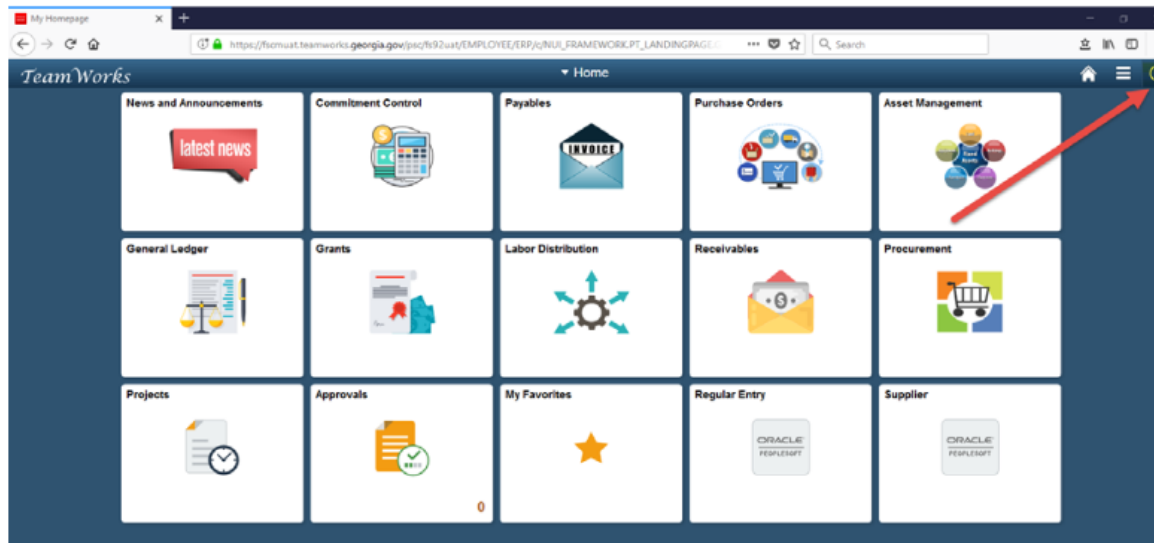## Setting up Favorites in 9.2

Creating Favorites

After the new system is turned on in October 2018, you will need to navigate to the full path using the NavBar (Compass Icon) and the Navigator tile in the upper right hand corner of the screen to create Favorites.

1. Click on the NavBar (Compass Icon).

2. Click on the Navigator tile.

NavBar ⚙

Navigator

Recent Places

Approvals

My Favorites
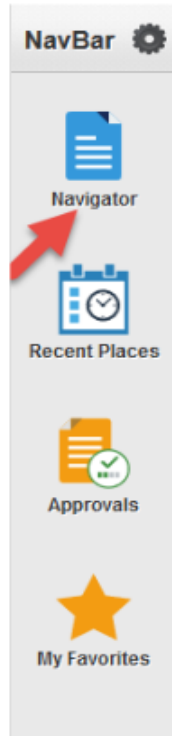
3. Navigate to the Full Menu path. In this case, click on Accounts Payable.

NavBar: Navigator

Navigator

Recent Places

Approvals

My Favorites

Accounts Receivable >

Accounts Payable >

Custom Accounts Payable >

Salary Travel Per Diem >

Asset Management >

IT Asset Management >

Financial Gateway >

Excise and Sales Tax/VAT IND >

4. Click on Vouchers.

NavBar: Navigator

Navigator	← **Accounts Payable** ⬆
	Vouchers >
Recent Places	**Control Groups** >
	Payments >
Approvals	**Batch Processes** >
	Review Accounts Payable Info >
My Favorites	**Reports** >
	Accounts Payable WorkCenter

5. Click on Add/Update.

6. Click on Regular Entry.

NavBar: Navigator

← **Add/Update**

Navigator

Regular Entry

Recent Places

Quick Invoice Entry

Summary Invoice Entry

Approvals

Complete Register Voucher

Close Voucher

My Favorites

Delete Voucher

Update Open Item

UnPost Voucher

7. Regular Entry page for a voucher displays.

8. Once you have navigated to the page, click on Actions Icon (3 bars in the upper right hand corner).

9. Click Add to Favorites.

Add To Homepage

Add To NavBar

Add To Favorites

My Preferences

Sign out
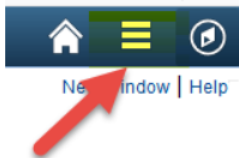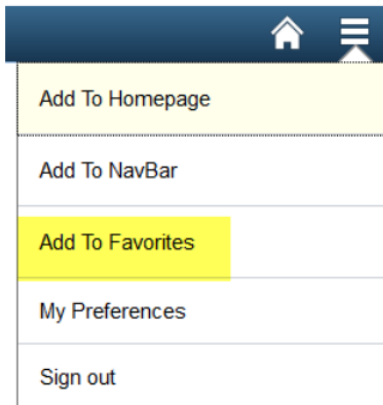
10. Update the Description if desired and click OK.

Add to Favorites

Please Enter a Unique Description for this Favorite

*Description   Regular Entry

[OK]   [Cancel]

11. Message displays stating that Favorite has been saved. Click OK.

The favorite has been saved.

[OK]

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12. Click on the NavBar (Compass Icon) in the upper right hand corner of the screen.
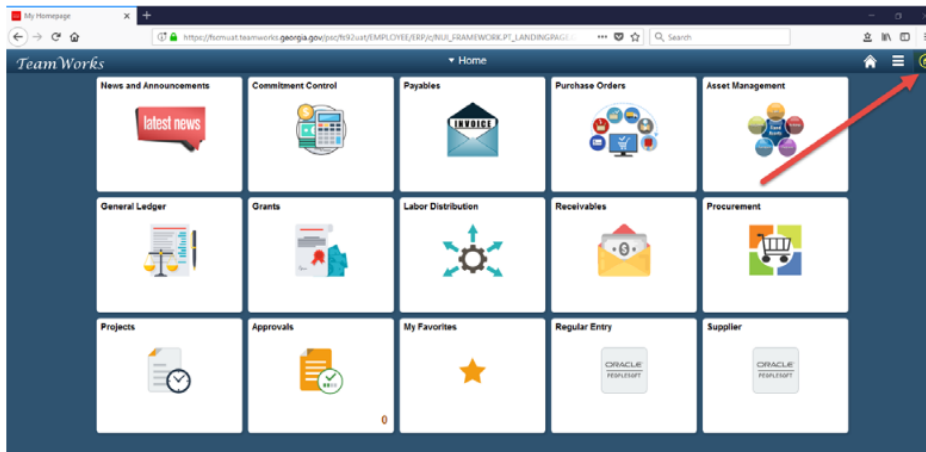
13. Click on My Favorites.
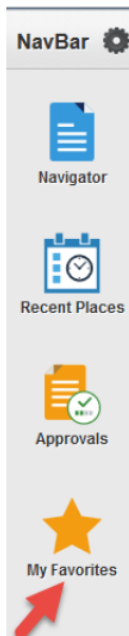
14. Regular Entry page you just created as a Favorite displays for future use.

NavBar: My Favorites

Navigator

Recent Places

Approvals

My Favorites

Edit Favorites

Add/Update Contracts

Manual Reconciliation

Payment Cancellation

Query Report Viewer

Regular Entry

Review Suppliers

Semi-Manual Reconciliation

User Profiles

If you created a Favorite in error, you would do the below steps to delete it.

1. Click on the NavBar (Compass Icon) in the upper right hand corner of the screen.
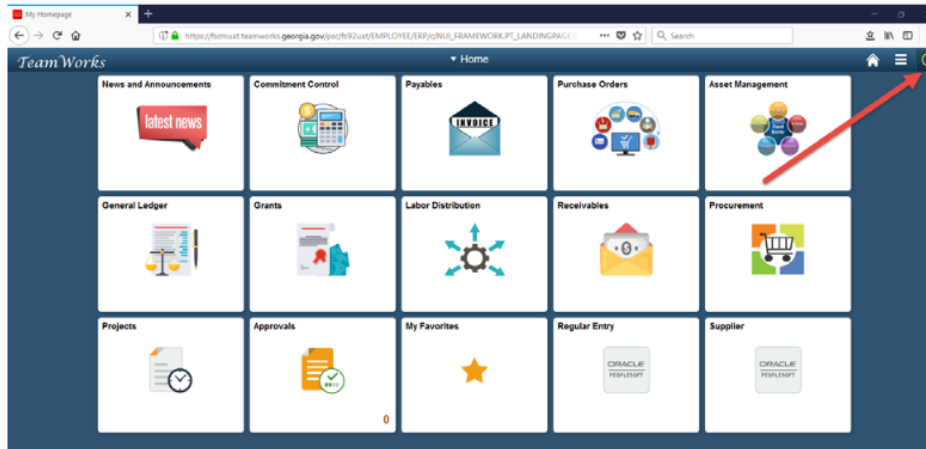
2. Click on My Favorites.

3. Click on Edit Favorites.

NavBar: My Favorites

Navigator

Recent Places

Approvals

My Favorites

Edit Favorites

Add/Update Contracts

Manual Reconciliation

Payment Cancellation

Query Report Viewer

Regular Entry

Review Suppliers

Semi-Manual Reconciliation

User Profiles

4. Press the minus (-) button on the row you would like to delete.

< **Home**

Edit Favorites

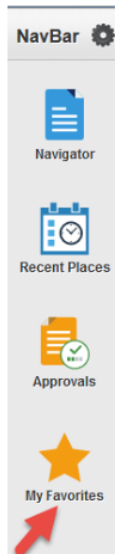Click the Save button after editing or deleting favorites.

▼ **Favorites** Personalize | Find | 🗗 | 🈸   First ◀ 1-8 of 8 ▶ Last

*Favorite	Sequence number	
Add/Update Contracts	0	☐
Manual Reconciliation	0	☐
Payment Cancellation	0	☐
Query Report Viewer	0	☐
Regular Entry	0	☐
Review Suppliers	0	☐
Semi-Manual Reconciliation		☐
User Profiles	0	☐

💾 Save   ✉ Notify

5. Click OK to confirm deletion.

Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK		Cancel

6. The row has been deleted. Press Save.

< **Home**

Edit Favorites

Click the Save button after editing or deleting favorites.

▼ Favorites Personalize | Find | 🔼 | 📊	First ◀ 1-7 of 7 ▶ Last		
*Favorite	Sequence number		
Add/Update Contracts	0	—
Manual Reconciliation	0	—
Payment Cancellation	0	—
Query Report Viewer	0	—
Review Suppliers	0	—
Semi-Manual Reconciliation	0	—
User Profiles	0	—

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7. Navigate back to My Favorites. Click on the NavBar (Compass Icon) in the upper right hand corner of the screen.
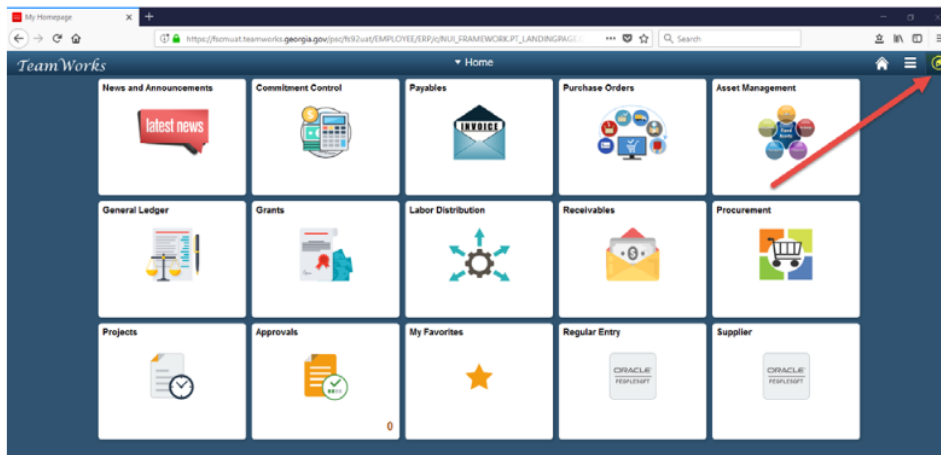
8. Click on My Favorites.
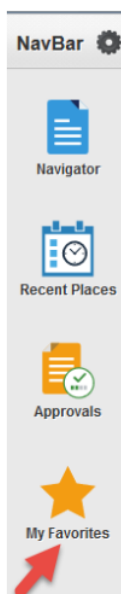
9. Regular Entry page no longer displays.

NavBar: My Favorites	
Navigator	✏️ **Edit Favorites**
	Add/Update Contracts
Recent Places	**Manual Reconciliation**
	Payment Cancellation
Approvals	**Query Report Viewer**
	Review Suppliers
My Favorites	**Semi-Manual Reconciliation**
	User Profiles