Add/Delete a Tile on My Financials Home, My Favorites or NavBar

Tiles may be added to My Favorites Home or a page may be added to My Favorites or to the NavBar to help facilitate quick navigation. This feature is very easy to utilize and can provide a great deal of efficiency for the user, particularly if they frequent certain menu navigations regularly.

The examples that follow will use Worklist navigations to add a Tile, a Favorite, and a NavBar shortcut. This is a common example for users who are frequent requisition, payment request, or voucher approver.
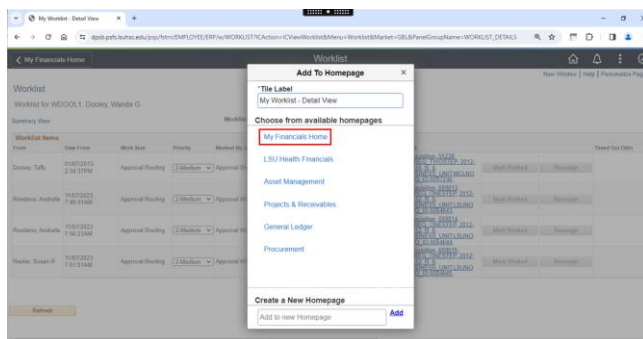
Navigation: NavBar > Worklist> My Worklist – Detail View (or Summary View)

Add a Tile to My Financials Home

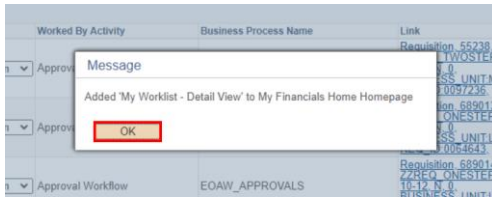On the Worklist page, select the **Actions** icon (3 stacked dots).
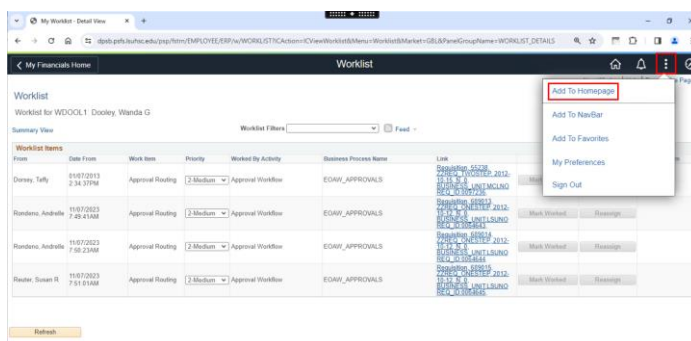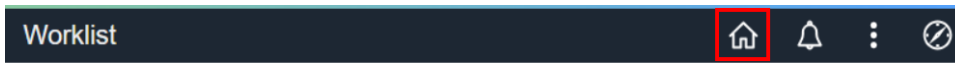

Click the **Add to Homepage** option.

The list of homepages will display. The homepages displayed will vary based on user roles. Click **My Financials Home**.
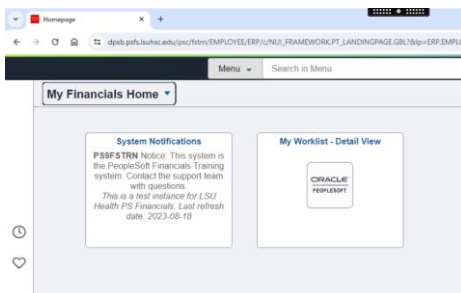
Job Aid
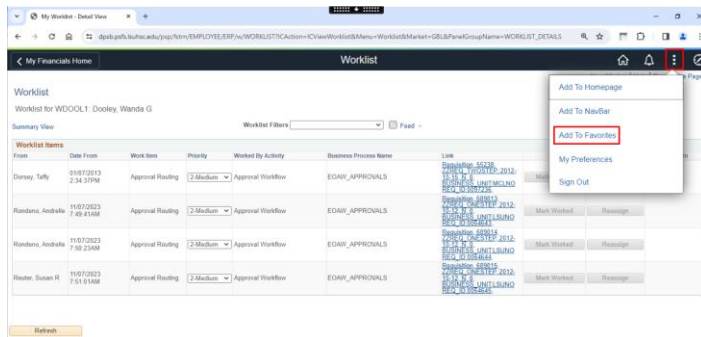

Click the **OK** button.

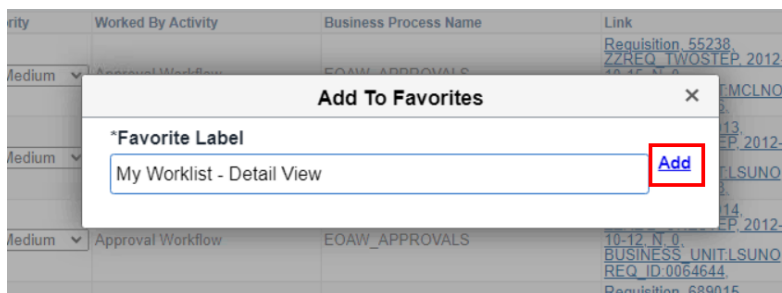Click the **Home** icon in the upper right corner of the page.

The Worklist is now available on the landing page, My Financials Home. The user may select this tile to navigate quickly to their worklist.
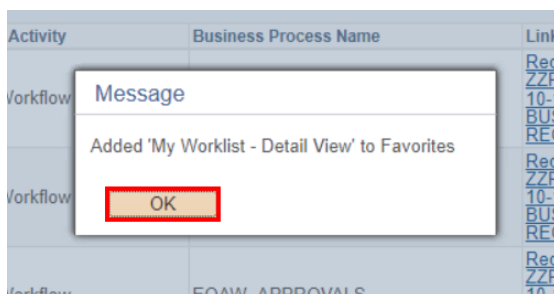
Add a Page to My Favorites

While on the Worklist page, select the **Actions** icon (3 stacked dots).

Click the **Add to Favorites** option.

The label name listed may be defaulted as shown or it may be changed as desired. Click the **Add** link to the right of the field.
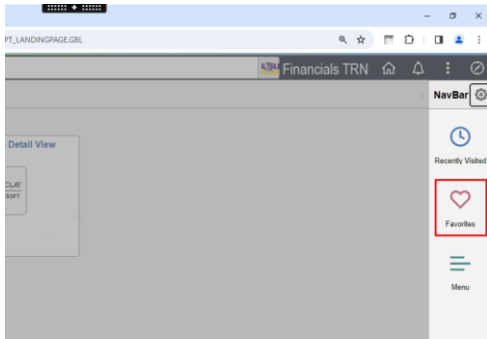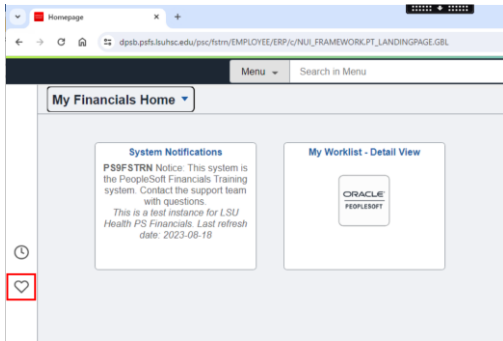

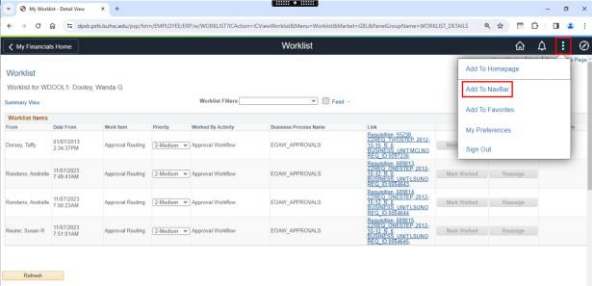Click the **OK** button.

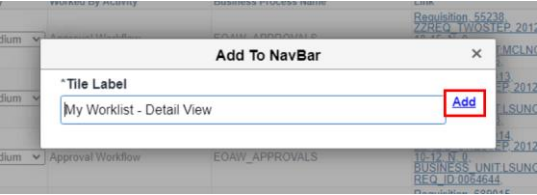Click the **Home** icon.

Job Aid

To navigate to any Favorites, you may either select the **Favorites** icon at the left side of the screen (the Heart) or through the **NavBar icon (the Compass) > Favorites**.
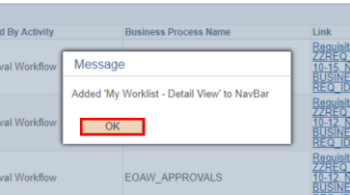
Add a Page to the NavBar

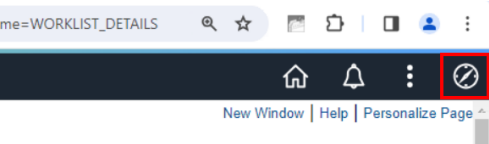While on the Worklist page, select the **Actions** icon (3 stacked dots).

Click the **Add to NavBar** menu option.

The label listed may be defaulted or it may be changed as desired. Click the **Add** link to the right of the field.
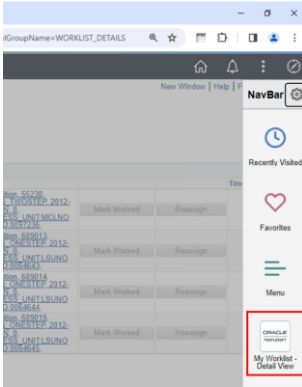

Click the **OK** button.

To verify that the page was added to the NavBar, Click the **NavBar** icon in the upper right corner of the screen.
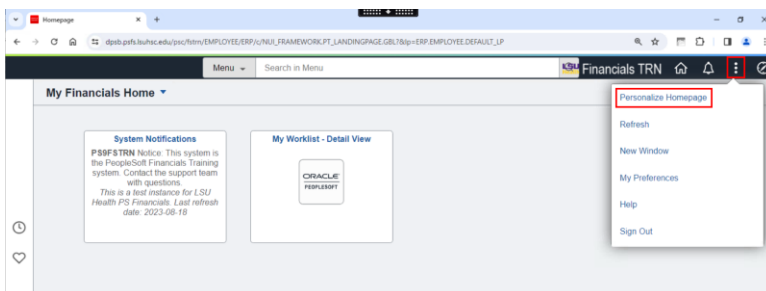
Job Aid

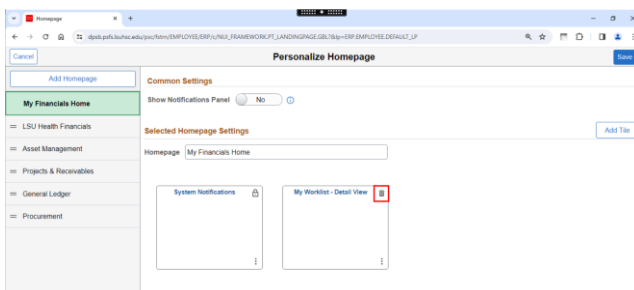The menu option appears at the bottom of the NavBar menu.

How to remove an item from Favorites, NavBar or Homepage.

<u>Remove the Tile from My Financials Home</u>

Click the **Actions** icon (3 stacked dots) and then click **Personalize Homepage**.

Personalize Homepage should default to the My Financials Home as seen below.

To delete a tile from the Homepage, it must contain a trashcan icon in the top right corner of the tile. In this example, click the trash can to delete the My Worklist Detail View tile.
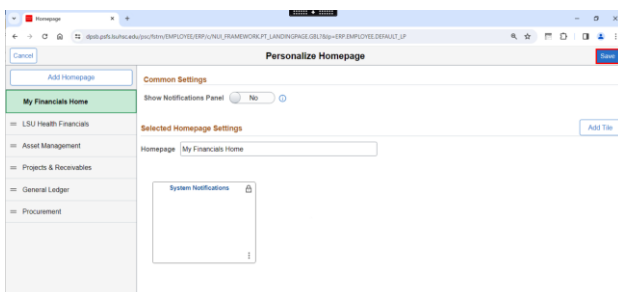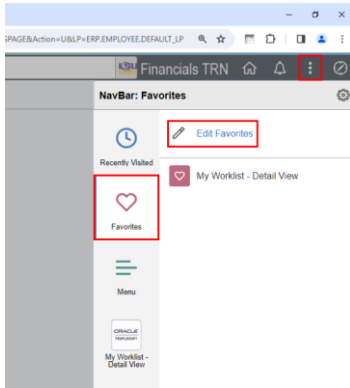

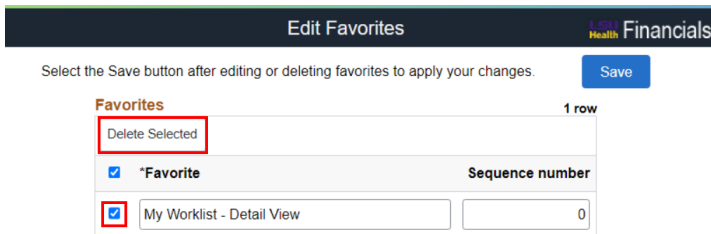The tile has been removed. Click **Save**.

Job Aid

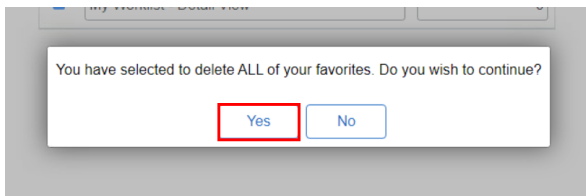## Remove the page from Favorites

Click the **NavBar** icon and click the **Edit Favorites** option.
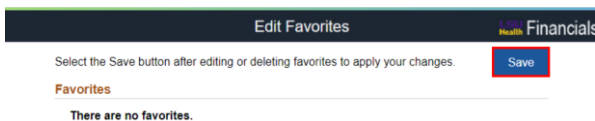

Click the **Edit Favorites** option.

Select the box next to the item to be removed. Click the **Delete Selected** button.
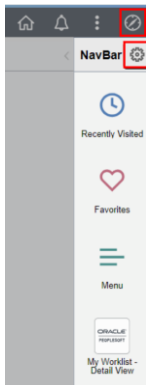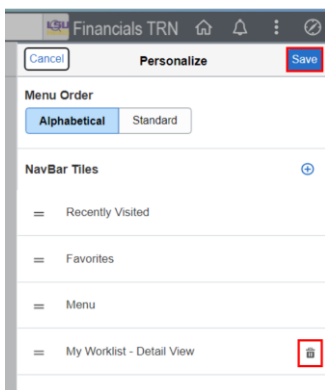

Click the **Yes** button.

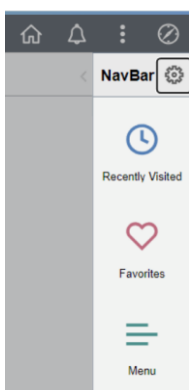Click **Save**.

Date Created: 11/8/2023

Remove the page from the NavBar menu navigation

Click the **NavBar** icon, then click the **Settings** icon.

On the Personalize window, click the **Delete** icon next to the menu option to be removed. Click **Save**.

The menu option has been removed.0