Section 2 My Favorites

What's a Favorites

Opening a Document from Favorites

Menu

Action buttons and More menu

Add to Favorites

Remove from Favorites

Sharing Data

Folders

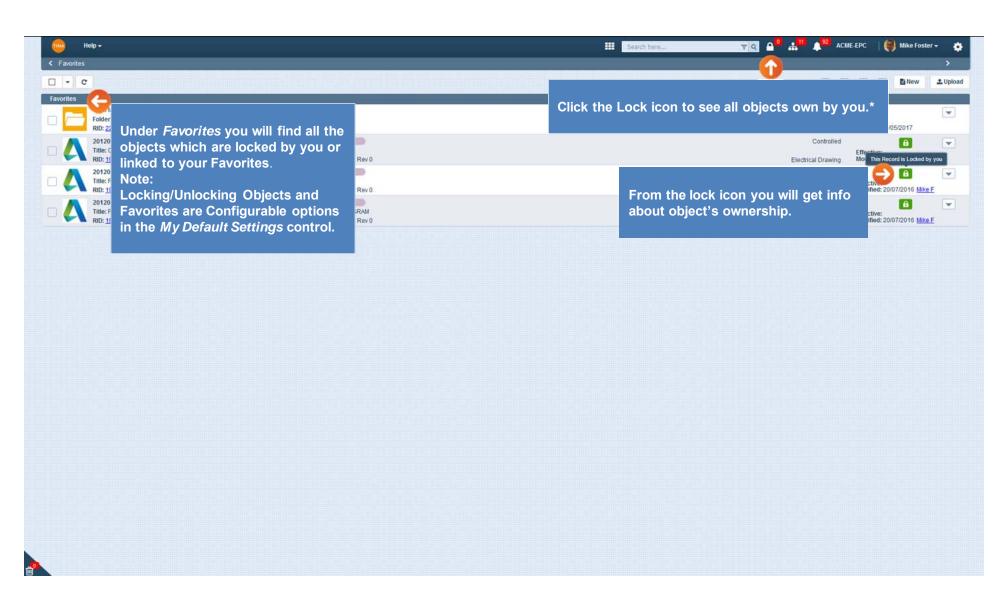
Create a New Folder

Add to Folder

Copy Record / Folder

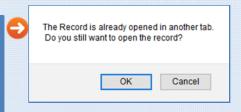
Delete Record / Folder

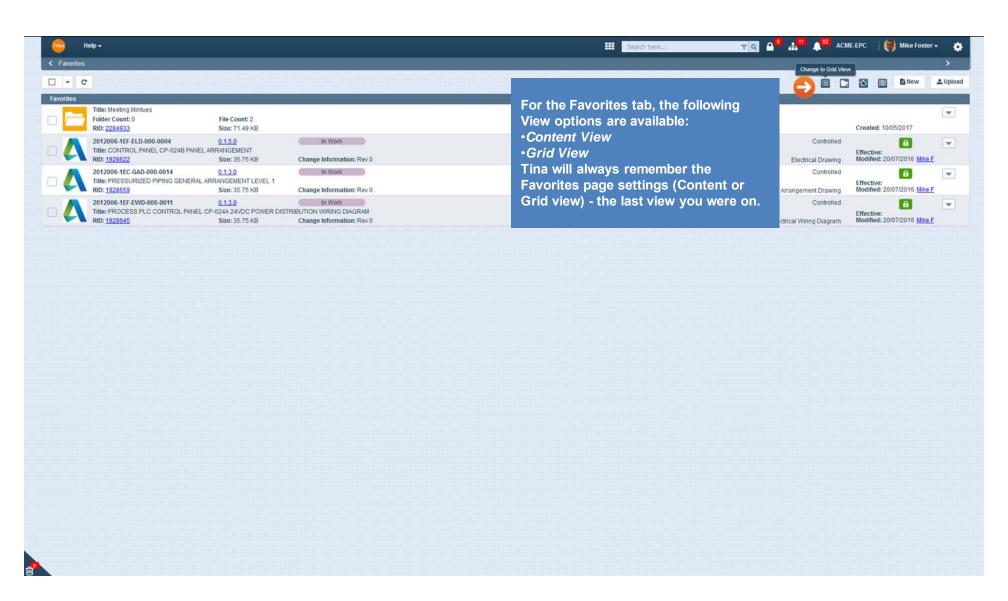
Assign Lock to Someone Else

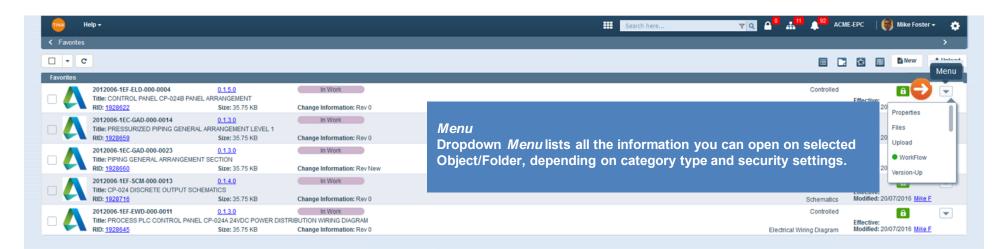


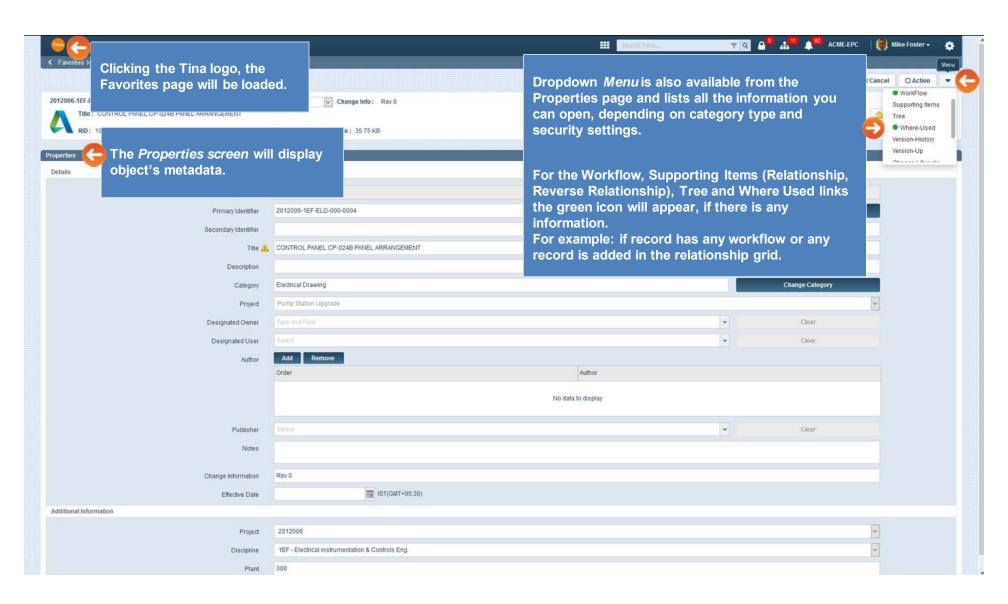


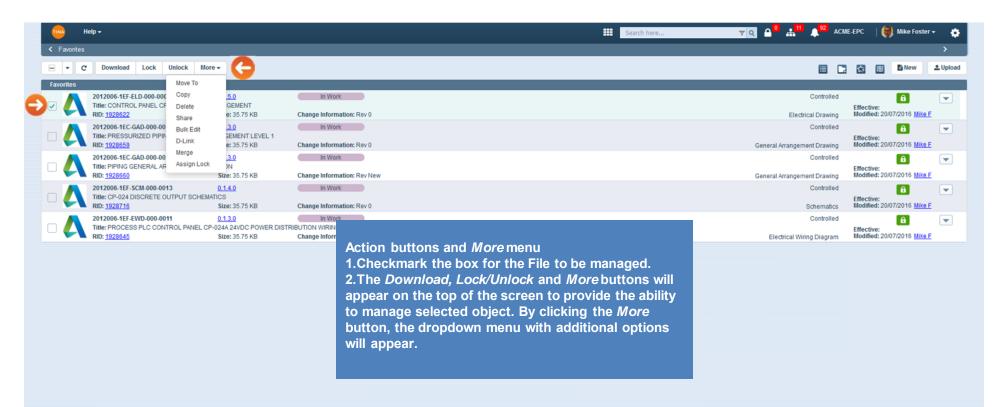
To open the object record, click the RID Number. The object's Properties screen will open in a separate web page. The application will allow you to have the same record open twice. The confirmation message will display with OK and Cancel options.



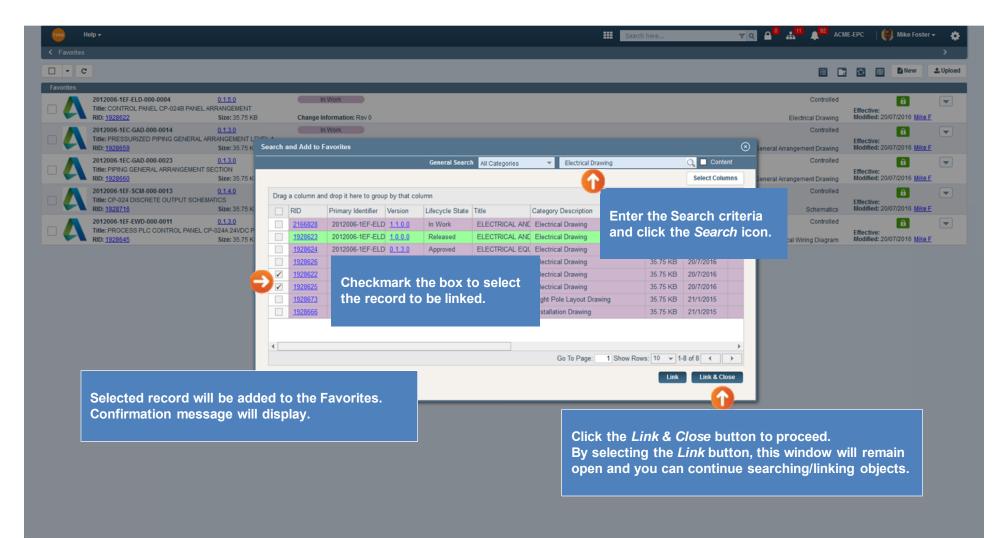


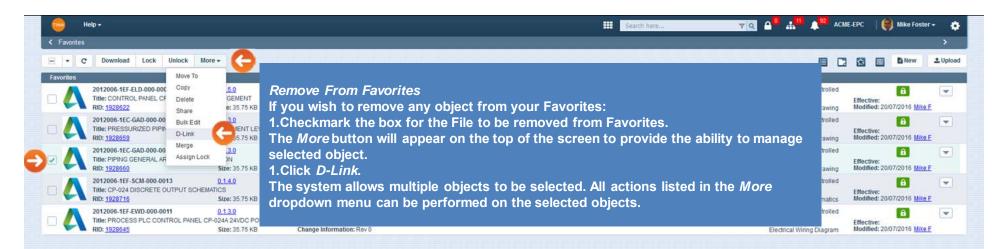




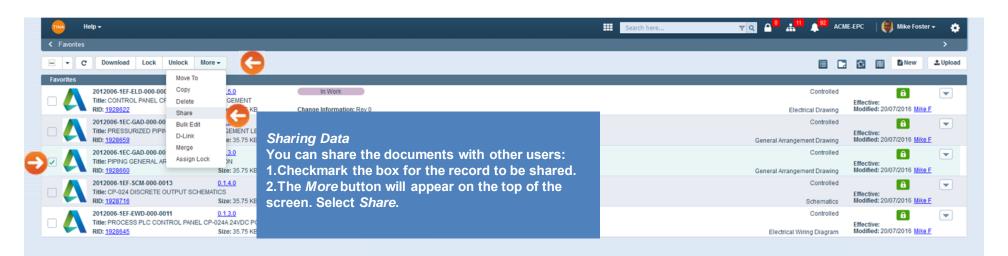


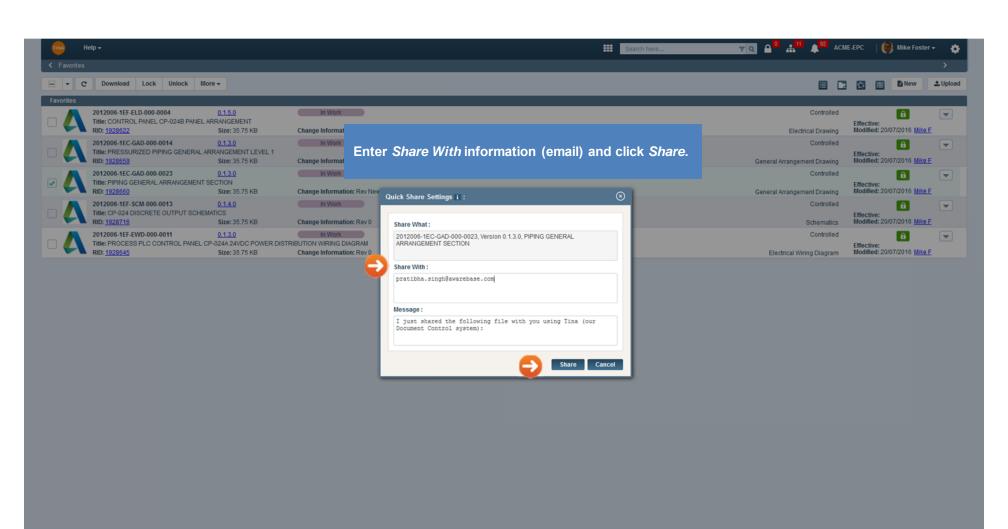


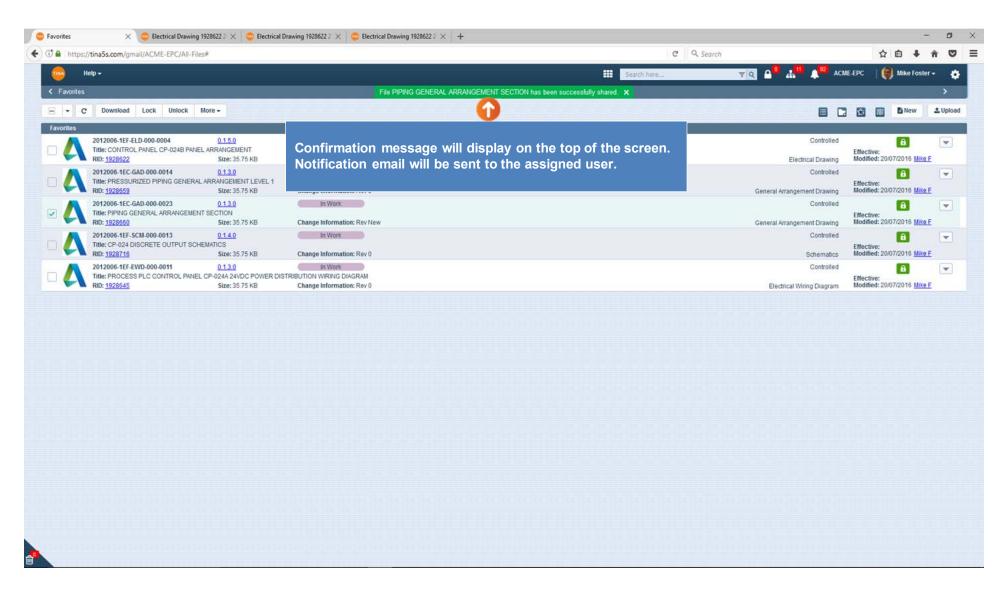


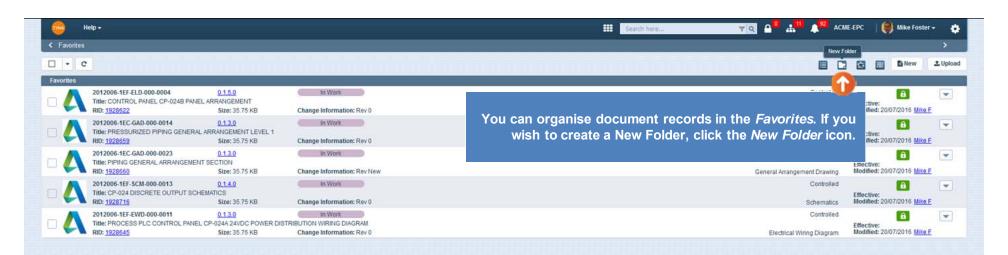


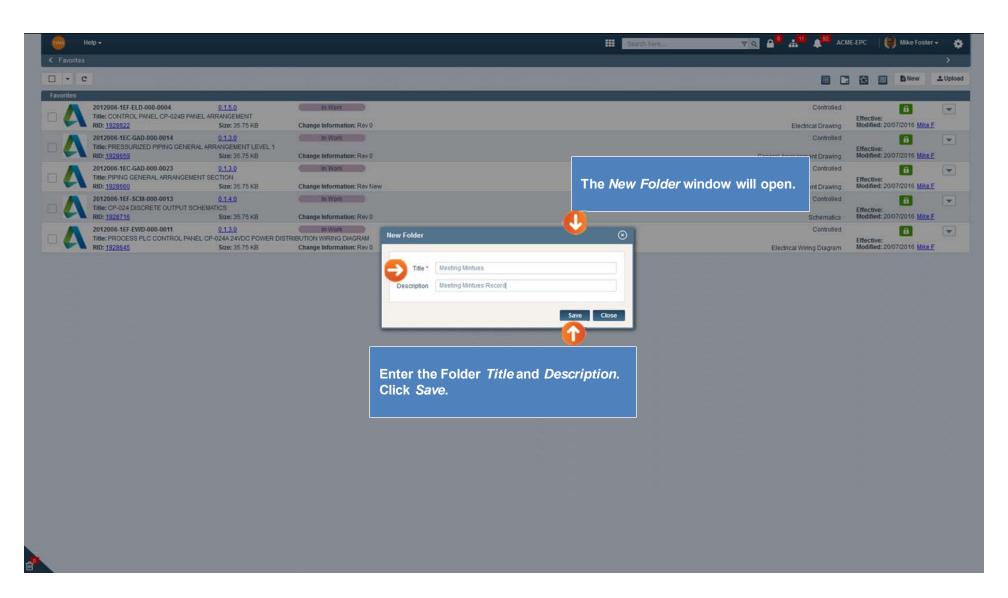
Selected object will be removed from the *Favorites* page. Confirmation Message will display.

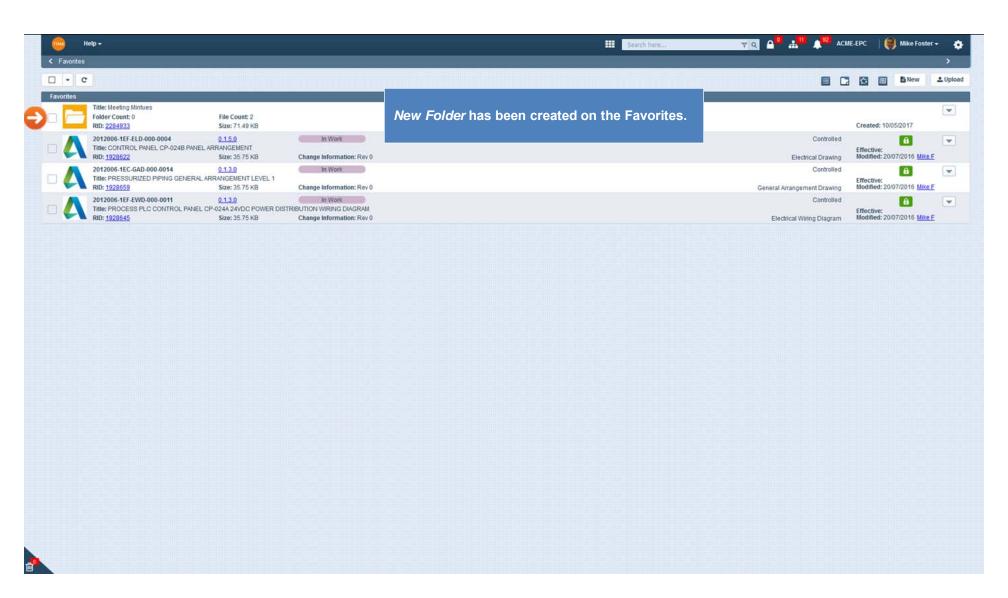


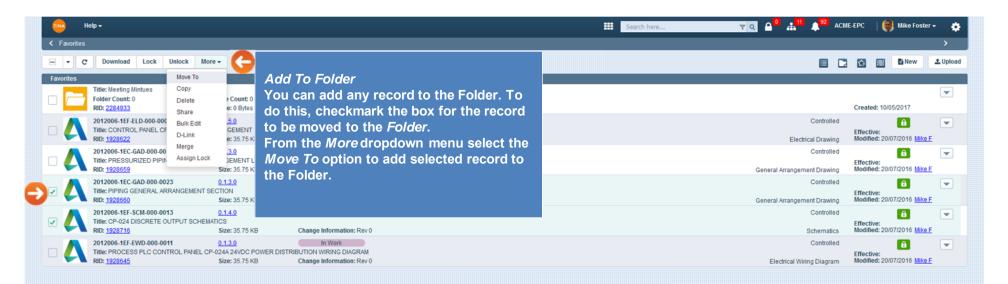


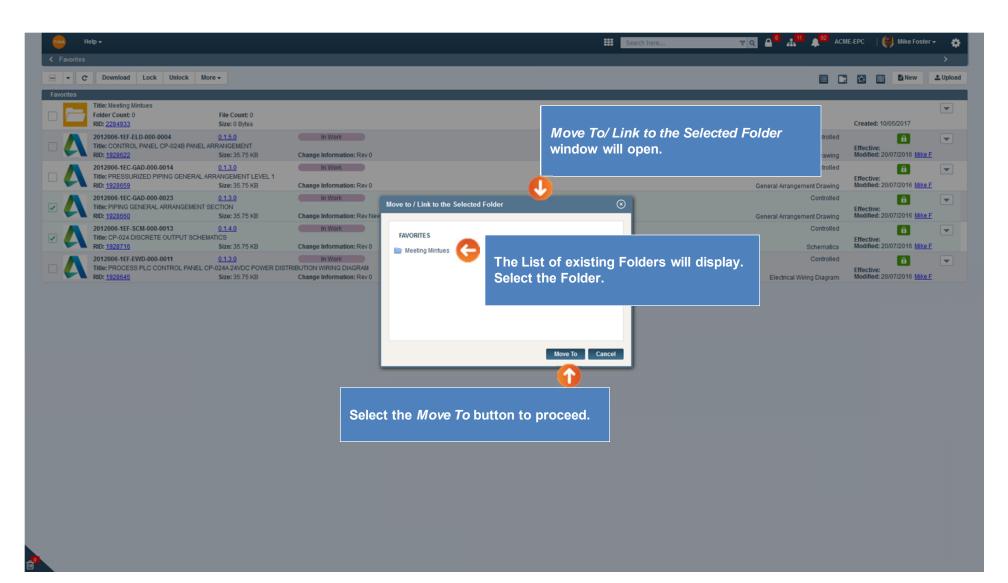


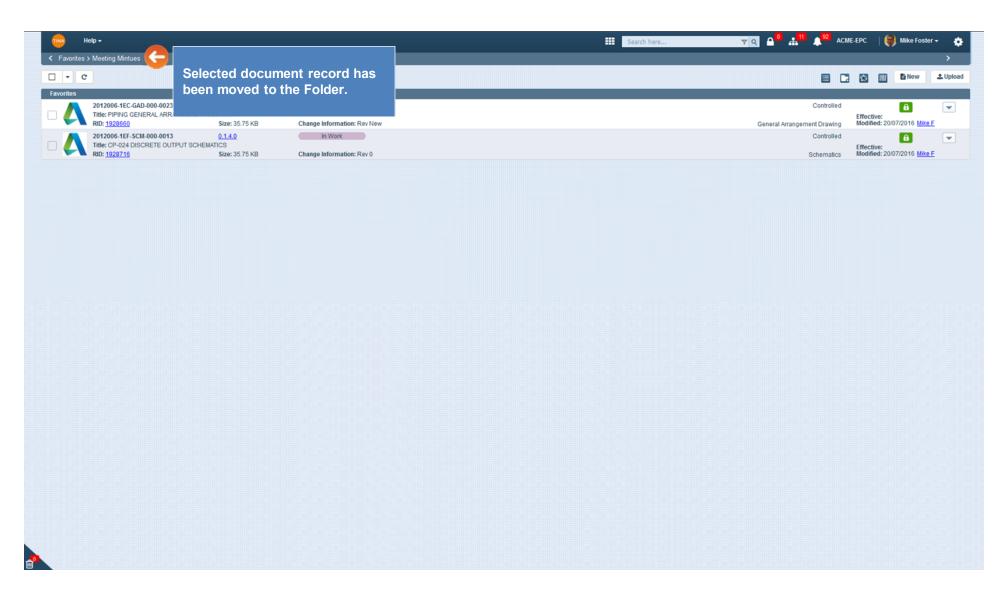


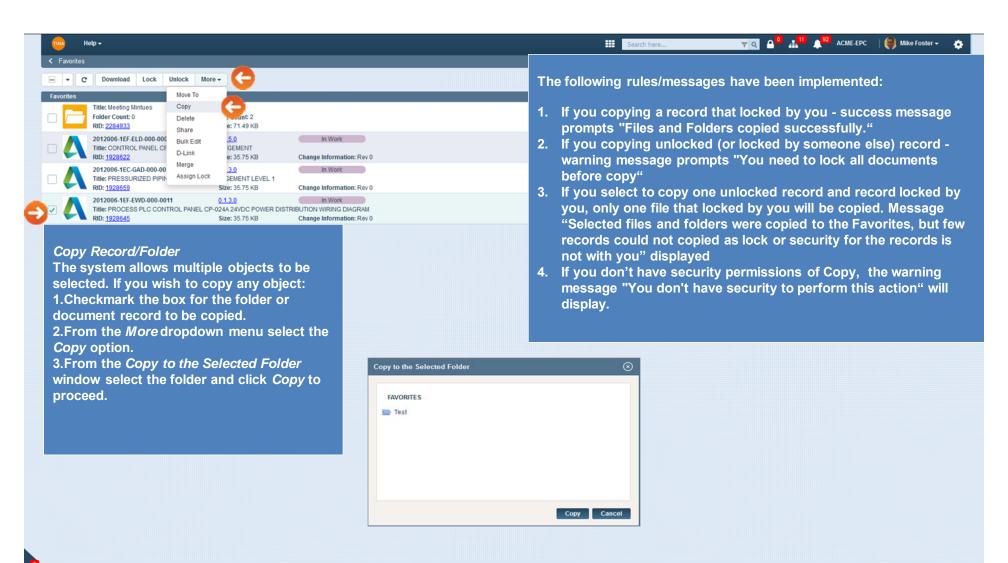


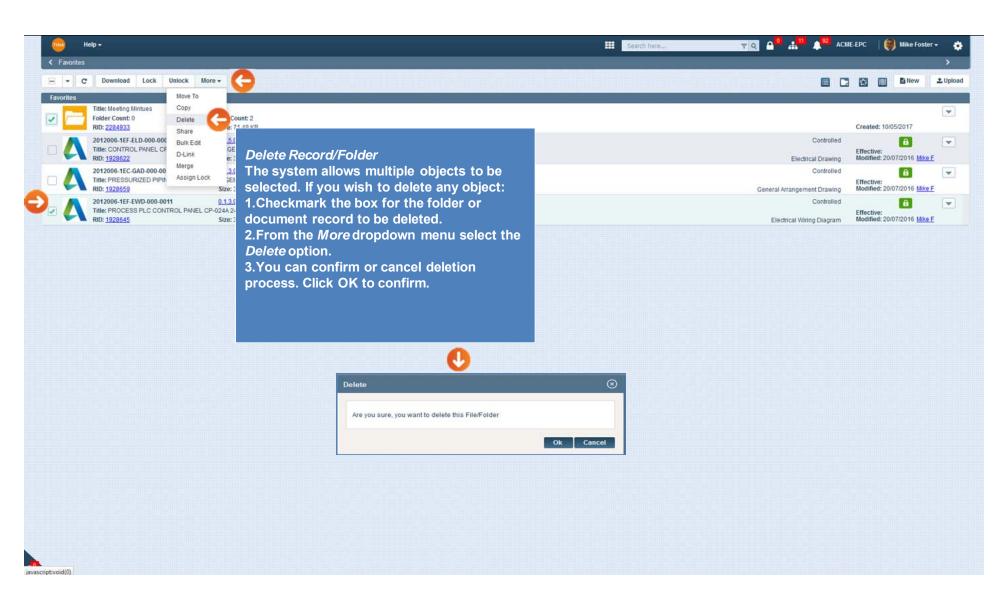


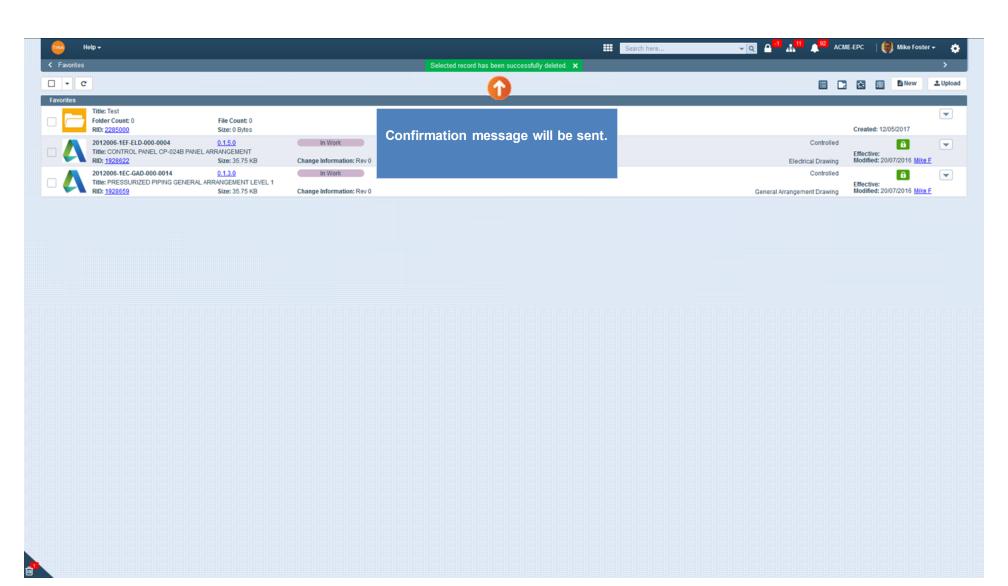














Assign Lock To Someone Else

Users who have the permission can assign the lock of documents to any other user:

- 1. Checkmark the box for the record.
- 2.From the *More* dropdown menu select the *Assign Lock* option.
- 3.The *Assign Lock* window will open. Type and Search any user to assign lock.
- 4.As soon as user is selected, pop-up will be closed and lock will be assigned to this user.
- 5. Notification will be sent to the user from whom the lock is taken away and to the user who gets the lock.



Both the assigner and the assignee must have security permissions:

- •Assigner Override Lock (take lock from another),
- •Assignee Take Lock.

