Add Personalization *(filter)*
Luma
For All Agencies
Will Filter View to Your Agency
Do Not Use With Contract Management

Personalize *(Filter)* Your View
To Your Agency (includes DOP)
Won't Work With Contract Management

1. **This guide will show you how to filter a view to show only your company (agency)**
2. **This must be setup for every tab you want to personalize**
3. **Once set, every time you come to that tab it will show only your personalization**
4. **You can turn this feature off and on as needed**
5. **If you add the filter and it shows an error *(invalid Field)*, don't save your work *(see below)***

Filter Criteria

(not ContractStatus.Closed and not ContractTemplate and n

ⓘ Invalid Field. Company = 200)

NOTE: Filters need to be Punctuated as shown in examples

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Slide #

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 <mark>yellow</mark>
C. Refresh webpage if change/item can't be seen
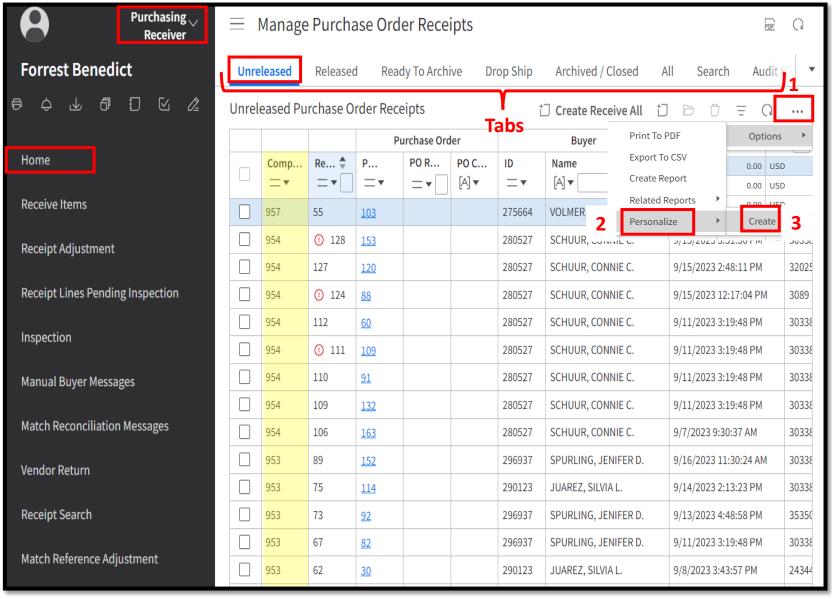
A

B

Personalize Your View

If you don't have this role, use a different one

- This slide is an example of how to create personalization
- Select the Role and Tab you want to update the filter text on
- Follow these steps

Example

Add Filter Text

Repeat Slides 5-6 to add filter to other Tabs

Deactivate Filter
View all Agencies

1. **To deactivate your filter**
2. **Go to the Tab you want to Activate the Filter**
3. **After deactivating you will see all agencies**

Activate Filter View Only Your Agency

1. **If Filter is Deactivated**
2. **Go to the Tab you want to Activate the Filter**
3. **Activate Filter to view only your agency**

Personalize to View Your Agency

Reset Filter Code

1. If for some reason your filter doesn't work, you can reset it back to its original state
2. Go to the Tab you want to Activate the Filter
3. Follow these steps to reset filter

View All Personalized Filter

1. **You can view all places were you have Personalization Set**
2. **These icons are on any page** →
3. **You can Deactivate/Activate or Delete the Filters here**

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'
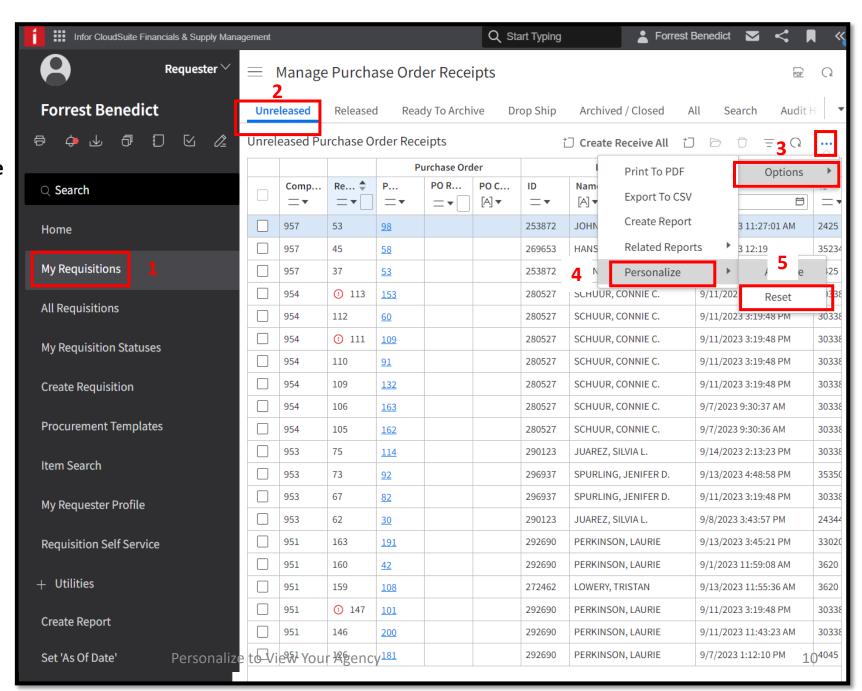Create Report

Personalizations   Reports   Invalid

My Personalizations   ☰

Name

[A] ⌄ [   ]

Business Class

[A] ⌄ [   ] ⌕≡

Status

[⌄]

Clear   Search

AllPurchaseOrderReceipts
List on PurchaseOrderReceipt
                    Deactivate   🗑

⚠ **ReleasedPurchaseOrderReceipts**
List on PurchaseOrderReceipt
                    Activate   🗑

EventsPendingAward
List on SourcingEvent
                    Deactivate   🗑

DraftEvents
List on SourcingEvent
                    Deactivate   🗑

SupplierSearchList
List on Supplier
Personalize to View Your Agency
                    Deactivate   🗑

Details   Status History   LPL

ReleasedPurchaseOrderReceipts

⚠ Inactive

Business Class   Type
PurchaseOrderReceipt   **List**

Description

Not Entered   Update

Actions

Deactivate   Turns off your personalization. Allows you to see the delivered applicatio

Activate   Turns on a previously deactivated personalization. Allows you to see you

Delete   Deletes your personalization. Allows you to see the delivered application

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