# Add, Edit and Delete Favorites in PeopleSoft 9.2
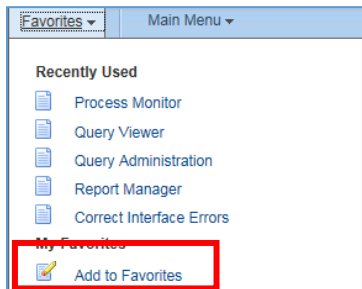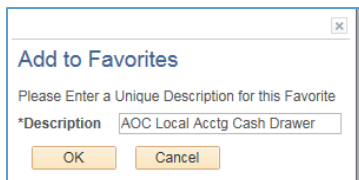
## Table of Contents

## Add Favorites

### Adding a Favorite link

Navigate to the desired page and add the favorite by clicking on "Favorites" and then "Add to Favorites":



Clicking on the "Add to Favorites" link will open a pop-up window, which allows the user to give the Favorite a recognizable description or name:



*NOTE: The default description/name will be the Page Name found in the navigational information. As favorites are linked directly to a user, the user can enter ANY unique name they choose; as long as it is no more than 30 characters long (a space is considered a character for purposes of this character limit).*

Once the desired name has been entered and the "OK" button is clicked, a secondary confirmation window will be displayed, which indicates that the favorite has been saved:
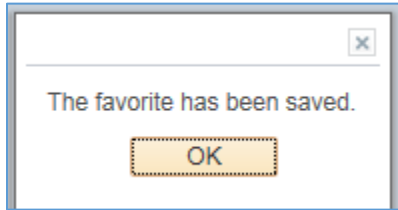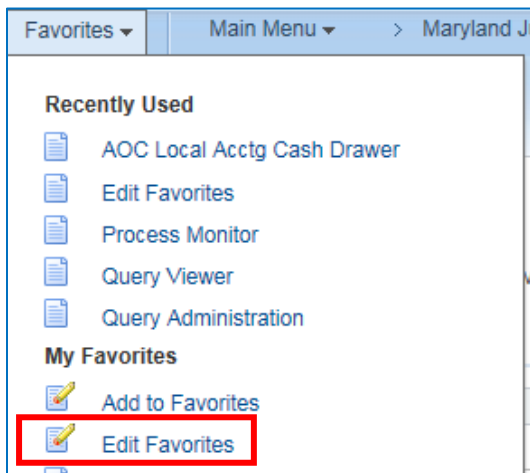


If the "Cancel" button is clicked instead, the "Add to Favorites" window will be closed and the favorite will not be saved.

## Edit Favorites

### Editing a Favorite link

Once a favorite has been added, the user has the ability to go back and change the name of the favorite. To do so, use the "Edit Favorites" button in the Favorites menu:
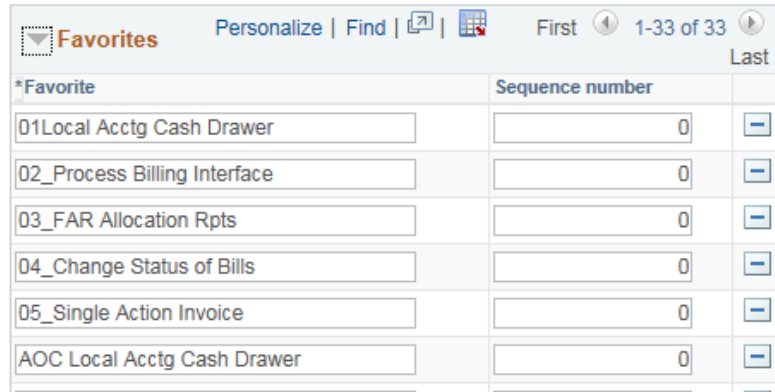
The link will take the user to the "Edit Favorites" page, which displays the user's favorites in a grid format:

## Edit Favorites

Click the Save button after editing or deleting favorites.

| Favorites  Personalize \| Find \| 🗗 \| 🏢  First ◀ 1-33 of 33 ▶ Last | |
|---|---|
| *Favorite | Sequence number |
| 01Local Acctg Cash Drawer | 0 ⊟ |
| 02_Process Billing Interface | 0 ⊟ |
| 03_FAR Allocation Rpts | 0 ⊟ |
| 04_Change Status of Bills | 0 ⊟ |
| 05_Single Action Invoice | 0 ⊟ |
| AOC Local Acctg Cash Drawer | 0 ⊟ |

💾 Save    ✉ Notify

The user can rename a favorite by selecting the applicable field and typing in a new name. Additionally, the user can set or modify the sequence in which the favorites will be displayed. By default, all new favorites will be given the Sequence Number "0". The sequence is sequential, with the lowest valued favorite being displayed first, i.e. 0, then 1, then 2, then 3, and so on.  All favorites with the same sequence are then listed alphabetically.  A user could assign all favorites a sequence number of "0" and then their full listing will be in alphabetical order.

*NOTE: Once changes have been made to the user's satisfaction, the "Save" button at the button of the page must be clicked. Navigating away from the page without saving will result in no changes being made to favorite names or sequence.*

## Delete Favorites
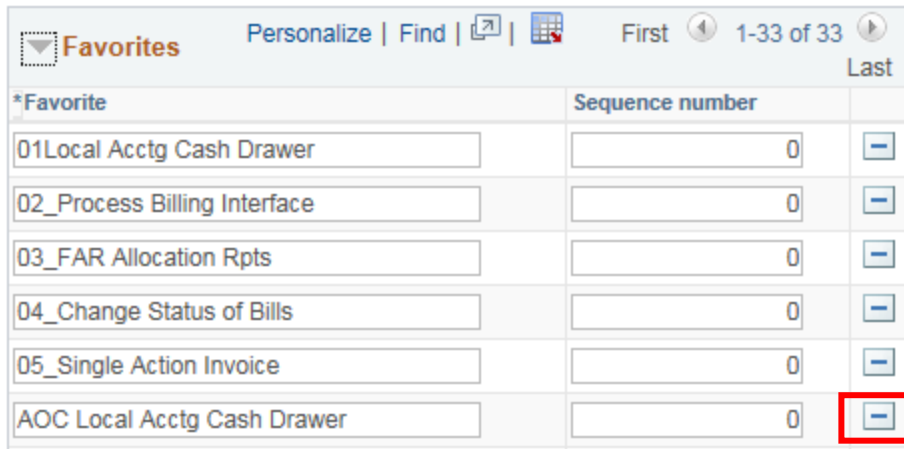
Deleting a Favorite link

When business processes change or if a favorite was added in error, users may need to delete a favorite link. To do so, navigate to the "Edit Favorites" page (see Edit Favorites section above for navigational information).

On the "Edit Favorites" page, click the minus button to the right of the applicable favorite to be deleted:

## Edit Favorites

Click the Save button after editing or deleting favorites.
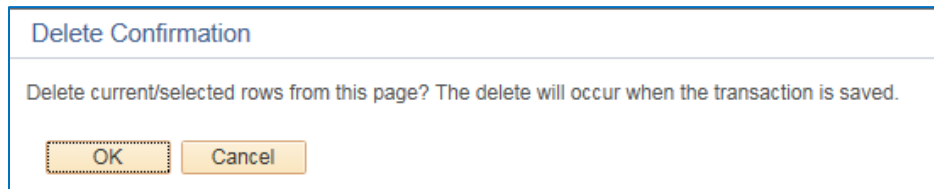
| *Favorite | Sequence number | |
|---|---|---|
| 01Local Acctg Cash Drawer | 0 | − |
| 02_Process Billing Interface | 0 | − |
| 03_FAR Allocation Rpts | 0 | − |
| 04_Change Status of Bills | 0 | − |
| 05_Single Action Invoice | 0 | − |
| AOC Local Acctg Cash Drawer | 0 | − |

Personalize | Find | 🗗 | 🖩   First ◀ 1-33 of 33 ▶ Last

A "Delete Confirmation" window will be displayed:

### Delete Confirmation

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

OK    Cancel

Clicking on the "OK" button will delete the favorite from the user's favorites list and the user will be returned to the "Edit Favorites" page.

If the "Cancel" button is clicked, the favorite will not be deleted and the user will be taken back to the "Edit Favorites" page.

*NOTE: Once changes have been made to the user's satisfaction, the "Save" button at the button of the page must be clicked. Navigating away from the page without saving will result in no changes being made to favorite names or sequence.*

*NOTE: Deleting a favorite will not change any of the sequence numbers for any remaining favorites, and if the user desires a new sequence, the changes will need to be made manually. In addition, favorites can always be resaved if deleted in error.*

## Trouble Shooting

An Error Message is received when saving

If you receive an error message when saving an added or changed favorite (something similar to the message below), it may be because another favorite is no longer valid. These issues will need to be resolved before a save can be successful.

The example below is because the 'AOC_RUN_REV_DIS' favorite is no longer a valid favorite/navigation option and must be deleted. In order for a newly added/changed favorite to be saved, the favorite causing the issue must also be deleted (see Delete Favorites section above for navigational information).

If you are unsure which favorite is being requested for deletion or unsure how to handle it, please enter a Service Now ticket for GEARS, and someone from the GEARS Support Team will contact you to assist with this error.

---

**Message**

Error getting cref AOC_RUN_REV_DIS from portal EMPLOYEE. (96,23)

The PeopleCode program executed an Error statement, which has produced this message.

[ OK ]

---