

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*)



NOTE: Filters need to be Punctuated as shown in examples

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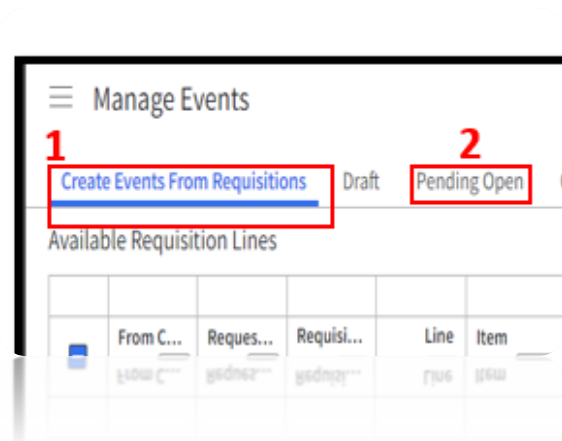
Slide

- 2.....Introduction with information
- 3.....Table of Contents
- 4.....Navigation Helps
- 5-6.....Add filter to Tab/View
- 7.....Add additional personalization (*filters*)
- 8.....Deactivate Filter (*view all Agencies*)
- 9.....Activate Filter (*view only your Agency*)
- 10.....Reset Filter (*completely removes your personalized filter*)
- 11.....How to view where you have added personalization

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. Refresh webpage if change/item can't be seen

A



B

New Template Values

Company *
200 DEPARTMENT OF ADMIN

From Event Template # *
90000121 REQUEST FOR QUOTE

Name
Bug Zapper

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

Purchasing Receiver

Forrest Benedict

Home

Receive Items

Receipt Adjustment

Receipt Lines Pending Inspection

Inspection

Manual Buyer Messages

Match Reconciliation Messages

Vendor Return

Receipt Search

Match Reference Adjustment

Manage Purchase Order Receipts

Unreleased Released Ready To Archive Drop Ship Archived / Closed All Search Audit

Unreleased Purchase Order Receipts

Buyer

Print To PDF

Export To CSV

Create Report

Related Reports

Personalize

Create

	Comp...	Re...	P...	PO R...	PO C...	ID	Name		
<input type="checkbox"/>	957	55	103			275664	VOLMER		
<input type="checkbox"/>	954	128	153			280527	SCHUUR, CONNIE C.	9/15/2023 3:31:50 PM	30338
<input type="checkbox"/>	954	127	120			280527	SCHUUR, CONNIE C.	9/15/2023 2:48:11 PM	32025
<input type="checkbox"/>	954	124	88			280527	SCHUUR, CONNIE C.	9/15/2023 12:17:04 PM	3089
<input type="checkbox"/>	954	112	60			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	954	111	109			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	954	110	91			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	954	109	132			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	954	106	163			280527	SCHUUR, CONNIE C.	9/7/2023 9:30:37 AM	30338
<input type="checkbox"/>	953	89	152			296937	SPURLING, JENIFER D.	9/16/2023 11:30:24 AM	30338
<input type="checkbox"/>	953	75	114			290123	JUAREZ, SILVIA L.	9/14/2023 2:13:23 PM	30338
<input type="checkbox"/>	953	73	92			296937	SPURLING, JENIFER D.	9/13/2023 4:48:58 PM	35350
<input type="checkbox"/>	953	67	82			296937	SPURLING, JENIFER D.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	953	62	30			290123	JUAREZ, SILVIA L.	9/8/2023 3:43:57 PM	24344

Add Filter Text

UnreleasedPurchaseOrderReceipts [Edit](#)

Business Class: List
PurchaseOrderReceipt: UnreleasedPurchaseOrderReceipts

Column: **Filter** Display Sorting Totaling

Filter Criteria: (IsValidForActorContext and IsUnreleased and not InterfaceInProcess) **and Company = 200**

Builder

1. Add phrase in RED
2. Capitalize the first letter in "Company"

3

Ok

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

The screenshot shows the 'Manage Purchase Order Receipts' interface. The user is logged in as Forrest Benedict. The 'Unreleased' filter is selected (2). The 'My Requisitions' tab is highlighted (1). The 'Options' menu is open, and the 'Deactivate' option is selected (5). The 'Personalize' option is also highlighted (4). The table below shows the data for 'Unreleased Purchase Order Receipts'.

	Comp...	Re...	P...	PO R...	PO C...	ID	Buyer Name
<input type="checkbox"/>	=>	=>	=>	=>	[A]	=>	[A]

Personalize to View Your Agency

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

The screenshot shows the Infor CloudSuite Financials & Supply Management interface. The user is Forrest Benedict. The page title is 'Manage Purchase Order Receipts'. The 'Unreleased' filter tab is selected. A dropdown menu is open, showing the 'Options' menu with 'Personalize' and 'Activate' options highlighted. The table below shows a list of Purchase Order Receipts.

	Comp...	Re...	P...	PO R...	PO C...	ID	Name		
<input type="checkbox"/>	957	53	98			253872	JOHN		
<input type="checkbox"/>	957	45	58			269653	HANS		
<input type="checkbox"/>	957	37	53			253872	IN		
<input type="checkbox"/>	954	113	153			280527	SCHUUR, CONNIE C.	9/11/202	
<input type="checkbox"/>	954	112	60			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	954	111	109			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	954	110	91			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	954	109	132			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	954	106	163			280527	SCHUUR, CONNIE C.	9/7/2023 9:30:37 AM	30338
<input type="checkbox"/>	954	105	162			280527	SCHUUR, CONNIE C.	9/7/2023 9:30:36 AM	30338
<input type="checkbox"/>	953	75	114			290123	JUAREZ, SILVIA L.	9/14/2023 2:13:23 PM	30338
<input type="checkbox"/>	953	73	92			296937	SPURLING, JENIFER D.	9/13/2023 4:48:58 PM	35350
<input type="checkbox"/>	953	67	82			296937	SPURLING, JENIFER D.	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	953	62	30			290123	JUAREZ, SILVIA L.	9/8/2023 3:43:57 PM	24344
<input type="checkbox"/>	951	163	191			292690	PERKINSON, LAURIE	9/13/2023 3:45:21 PM	33020
<input type="checkbox"/>	951	160	42			292690	PERKINSON, LAURIE	9/1/2023 11:59:08 AM	3620
<input type="checkbox"/>	951	159	108			272462	LOWERY, TRISTAN	9/13/2023 11:55:36 AM	3620
<input type="checkbox"/>	951	147	101			292690	PERKINSON, LAURIE	9/11/2023 3:19:48 PM	30338
<input type="checkbox"/>	951	146	200			292690	PERKINSON, LAURIE	9/11/2023 11:43:23 AM	30338
<input type="checkbox"/>	951	126	181			292690	PERKINSON, LAURIE	9/7/2023 1:12:10 PM	4045

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

Infor CloudSuite Financials & Supply Management

Requester Forrest Benedict

Manage Purchase Order Receipts

Unreleased Released Ready To Archive Drop Ship Archived / Closed All Search Audit H

Unreleased Purchase Order Receipts Create Receive All

Print To PDF Options

Export To CSV

Create Report

Related Reports

Personalize

Reset

	Comp...	Re...	P...	PO R...	PO C...	ID	Name	
<input type="checkbox"/>	957	53	98			253872	JOHN	
<input type="checkbox"/>	957	45	58			269653	HANS	
<input type="checkbox"/>	957	37	53			253872	M	
<input type="checkbox"/>	954	113	153			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM 30338
<input type="checkbox"/>	954	112	60			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM 30338
<input type="checkbox"/>	954	111	109			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM 30338
<input type="checkbox"/>	954	110	91			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM 30338
<input type="checkbox"/>	954	109	132			280527	SCHUUR, CONNIE C.	9/11/2023 3:19:48 PM 30338
<input type="checkbox"/>	954	106	163			280527	SCHUUR, CONNIE C.	9/7/2023 9:30:37 AM 30338
<input type="checkbox"/>	954	105	162			280527	SCHUUR, CONNIE C.	9/7/2023 9:30:36 AM 30338
<input type="checkbox"/>	953	75	114			290123	JUAREZ, SILVIA L.	9/14/2023 2:13:23 PM 30338
<input type="checkbox"/>	953	73	92			296937	SPURLING, JENIFER D.	9/13/2023 4:48:58 PM 35350
<input type="checkbox"/>	953	67	82			296937	SPURLING, JENIFER D.	9/11/2023 3:19:48 PM 30338
<input type="checkbox"/>	953	62	30			290123	JUAREZ, SILVIA L.	9/8/2023 3:43:57 PM 24344
<input type="checkbox"/>	951	163	191			292690	PERKINSON, LAURIE	9/13/2023 3:45:21 PM 33020
<input type="checkbox"/>	951	160	42			292690	PERKINSON, LAURIE	9/1/2023 11:59:08 AM 3620
<input type="checkbox"/>	951	159	108			272462	LOWERY, TRISTAN	9/13/2023 11:55:36 AM 3620
<input type="checkbox"/>	951	147	101			292690	PERKINSON, LAURIE	9/11/2023 3:19:48 PM 30338
<input type="checkbox"/>	951	146	200			292690	PERKINSON, LAURIE	9/11/2023 11:43:23 AM 30338
<input type="checkbox"/>	951	126	181			292690	PERKINSON, LAURIE	9/7/2023 1:12:10 PM 4045

View All Personalized Filter

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

Forrest Benedict Requester

Personalizations Reports Invalid

My Personalizations Details Status History LPL

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
Deactivate []

ReleasedPurchaseOrderReceipts
Inactive
Business Class PurchaseOrderReceipt Type List

Description
Not Entered Update

Actions
Deactivate Turns off your personalization. Allows you to see the delivered application
Activate Turns on a previously deactivated personalization. Allows you to see your
Delete Deletes your personalization. Allows you to see the delivered application

Personalize to View Your Agency