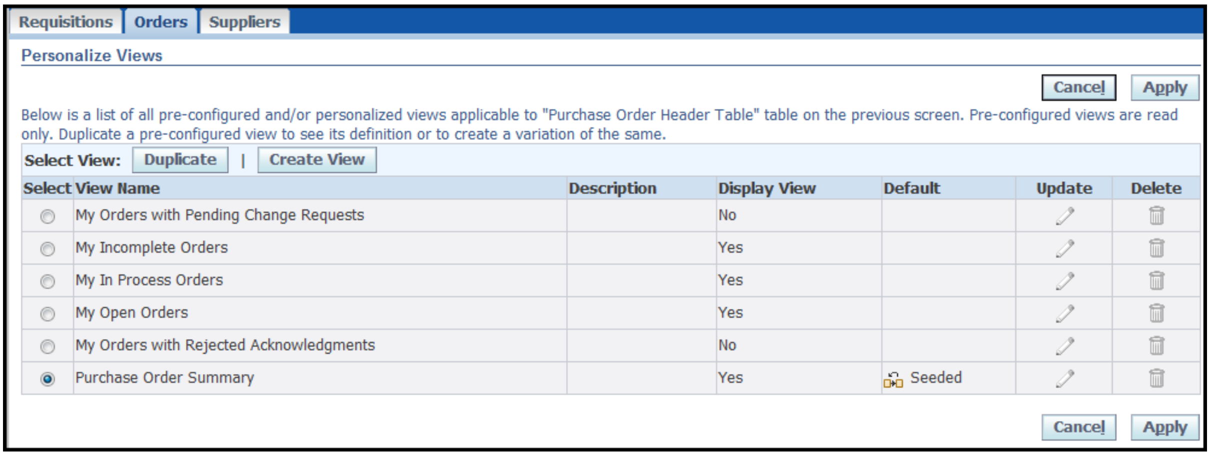
Buyers Work Centre: Personalization

This function enables you to set up personalised views of requisition and purchase order data. Whether you are creating a personalised view on the Requisitions or Orders tab, the process is the same, the only difference is that the additional fields you can add into a view vary.

Creating a Personalised View

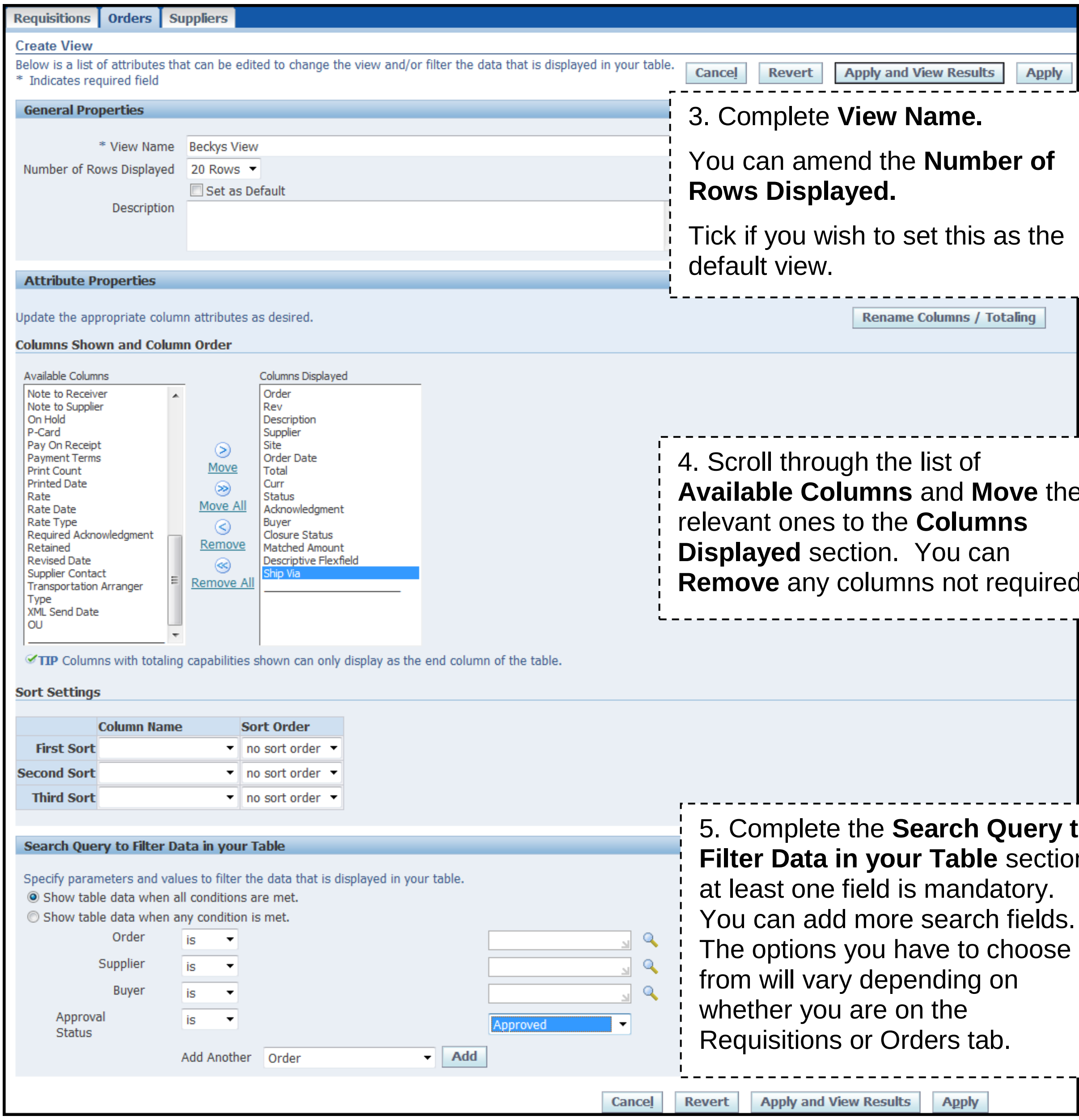
Responsibility	**iProcurement Buyer**
Navigate	**Buyers Work Centre > Orders or Requisitions**

1. Once you have navigated via the above and you are on the relevant tab, click on **Personalize** and the following screen displays.



2. To create a brand new view, click **Create View** to display the **General Properties** screen.

3. Or base a view on the standard Purchase Order Summary view, but add in a couple of extras! To do this select ***Purchase Order Summary*** and click ***Duplicate View.***



3. Complete **View Name.**

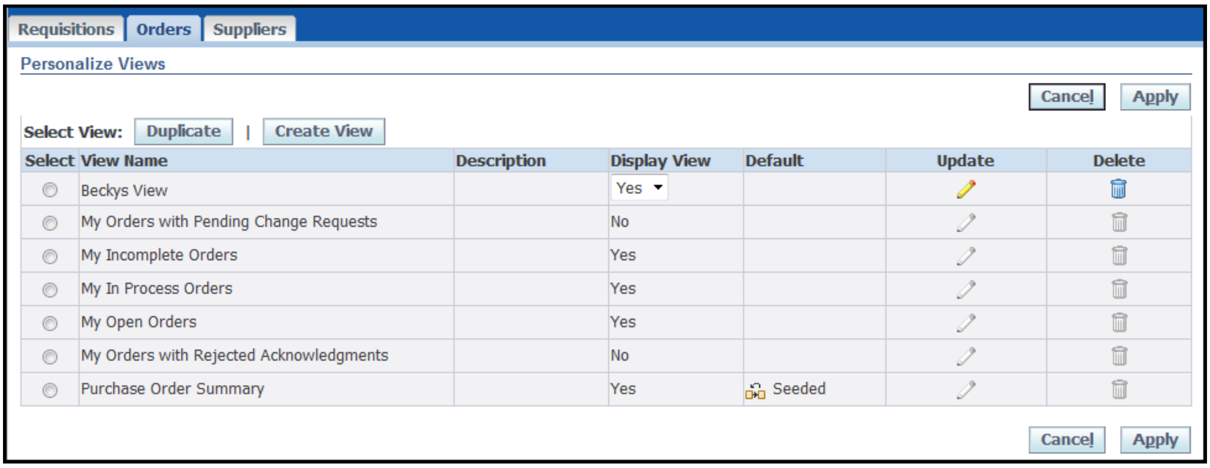
You can amend the **Number of Rows Displayed.**

Tick if you wish to set this as the default view.

4. Scroll through the list of **Available Columns** and **Move** the relevant ones to the **Columns Displayed** section. You can **Remove** any columns not required.

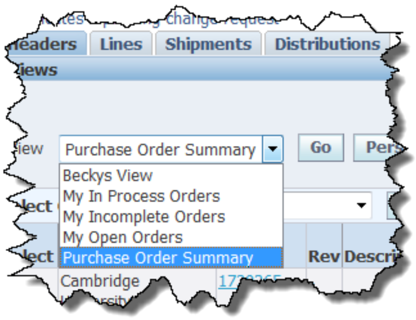
5. Complete the **Search Query to Filter Data in your Table** section, at least one field is mandatory. You can add more search fields. The options you have to choose from will vary depending on whether you are on the Requisitions or Orders tab.

6. Click **Apply** and the **Personalize Views** screen displays.



7. Click **Apply** and the relevant tab screen will display.

8. If you haven't set the new screen as your default, then click on the drop down arrow in the **View** section and you will see your view listed.



9. **Highlight** it and click **Go.**

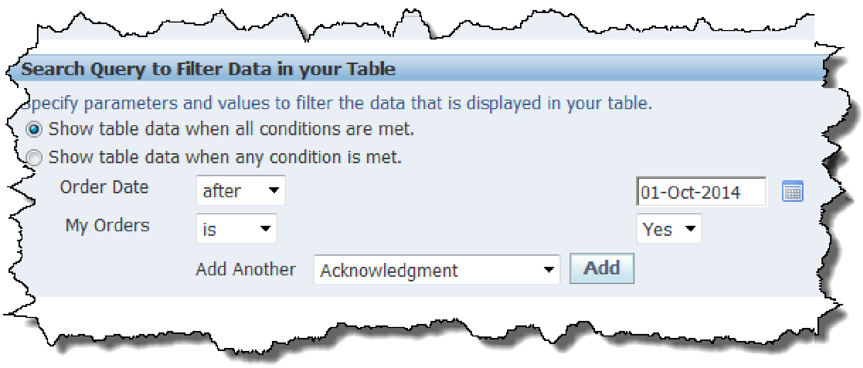
   Data matching your criteria will display.

My Purchase Order Summary screen takes a while to display

If you are a frequent buyer then the Purchase Order Summary screen may start to take longer than usual to load due to the volume of orders you have raised. To reduce the amount of time it takes for the screen to load, you can personalise the Purchase Order summary page so that only orders after a certain date display. Orders before the date you specify can still be searched for using the relevant search fields.

- In ***Step 3*** select ***Set as Default***. (ignore step 4 as its irrelevant in this scenario)

- In ***Step 5,*** in the ***Search Query to Filter Data in your Table*** section, add in ***Order Date*** and in the drop down list for that field, select ***after.*** Use the calendar icon to select the date you wish to view your orders raised after. Click ***Apply and View Results.***



- Personalised screen will now display with the orders from the date you selected.

You can edit this personalised screen at any point to change the calendar date, by clicking on ***Personalize,*** clicking on the ***Pencil*** icon for the relevant view and navigating to the field to be changed.