Procurement Professionals Roles Workshop

February 27nd, 2023

Facilitator: Sheena Coles, Organizational Change Management Deputy Controller

Luma

Expectations

*During the presentation, please take note of the following:*

Mute yourself – Please ensure your microphone is muted and give the presenters your full attention.

Chat Functionality – Please utilize the chat functionality (bottom right) to ask questions or wait until the end of the presentation to come off of mute and ask. We will make every effort to answer as many questions as possible during the session, but some questions may require separate discussions.

Follow up – This meeting is being recorded and will be provided in the follow-up email. Furthermore, we are documenting queries and will publish an FAQ document on the Luma webpage.
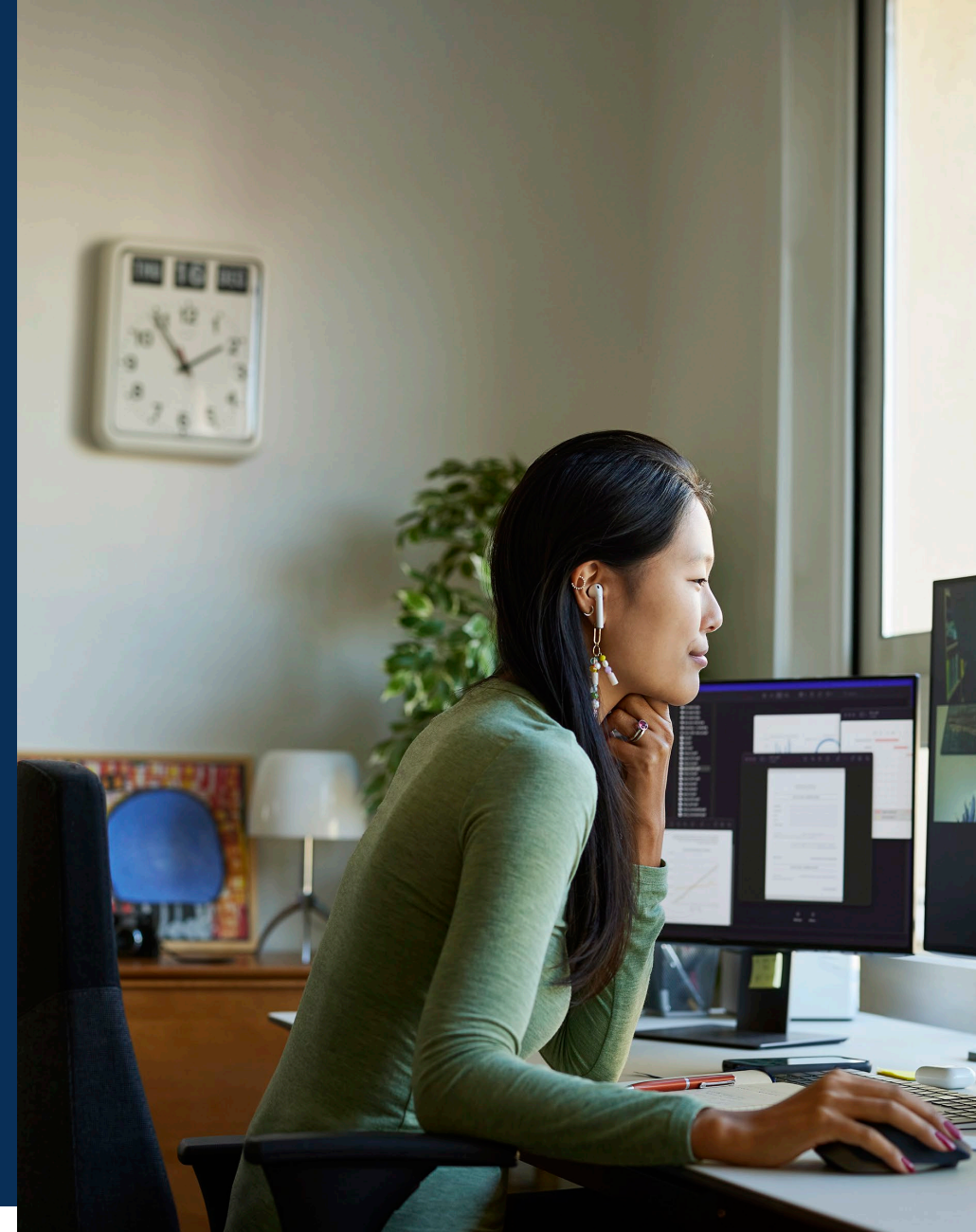
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Statewide Value

Luma will modernize and transform the way the State of Idaho does business, improving transparency, and providing a core foundation for the future.

One system

Real-time

Dynamic

Statewide Functional Areas and Roles

We will be covering the Procurement functional area.

Procurement

There are five additional roles / functional areas that will be introduced in separate Role Workshops:
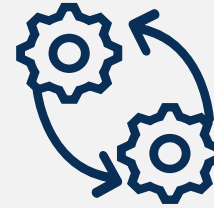
Manager   **Employee**   **Finance**   **HR Generalist**   **Recruiter**

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Objectives

What are you going to do in Luma?

What changes can you expect?

When is this happening?

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Procurement Roles

Requester

- Determines requirements and cost estimates for the purchase of goods and services
- Submits requisitions

Buyer

- Reviews Purchase Requests and creates Purchase Orders
- Conducts market research
- Monitors Vendor commitments
- Approves Vendor returns

Purchasing Receiver

- Receives and inspects incoming goods
- Disposes items that are no longer needed

Procurement Roles (cont.)

Sourcing Manager

- Manages souring events
- Evaluates supplier responses
- Oversees selection and award of sourcing events

Contract Manager

- Creates the contract file, including contract line-item details, terms and conditions, and pricing
- Amends and renews contracts

Culture and Innovation Changes

Digital-first approach

One state mentality

Enhanced security

Changes by Process

The next few slides detail what is changing and the impact of those changes for the processes below.

Requisitions And Purchasing

Sourcing

Receiving

Contract Management

Changes for Requisitions and Purchasing

What is changing

Impact of that change

Approval process

01 The process for creating, submitting, and approving a requisition will be conducted in Luma.

Accounting distribution is required on the requisition

02 Entering accounting distribution codes for the requested good or service are required before submitting the request for approval.

Purchasing and Finance module integration

03 Purchasing and Finance resources can track the entire procure to pay cycle from the requisition all the way to the warrant creation.

Value for Requisitioning

Process standardization and transparency
Luma will standardize the process to create and submit a request across all agencies and increase transparency through a centralized system that provides better data management.

Integration between modules
Luma will link requisitions with associated transactions in the procure to pay process giving users visibility to the entire lifecycle of the purchase.

Automated reminders
Luma will send alerts to remind managers of pending approvals, ensuring tasks are completed in a timely manner. This will help increase agency efficiency.

Changes for Sourcing

What is changing		Impact of that change
IPRO e-purchasing system	01	IPRO will be powered by Luma instead of JAGGAER.
Sourcing events	02	All agencies will be able to use Luma to post sourcing events.
Supplier portal	03	Suppliers can view sourcing events and contracts as well as purchase orders and payments associated with their vendor profile.

Value for Sourcing

Electronic submissions
Luma will offer suppliers the opportunity to submit bids electronically or sourcing managers can enter a manually submitted bid from a supplier.
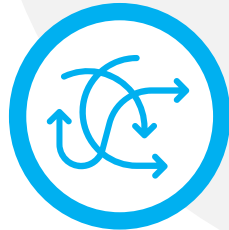
Sourcing all in one place
Luma will be a single source for all sourcing events, offering the state a standardized process that can help manage sourcing events from start to finish.
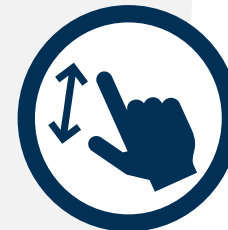
Visibility across agencies
Luma will increase transparency for agencies to view suppliers and source from them.

Simplified business
Luma will allow suppliers to submit bids to multiple agencies.

Changes for Receiving

What is changing

Impact of that change

Standard receiving procedure

01 All agencies will follow a standardized receiving process in Luma.

Inspection of goods

02 Agency staff can require an inspection before the receipt can be completed. After the inspection is completed, the invoice can then be processed against the PO and receipt.

Value for Receiving

Streamlined and standardized
Luma will streamline and standardize the receiving and inspection process helping to create better accountability around goods.

Information all in one place
Luma will centralize information allowing better tracking and processing of payments.

Three-way matching
Luma will offer the ability to track that inspections are completed and passed through a three-way AP matching process. In turn, there will be control over receiving a good prior to payment.

Changes for Contract Management

Contracts tracking

01

Luma allows tracking deliverables, milestones, and remaining balances on contracts based on paid invoices.

Close out process

02

Agencies will be unable to process payments against a closed contract.

Value for Contract Management

Better data
Agencies will have detailed contract management tracking to inform stronger business decisions.

Built-in compliance
Luma will help prevent invalid payments against a contract by recognizing invoices that are not eligible for payment.

Enhanced tracking
Luma will provide contract managers with a tool to assist in tracking whether the supplier and the state have met all their obligations under the contract.

Automated notifications
Luma will alert staff when a contract is nearing its expiration date. This can help prepare contract managers, sourcing managers, and other staff to gear up for new contracts or sourcing events that might be needed.

Road to Go-Live

Role Workshops

You're here!

Agency Participation in Luma Labs

Provide Idaho agency employees an opportunity to experience their COA data, organizational structure, and a sample of basic processes and configurations.

**Luma Labs
February - March**

**Early May:
Supplier Portal Go-Live**

Vendors across the State can begin registering in the Supplier Portal.

Training for FSM and HCM

Training for human capital management: human resources, time, and pay and finance and supply chain management in preparation for Go-Live.

**FSM and HCM Training
May - June**

**June 11th:
HR, Time, and Pay Go-Live**

Agencies across the State begin using Luma to conduct human capital management tasks.

**July 1st:
Finance and Procurement Go-Live**

Agencies across the State begin using Luma to conduct budget, finance, and procurement related tasks.

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Post Go-Live: Sustainment

Get Luma Support

If experiencing errors, employees will be able to submit a service ticket for assistance

Reference Materials

User guides and training materials will be available to support self-support efforts.

Sustainment Team

An entire team will be hosted by the State Controller's Office to support the transition to Luma

* Dates subject to change

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Luma Training:

- Training will be available as stand-alone/self-paced and instructor-led (virtual) courses

- An individual's role will determine the type/amount of training needed

- Generally, core users (frequent Luma users) will need more instruction

- The Training Showcase Kickoff in early March will provide additional details

2023*

March	April	May	June
Training Showcase Kickoff	Training Registration	Employee Luma Training	

*Specific dates to be communicated separately.

Preparing for Luma

In addition to formal training, you will be provided with the following resources to make sure you are confident, knowledgeable and comfortable to complete your work in Luma.

USER EXPERIENCE SIMULATIONS, LUMA LABS, AND MONTHLY COMMUNICATION TOOLKITS

User Experience Simulations, Luma Labs, and the monthly Change Liaison Communication Toolkits are activities and resources designed to inform agency employees of changes associated with Luma and demystify the system.

READINESS CHECKLIST

As a component of the Readiness Program, the Readiness Checklist will outline actions to complete to ensure your agency is prepared prior to system go-live. The checklist will be proactively updated and available on the Luma website in late March.

REVISIT EXISTING COMMUNICATION CHANNELS

Familiarize yourself with information already available about the Luma Project by visiting the Luma Website and the Luma YouTube Page.

Resources

Have questions? Please contact or access the following:

Agency leadership and supervisor – You direct supervisor and agency leadership should be your first stop with question and concerns. They are ready to coach, guide, and support you.

Change Liaison – each agency has an assigned Change Liaison who supports the project's implementation. Each month they receive a communications toolkit to distribute to peers and staff.

Agency Advocate – our Agency Advocates sit within the State Controller's Office and are dedicated to a subset of agencies. They're here to support you and your staff as we cross the finish line to Go-Live.

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Questions?