

Add Personalization (*filter*)
Contract Management
Luma
Agencies Only
Will Filter View to Your Agency

Personalize (Filter) Your View To Your Agency

Contract Management Only

Agency

1. This guide will show you how to filter a view to show only your company (agency) for contracts
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 (*my take a few moments to populate*)
4. You can turn this feature off and on as needed
5. If you add the filter and it shows an error, don't save your work (*see below*)



NOTE: Filters need to be Punctuated as shown in examples

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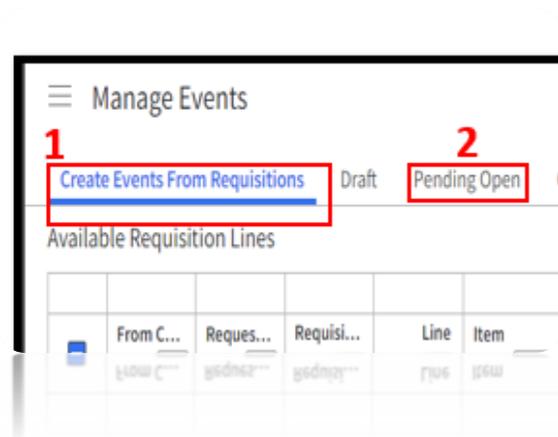
Slide

- 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 *
 DEPARTMENT OF ADMIN

From Event Template # *
 REQUEST FOR QUOTE

Name

Personalize Your View

Contract Management

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

The screenshot displays the 'Contract Management' interface. On the left is a dark sidebar with a user profile for 'Forrest Benedict' and a 'Contract Manager' dropdown menu. The main area is titled 'Manage Contracts' and features a 'Tabs' bar with options: 'Contracts', 'Search List', 'In Process', 'Contract Costs', 'Proposed Contracts', and 'Contract Hierarchy'. The 'Contracts' tab is active, showing a list of contract entries. A red box highlights the 'Contracts' tab, and a red '1' is placed above the menu icon (three dots) for the selected contract. A context menu is open over this menu icon, listing various actions. A red box highlights the 'Options' menu item, with a red '2' next to it. A second context menu is open over 'Options', listing actions like 'Print To PDF', 'Export To CSV', and 'Personalize'. A red box highlights the 'Personalize' option, with a red '3' next to it. A third context menu is open over 'Personalize', listing 'Create', 'View Audit Log', and 'View Full Audit Log'. A red box highlights the 'Create' option, with a red '4' next to it. A red '5' is located in the bottom right corner of the interface. The background shows a contract summary for 'JANET GARRETT/15-7' with details like 'Supplier: 23029 - EDMARK AUTO INC' and 'Working Contract ID: CPO151500021'.

Contracts [Edit](#)

Business Class List
Contract CManagerDashboard

Column **Filter** Display

Filter Criteria

This phrase will change depending on Tab you are in

1 Add phrase in Red as shown

(not ContractStatus.Closed and not ContractTemplate and not CanUpdateProposedContract) **and**
ContractClassification like "*270 DPA"

Builder

Capitalization is important

Add your Agency Number with DPA after

OR

- If you want to see your agency's contracts as well as contracts **Rev 1** managed by DOP, do the following:
- Delete the **DPA** and add an ***** after your Agency Number i.e. **"*270*"**

⚠ Invalid Condition. ⚠

- If line is entered in error, system will let you know here
- If you Can't add the filter, just click on Cancel

Cancel

Reset

2 **Ok**

- Closes Page
- Won't save work

- Closes Page
- Resets Filter to Original State

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 Deactivate the filter
3. After deactivating you will see all agencies

The screenshot shows the 'Contract Manager' interface. On the left sidebar, the 'Manage Contracts' tab is highlighted with a red box and a red '1'. The main content area shows the 'In Process Contracts' tab selected with a red box and a red '2'. A table of contracts is displayed, with the 'Personalize' button highlighted in a red box and a red '4'. A dropdown menu is open, showing the 'Deactivate' option highlighted in a red box and a red '5'. A red '3' points to the menu icon in the top right of the table. A red '5' also points to the 'Deactivate' button in the dropdown menu.

Contract Manager

Forrest Benedict

Home

Manage Contracts 1

Search For Contract Information

Additional Contract Information

+ Manage Suppliers And Subcont...

Spend Analysis

+ Analyze Contract Information

Refresh Spend Cube

My IDM Jobs

Manage Contracts

ist In Process Contract Costs Proposed Contracts Contract Hierarchy Invoice Cost Differences

In Process Contracts

	Contr...	C...	Working C...	Name
<input type="checkbox"/>	[A]▼	=▼	[A]▼	[A]▼
<input type="checkbox"/>	LUMA	2	CPO151500021	JANET GARRETT/15-7
<input type="checkbox"/>	LUMA	13	BPO172100524	ILETS CIRCUITS
<input type="checkbox"/>	LUMA	15	CPO182400502	SAAS OVER LEGAL PERMIT SYS
<input type="checkbox"/>	LUMA	19	CPO20221041	DESIGNATED EXAMINER SERVICES
<input type="checkbox"/>	LUMA	31	CPO182400263	D3JANITORIALSVCEB/WBPOE
<input type="checkbox"/>	LUMA	33	SBPO19200189	ITB FACILITIES MRO
<input type="checkbox"/>	LUMA	39	CPO182400062	JANITORIAL SERVICES - BLACKS CREEK REST AREA
<input type="checkbox"/>	LUMA	44	CPO181000338	BROCHURE PRINTING
<input type="checkbox"/>	LUMA	49	CPO20220903	HVAC COOLING/HUMIDIFICATION SYSTEMS & UPS (BATTERY BACKUP) SYSTEMS SERV
<input type="checkbox"/>	LUMA	52	PO20210875	WHEEL LOADERS 2021
<input type="checkbox"/>	LUMA	54	PO20210864	MOTOR GRADERS 2021
<input type="checkbox"/>	LUMA	55	CPO20200228	MARKETING SERVICES

Print To PDF

Export To CSV

Create Report

Related Reports

Personalize 4

Update

Deactivate 5

Reset

Options

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 'Contract Manager' interface for user 'Forrest Benedict'. The 'In Process' tab is selected. A table of 'In Process Contracts' is displayed. A context menu is open over the table, with the 'Personalize' option selected, and a sub-menu showing the 'Activate' option.

1. Manage Contracts

2. In Process

3. Options

4. Personalize

5. Activate

Contr...	C...	Working Contract ID	Name
[A]	[A]		[A]
<input type="checkbox"/>	LUMA 2	CPO151500021	JANET GA
<input type="checkbox"/>	LUMA 13	BPO172100524	ILETS
<input type="checkbox"/>	LUMA 15	CPO182400502	SAAS OVE
<input type="checkbox"/>	LUMA 19	CPO20221041	DESIGNATED EXAMINER SERVICES
<input type="checkbox"/>	LUMA 31	CPO182400263	D3JANITORIALSVCEB/WBPOE
<input type="checkbox"/>	LUMA 33	SBPO19200189	ITB FACILITIES MRO
<input type="checkbox"/>	LUMA 39	CPO182400062	JANITORIAL SERVICES - BLACKS CREEK REST AREA
<input type="checkbox"/>	LUMA 44	CPO181000338	BROCHURE PRINTING
<input type="checkbox"/>	LUMA 49	CPO20220903	HVAC COOLING/HUMIDIFICATION SYSTEMS & UPS (BATTERY BAC
<input type="checkbox"/>	LUMA 52	PO20210875	WHEEL LOADERS 2021

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 Reset
3. Follow these steps to reset filter

The screenshot shows the 'Contract Manager' interface for user 'Forrest Benedict'. The 'Manage Contracts' tab is selected in the sidebar (1). The main view shows 'In Process Contracts' (2). A table lists various contracts. A context menu is open over a row (3), with the 'Reset' option highlighted (5). Other options in the menu include 'Personalize' (4), 'Options', 'Print To PDF', 'Export To CSV', 'Create Report', and 'Related Reports'.

	Contr...	C...	Working Contract ID	Name
<input type="checkbox"/>	[A]▼	=▼	[A]▼	[A]▼
<input type="checkbox"/>	LUMA	2	CPO151500021	JANET GA
<input type="checkbox"/>	LUMA	13	BPO172100524	ILETS
<input type="checkbox"/>	LUMA	15	CPO182400502	SAA: 4
<input type="checkbox"/>	LUMA	19	CPO20221041	DESIGNATED EXAMINER SERVICES 5
<input type="checkbox"/>	LUMA	31	CPO182400263	D3JANITORIALSVCEB/WBPOE
<input type="checkbox"/>	LUMA	33	SBPO19200189	ITB FACILITIES MRO
<input type="checkbox"/>	LUMA	39	CPO182400062	JANITORIAL SERVICES - BLACKS CREEK REST AREA
<input type="checkbox"/>	LUMA	44	CPO181000338	BROCHURE PRINTING
<input type="checkbox"/>	LUMA	49	CPO20220903	HVAC COOLING/HUMIDIFICATION SYSTEMS & UPS (BATTERY BAC
<input type="checkbox"/>	LUMA	52	PO20210875	WHEEL LOADERS 2021

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 Activate, Deactivate or Delete Filter from here

The screenshot shows a user interface for a requester named Forrest Benedict. The main content area is titled 'Personalizations' and shows a list of filters. The filter 'ReleasedPurchaseOrderReceipts' is highlighted in blue. The sidebar menu has a search bar and several navigation items. The main content area has a search bar and a list of filters with 'Deactivate' and 'Delete' buttons.

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