



Landmark Web UI User Guide

Release 2023.x

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About this guide

This guide provides information about the web-based user interface for Infor Landmark applications. This guide describes functionality and features of the latest Infor user experience, called SoHo 4 UX.

Infor Landmark applications run within the Infor Ming.le™ user interface.

Related documents

- For information about supported browsers, see the compatibility matrix on Infor Support Portal or your Infor CloudSuite™ technical requirements guide
- *Infor Ming.le™ Help* available on docs.infor.com

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://conciierge.infor.com/> and create a support incident.

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Chapter 1: Overview

About Landmark Web UI

The Landmark Web UI is web-based user interface provided with your Infor Landmark applications. The UI uses HTML5, CSS, JavaScript and JSON languages, markup, and techniques.

Note: Depending on your security privileges, some features may be hidden from you. Your administrator provides access to user interface features.

Major features

- User devices are automatically detected and applications display appropriately. Pages are responsive, mobile-friendly, and in some cases adaptive.
- Ability to set an as of date to view application data as of a past, current, or future date.
- Ability to view the progress of action requests and scheduled activities.
- Ability to generate CSV or PDF outputs from lists.
- Ability to create custom reports by filtering delivered lists.
- Ability to personalize the current list or form.

Basic navigation

The Landmark web UI is made up of these areas:

Area	Description
Menu	<p>The application menu displays on the left. You can hide the menu and open it when needed, click the hamburger icon in the application header bar.</p> <p>Use the menu to switch between web applications and access the pages, forms, and lists for your current application.</p> <p>The menu tree is collapsible and expandable and it remembers your actions.</p>

Area	Description
Forms, lists, and pages	<p>Landmark-based applications are made up of standard types of user interfaces:</p> <ul style="list-style-type: none"> • Lists display the records or a subset of records from the database table associated with a business class. • Forms enable you to view, add, modify, and delete data associated with a business class. • Pages are composites that combine lists into a single viewable screen. Lists are placed on the page in panes using different layout formats and one or more tabs.

Menu

This table describes the functions available in the application menu:

Function	Description
Application switcher	Click to select your web application.
User icons	<p>Click to access My Print Files, My Notifications, My Inbasket, My Jobs, My Reports, and My Actions.</p> <p>Note: Some icons may be hidden or displayed depending on the application configuration and your security privileges.</p>
Menu search	<p>Search menu items to find a list, form, or page.</p> <p>You will only find a specific list, form, or page if it is included in the application menus.</p>
Settings	<p>Click to open User Settings where you can select UI themes, colors, and layout and launch the keyboard shortcuts reference window.</p> <p>If you have permissions, you can set your preferred starting page.</p>
About icon	Click to open the page with information about the Landmark technology, web user interface, and application versions.
Help icon	Click to open online documentation for your application in a new browser tab.

Lists, forms, and pages

This table describes common functions available in list, forms, and pages:

Function	Description
Toolbar	Actions associated with the list or form, including create, save, delete, list filter, and more actions menu (ellipsis).
List inline create	If a list implements inline create in the source code, you can add data directly in the list row.

Function	Description
Records per page	<p>The number of records to show in the list.</p> <p>To change the number of records per page in a list, select a new value up to 200.</p> <p>To change the default records per page for a list, an administrator can create a configuration or personalization using the Configuration or Personalization Console in the Rich Client user interface.</p>
Field actions	<p>Field-level options that display from a vertical ellipsis next to fields when they are active. Actions include Show Field History, Show Pending Changes, Drill Around, and so on.</p>

Version information

You may need to record version information for other users or support.

You can access the version information of Landmark technology, web user interface, application, and security from the user interface. Click the **About** icon at the bottom of the left application menu.

On the **Versions** page, you can print to a file or send an email with the information.

Language and locale settings

The Web UI uses the **Language** and Locale settings from Infor Ming.le user settings. The Infor Ming.le user settings default is to use browser settings.

Infor Ming.le user settings will override any other Landmark-specific setting with the exceptions of a special context session key set for IsoLocale added to the URL or if en-US is set in Infor Ming.le.

In the Web UI, your IsoLocale can be set in the following ways:

- Using Infor Ming.le user settings
- Using URL with a `csk.IsoLocale` parameter, for example `csk.IsoLocale=fr_FR`
- Using the **IsoLocale** field on Actor record
- Using the browser language settings

The language defaulting logic:

- Check for `csk.IsoLocale=<IsoLocale>` on URL. If found, use it.
- Check for Infor Ming.le user settings. If found, use it. In Infor Ming.le this is always set and found.
- If 1 or 2 is not set or item 2 was set to **en-US**, then check for **Actor.IsoLocale** value. If populated, use it.
- Use browser language setting.

Launching and signing out of Infor Landmark applications

This section describes how to launch and log out of Infor Landmark applications. If your system administrator has created a different system at your site, you might not log in as described here.

When you are finished using the applications, it is a good idea to sign out. Depending on procedures at your site, logging out can be mandatory.

Launching

- 1 From your browser, launch Infor Ming.le and log in. If you are unsure of the URL, see your system administrator.
- 2 From the Infor Ming.le main page, click the application menu and select the icon for your Landmark application. You will be on the homepage for the application.

Signing out

- 1 Click the user menu in the right of the Infor Ming.le top navigation panel and then click **Sign out**.
- 2 To completely end your session, close the browser window.

Chapter 2: Working with applications

About your default start page

When you select an Infor Landmark Technology Runtime application such as Infor Financials & Supply Management in the Infor Ming.le application menu, you are presented with a default home page that displays widgets of your available applications with icons and descriptions. Click on a widget to navigate to an application.

If you have access to a single application, you will bypass the default home page and be taken directly to your application. This will also happen if the application is configured with a default starting web application, such as HR Talent, which is usually configured to default users to the Employee Space application.

Your security roles may be configured so you can select your preferred starting page. This selection will take precedence over the default home page in future sessions. For example, User A might select the Buyer homepage and User B might select Payables Manager.

If you are allowed to select your preferred starting page, you can clear or change your preferred application selection in the application menu. Select the **Settings** icon and select a web application in the **Preferred Application** field.

If you do not see the **Preferred Application** field on **User Settings**, your user role does not have access to change preferred application start page. Your administrator controls this setting for security roles or for the application.

Keyboard shortcuts

General

Action	Keyboard shortcuts (PC)	Keyboard shortcuts (Mac)
Toggle menu	Ctrl + Shift + K	Cmd + Shift + K
Save	Ctrl + Shift + S	Cmd + Shift + S
Previous record	Ctrl + Shift + Left arrow	Cmd + Shift + Left arrow
Next record	Ctrl + Shift + Right arrow	Cmd + Shift + Right arrow
Field define	Ctrl + Shift + F6	Fn + F6

Action	Keyboard shortcuts (PC)	Keyboard shortcuts (Mac)
Refresh	Ctrl + Shift + F5	Fn + F5
Open	Ctrl + Alt + O	Cmd + Alt + O
Field select	Down arrow	Down arrow
Edit undo	Ctrl + Z	Cmd + Z
Edit redo	Ctrl + Y	Command + Shift + Z
View information about a field, page, list, or form, including a URL	Ctrl + Shift + left-mouse-click	Cmd + Shift + mouse-click
Add today's date in a date field	t	t

Datepicker calendar

Action	Keyboard shortcut
Move left	Left arrow
Move right	Right arrow
Move up	Up arrow
Move down	Down arrow
Previous month	Page Up
Next month	Page Down
Select date	Enter

Lists (inline create)

If a list allows you to add data using the inline create row, you can use keyboard shortcuts within the row to help with data entry.

Action	Keyboard shortcut
Delete the row you are currently in	Escape

About the Drill Around feature

The Drill Around feature lets you view more information without having to navigate to the page where that information is maintained.

For example, you could use the Drill Around feature to determine the purchase unit of measure for an item when adding the item to a requisition.

- 1 On a requisition, you create a new requisition line.
- 2 You click in the Item field to add an item.
- 3 In the select list, you locate your item and right-click on it.
- 4 Select **Drill Around > Valid Unit of measure**. The item units of measure page shows in a new browser tab.

Viewing data through the Drill Around feature

- 1 For a field-level Drill Around, click **Field Actions** and select **Drill Around** and the related item.
- 2 For a row that lets you use the Drill Around feature, right-click the row or click **More Actions** (ellipsis) and select **Drill Around** and the related item.

Reviewing and working with your actions

As you perform tasks in the application, you initiate action requests and scheduled actions. Action requests trigger processes (work units) that are routed by the Infor Process Server.

Scheduled actions are actions on high volumes of data that may take a while to complete. Scheduled actions can either start running instantly or run on a schedule.

- 1 To access your request actions and scheduled actions, click **My Actions**.
- 2 To access your request actions that were saved as draft, click **My Actions > My Open Request Actions**.

Withdrawing or manually completing a request action

You can view your action requests and withdraw them or manually complete or reject request actions. You might want to manually complete, manually reject, or withdraw an action request if it appears that the process is failing, or the person that the request has been routed to is no longer available.

- 1 On **My Actions**, open **My Open Request Actions** or **My Request Actions** and select the request action.
- 2 To manually reject, manually complete, or withdraw an action request, select the appropriate action on the **Actions** menu.

Rerunning a failed scheduled action

You can rerun a schedule action that did not successfully complete.

- 1 On **My Actions**, open **My Scheduled Actions** and select the action.
Scheduled actions will display associated action instances on the **Action Instances** tab. If the schedule action encountered an error, a red flag displays.
- 2 To view the detail of an error, open the instance that has the error status. On the **Action Instance** window, click **View Error Summary**. This creates an error report for troubleshooting purposes.
- 3 To rerun a failed scheduled action, select or open the instance with the error and select **Actions > Requeue**.

Stopping or overriding a scheduled action

Do one of the following:

- Suspend the queue.
- Open the action. In scheduling details, clear the **Pending Scheduling** field.

Setting As Of Date

As of dates let you view application records as they existed on a date that you specify. For example, when you are looking at records that display in lists, you can change the as of date to be a date in the future or past, or today, which is the default as of date.

For example, you want to view a list of jobs as of a month ago. Access the Jobs form within Infor HR Talent setup. In the application menu, click **Set 'As of Date'**. Click the calendar icon and select the date for which you want to view available jobs. If today is September 15, you would select a date of August 15. The display of jobs changes to reflect those jobs that were available as of August 15.

The web user interface displays a banner message when as of dates are set. When you close the banner message you clear the as of date setting.

Using effective dates

When you select an effective date, you are telling the application when the change you are making to a record is to go into effect. This lets you actually schedule a change to a record, if the date you select is other than today's date. In other words, you decide when the change to that record should occur, in the past or in the future. The change itself does not actually happen until the date that you selected is met.

If you do not select an effective date for a record, the as of date, either today or a future date, defaults.

Note: If you make future dates for a record, be sure to change the date back to the current date. You can unintentionally delay changes to other records if you forget to reset the date.

The effective date for a record displays in the audit log, so that you can see when and why a record was changed, and when a change is pending.

See [Viewing the audit log](#) on page 14.

Retroactive changes

When you select a past effective date for a change, the change is referred to as retroactive.

Be aware that security rules affect who is allowed to make retroactive changes.

For example, contract talks with the local union have completed, and you need to incorporate a change in employee pay rates to be effective on the date when the contract was approved, two weeks ago. To schedule the change, select an effective date for these records to be two weeks ago.

For example, you have a contract whose line item price has been reduced as of a month ago. To schedule the change, you select an effective date for that contract change to be effective a month ago.

Future changes

For example, an employee tells you that he is moving to a different address in one month's time. Rather than having to remind yourself to make the change in a month, you schedule the change by assigning the appropriate record an effective date of one month from now.

For example, you have a contract whose line item price will be increased in a week. To schedule the change, you select an effective date for that contract change to be effective in a week.

Future record changes display in the audit log. To see if a record has a pending change due to a future effective date, you can view the audit log for that record.

You can also set an alert on list for records that have pending changes.

Viewing the audit log

The audit log for a record lists a history of changes that were made to that record, including:

- The period in which the change was made (past, current, or future)
- The effective date
- User ID of the person who made the change
- The action that the user performed
- What field change was made

You access a record's audit log by accessing the record and then performing the action of **View Audit Log** or **View Full Audit Log**.

The audit log lets you see changes, using the logical view, and the full audit log lets you see changes that were superseded, the physical view. Use the **View Full Audit Log** to see when and why changes occurred, and to problem solve.

Additionally, other features of the audit log let you:

- Sort log entries in ascending or descending order
- Compare the differences between any two log entries

To compare entries, you select the entries to be compared, and click **Compare**. The **Compare Log** window is displayed, indicating the field names, previous value (from value), and what the value was changed to (to value).

Note: Be aware that security rules may affect who can access the audit log.

For example, suppose today is July 1, 2003. You made a retroactive change to an employee's pay rate as of June 1, 2002, to increase the pay rate to \$35,000.

The pay rate history as of July 1, 2003 is as follows:

Date	Pay rate
January 1, 2003	\$30,000
January 1, 2002	\$20,000
January 1, 2001	\$10,000

After the pay rate change is made, retroactive to June 1, 2002 to \$35,000, this is what you see in the View Audit Log:

Date	Pay rate
June 1, 2002	\$35,000
January 1, 2002	\$20,000
January 1, 2001	\$10,000

This is what you see in the View Full Audit Log:

Date	Pay rate
January 1, 2003, displayed as crossed out	\$30,000, displayed as crossed out
June 1, 2002	\$35,000
January 1, 2002	\$20,000
January 1, 2001	\$10,000

In the View Full Audit Log, the record that was superseded, \$30,000 for January 1, 2003, is displayed as being crossed out. In the View Audit Log, however, the crossed-out change does not display.

Color coding and text formatting in the audit log

Audit logs use color coding and text formatting for some entries to make it easier to identify the status of the entries. Listed below are the colors and formatting and their meanings:

- A green entry means that the entry was never processed and is still sitting in the effective log, probably because of an async failure.

- The red are the canceled entries (as opposed to superseded).
- The entries with the strike-thru are entries that have become invalid because of a retroactive change that superseded the data or an Audit Delete that canceled the entry.
- Text in italics is the audit corrections for the associated audit entry.

Viewing field history and pending changes

You can view audit information for a field: history of changes that have been made to a field, including those changes that will take effect in the future.

Note: If more than one update have been made in a single day, only the most recent update is displayed for that day.

- 1** Activate the field for which you want to view changes by hovering over the field or clicking inside it, then click **Field Actions** (vertical ellipsis).
- 2** Select **Show Field History** or **Show Pending Changes**.
Multiple changes display in order from most recent to oldest.

Viewing business class, form, list, and field information

You can view the business class and form information for an application field. This is useful when you would like to link to a list or form or when you need to understand which business class a particular form, list, page, or field belongs to in order to personalize or configure a list or form, or create user fields.

- 1** Open the form and hover over the form element you want, or place your cursor in the field you want.
- 2** Press **Ctrl + Shift** + left-mouse click. An information pop up displays. It includes the business class and name information.

Changing user context

Most users work with only one organization or enterprise group. However, some administrators can be assigned to multiple organizations or enterprise groups. Your security settings determine what organizations or enterprise groups you have access to.

- The User Context option is enabled when the **User Context Menu Enabled** field is selected in the Configurable Features tab on a User Role. See *Infor Landmark Technology User Setup and Security*.
- Your actor must be assigned to multiple enterprise groups or organizations.
- You can work with one organization or enterprise group at a time. In other words, you are "in context" with one organization or enterprise group at any time.

- The user context is global to all your web applications. If you change your user context in one web application, it is changed in all applications.
- You can change your user context as frequently as you need to.
- When you exit the application, the user context that you last used will be retained.

To work with another organization or enterprise group, you can change your user context.

- 1** Select **User Context** in the left application menu.
- 2** Select the organization you want to be in context with. The fields available will vary depending on which organizations(s) you have access to.
- 3** Click **OK**.

Chapter 3: Reports and jobs

This section provides a high level overview of working with reports and jobs in Infor Landmark Technology Runtime applications. For more information, see *Infor Landmark Reporting Administration Guide* and the help for your Landmark application.

Reviewing and working with your reports

My Reports are reports that you defined using Create Report from the Options menu on a list.

To access your reports, click **My Reports** icon in the application menu.

To run a report and view the results, click **View Report**.

Reviewing and working with your jobs

Jobs, also referred to as batch jobs, are specific units of work that are performed in the background. Two types of programs use batch jobs: batch updates and reports.

These programs differ from those used by online application forms in that with online forms the data gets processed immediately. Batch jobs wait in a job queue for processing when the system has the available resources.

Reports differ from batch updates in that a report's purpose is to retrieve data from the database. The purpose of a batch update is to make changes to the data in the database. Sometimes a report is available with a batch update. For example, to show what was updated.

You can use **My Jobs** to create, modify, run, and monitor jobs. **My Jobs** page includes a list of your jobs and public jobs.

To access your jobs, click **My Jobs** icon in the application menu.

Reports that generate from jobs are available in **My Print Files**.

Reports from lists

Every list can be turned into a report. The **More Actions** (ellipsis) **Options** menu provides several reporting tools.

- Use **Print to PDF** to export an original or modified list to a PDF file. Access your PDF files you generate from **My Print Files**. You can print immediately or schedule the PDF file generation..
Print to PDF lets you export not only the primary list, but the underlying details as well.
 - On a tree view you can export the following level of detail to a PDF file:
 - **Root Level Only**
 - **Root Level Only With Details**
 - **All Levels**
 - **All Levels With Details**
 - **Specified Maximum Levels**
 - **Specified Maximum Levels With Details**
 - **Selected Record With Details**
 - For multiple-panel lists, you can export the following level of detail to a PDF file:
 - **Current List Only**
 - **Current List With Details**
 - **Selected Record With Details**
- Use **Export To CSV** to export an original or modified list to a CSV file, which you can manipulate to produce an Excel report.
On a tree view you can export the following level of detail to a CSV file: **All Levels** or **Specified Maximum Levels**. Note that the CSV is flattened, so there is nothing in the result that shows what level a row was within the tree.
- Use **Create Report** to create a report by filtering the list from which you start. You can view the report you create for a list from **My Reports**.
- Use **Personalize** to permanently change a list for yourself. You can reset the list to its original settings at any time. You can add fields, remove fields, add subtotals, change the sorting order, and filter for a specific instance.

Creating reports from the Create Reports option

When you are on a list, you can create a report by building a filter for the list.

If you want to build an audit report, see [Creating audit reports from lists](#) on page 20.

- 1** Click **More Actions** (ellipsis) and select **Options > Create Report**.
- 2** In **List Title**, specify a descriptive name for the report. You may want to include your user name if you will make the report public.
- 3** Optionally, on the **Filter** tab, select from a list of defined conditions to build a filter, or you can click [Advanced](#) to use the text box to define your own condition. The syntax will be validated when you exit the field.

See [Building a filter](#) on page 26

- 4 To save the report and view the results, click **Create And View Report**.
- 5 View the report results at any time from **My Reports**.

Creating audit reports from lists

You can create audit reports from standard lists. You can view the report you create in **My Reports**.

- 1 On a list, create a report. **More Actions** (ellipsis) and select **Options > Create Report**.
- 2 Specify a name for the report that is easy to recognise, for example add **Audit** to the name.
- 3 On the **Data Source** tab, select **Use Audit Data**.
- 4 Click **Create And View Report**. The new report is displayed.
- 5 Personalize the report to include audit fields. Click **Options > Personalize**.
- 6 On the **Column** tab, click **Add Field** to include audit fields such as effective date, action, actor, or reason code.
- 7 Add each field to the columns list and arrange the columns.
- 8 When you are satisfied with your personalization, click **OK**. The report is available in **My Reports**.
You can output your report using **Options > Print To PDF** or **Export To CSV**.

About Embedded Analytics cubes

Some of the reports in are Embedded Analytics cubes. Cube-based reporting is a feature that allows for multi-dimensional reporting. Cubes are useful built-in tools for visualizing and sorting data. Cubes create reports using a copy of the database data that is held in a separate set of files. In order for data to be populated into these files, your system administrator must create the cube. Cubes differ from the other reports in some major areas.

- The data displayed is not real-time data. It is the data as it stood when the cube was last refreshed. A process must be set in place by your organization to have a system administrator refresh the cube as often as it makes sense for your organization. Cubes can also be refreshed on demand.
- By default, the cube displays data for the current period.
- The left-most column contains the cube dimension, or dimensions. For example, hiring manager and location. Each cube has default dimensions you can use.
- Other columns represent measures for the dimensions. For example, the total number of requisitions for a location.
- Some measure values have links that bring up a list. These lists represent real-time data. Therefore, if the data changed after the cube was refreshed, it is possible that the total number of records may not correspond to the record count that displays on the cube.
- Some of the cubes have graphic representations such as charts. However, the graphics are not interactive; they do not give you access to more detailed data.

- If you have access, you can change both the dimension defaults and the measures that display for cubes.

Purging PDF files from My Print Files list

When you use the **Print to PDF** option, the system stores your generated print files under My Print Files. Over time, this list can become long. There are two ways you can delete items from the My Print Files list:

- Select the record or records you want to delete and click Delete.
- Use Purge My Reports. Purge actions can be run immediately or scheduled. Scheduled actions can be run once or at regular intervals.

- 1** Select **My Print Files**.
- 2** Click **More Actions** (ellipsis) and select **Purge My Reports**.
- 3** Specify this information:

Thru Date

If you select a through date, files are deleted for the date you selected and earlier.

Purge Offset Days

If you use the offset days, the system will delete files older than the days you specify. For example if you specify **3**, then any files older than three days will be deleted.

Include Folders

Select this check box to delete folders.

- 4** Click **OK** to run the purge or click **Schedule** to run it later.

Chapter 4: Personalizations

Personalizations are changes that you make to a delivered object, such as a list, that makes it easier for you to work with. This topic provides examples of the kinds of personalizations you might want to make and explains how to make them.

Not all personalizations described in this section will be available to all users and not all users' screens will appear the same as they do here. Your system administrator provides access to personalizations which includes access to menu items.

The personalizations described here can be viewed and used only by the person who made them. Infor Landmark Technology administrators can make changes to delivered objects that other users can access.

Note: In some cases, you are working with live data when you personalize and are able, for example, to add and delete data from lists. Take care when working with personalizations to alter system data only if you intend to do so.

These are examples of changes you might make. The options available for personalization vary depending on the object you are attempting to personalize.

Personalization example	How to
Add, remove, or reorganize the columns in a list or report.	Click More Actions (ellipsis) and select Options > Personalize and use the List Editor.
Modify a list to automatically filter and show only records that meet certain criteria.	Click More Actions (ellipsis) and select Options > Personalize and use the List Editor.
Use available widgets to create your own custom web pages that are not specific to a particular application.	Use Infor Ming.le Homepages. See <i>Infor Ming.le Help</i> .

Personalizing lists

You can add or delete columns, change labels, change column order, change the sort order, the order in which the data in the columns is presented, and for numeric columns, add totals. Select **Options > Personalize** to open the list editor view of the list.

Lists are reused in Landmark applications. If you personalize a list, every page that uses the list will reflect your personalization.

The **Column** tab in the list editor shows a table that represents the columns, fields and field values, that make up the list. The columns (fields) table presents information about the fields as they are used in the table.

- **Field Name:** The name of the field within the application object or business class.
- **Label:** The column heading as it is defined by the business class unless you choose to personalize it.
- **Updateable:** Whether or not the values in the list can be edited directly from the list.
- **Sort Order:** If a sort order has been applied to the column, it shows here.
- **Totaling:** If a totaling option is applied, it displays here.

This table shows the types of changes you can make to a list in the list editor view.

Task	Description
Change the list title.	Specify a new title in List Title .
Change a column label.	Select the row that represents the column change the value in Label under Details.
Configure whether or not field values can be edited directly from the list.	Select the row that represents the field and select Updateable under Details.
Remove a column from a list.	Select the row that represents the column and click Delete icon.
Reorder the columns.	Select the row that represents the column, hover over the drag and drop icon (vertical dots) and move the row into the new position.
Add an alert.	Select the row that represents the column, and click Alerts. See Defining list alerts on page 25.
Define the sort order for individual columns.	<p>To sort a column, select the row that represents the column and click Sorting and Totaling. Select a value in Sort Order. Most of the available sort options here are for technical users. You might want to select ByUniqueID, which shows the data in key field order. By default, the sort order is the way in which the data is stored in the database.</p> <p>If you make a selection for sort order for an individual field, the individual field's setting will override the default sort order on the list.</p>
Add totaling options to columns that contain numeric data.	<p>This option calculates the total for data in the list and displays it at the end of the list.</p> <ol style="list-style-type: none"> 1 Select the row that represents the column and click Sorting and Totaling. 2 Change the value in Totaling. <ul style="list-style-type: none"> • Total: The total of all records • Running Total: The total at the current point in the records • Percent of Total: The percent of the total that this set of records represents

Task	Description
Define filter conditions for the list that will automatically filter the list and show only records that meet criteria.	Click the Filter tab. See Building a filter on page 26.
Add a column to the list.	Click Add Field . See Adding a column to a list on page 24.
Add a column that calculates other columns.	Click Add Compute . See Adding a computed field to a list on page 25.
Remove your personalization and reset your list to the default.	Click Reset .

Adding a column to a list

- 1 From the list you want to personalize, click **More Actions** (ellipsis) and select **Options > Personalize**.
- 2 On the **Column** tab, click **Add (+) > Add Field**.
- 3 Specify this information:

Label

Specify the column name that you want to display on the list.

Field

Specify the column (field) you want to add. If you know business class and field names, begin typing in the field. The field uses an auto-complete feature, which starts searching as you type. It will search for any business class, one to one and one to many fields. Wildcards are not available.

You must know the source code (LPL) name of the field you are searching for. To get the LPL name of a field, go to the field you want and place your cursor in the field. Press **Ctrl + Shift** + left-mouse-click. This shows the **Field Information** window where you can specify or copy the field value.

Updateable

Select to allow field values to be edited directly from the list.

Sort Order

Specify the order data is shown in the column.

Most of the available sort options here are for highly technical users. You might want to select **ByUniqueID**, which shows the data in key field order. By default, the sort order is the way in which the data is stored in the database.

If you make a selection for sort order for an individual field, the individual field's setting will override the default sort order on the list.

Totaling

If the column you add is numeric data, you can use this option to calculate the total for data in the list and display it at the end of the list.

- **Total**: The total of all records
- **Running Total**: The total at the current point in the records

- **Percent of Total:** The percent of the total that this set of records represents
- 4 The new column is added to the bottom of the list of fields for the list. To reorder the column in the list, hover over the drag and drop icon (vertical dots) and move the row into the new position.
 - 5 Click **OK**.

Adding a computed field to a list

A compute field is a field that calculates other fields. You can use Add Compute to calculate numeric data and dates from fields on the list or form you are working with.

- 1 From the list you want to personalize, click **More Actions** (ellipsis) and select **Options > Personalize**.
- 2 On the **Column** tab, click **Add (+) > Add Compute**.
- 3 Specify this information:

Label

Specify the column name to show on the list. The first letter must be upper-case.

Compute

Specify the expression to calculate. The expression builder provides some help for creating a logical calculation but you must be knowledgeable about the type of data in the fields in order to be sure that the new field provides the data you are attempting to calculate.

- Specify the fields you want to calculate.
- Specify an operator (+, -, *, and so on) after each field to make the comparison or calculation.

Totaling

Select the type of totaling:

- None
- Total: The total of all records
- Running Total: The total at the current point in the records
- Percent of Total: The percent of the total that this set of records represents

- 4 Click **OK**.

Defining list alerts

You can add or edit the alert icons that display in list columns.

- 1 From the list you want to personalize, click **More Actions** (ellipsis) and select **Options > Personalize**.
- 2 To add an alert to an existing column, select the row that represents the column that should have an alert and click Alerts.
- 3 To add a new column for the alert, click **Add (+) > Add Field**.
- 4 If you are adding a column, specify the appropriate field and label in Details.

- 5 In Alerts, choose an Alert Type (red, yellow, green, blue). For example, click **Add (+) > Add Red Alert**.
- 6 Select a condition to trigger the Alert. The available conditions is a list of the conditions defined in the business class logic.
Narrow the list to the appropriate conditions by using the Search field.
If you wanted to set up an alert for a condition that you don't see on the list, you can define your own Condition type User Field and add it to the list, assuming you have the appropriate configuration security role.
- 7 Optional. Use the **Negated** field in conjunction to the Condition field. A checked value means the condition is negated.
- 8 Optional. Specify the mouse over text.
- 9 Optional. Add additional alert types and conditions.
For example, you may select one condition to trigger a red alert, another to trigger a yellow alert and so on.
- 10 Click **OK**.

Building a filter

You can select conditions to filter personalized lists and reports you create.

- 1 Select **Options > Personalize** or **Options > Create Report**.
- 2 On the **Filter** tab, select from a list of defined conditions to build a filter.
 - In Basic mode, select from the list of conditions to build the filter. The filter displays in the field at the bottom. The Match All option adds **AND** between filter conditions, the Any option adds **OR**.
 - In Advanced mode, you can type in your own filter criteria. The syntax is validated when you tab out of the field.
Or click **Builder** to use the Condition Builder window. See [Defining filter criteria using Condition Builder](#) on page 26.

Defining filter criteria using Condition Builder

You can use the Condition Builder to build filter conditions. For example, the condition builder is available from the Filter tab when you create a report or personalize a list.

The Condition Builder has three columns. You can add more than one condition on the Condition Builder. If you select All, all the conditions must be met. If you select Any, any one of the conditions must be met.

To build filter criteria:

- 1 In the left column, select field that you want to assign a condition to. For example, if you want to select job applications for HR organization 1000, select **HROrganization**.
- 2 In the middle column, select the condition operator, for example, **Equal to**.

- 3 In the right column, click the **Literal** checkbox and type a value. In this case, **1000**. You could also select another field here.
- 4 To add another condition, click **Build Another**.
- 5 If applicable, add another condition in the second row. For example, if you want only candidates for job requisition 5, you can select JobRequisition, is equal to 5
- 6 Continue building your conditions until you are done.
Note: To remove a condition from the Condition Builder, click the delete icon next to the condition.
- 7 When you are done with your conditions, click **OK**. All the conditions you defined are added in the instance selection box separated by "and" or "or" (depending on whether you selected All or Any).
- 8 To remove a condition, delete it from the text box. You can also edit a condition within the text.
- 9 To add more conditions, click the Builder button, enter your conditions, and click **OK**.
When you click OK, the system asks you whether you want to replace the existing conditions with these conditions, or whether you want to append the conditions to the existing conditions. If you select **Append**, the conditions are added at the end of the other conditions.

Using compact mode

Compact mode increases form density. It affects the forms, form fields, and form headers, allowing more information to be displayed on the screen at one time. This allows for faster data entry and reduces scrolling. This is a user level setting.

- 1 Using the SoHo 4 UX interface from any application, access **User Settings**.
- 2 Enable or disable **Use Compact Form Layout**, as needed.
- 3 Click **Save**.

Chapter 5: User proxies

A user proxy is a means to temporarily transfer the access privileges of one user to another user. User proxies can be set up by administrators or by individual users. As an administrator, you can set up proxies for any user and assign them to other users. As an individual, non-administrator user, you can set up a proxy only for yourself and assign it to another user.

Proxies are set up for grantors and grantees. The grantor is the one whose access privileges you need to assign to some else. The user to whom you assign the proxy is the grantee. When you set up the proxy, you can set it up only for one or more of the roles that the grantor has. You can set up multiple proxies for a grantor such that one proxy assigns some roles to one grantee and another proxy assigns other roles to another grantee.

Your ability to set up user proxies is controlled by the following security classes:

- **ProxyAdminAccess:** Enables a user to set up proxies for any user.
- **ProxyGrantorAccess:** Enables users to set up proxies only for themselves.
- **ProxyInquireAccess:** Enables users to view any proxies assigned to them.

If a proxy is assigned to you, you can switch to the proxy and perform actions based on the security privileges of that proxy.

Setting up a user proxy

Use this procedure if you need to set up a user proxy that applies to yourself. That is, you need to assign one or more of your roles to another user, for example, because you will be on vacation.

To set up a user proxy for yourself, you must have **ProxyGrantorAccess** security class assigned to one of your roles, and the roles you want to assign to the proxy must be proxyable. If you need more information, consult your system administrator.

- 1 In the application menu, select **Proxy**.
- 2 Select the [Proxy Management](#) link.
- 3 Create a proxy. On the Proxy Definition list, click **Create**.
- 4 Specify this information:

Grantor

Your actor name.

Proxy Name

A name for the proxy.

Description

A description for the proxy.

From Date

The first date the proxy is in effect.

To Date

The last date the proxy is in effect.

Enabled

Select to indicate the proxy is enabled. For the grantee to switch to the grantor's access privileges, the proxy must be enabled and the current date must fall within the from and to dates.

- 5 Click **Save**.
The record is saved and the **Proxy Roles** and **Proxy Granted To Actors** tabs display.
- 6 Assign roles to your proxy. On the **Proxy Roles** tab, click **Create**.
 - a Select a role from among those assigned to you and which can be used as a proxy.
 - b Click **Save**.
 - c Repeat the previous steps to assign more roles to the proxy.
- 7 Assign the proxy to a grantee.
 - a Return to the Proxy Definition list.
 - b Double-click the proxy you want to assign grantees to, or select the proxy and click **All Actions Menu (ellipses) > Update**.
 - c On the **Proxy Granted To Actors** tab, click **Create**.
 - d Specify an actor ID in the **Granted To** field and click **Save**.
 - e Repeat the previous steps to assign your proxy to more grantees.

Switching to a proxy

This procedure describes how to log in as a user for whom you have been granted proxy access so that you perform that user's work.

- 1 In the application menu, select **Proxy**.
- 2 Select name of the user and application you are acting as proxy for.
- 3 Wait for the system to open that user's application. You can now perform the work to which you have been given access.
- 4 When you are finished performing proxy duties, click **Proxy** and on Switch Back From Proxy, select the application to which you want to return.