorted By Item

Top of Page

New Event Values

Company * — 260 — DEPARTMENT OF FISH & GAME — Your Agency

Apply Event Template — 90000161 — REQUEST FOR QUOTE — When you select Template Certain fields will auto populate.

Name — Cleaning spaceship — Change to Title of Event

Description — Cleaning spaceship — Update with event description

Reference —

Type — RFQ — Request For Quote — Ensure this is the type of Event you are completing

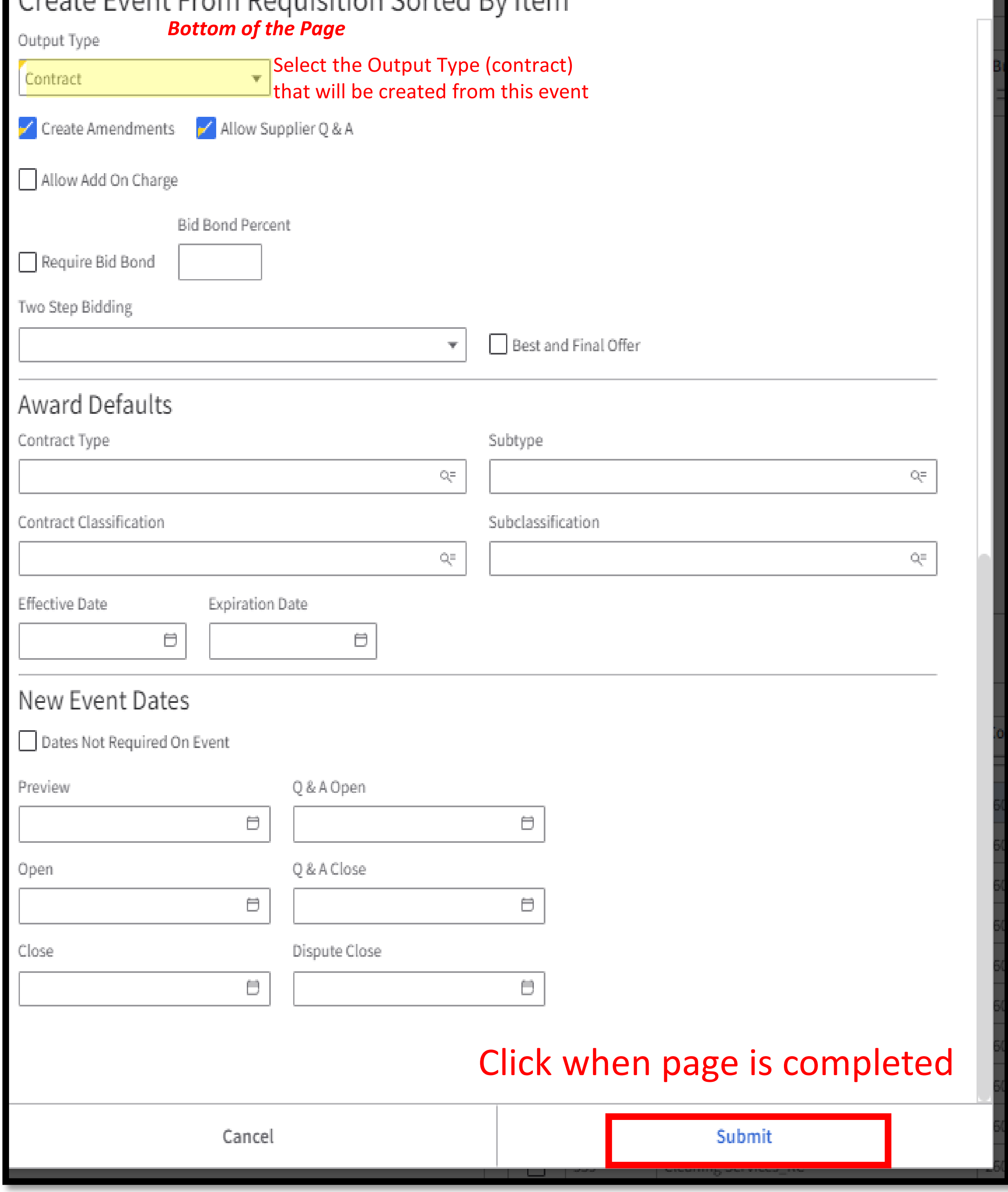
Buyer — 266840 — BENEDICT II, FORREST T. — Your name

Currency — USD — ☐ Allow Responses in a Different Currency

Category — AGENCY MANAGED — Sourcing Events Managed By An Agency — Select the Buyer Category

Sub Category —

Supplier Portal Posting Options — Display On Portal



Create Event From Requisition Sorted By Item

Bottom of the Page

Output Type — Contract — Select the Output Type (contract) that will be created from this event

☑ Create Amendments ☑ Allow Supplier Q & A

☐ Allow Add On Charge

☐ Require Bid Bond — Bid Bond Percent —

Two Step Bidding — ☐ Best and Final Offer

Award Defaults

Contract Type — Subtype —

Contract Classification — Subclassification —

Effective Date — Expiration Date —

New Event Dates

☐ Dates Not Required On Event

Preview — Q & A Open —

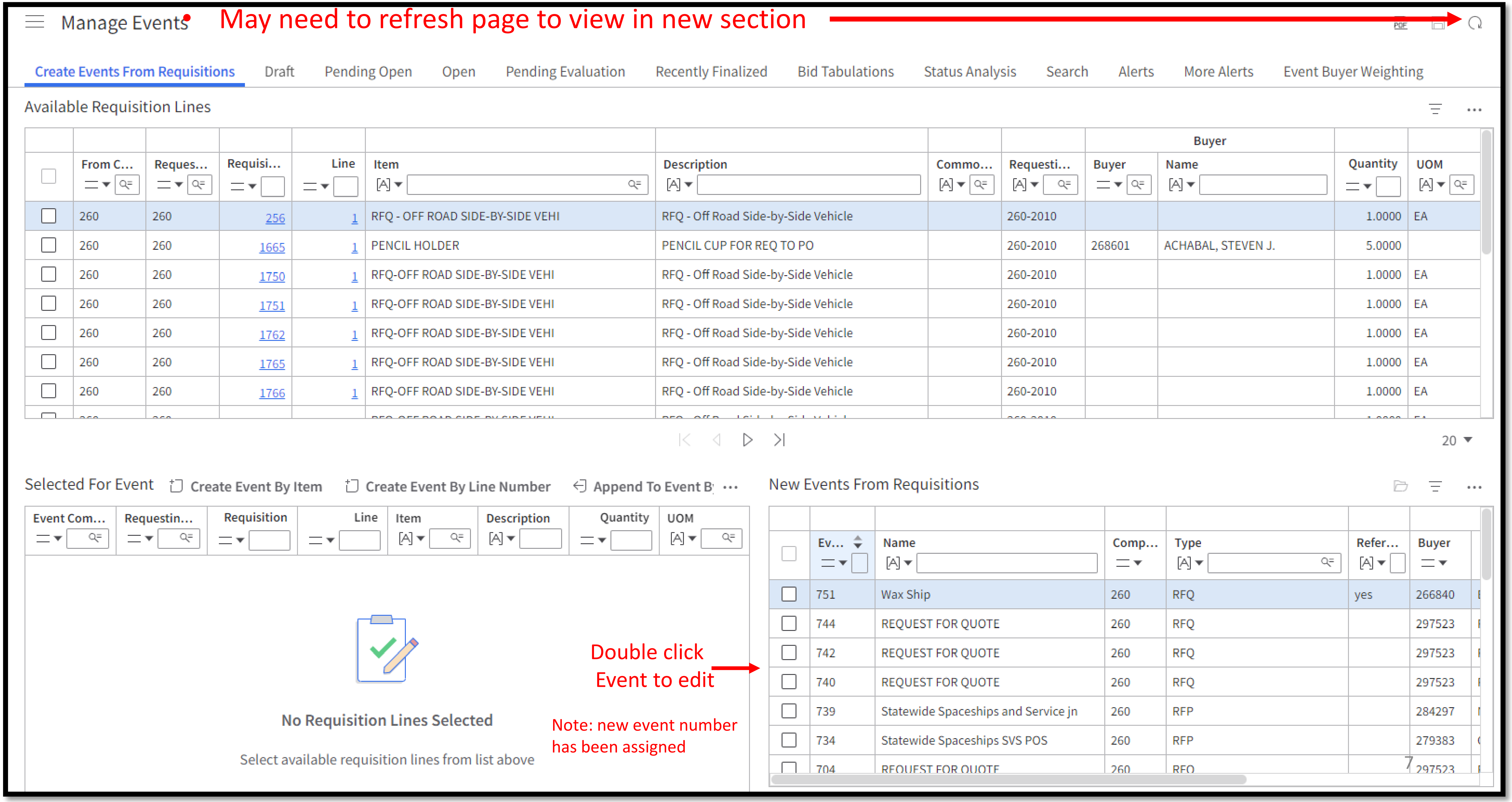
Open — Q & A Close —

Close — Dispute Close —

Click when page is completed

After you click “Submit” from the previous page

- Event will show up under “New Events From Requisitions”
- May need to refresh page to view in new section



Manage Events

Create Events From Requisitions | Draft | Pending Open | Open | Pending Evaluation | Recently Finalized | Bid Tabulations | Status Analysis | Search | Alerts | More Alerts | Event Buyer Weighting

Available Requisition Lines

									Buyer		
☐	From C...	Reques...	Requisi...	Line	Item	Description	Commo...	Requesti...	Buyer	Name	Quantity	UOM
☐	260	260	256	1	RFQ - OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1665	1	PENCIL HOLDER	PENCIL CUP FOR REQ TO PO		260-2010	268601	ACHABAL, STEVEN J.	5.0000	
☐	260	260	1750	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1751	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1762	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1765	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA
☐	260	260	1766	1	RFQ-OFF ROAD SIDE-BY-SIDE VEHI	RFQ - Off Road Side-by-Side Vehicle		260-2010			1.0000	EA

20

Selected For Event | Create Event By Item | Create Event By Line Number | Append To Event B

Event Com...	Requestin...	Requisition	Line	Item	Description	Quantity	UOM

No Requisition Lines Selected

Select available requisition lines from list above

Double click Event to edit

Note: new event number has been assigned

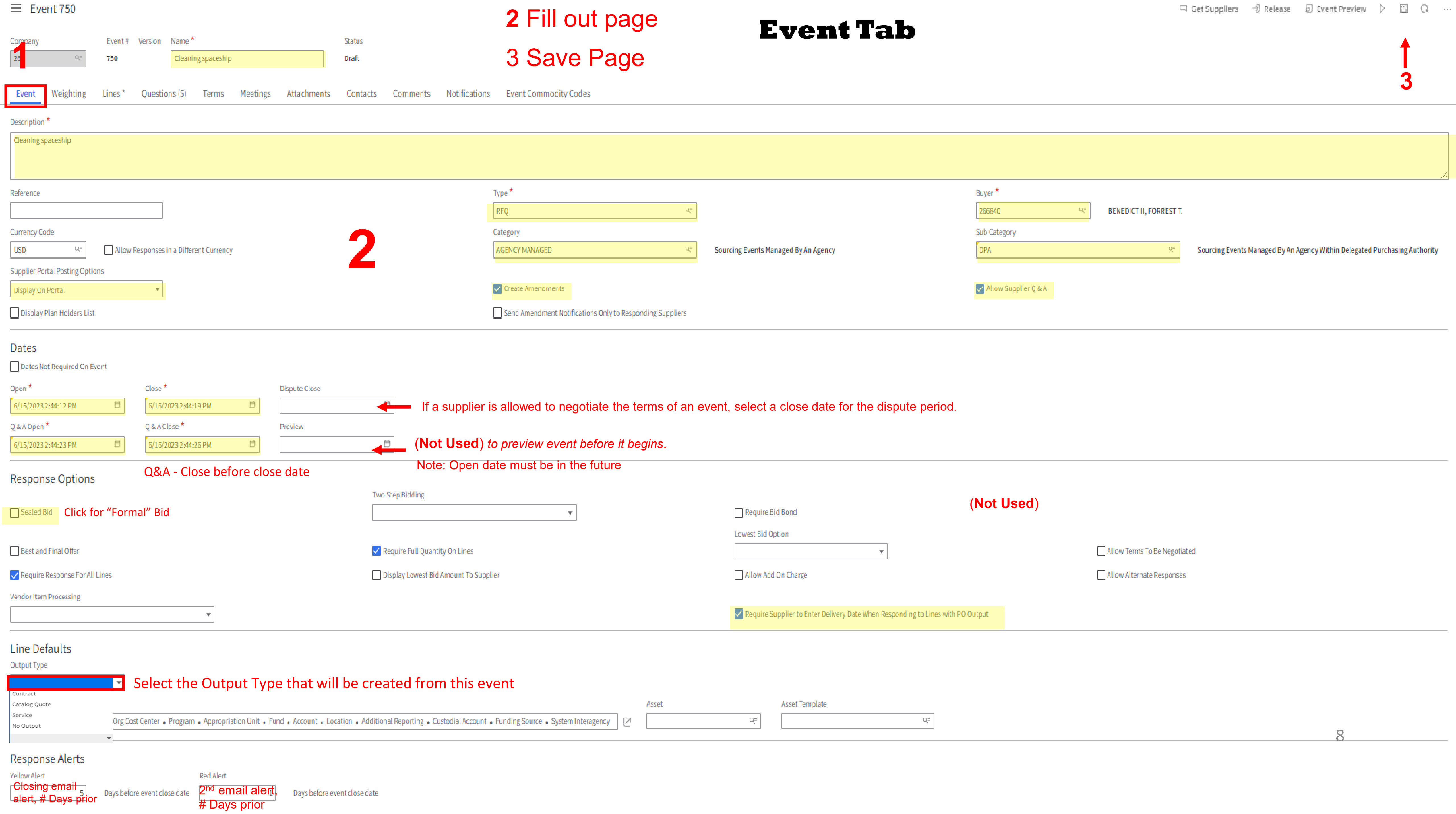
New Events From Requisitions

☐	Ev...	Name	Comp...	Type	Refer...	Buyer
☐	751	Wax Ship	260	RFQ	yes	266840
☐	744	REQUEST FOR QUOTE	260	RFQ		297523
☐	742	REQUEST FOR QUOTE	260	RFQ		297523
☐	740	REQUEST FOR QUOTE	260	RFQ		297523
☐	739	Statewide Spaceships and Service jn	260	RFP		284297
☐	734	Statewide Spaceships SVS POS	260	RFP		279383
☐	704	REQUEST FOR QUOTE	260	RFQ		297523

Event Tab

2 Fill out page

3 Save Page



Event 750

Company: 26

Event #: 750

Version:

Name *: Cleaning spaceship

Status: Draft

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

Description *: Cleaning spaceship

Reference:

Type *: RFQ

Buyer *: 266840 BENEDICT II, FORREST T.

Currency Code: USD

☐ Allow Responses in a Different Currency

Category: AGENCY MANAGED Sourcing Events Managed By An Agency

Sub Category: DPA Sourcing Events Managed By An Agency Within Delegated Purchasing Authority

Supplier Portal Posting Options: Display On Portal

☑ Create Amendments

☑ Allow Supplier Q & A

☐ Display Plan Holders List

☐ Send Amendment Notifications Only to Responding Suppliers

Dates

☐ Dates Not Required On Event

Open *: 6/15/2023 2:44:12 PM

Close *: 6/16/2023 2:44:19 PM

Dispute Close:

If a supplier is allowed to negotiate the terms of an event, select a close date for the dispute period.

Q & A Open *: 6/15/2023 2:44:23 PM

Q & A Close *: 6/16/2023 2:44:26 PM

Preview:

(**Not Used**) *to preview event before it begins.*

Note: Open date must be in the future

Q&A - Close before close date

Response Options

☐ Sealed Bid Click for “Formal” Bid

Two Step Bidding:

☐ Require Bid Bond

(**Not Used**)

Lowest Bid Option:

☐ Best and Final Offer

☑ Require Full Quantity On Lines

☐ 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 the Output Type that will be created from this event

- Contract
- Catalog Quote
- Service
- No Output

Org Cost Center . Program . Appropriation Unit . Fund . Account . Location . Additional Reporting . Custodial Account . Funding Source . System Interagency

Asset:

Asset Template:

Response Alerts

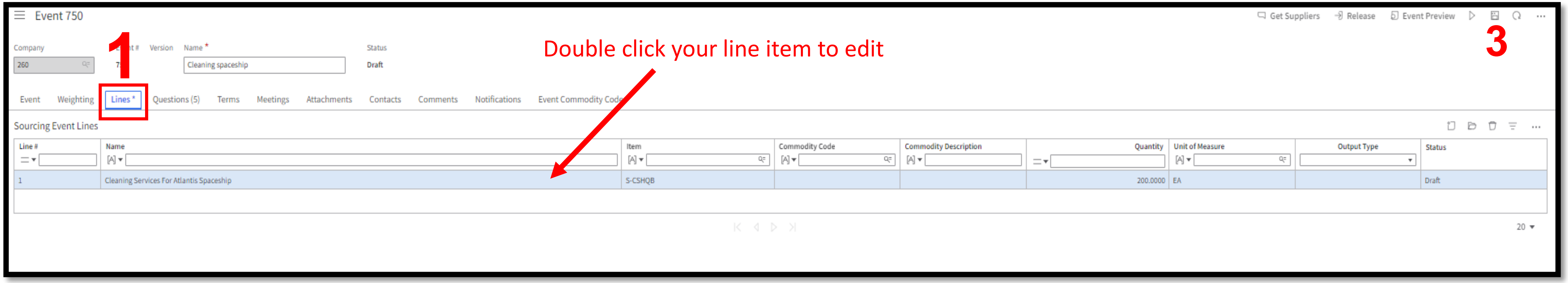
Yellow Alert: 5 Days before event close date

Closing email alert, # Days prior

Red Alert: 1 Days before event close date

2nd email alert, # Days prior

Line Tab


Event 750
Get Suppliers
Release
Event Preview
1
3
Event
Weighting
Lines *
Questions (5)
Terms
Meetings
Attachments
Contacts
Comments
Notifications
Event Commodity Code

Company: 260

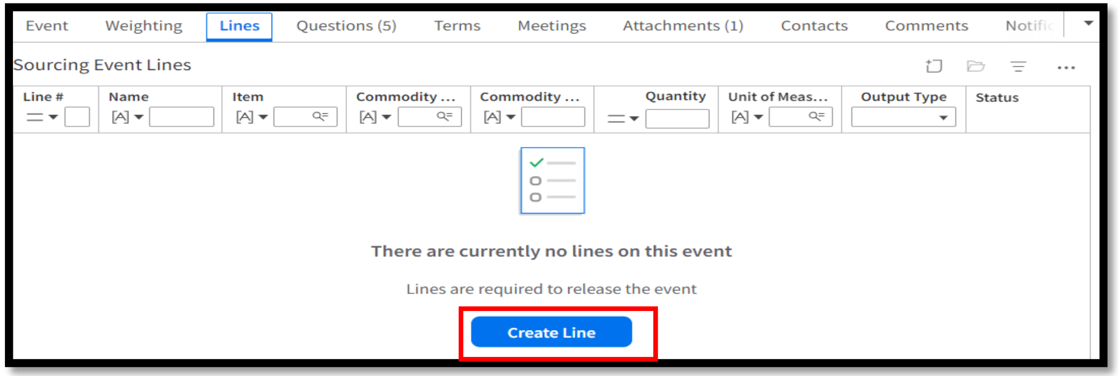
Name *: Cleaning spaceship

Status: Draft

Double click your line item to edit

Sourcing Event Lines

Line #	Name	Item	Commodity Code	Commodity Description	Quantity	Unit of Measure	Output Type	Status
1	Cleaning Services For Atlantis Spaceship	S-CSHQB			200.0000	EA		Draft

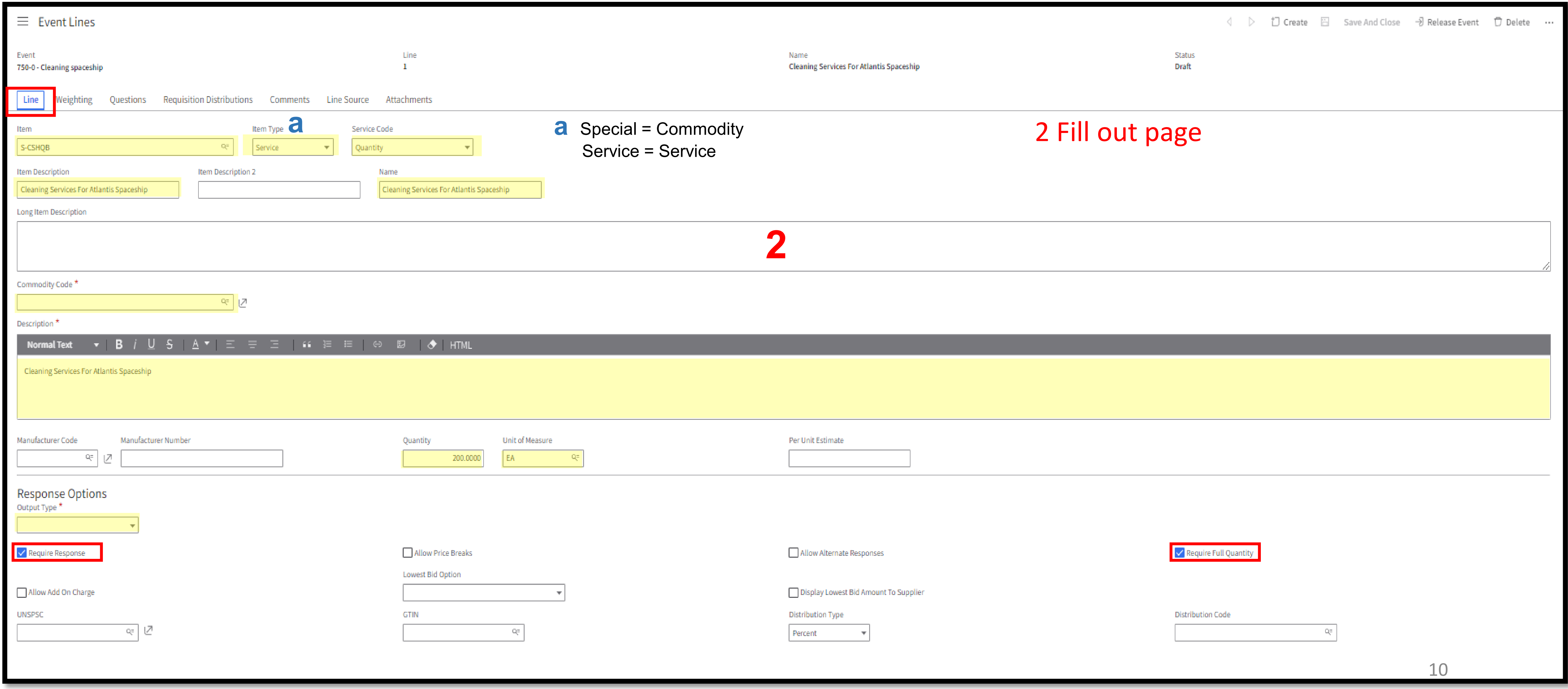

Event
Weighting
Lines
Questions (5)
Terms
Meetings
Attachments (1)
Contacts
Comments
Notific
Sourcing Event Lines
Line #
Name
Item
Commodity ...
Commodity ...
Quantity
Unit of Meas...
Output Type
Status
Create Line

There are currently no lines on this event

Lines are required to release the event

- If no line Item
    - Click “Create Line” to add a line item

Line Tab
(Cont.)



Event Lines
Create
Save And Close
Release Event
Delete

Event: 750-0 - Cleaning spaceship
Line: 1
Name: Cleaning Services For Atlantis Spaceship
Status: Draft

Line
Weighting
Questions
Requisition Distributions
Comments
Line Source
Attachments

Item: S-CSHQB
Item Type **a**: Service
Service Code: Quantity

a Special = Commodity
Service = Service

2 Fill out page

Item Description: Cleaning Services For Atlantis Spaceship
Item Description 2:
Name: Cleaning Services For Atlantis Spaceship
Long Item Description:

2

Commodity Code *:
Description *: Cleaning Services For Atlantis Spaceship

Normal Text
B
I
U
S
A
HTML

Manufacturer Code:
Manufacturer Number:
Quantity: 200.0000
Unit of Measure: EA
Per Unit Estimate:

Response Options
Output Type *:

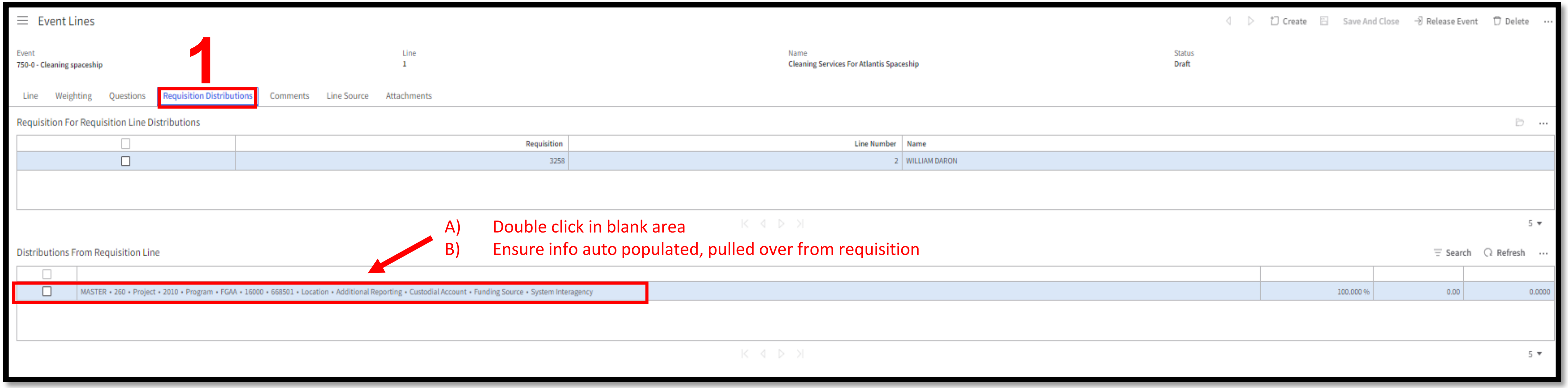
☑ Require Response
☐ Allow Price Breaks
☐ Allow Alternate Responses
☑ Require Full Quantity

Lowest Bid Option:
☐ Allow Add On Charge
☐ Display Lowest Bid Amount To Supplier

UNSPSC:
GTIN:
Distribution Type: Percent
Distribution Code:

Line Tab

(Cont.)


Event Lines
Create
Save And Close
Release Event
Delete
Line
Weighting
Questions
Requisition Distributions
Comments
Line Source
Attachments
Search
Refresh
5

1

Event
750-0 - Cleaning spaceship

Line
1

Name
Cleaning Services For Attantis Spaceship

Status
Draft

Requisition For Requisition Line Distributions

☐	Requisition	Line Number	Name
☐	3258	2	WILLIAM DARON

A) Double click in blank area

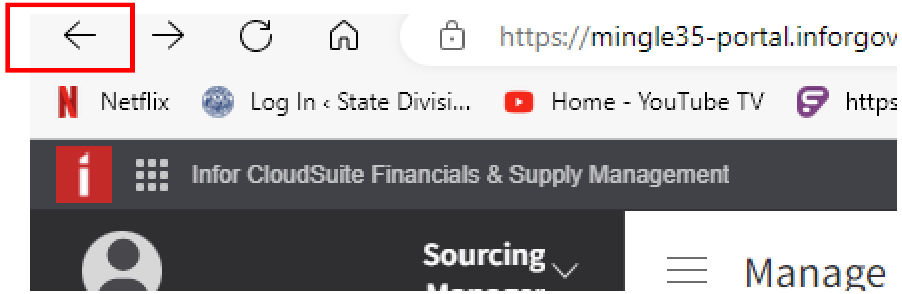
B) Ensure info auto populated, pulled over from requisition

Distributions From Requisition Line

☐				
☐	MASTER • 260 • Project • 2010 • Program • FGAA • 16000 • 668501 • Location • Additional Reporting • Custodial Account • Funding Source • System Interagency	100.000 %	0.00	0.0000

2 Click page back arrow until you see the Event Tab

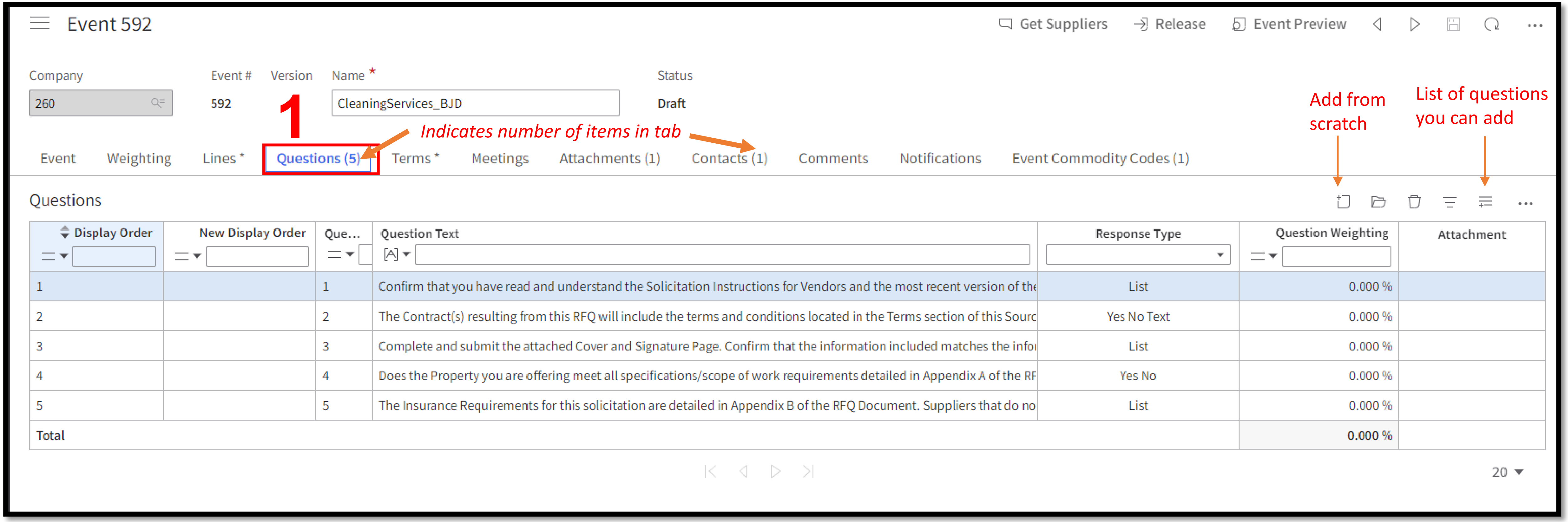
2


https://mingle35-portal.inforgov
Netflix
Log In ‹ State Divisi...
Home - YouTube TV
https
Infor CloudSuite Financials & Supply Management
Sourcing
Manage

Questions Tab

These are the Default # of Questions for an RFQ

To Update/add files to the questions per your event
- Double click line item to edit


Event 592
Get Suppliers
Release
Event Preview
Event
Weighting
Lines *
Questions (5)
Terms *
Meetings
Attachments (1)
Contacts (1)
Comments
Notifications
Event Commodity Codes (1)
20

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

1

Indicates number of items in tab

Add from scratch

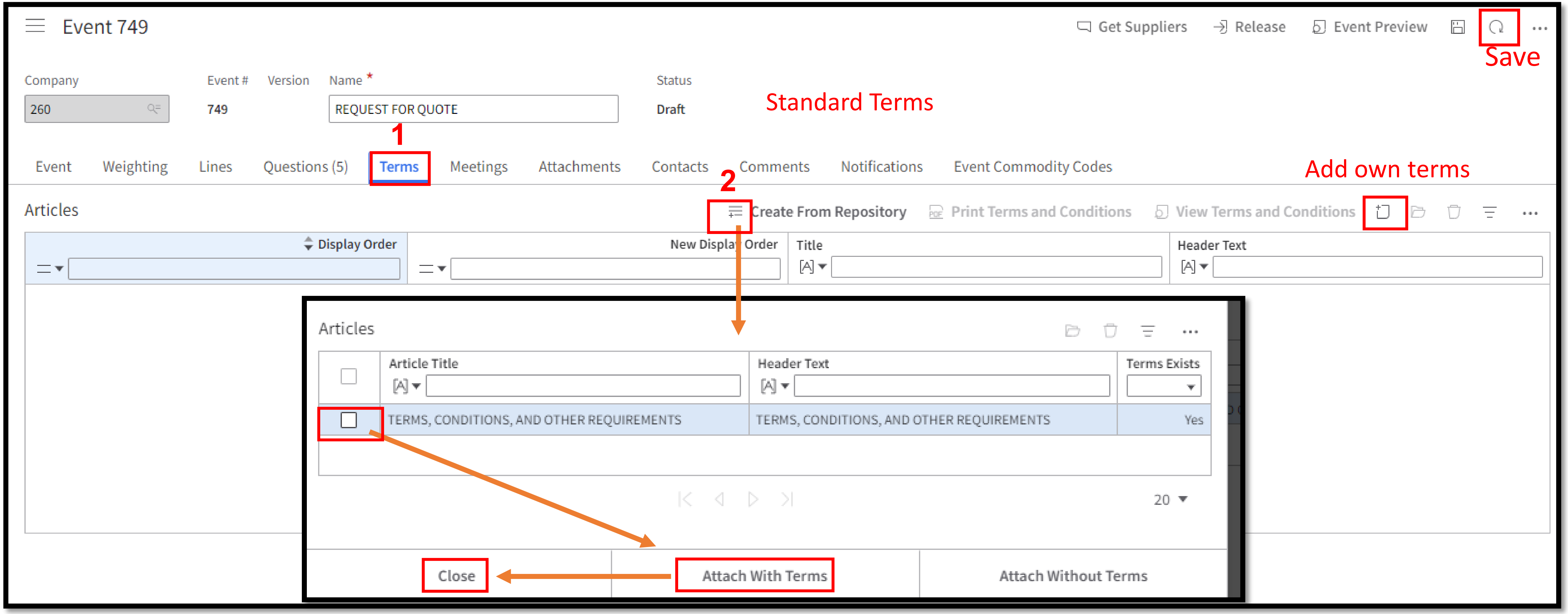
List of questions you can add

Questions

Display Order	New Display Order	Que...	Question Text	Response Type	Question Weighting	Attachment
1		1	Confirm that you have read and understand the Solicitation Instructions for Vendors and the most recent version of the	List	0.000 %	
2		2	The Contract(s) resulting from this RFQ will include the terms and conditions located in the Terms section of this Sourc	Yes No Text	0.000 %	
3		3	Complete and submit the attached Cover and Signature Page. Confirm that the information included matches the infor	List	0.000 %	
4		4	Does the Property you are offering meet all specifications/scope of work requirements detailed in Appendix A of the RF	Yes No	0.000 %	
5		5	The Insurance Requirements for this solicitation are detailed in Appendix B of the RFQ Document. Suppliers that do no	List	0.000 %	
Total					**0.000 %**	

Terms Tab

Add Terms & Conditions to Event



Event 749
Get Suppliers
Release
Event Preview
Event
Weighting
Lines
Questions (5)
Terms
Meetings
Attachments
Contacts
Comments
Notifications
Event Commodity Codes
Articles
Create From Repository
Print Terms and Conditions
View Terms and Conditions
Display Order
New Display Order
Title
Header Text
Articles
20
Close
Attach With Terms
Attach Without Terms

3

Save

Standard Terms

1

2

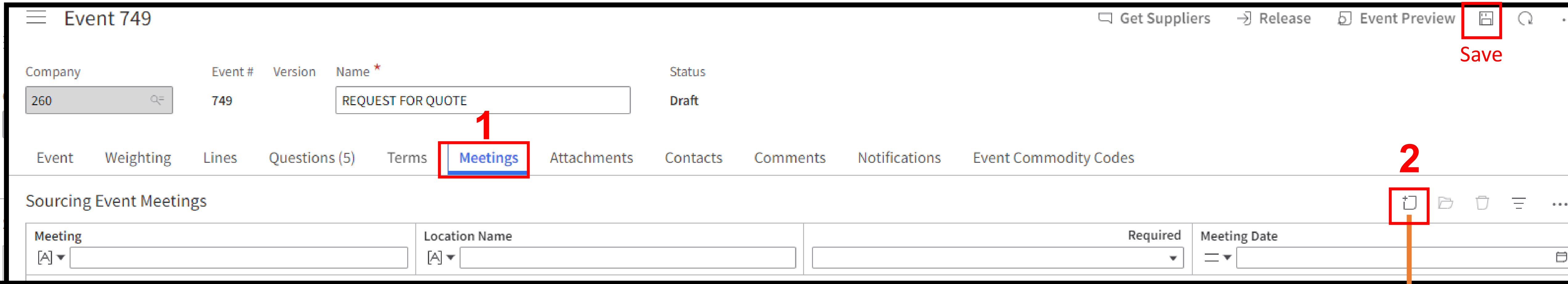
Add own terms

Company: 260
Event #: 749
Version:
Name *: REQUEST FOR QUOTE
Status: Draft

☐	Article Title	Header Text	Terms Exists
☐	TERMS, CONDITIONS, AND OTHER REQUIREMENTS	TERMS, CONDITIONS, AND OTHER REQUIREMENTS	Yes

Meetings Tab

Add Meetings For Event



Event 749

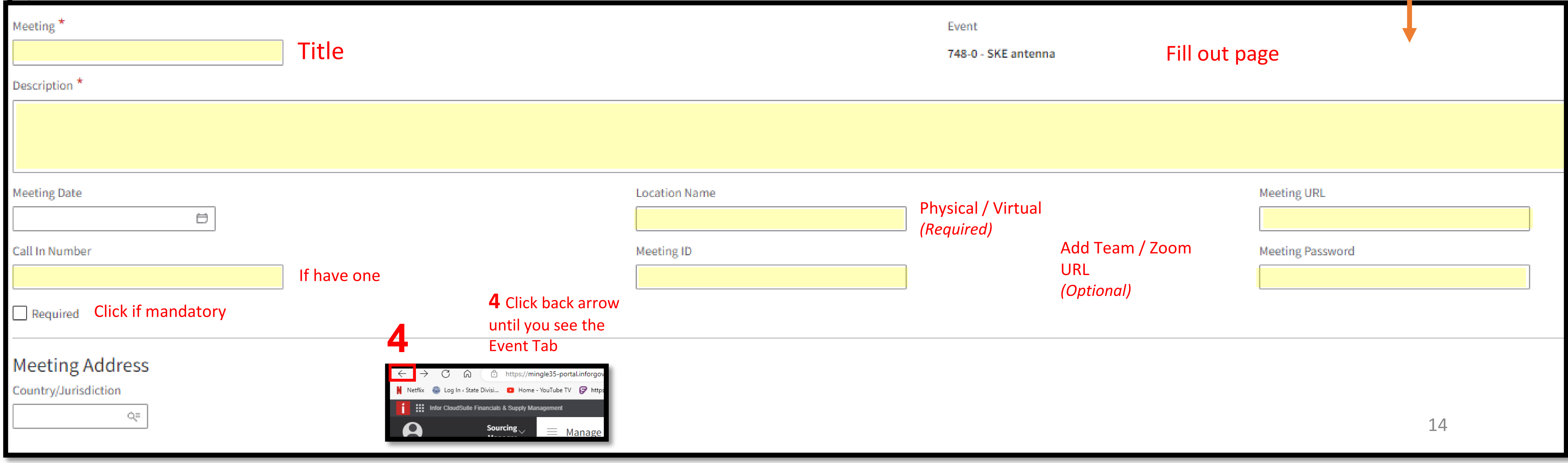
Get Suppliers
Release
Event Preview
3
Save

Company	Event #	Version	Name *	Status
260	749		REQUEST FOR QUOTE	Draft

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

Sourcing Event Meetings

Meeting	Location Name	Required	Meeting Date



Meeting * — Title

Event: 748-0 - SKE antenna

Fill out page

Description *

Meeting Date

Location Name — Physical / Virtual *(Required)*

Meeting URL

Call In Number — If have one

Meeting ID

Add Team / Zoom URL *(Optional)*

Meeting Password

☐ Required — Click if mandatory

4 Click back arrow until you see the Event Tab

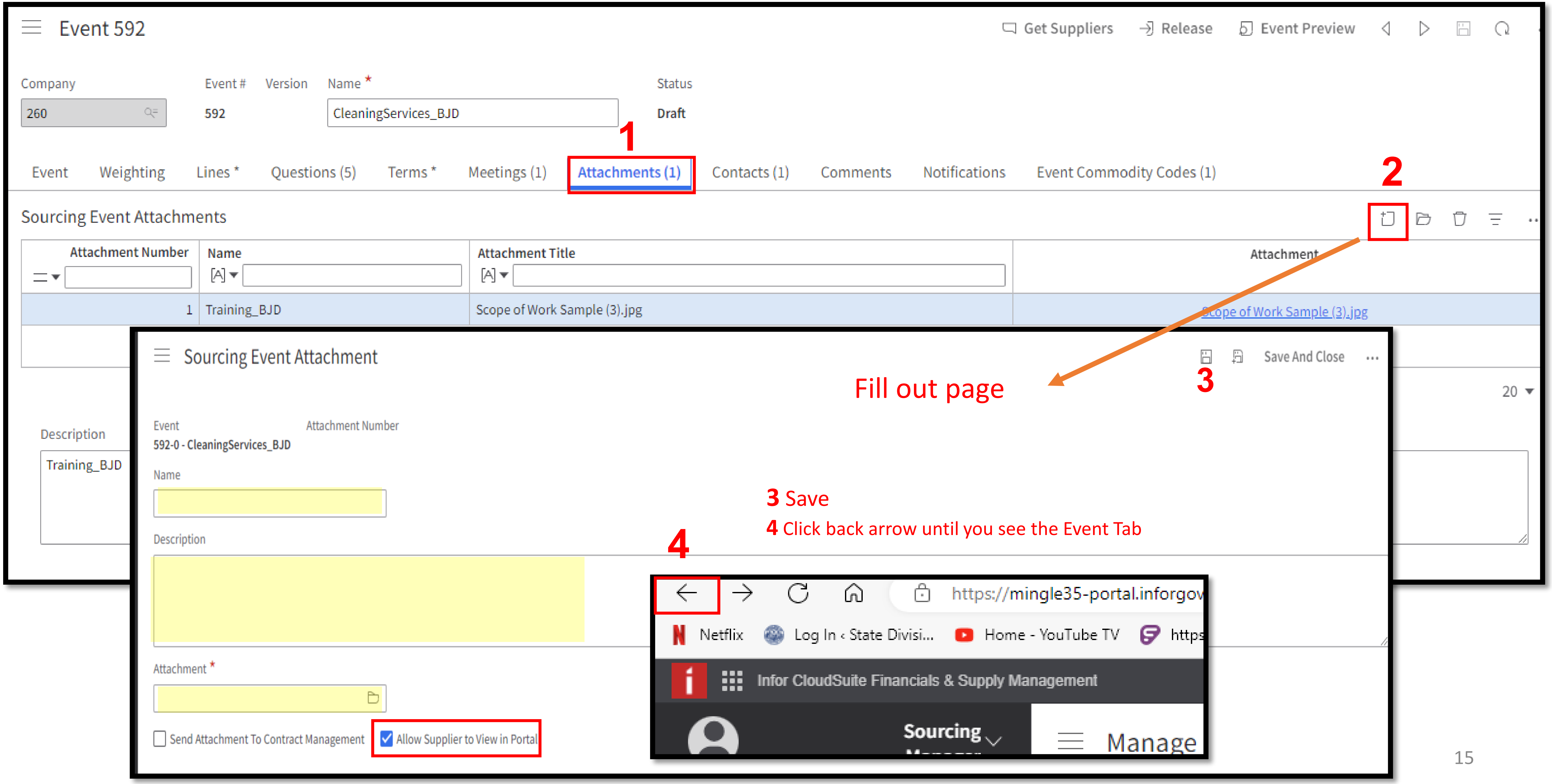
Meeting Address

Country/Jurisdiction

4
https://mingle35-portal.inforgov
Netflix
Log In ‹ State Divisi...
Home - YouTube TV
Infor CloudSuite Financials & Supply Management
Sourcing
Manage

Attachment Tab

Add Attachments


Event 592
Get Suppliers
Release
Event Preview
Event
Weighting
Lines *
Questions (5)
Terms *
Meetings (1)
Attachments (1)
Contacts (1)
Comments
Notifications
Event Commodity Codes (1)
Sourcing Event Attachments
1
2
3
4
Sourcing Event Attachment
Save And Close
20
Infor CloudSuite Financials & Supply Management
Netflix
Log In ‹ State Divisi...
Home - YouTube TV
https
Sourcing
Manage

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

Attachment Number	Name	Attachment Title	Attachment
1	Training_BJD	Scope of Work Sample (3).jpg	Scope of Work Sample (3).jpg

Description: Training_BJD

Fill out page

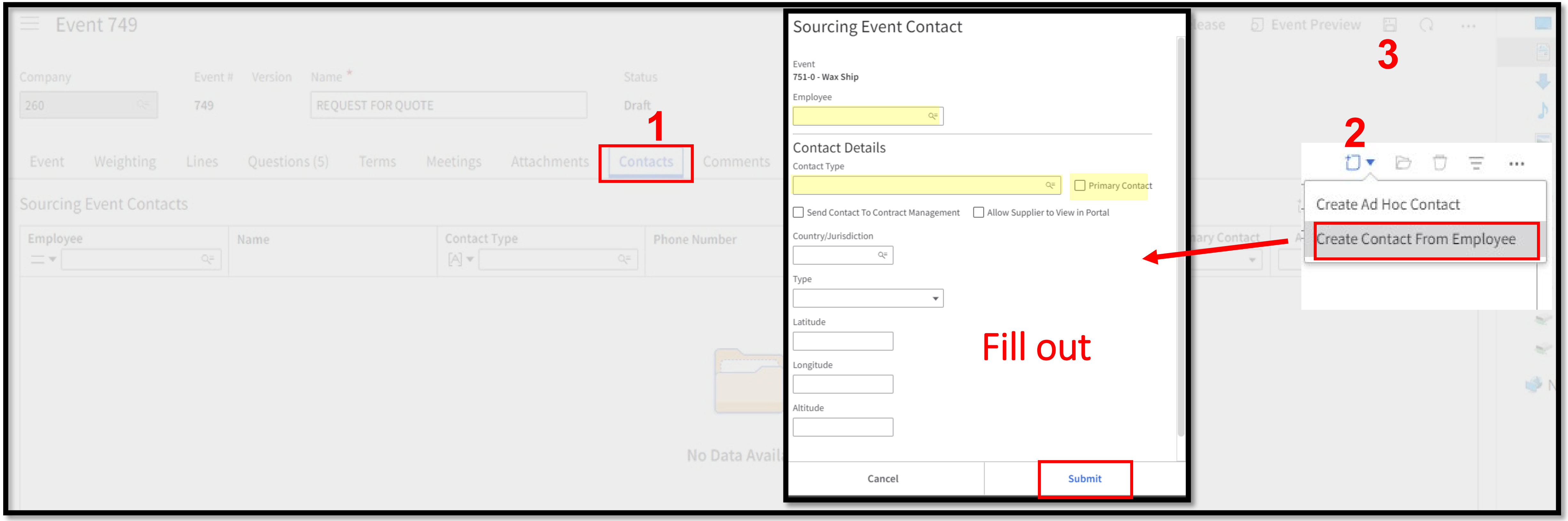
Event: 592-0 - CleaningServices_BJD
Attachment Number:
Name:
Description:
Attachment *:
☐ Send Attachment To Contract Management
☑ Allow Supplier to View in Portal

https://mingle35-portal.inforgov

3 Save
4 Click back arrow until you see the Event Tab

Contact Tab

Add Event Lead and Other Contacts


Event 749
Company
260
Event #
749
Version
Name *
REQUEST FOR QUOTE
Status
Draft
Event
Weighting
Lines
Questions (5)
Terms
Meetings
Attachments
Contacts
Comments
Sourcing Event Contacts
Employee
Name
Contact Type
Phone Number
No Data Avail
1
Release
Event Preview
3
2
Create Ad Hoc Contact
Create Contact From Employee
Sourcing Event Contact
Fill out

Event
751-0 - Wax Ship

Employee

Contact Details

Contact Type

☐ Primary Contact

☐ Send Contact To Contract Management ☐ Allow Supplier to View in Portal

Country/Jurisdiction

Type

Latitude

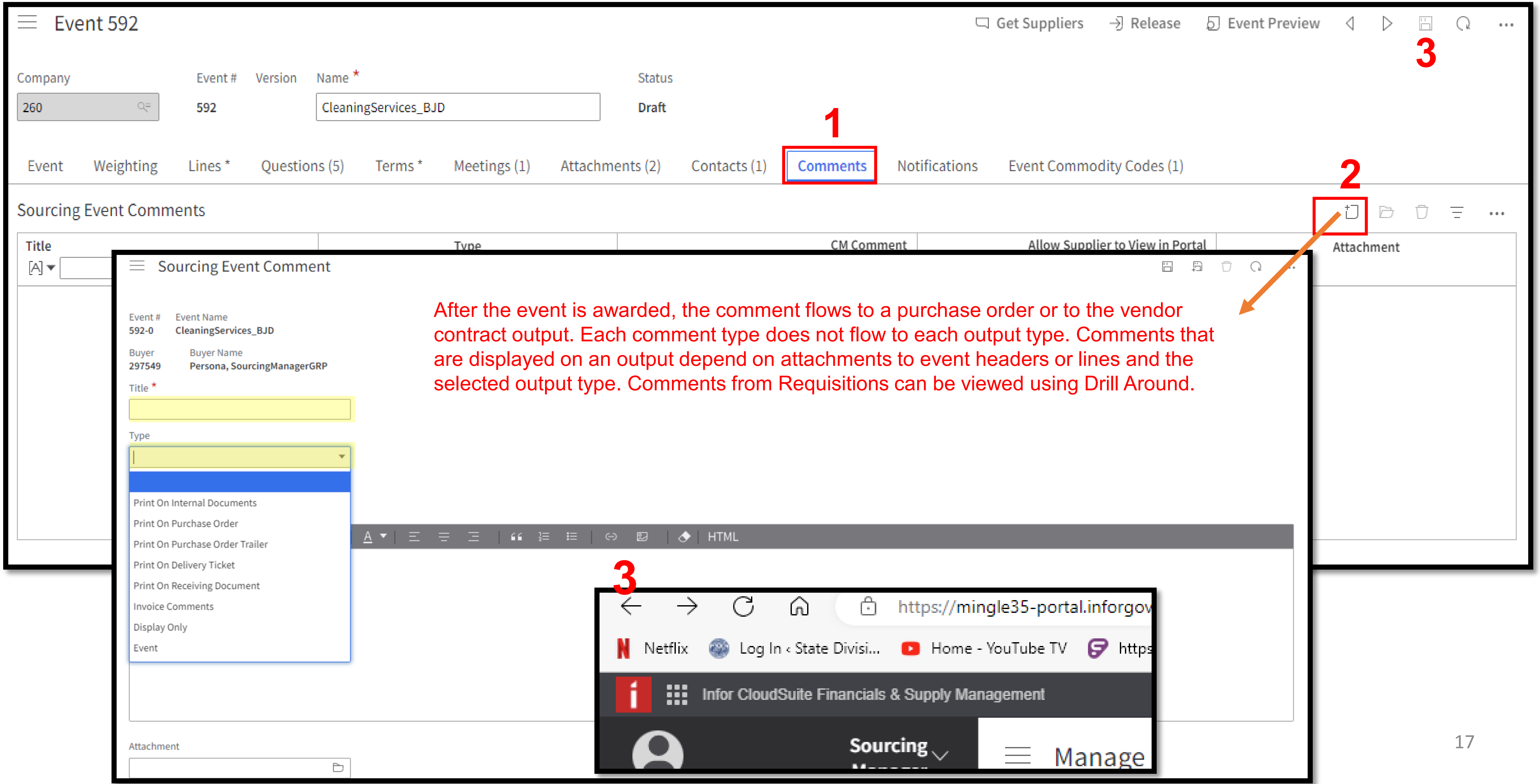
Longitude

Altitude

Cancel Submit

Comments Tab

Add Comments if any


1
2
3
3
Get Suppliers
Release
Event Preview
Event
Weighting
Lines *
Questions (5)
Terms *
Meetings (1)
Attachments (2)
Contacts (1)
Comments
Notifications
Event Commodity Codes (1)
HTML

Event 592

Company	Event #	Version	Name *	Status
260	592		CleaningServices_BJD	Draft

Sourcing Event Comments

Title	Type	CM Comment	Allow Supplier to View in Portal	Attachment

Sourcing Event Comment

Event #	Event Name
592-0	CleaningServices_BJD

Buyer	Buyer Name
297549	Persona, SourcingManagerGRP

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

Attachment

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.

https://mingle35-portal.inforgov

Netflix
Log In ‹ State Divisi...
Home - YouTube TV
https

Infor CloudSuite Financials & Supply Management

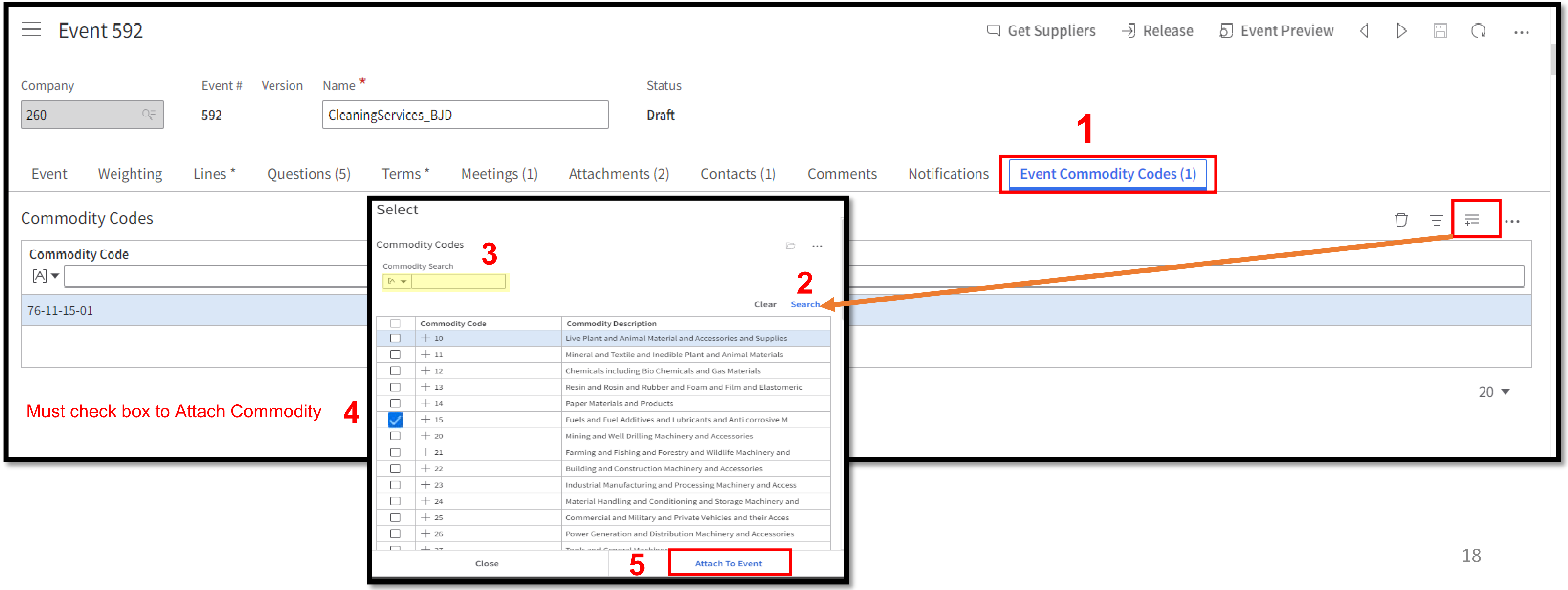
Sourcing

Manage

Event Commodity Tab

Add Additional Commodity Codes

Note: add as many as you need



Event 592
Get Suppliers
Release
Event Preview
Event
Weighting
Lines *
Questions (5)
Terms *
Meetings (1)
Attachments (2)
Contacts (1)
Comments
Notifications
Event Commodity Codes (1)
Commodity Codes
Commodity Code
20
1
2
3
5
Select
Commodity Codes
Commodity Search
Clear
Search
Close
Attach To Event

Company: 260

Event #: 592

Version:

Name *: CleaningServices_BJD

Status: Draft

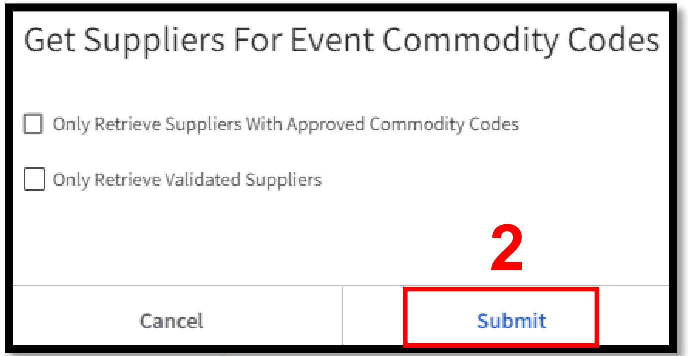
Commodity Code: 76-11-15-01

☐	Commodity Code	Commodity Description
☐	+ 10	Live Plant and Animal Material and Accessories and Supplies
☐	+ 11	Mineral and Textile and Inedible Plant and Animal Materials
☐	+ 12	Chemicals including Bio Chemicals and Gas Materials
☐	+ 13	Resin and Rosin and Rubber and Foam and Film and Elastomeric
☐	+ 14	Paper Materials and Products
☑	+ 15	Fuels and Fuel Additives and Lubricants and Anti corrosive M
☐	+ 20	Mining and Well Drilling Machinery and Accessories
☐	+ 21	Farming and Fishing and Forestry and Wildlife Machinery and
☐	+ 22	Building and Construction Machinery and Accessories
☐	+ 23	Industrial Manufacturing and Processing Machinery and Access
☐	+ 24	Material Handling and Conditioning and Storage Machinery and
☐	+ 25	Commercial and Military and Private Vehicles and their Acces
☐	+ 26	Power Generation and Distribution Machinery and Accessories

Must check box to Attach Commodity 4

Add Suppliers to Event

- Don’t click on any option
- Leave all options blank and click Submit
  - Suppliers will be added per commodity Code(s) used for the Event

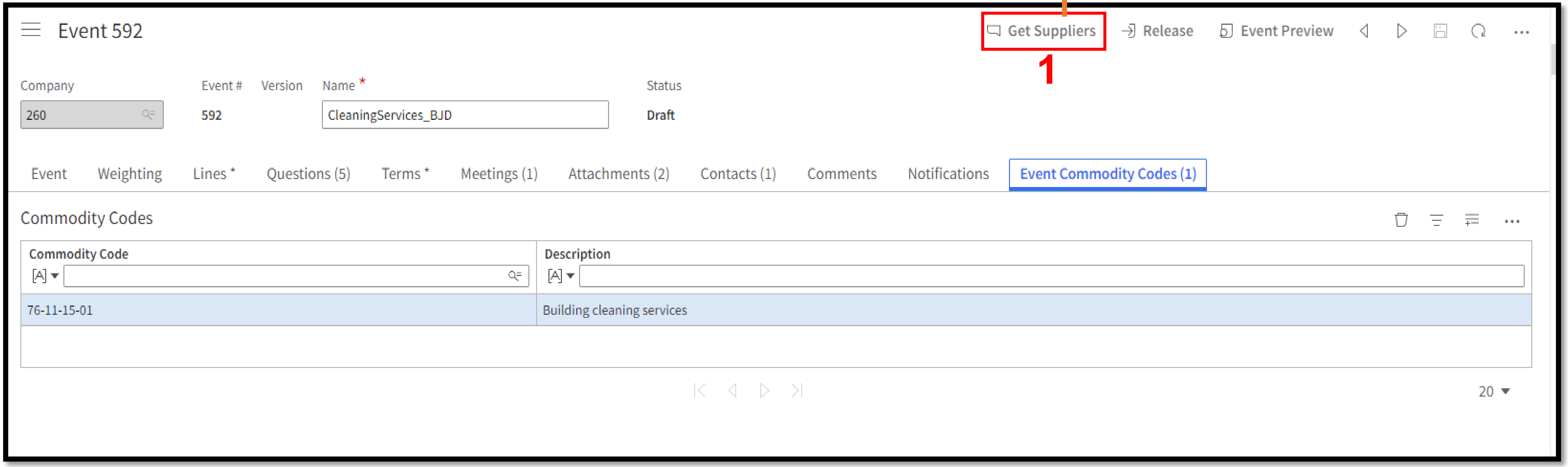


Get Suppliers For Event Commodity Codes

☐ Only Retrieve Suppliers With Approved Commodity Codes

☐ Only Retrieve Validated Suppliers

2
Cancel
Submit



Event 592

Company	Event #	Version	Name *	Status
260	592		CleaningServices_BJD	Draft

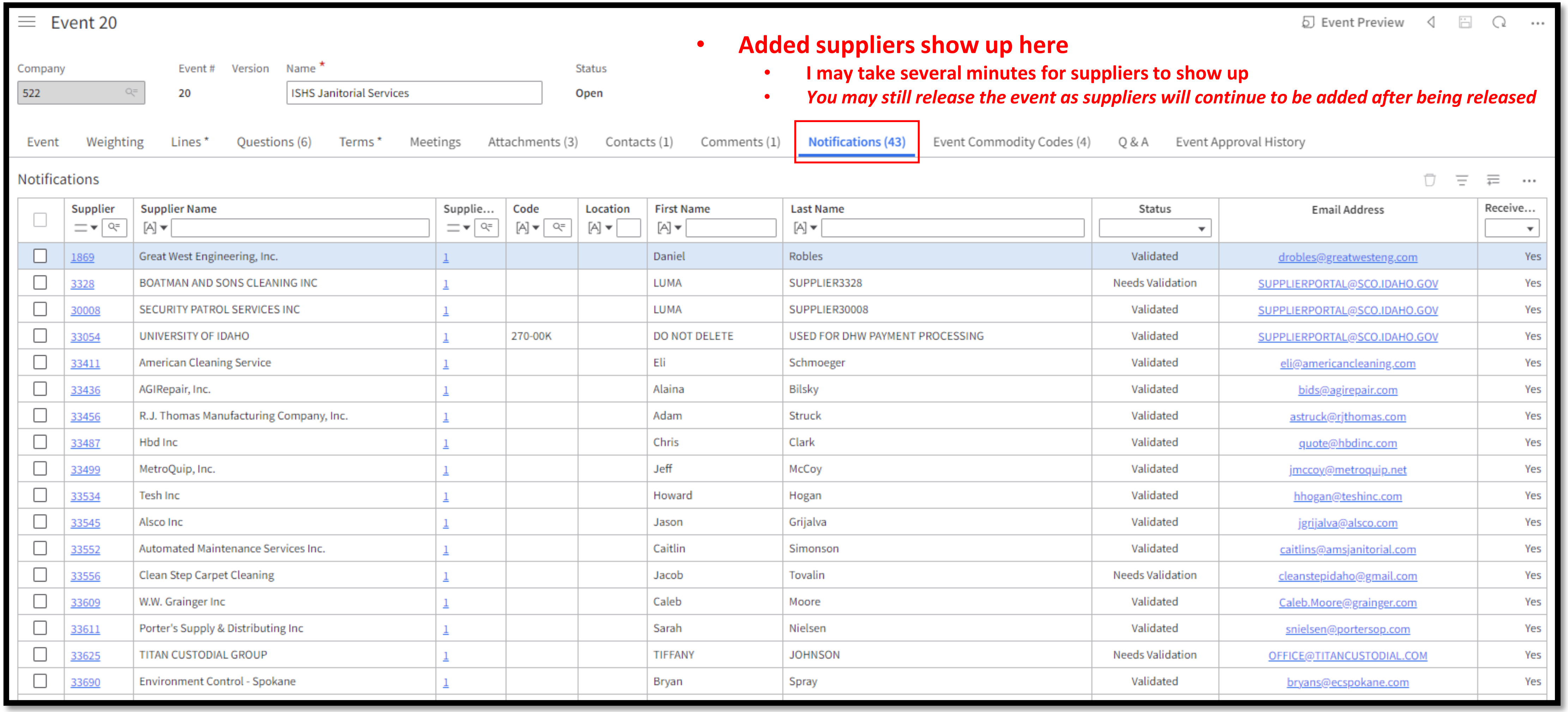
Commodity Codes

Commodity Code	Description
76-11-15-01	Building cleaning services

Get Suppliers
1
Release
Event Preview
Event
Weighting
Lines *
Questions (5)
Terms *
Meetings (1)
Attachments (2)
Contacts (1)
Comments
Notifications
Event Commodity Codes (1)
20

Add Suppliers to Event Cont.

Notifications Tab



Company: 522

Event #: 20

Version:

Name *: ISHS Janitorial Services

Status: Open

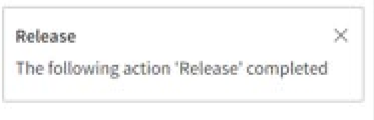
- **Added suppliers show up here**
  - I may take several minutes for suppliers to show up
  - *You may still release the event as suppliers will continue to be added after being released*

Notifications

☐	Supplier	Supplier Name	Supplie...	Code	Location	First Name	Last Name	Status	Email Address	Receive...
☐	1869	Great West Engineering, Inc.	1			Daniel	Robles	Validated	drobles@greatwesteng.com	Yes
☐	3328	BOATMAN AND SONS CLEANING INC	1			LUMA	SUPPLIER3328	Needs Validation	SUPPLIERPORTAL@SCO.IDAHO.GOV	Yes
☐	30008	SECURITY PATROL SERVICES INC	1			LUMA	SUPPLIER30008	Validated	SUPPLIERPORTAL@SCO.IDAHO.GOV	Yes
☐	33054	UNIVERSITY OF IDAHO	1	270-00K		DO NOT DELETE	USED FOR DHW PAYMENT PROCESSING	Validated	SUPPLIERPORTAL@SCO.IDAHO.GOV	Yes
☐	33411	American Cleaning Service	1			Eli	Schmoeger	Validated	eli@americancleaning.com	Yes
☐	33436	AGIRepair, Inc.	1			Alaina	Bilsky	Validated	bids@agirepair.com	Yes
☐	33456	R.J. Thomas Manufacturing Company, Inc.	1			Adam	Struck	Validated	astruck@rjthomas.com	Yes
☐	33487	Hbd Inc	1			Chris	Clark	Validated	quote@hbdinc.com	Yes
☐	33499	MetroQuip, Inc.	1			Jeff	McCoy	Validated	jmccoy@metroquip.net	Yes
☐	33534	Tesh Inc	1			Howard	Hogan	Validated	hhogan@teshinc.com	Yes
☐	33545	Alsco Inc	1			Jason	Grijalva	Validated	jgrijalva@alsco.com	Yes
☐	33552	Automated Maintenance Services Inc.	1			Caitlin	Simonson	Validated	caitlins@amsjanitorial.com	Yes
☐	33556	Clean Step Carpet Cleaning	1			Jacob	Tovalin	Needs Validation	cleanstepidaho@gmail.com	Yes
☐	33609	W.W. Grainger Inc	1			Caleb	Moore	Validated	Caleb.Moore@grainger.com	Yes
☐	33611	Porter's Supply & Distributing Inc	1			Sarah	Nielsen	Validated	snielsen@portersop.com	Yes
☐	33625	TITAN CUSTODIAL GROUP	1			TIFFANY	JOHNSON	Needs Validation	OFFICE@TITANCUSTODIAL.COM	Yes
☐	33690	Environment Control - Spokane	1			Bryan	Spray	Validated	bryans@ecspokane.com	Yes

Once Event is finished
Click Release for Approval / Go Live

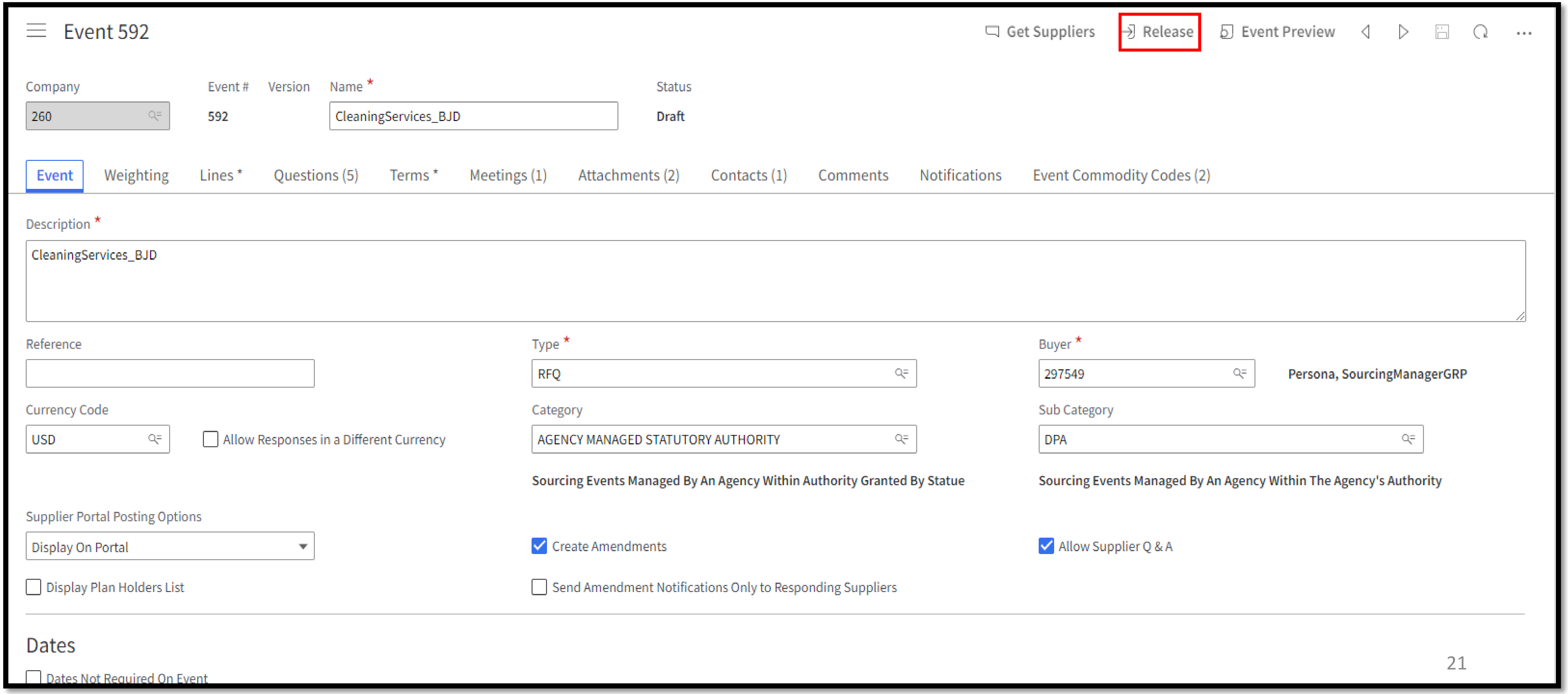
Popup shows after clicking Release



Release

The following action 'Release' completed

1


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

Event 592

Company: 260

Event #: 592

Version:

Name *: CleaningServices_BJD

Status: Draft

Description *: CleaningServices_BJD

Reference:

Type *: RFQ

Buyer *: 297549 Persona, SourcingManagerGRP

Currency Code: USD

☐ Allow Responses in a Different Currency

Category: AGENCY MANAGED STATUTORY AUTHORITY

Sourcing Events Managed By An Agency Within Authority Granted By Statue

Sub Category: DPA

Sourcing Events Managed By An Agency Within The Agency's Authority

Supplier Portal Posting Options: Display On Portal

☑ Create Amendments

☑ Allow Supplier Q & A

☐ Display Plan Holders List

☐ Send Amendment Notifications Only to Responding Suppliers

Dates

☐ Dates Not Required On Event

Once Event is Released

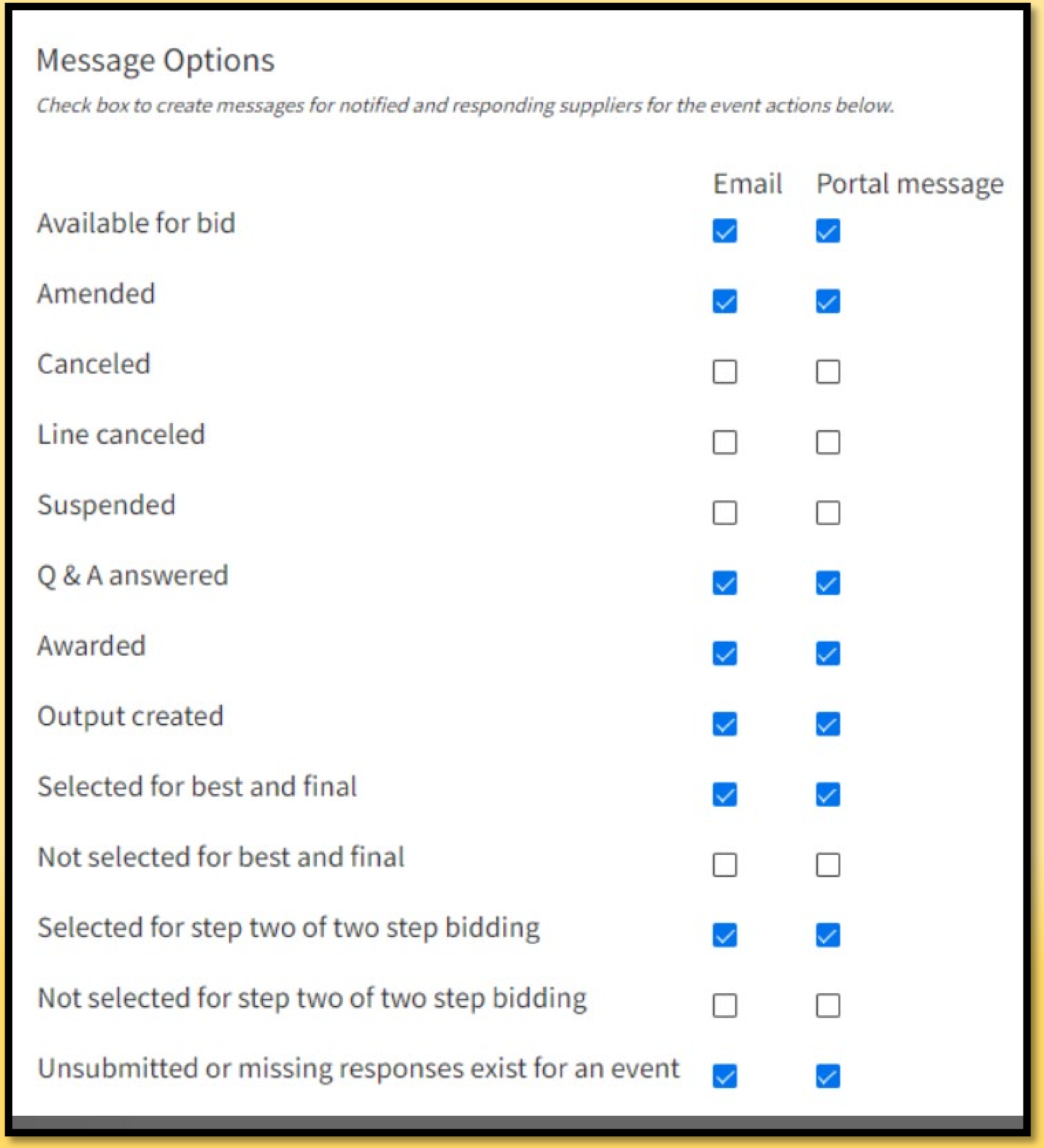
A. After Release of Event the following status will display:
  a) If approval is not required and the open date is in the future, then the event status changes to **Pending Open** until the open date and time.
  b) Informal events or, if approval is not required, and the open date is reached, the event status changes to **Open**. Suppliers are notified.
  c) If approval is required, the event status changes to **Pending Event Approval**. A notification is sent to the first person in the approval process file.

B. Approving events (Supervisors)

Events can be manually approved if users do not have access to the Process Flow In basket.

  a) Sign in as Sourcing Manager and select **Create Events**.
  b) Select an event with a **Pending Event Approval** status.
  c) Select **Actions** > **Manual Approve**. The event is displayed on the **Open** list. The event is posted on Supplier Portal and notifications are sent to suppliers that are listed on the **Notifications** tab. If the event has a date range and the open date has not been reached, then the event status is set to **Pending Approval**. If you select **Manual Disapprove**, then the event is returned to a draft status and an email notification is sent to the Buyer.
  d) If you select **Manual Reject**, then the event is returned to a Canceled status and an email is sent to the Buyer. If the close date has not passed, then the event can be approved later.

Types of Messages Suppliers will receive from Luma



Message Options

Check box to create messages for notified and responding suppliers for the event actions below.

	Email	Portal message
Available for bid	☑	☑
Amended	☑	☑
Canceled	☐	☐
Line canceled	☐	☐
Suspended	☐	☐
Q & A answered	☑	☑
Awarded	☑	☑
Output created	☑	☑
Selected for best and final	☑	☑
Not selected for best and final	☐	☐
Selected for step two of two step bidding	☑	☑
Not selected for step two of two step bidding	☐	☐
Unsubmitted or missing responses exist for an event	☑	☑

Actions that will trigger an amendment

Update Sourcing Event
- Name
- Description
- Type
- Sealed Bid
- Require Response For All Lines
- Preview Date
- Open Date
- Close Date
- Q and A Open Date
- Q and A Close Date
- Dispute Close Date
- Delivery Date
- Buyer
- Supplier Portal Posting Options

Cancel Sourcing Event
Add Sourcing Event Line

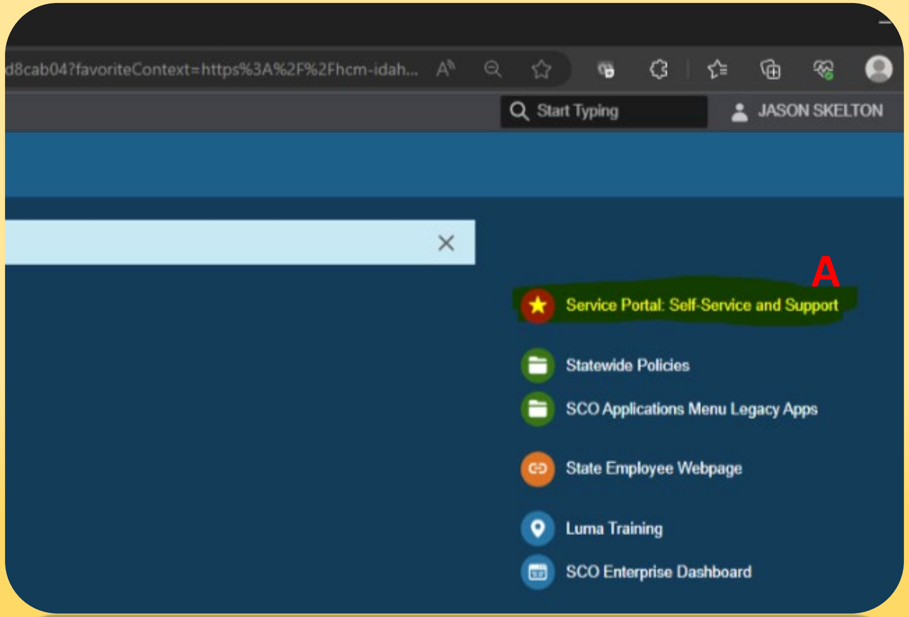
Update Sourcing Event Line
- Name
- Description
- Output Type
- Require Response
- Commodity Code
- Item
- Item Description
- Quantity
- UOM
- Ship To
- Requested Delivery Date
- Allow Comparable
- Allow Price Breaks

Cancel Sourcing Event Line
Add Term And Condition
Update Term And Condition
Delete Term And Condition
Add Question
Update Question
Delete Question
Add Meeting
Update Meeting
Delete Meeting
Add Contact
Update Contact
Delete Contact
Add Attachment
Update Attachment
Delete Attachment

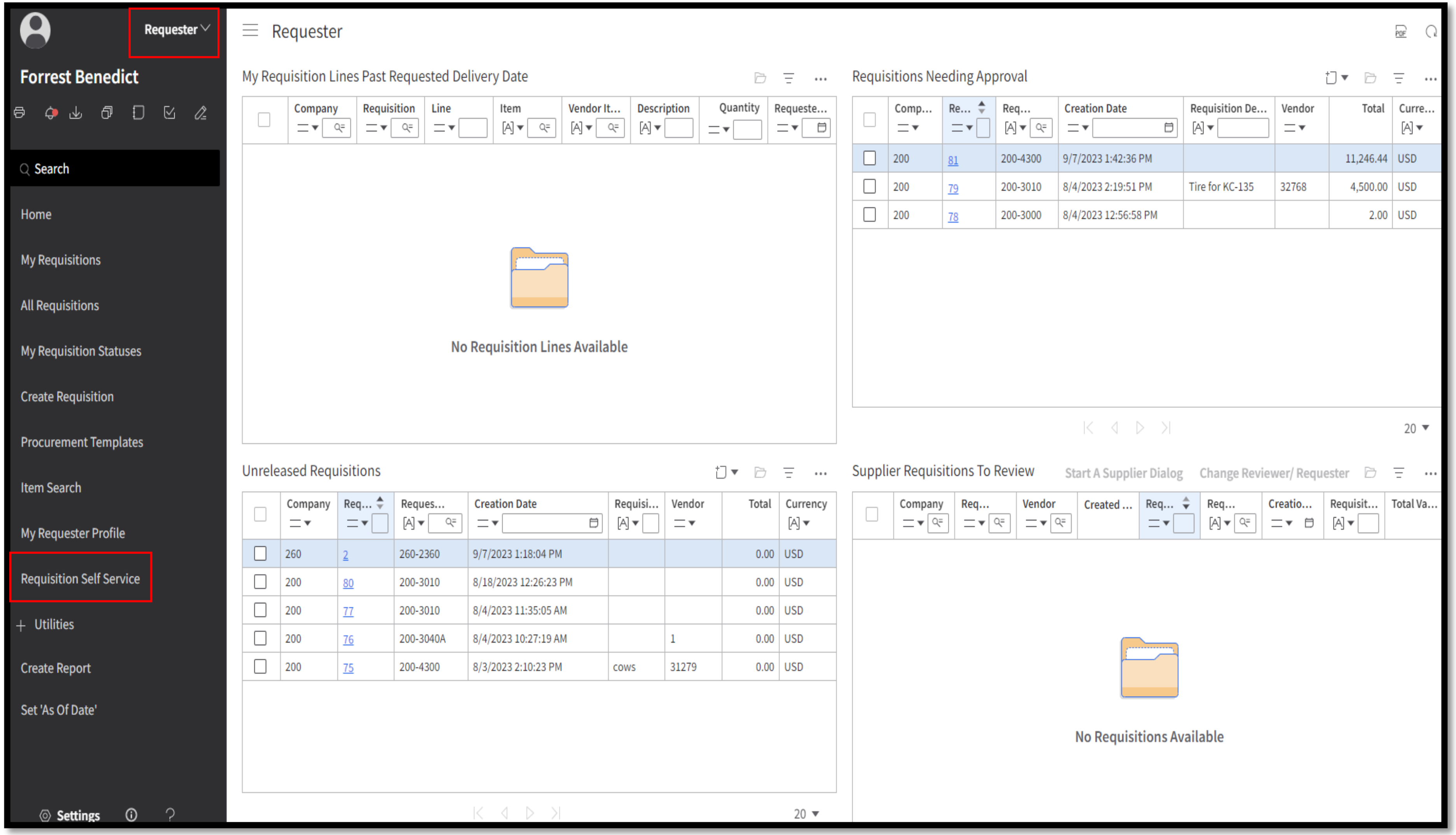
Need Help?

A. Luma related questions i.e. how do I…, contact the Luma Team at: servicedesk@sco.Idaho.gov or the service portal **A**

B. For Purchasing Process questions contact the DOP help desk at: dophelpdesk@adm.idaho.gov


d8cab04?favoriteContext=https%3A%2F%2Fhcm-idah...
Start Typing
JASON SKELTON
A
Service Portal: Self-Service and Support
Statewide Policies
SCO Applications Menu Legacy Apps
State Employee Webpage
Luma Training
SCO Enterprise Dashboard

Create a Requestion *(DA1)*


Requester
Forrest Benedict
Search
Home
My Requisitions
All Requisitions
My Requisition Statuses
Create Requisition
Procurement Templates
Item Search
My Requester Profile
Requisition Self Service
Utilities
Create Report
Set 'As Of Date'
Settings

Requester

My Requisition Lines Past Requested Delivery Date

☐	Company	Requisition	Line	Item	Vendor It...	Description	Quantity	Requeste...

No Requisition Lines Available

Requisitions Needing Approval

☐	Comp...	Re...	Req...	Creation Date	Requisition De...	Vendor	Total	Curre...
☐	200	81	200-4300	9/7/2023 1:42:36 PM			11,246.44	USD
☐	200	79	200-3010	8/4/2023 2:19:51 PM	Tire for KC-135	32768	4,500.00	USD
☐	200	78	200-3000	8/4/2023 12:56:58 PM			2.00	USD

20

Unreleased Requisitions

☐	Company	Req...	Reques...	Creation Date	Requisi...	Vendor	Total	Currency
☐	260	2	260-2360	9/7/2023 1:18:04 PM			0.00	USD
☐	200	80	200-3010	8/18/2023 12:26:23 PM			0.00	USD
☐	200	77	200-3010	8/4/2023 11:35:05 AM			0.00	USD
☐	200	76	200-3040A	8/4/2023 10:27:19 AM		1	0.00	USD
☐	200	75	200-4300	8/3/2023 2:10:23 PM	cows	31279	0.00	USD

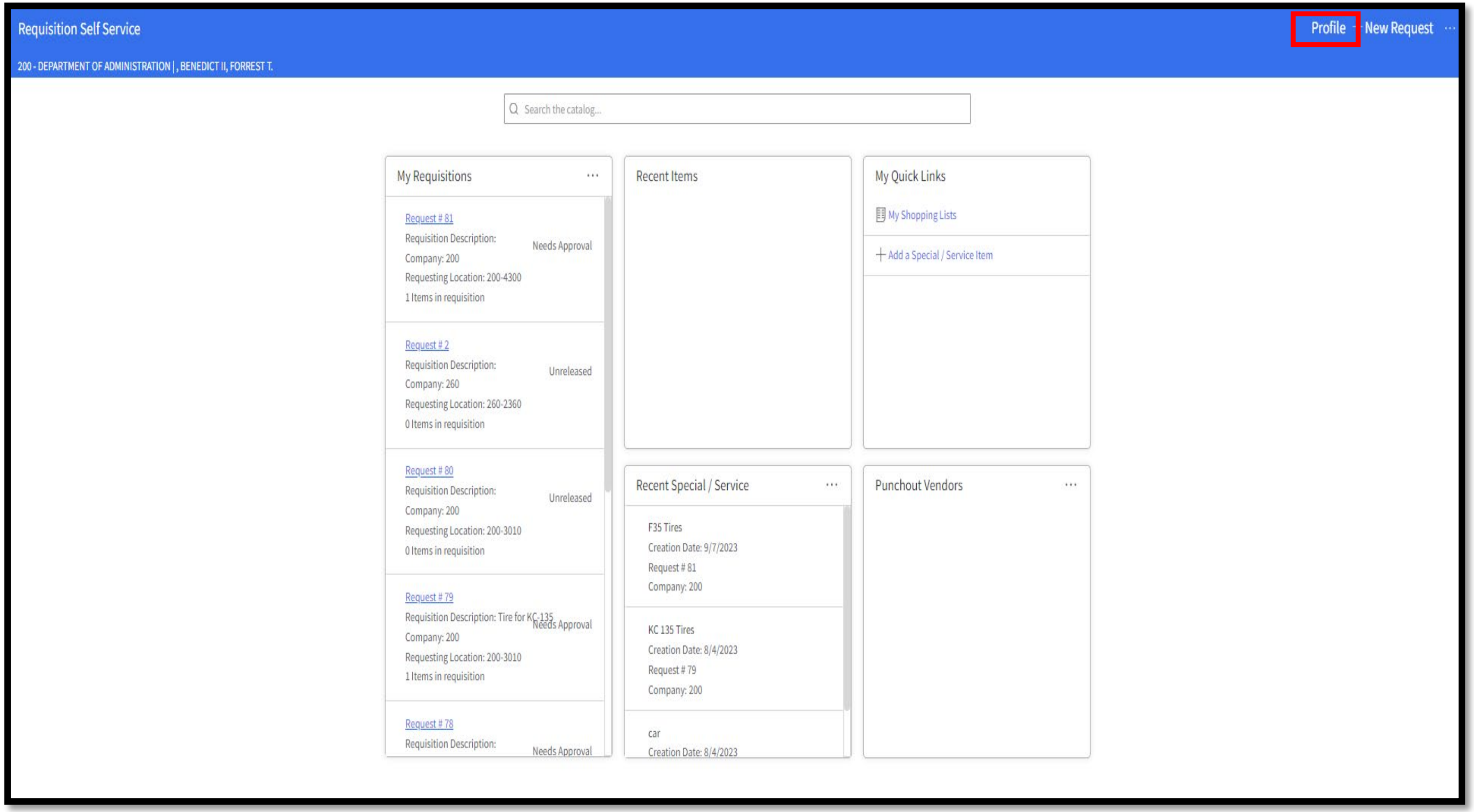
20

Supplier Requisitions To Review

Start A Supplier Dialog
Change Reviewer/ Requester

☐	Company	Req...	Vendor	Created ...	Req...	Req...	Creatio...	Requisit...	Total Va...

No Requisitions Available



Requisition Self Service

200 - DEPARTMENT OF ADMINISTRATION | , BENEDICT II, FORREST T.

My Requisitions

Request # 81
Requisition Description:
Needs Approval
Company: 200
Requesting Location: 200-4300
1 Items in requisition

Request # 2
Requisition Description:
Unreleased
Company: 260
Requesting Location: 260-2360
0 Items in requisition

Request # 80
Requisition Description:
Unreleased
Company: 200
Requesting Location: 200-3010
0 Items in requisition

Request # 79
Requisition Description: Tire for KC-135
Needs Approval
Company: 200
Requesting Location: 200-3010
1 Items in requisition

Request # 78
Requisition Description:
Needs Approval

Recent Items

My Quick Links

My Shopping Lists

+ Add a Special / Service Item

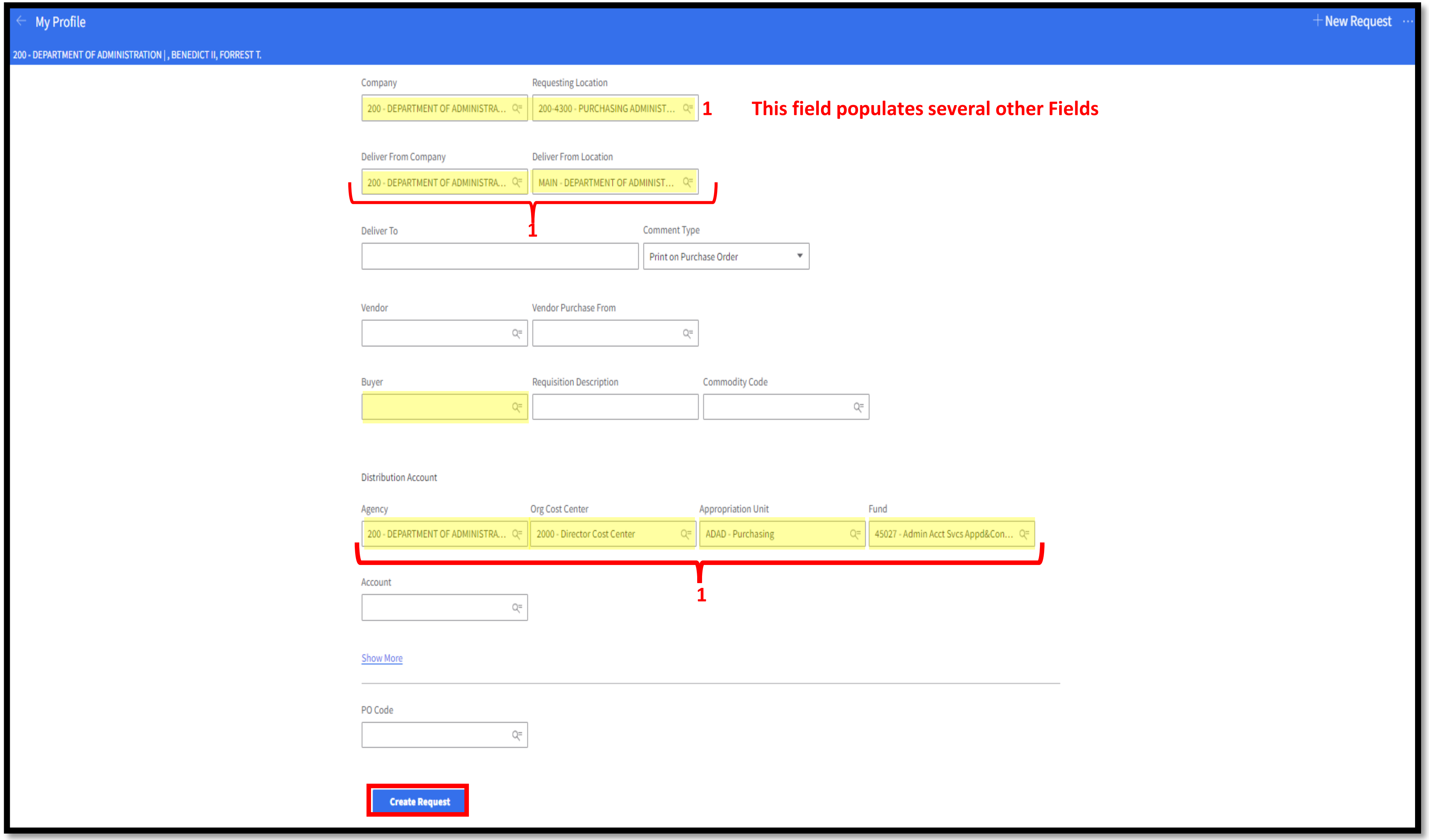
Recent Special / Service

F35 Tires
Creation Date: 9/7/2023
Request # 81
Company: 200

KC 135 Tires
Creation Date: 8/4/2023
Request # 79
Company: 200

car
Creation Date: 8/4/2023

Punchout Vendors



200 - DEPARTMENT OF ADMINISTRATION | , BENEDICT II, FORREST T.

Company: 200 - DEPARTMENT OF ADMINISTRA…

Requesting Location: 200-4300 - PURCHASING ADMINIST… 1

This field populates several other Fields

Deliver From Company: 200 - DEPARTMENT OF ADMINISTRA…

Deliver From Location: MAIN - DEPARTMENT OF ADMINIST…

1

Deliver To:

Comment Type: Print on Purchase Order

Vendor:

Vendor Purchase From:

Buyer:

Requisition Description:

Commodity Code:

Distribution Account

Agency: 200 - DEPARTMENT OF ADMINISTRA…

Org Cost Center: 2000 - Director Cost Center

Appropriation Unit: ADAD - Purchasing

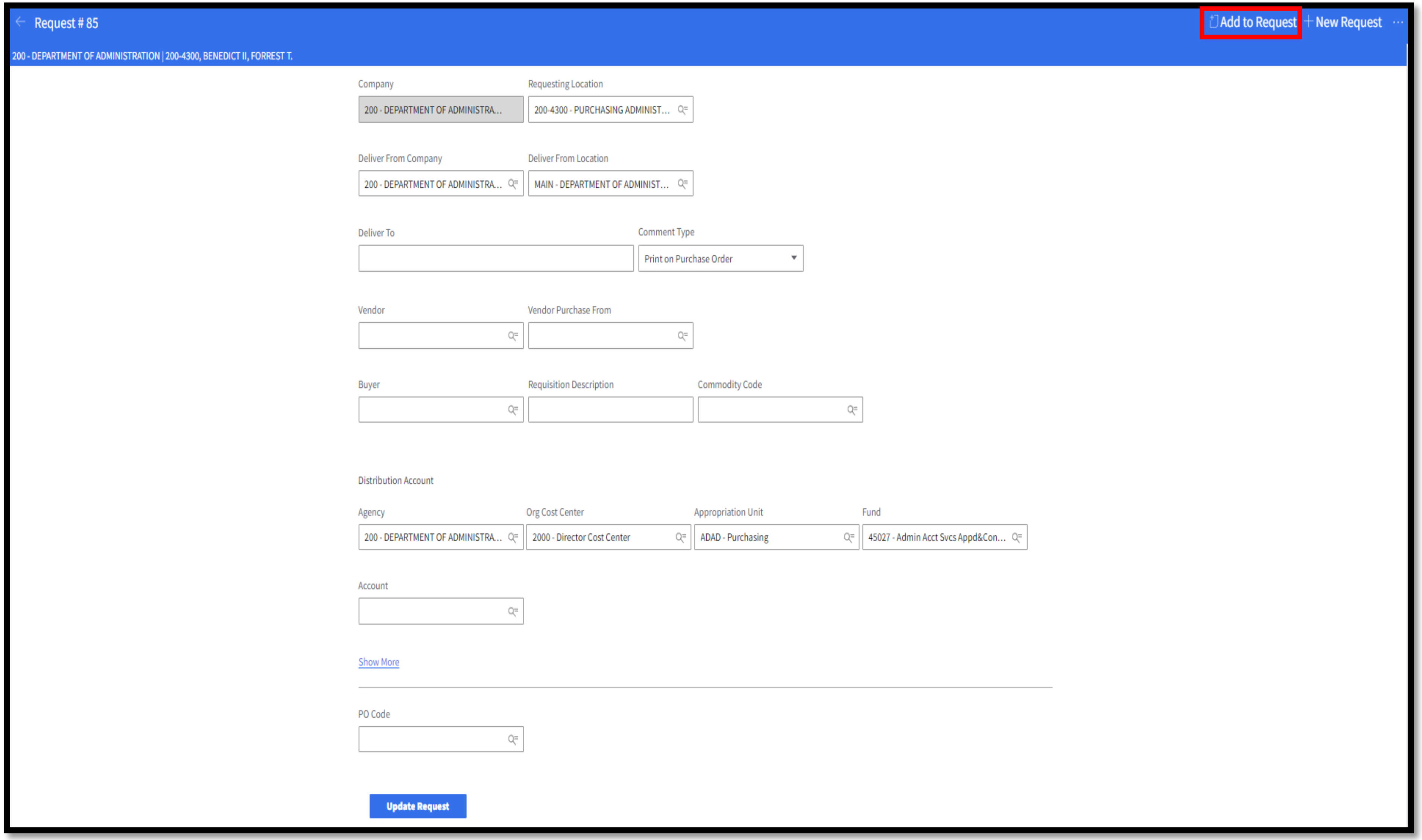
Fund: 45027 - Admin Acct Svcs Appd&Con…

1

Account:

PO Code:

New Button Appears
Click



Request # 85

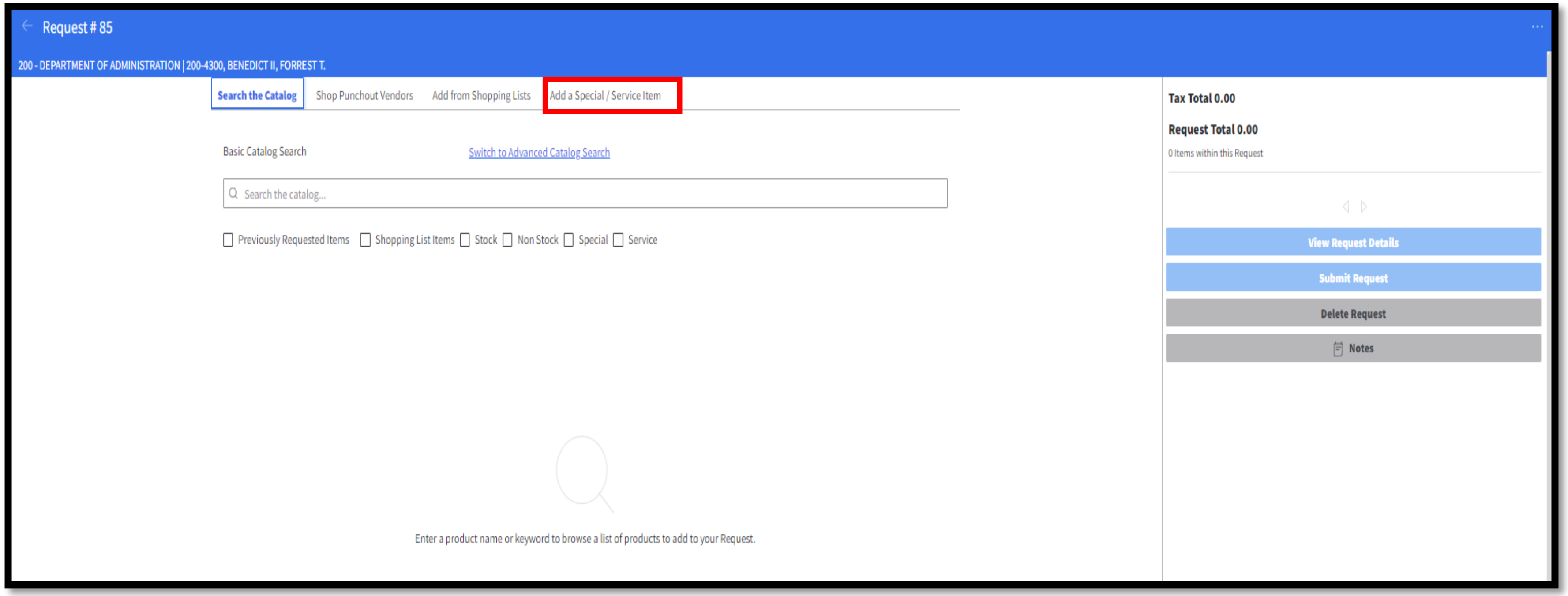
200 - DEPARTMENT OF ADMINISTRATION | 200-4300, BENEDICT II, FORREST T.

Company: 200 - DEPARTMENT OF ADMINISTRA...
Requesting Location: 200-4300 - PURCHASING ADMINIST...
Deliver From Company: 200 - DEPARTMENT OF ADMINISTRA...
Deliver From Location: MAIN - DEPARTMENT OF ADMINIST...
Deliver To:
Comment Type: Print on Purchase Order
Vendor:
Vendor Purchase From:
Buyer:
Requisition Description:
Commodity Code:

Distribution Account

Agency: 200 - DEPARTMENT OF ADMINISTRA...
Org Cost Center: 2000 - Director Cost Center
Appropriation Unit: ADAD - Purchasing
Fund: 45027 - Admin Acct Svcs Appd&Con...
Account:

PO Code:


Request # 85
Search the Catalog
Shop Punchout Vendors
Add from Shopping Lists
Add a Special / Service Item
Switch to Advanced Catalog Search
☐ Previously Requested Items
☐ Shopping List Items
☐ Stock
☐ Non Stock
☐ Special
☐ Service
View Request Details
Submit Request
Delete Request
Notes

200 - DEPARTMENT OF ADMINISTRATION | 200-4300, BENEDICT II, FORREST T.

Basic Catalog Search

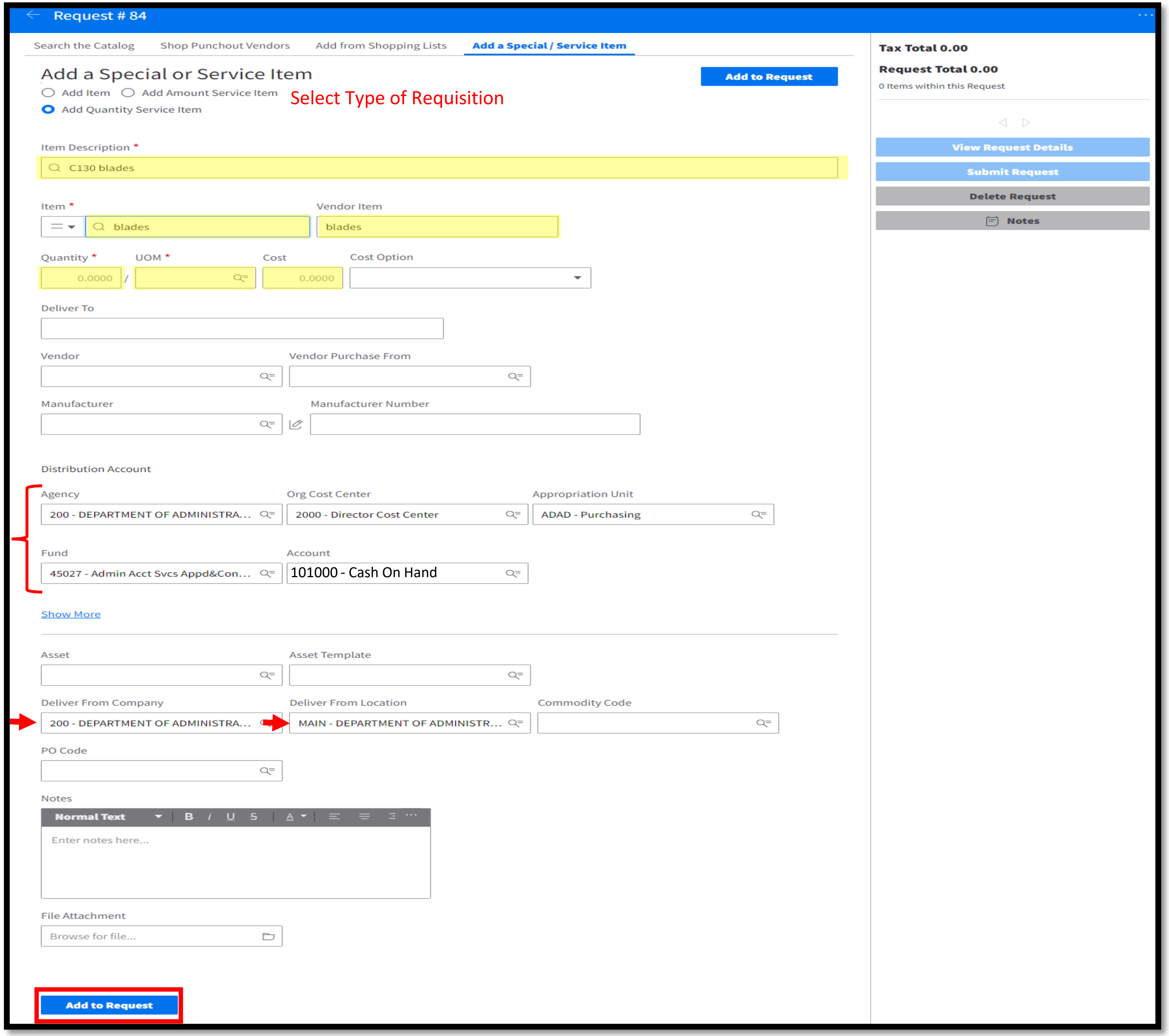
Search the catalog...

Enter a product name or keyword to browse a list of products to add to your Request.

Tax Total 0.00

Request Total 0.00

0 Items within this Request


Request # 84
Search the Catalog
Shop Punchout Vendors
Add from Shopping Lists
Add a Special / Service Item
Add to Request
Tax Total 0.00
Request Total 0.00
0 Items within this Request
View Request Details
Submit Request
Delete Request
Notes
Show More
Normal Text
Add to Request

Add a Special or Service Item

○ Add Item ○ Add Amount Service Item
● Add Quantity Service Item

Select Type of Requisition

Item Description *: C130 blades

Item *: blades

Vendor Item: blades

Quantity *: 0.0000

UOM *:

Cost: 0.0000

Cost Option:

Deliver To:

Vendor:

Vendor Purchase From:

Manufacturer:

Manufacturer Number:

Distribution Account

Agency: 200 - DEPARTMENT OF ADMINISTRA...

Org Cost Center: 2000 - Director Cost Center

Appropriation Unit: ADAD - Purchasing

Fund: 45027 - Admin Acct Svcs Appd&Con...

Account: 101000 - Cash On Hand

Ensure Correct

Asset:

Asset Template:

Deliver From Company: 200 - DEPARTMENT OF ADMINISTRA...

Deliver From Location: MAIN - DEPARTMENT OF ADMINISTR...

Commodity Code:

Ensure Correct

PO Code:

Notes: Enter notes here...

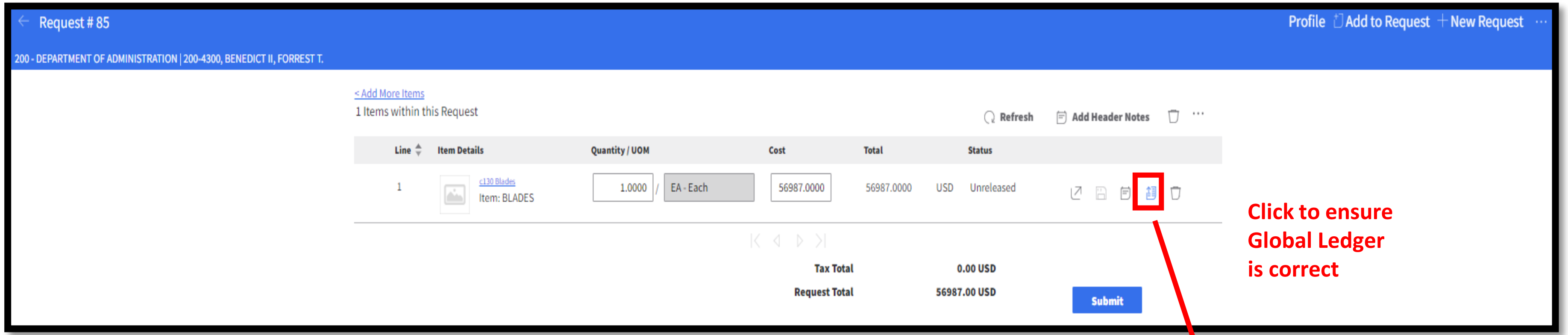
File Attachment: Browse for file...

Attach any Files (Optional)

[redacted]

Item added
Here

Click to
View
Request


Request # 85
Profile
Add to Request
New Request
< Add More Items
Refresh
Add Header Notes
Submit

200 - DEPARTMENT OF ADMINISTRATION | 200-4300, BENEDICT II, FORREST T.

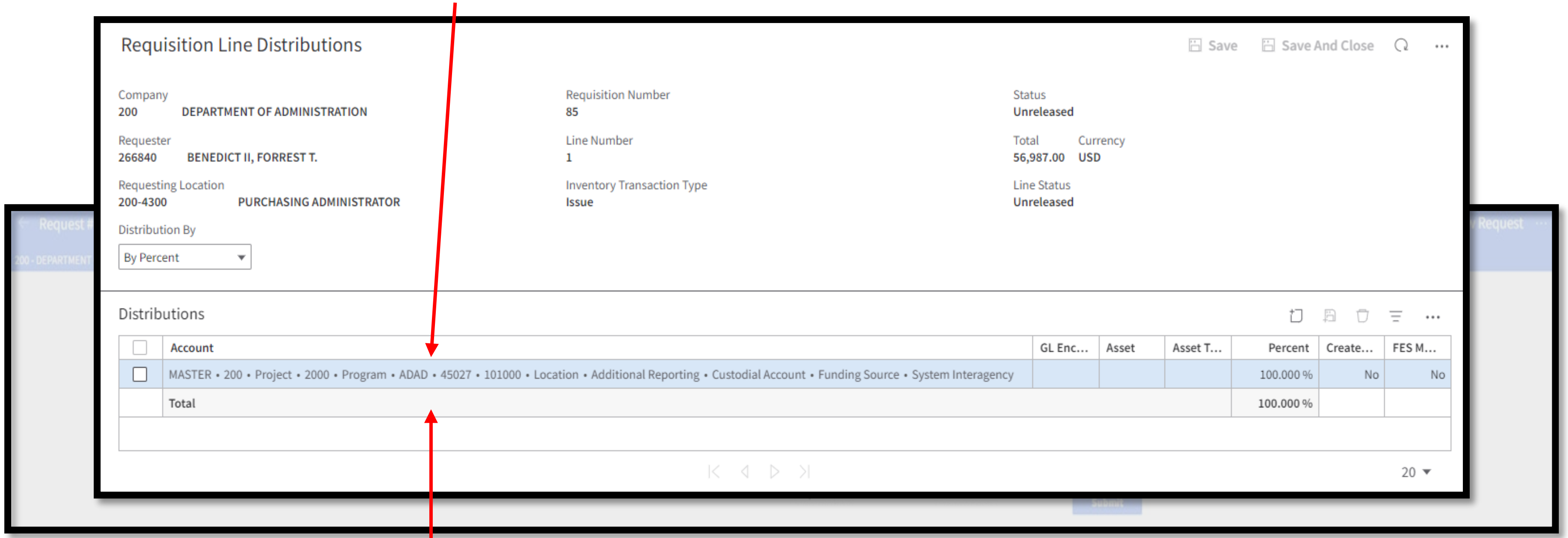
1 Items within this Request

Line	Item Details	Quantity / UOM	Cost	Total		Status
1	c130 Blades Item: BLADES	1.0000 / EA - Each	56987.0000	56987.0000	USD	Unreleased

Tax Total	0.00 USD
Request Total	56987.00 USD

Click to ensure Global Ledger is correct

Check Global Ledger



Requisition Line Distributions

Company
200 DEPARTMENT OF ADMINISTRATION

Requester
266840 BENEDICT II, FORREST T.

Requesting Location
200-4300 PURCHASING ADMINISTRATOR

Distribution By
By Percent

Requisition Number
85

Line Number
1

Inventory Transaction Type
Issue

Status
Unreleased

Total 56,987.00
Currency USD

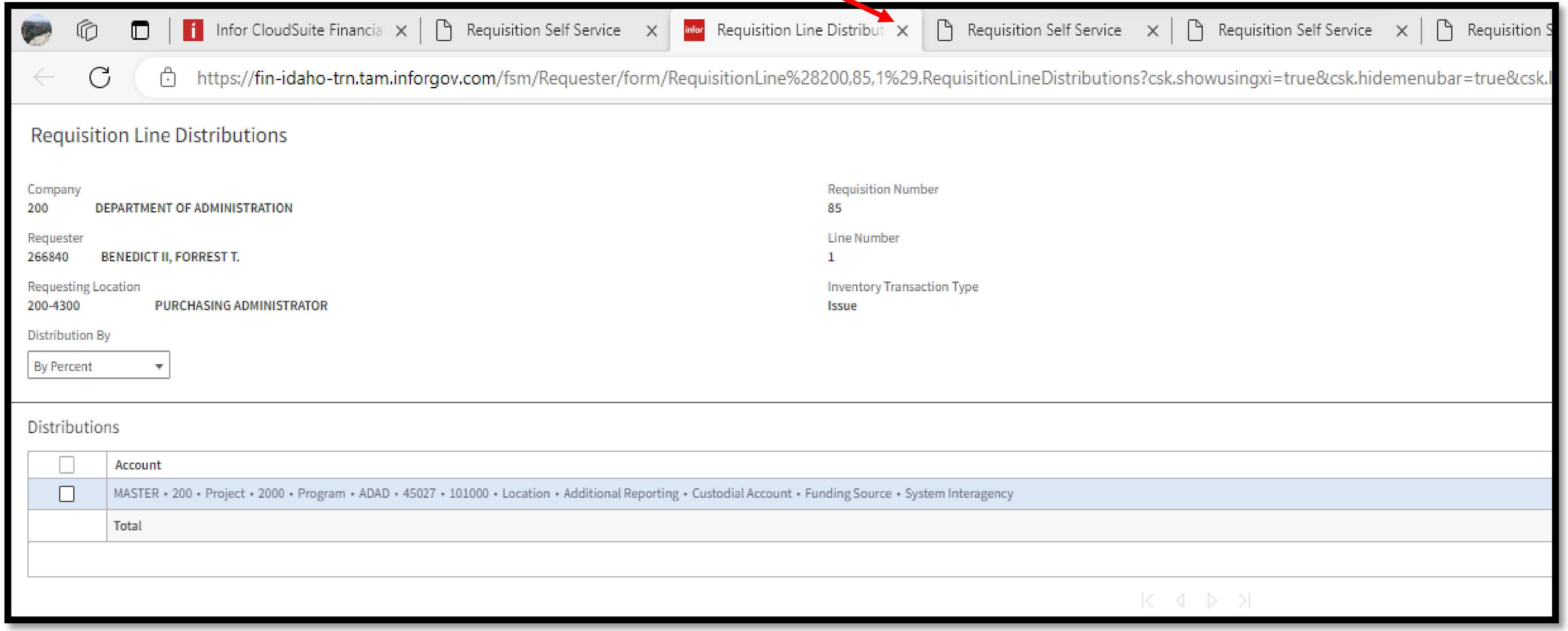
Line Status
Unreleased

Distributions

☐	Account	GL Enc…	Asset	Asset T…	Percent	Create…	FES M…
☐	MASTER • 200 • Project • 2000 • Program • ADAD • 45027 • 101000 • Location • Additional Reporting • Custodial Account • Funding Source • System Interagency				100.000 %	No	No
	Total				100.000 %		

Double click to make changes

Once Ledger has been checked Close Tab


Infor CloudSuite Financia
Requisition Self Service
Requisition Line Distribut
Requisition Self Service
Requisition Self Service
Requisition S

https://fin-idaho-trn.tam.inforgov.com/fsm/Requester/form/RequisitionLine%28200,85,1%29.RequisitionLineDistributions?csk.showusingxi=true&csk.hidemenubar=true&csk.

Requisition Line Distributions

Company
200 DEPARTMENT OF ADMINISTRATION

Requester
266840 BENEDICT II, FORREST T.

Requesting Location
200-4300 PURCHASING ADMINISTRATOR

Distribution By
By Percent

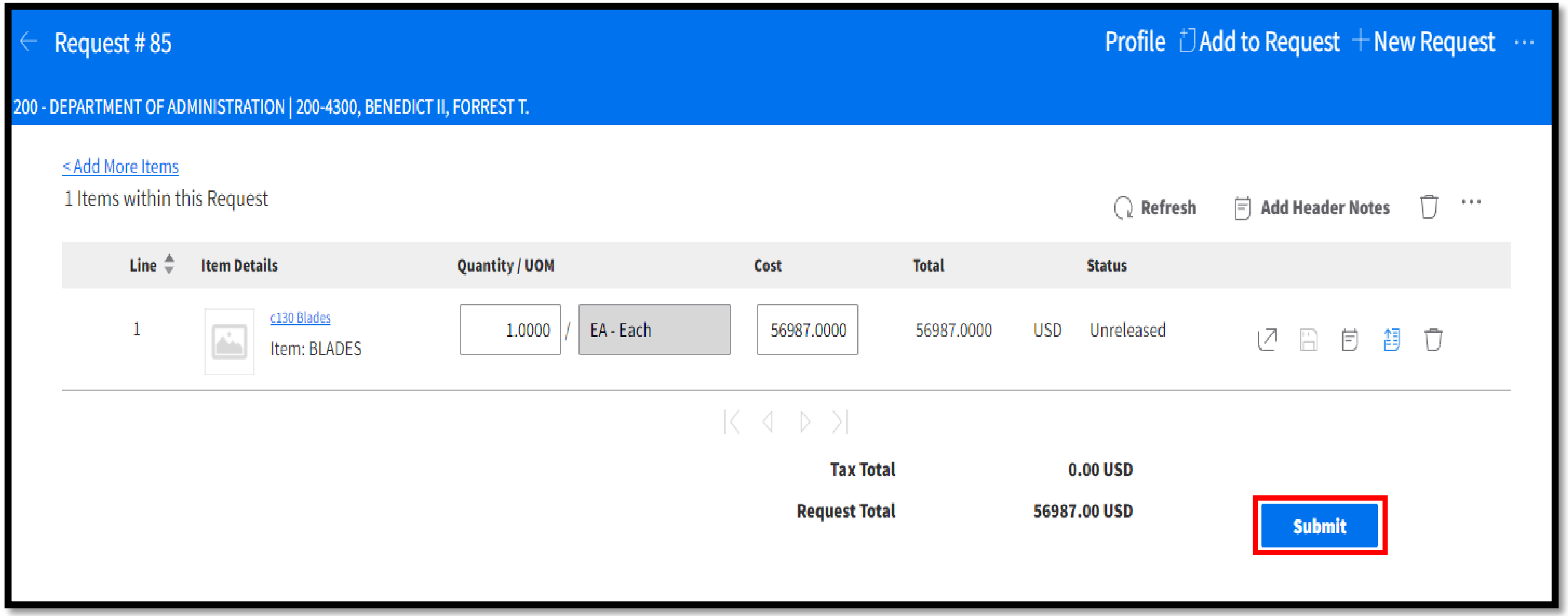
Requisition Number
85

Line Number
1

Inventory Transaction Type
Issue

Distributions

☐	Account
☐	MASTER • 200 • Project • 2000 • Program • ADAD • 45027 • 101000 • Location • Additional Reporting • Custodial Account • Funding Source • System Interagency
	Total



Request # 85

Profile · Add to Request · New Request

200 - DEPARTMENT OF ADMINISTRATION | 200-4300, BENEDICT II, FORREST T.

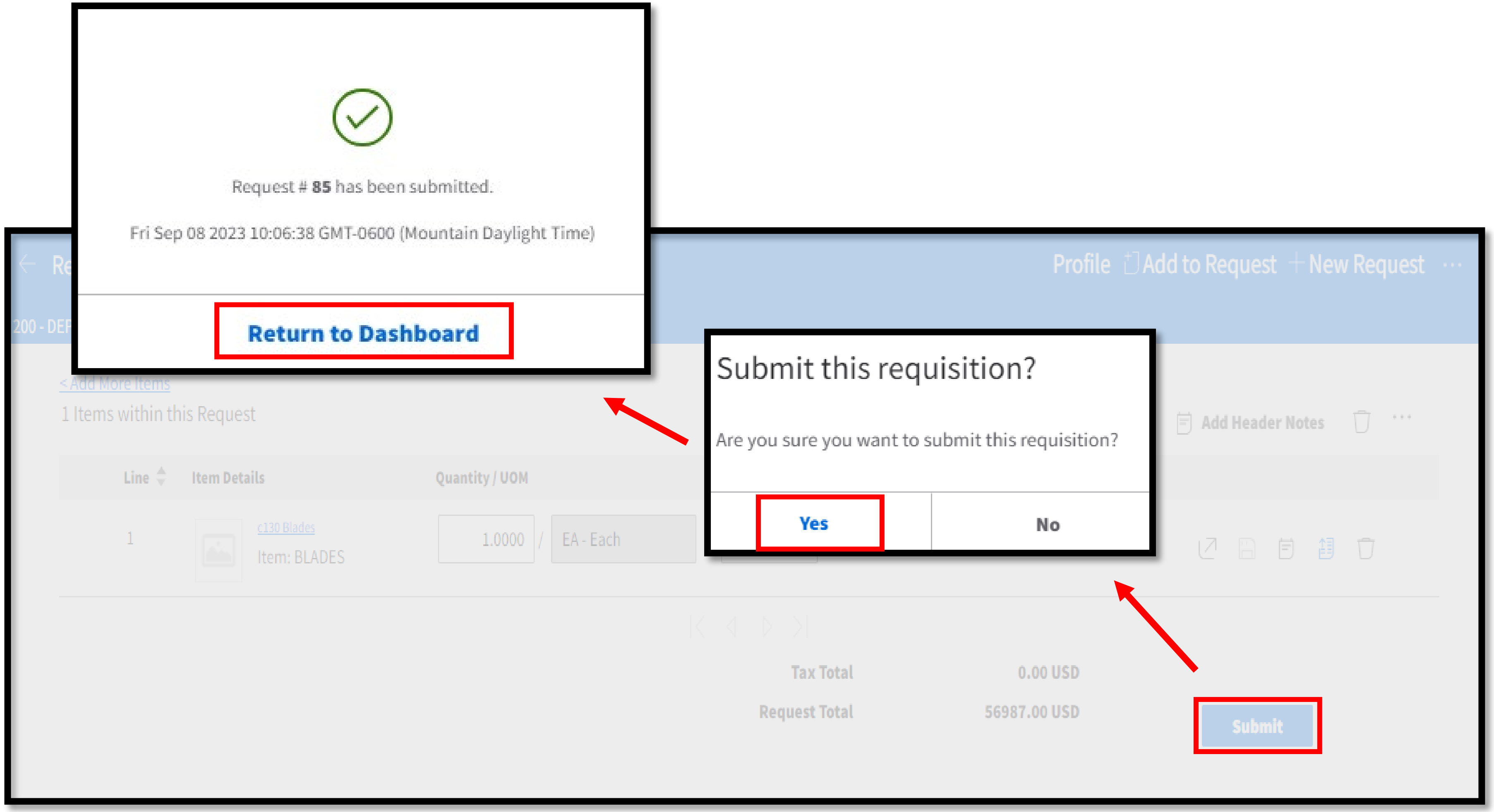
< Add More Items

1 Items within this Request

Refresh · Add Header Notes

Line	Item Details	Quantity / UOM	Cost	Total		Status
1	c130 Blades Item: BLADES	1.0000 / EA - Each	56987.0000	56987.0000	USD	Unreleased

Tax Total	**0.00 USD**
Request Total	**56987.00 USD**



Request # **85** has been submitted.

Fri Sep 08 2023 10:06:38 GMT-0600 (Mountain Daylight Time)

Submit this requisition?

Are you sure you want to submit this requisition?

1 Items within this Request

Line	Item Details	Quantity / UOM
1	c130 Blades Item: BLADES	1.0000 / EA - Each

Tax Total 0.00 USD

Request Total 56987.00 USD

Return to Dashboard
Re
200 - DEF
Profile
Add to Request
New Request
< Add More Items
Add Header Notes
Yes
No
Submit