

Managing Favourites via the Directory

When you locate a contact (e.g., person, system, or group/program) using the Directory, you can add them to your favourites list.

In a search results list, if a contact can be added as a favourite, an **Add to Favourites** button appears beside the contact's name.

- Person, group, program, or BASE Managed Specialty Group favourite button (★)
- System favourite button (★)

When you click the **Add to Favourites** button the selected contact is added to your favourites list.

If a contact is already a favourite, its **Favourite** button appears with an orange colour.

- Person, group, program, or BASE Managed Specialty Group favourite button (★)
- System favourite button (★)

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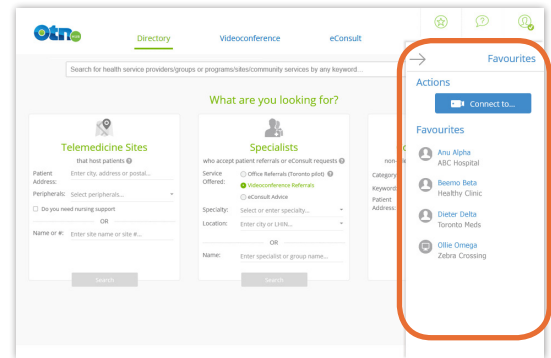





Figure 1: Favourites panel



Adding a Person, Group, Program, or BASE Managed Specialty Group as a Favourite

To add a contact from a **search results list**:

- [Search for the contact](#) , locate their name in the results list and click the associated **Add Favourite** button  in the actions panel at the top right of the search result listing (Figure 2).

A success message appears, the screen refreshes, and a **Favourite** icon  replaces the Add Favourite button.

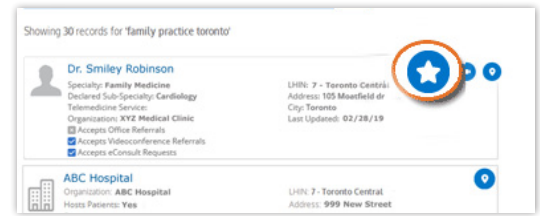





Figure 2: Search results - add favourite button

To add a contact from their **profile details**:

- Open the desired [profile details](#)  and click the associated **Add Favourite** button  in the actions panel at the top right of the profile details page (Figure 3).

A success message appears, the screen refreshes, and a **Favourite** icon  replaces the Add Favourite button.

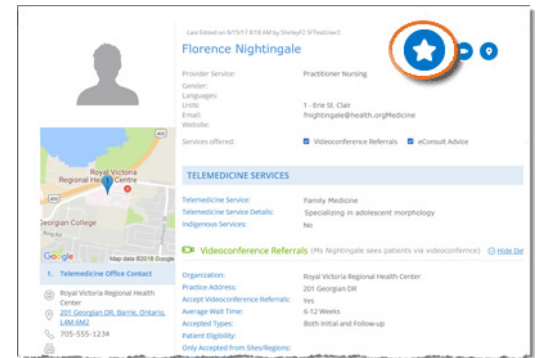


Figure 3: Profile details - add favourite button



Adding a System as a Favourite

To add a system from a **search results list**:

1. To find the site that hosts the system, [search for the site](#) and locate the site name in the results list.
2. To view the systems associated with the site, click the **Show Systems** (▼) indicator.
3. To initiate a call to the system, click the system's associated **Add Favourite** button (★) in the **Actions** column (Figure 4).

A success message appears, the screen refreshes, and a **Favourite** icon (★) replaces the Add Favourite button.

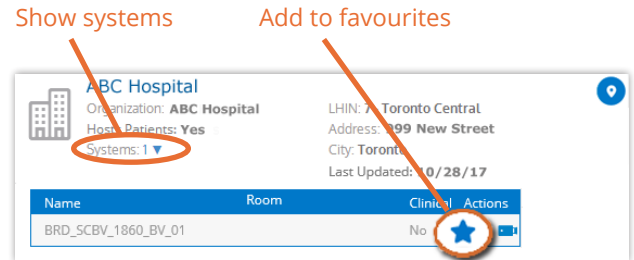


Figure 4: Search results, system - add favourite button

To add a system from a **site's profile details**:

- Open the desired [profile details](#), scroll down to the **Systems** section and click the associated **Add Favourite** button (★) in the system's panel header (Figure 5).

A success message appears, the screen refreshes, and a **Favourite** icon (★) replaces the Add Favourites button.

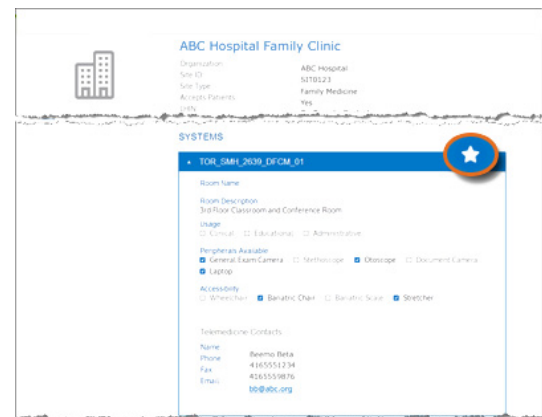


Figure 5: Profile details, system - add favourite button



Renaming a Favourite (Nickname)

By default, when a contact is added to **Favourites**, it displays the contact name. You can change the name displayed to something more meaningful for you.

Notes:

- Be sure each nickname is unique. Duplicates are not allowed.
- To ensure readability, use a nickname with less than 20 characters.

1. Locate the desired contact in your Favourites list and click the name.

An action bar appears under the favourites entry.

2. Click the **More** button (⋮) and select **Rename**.

A **Rename Favourite** pop-up appears, which displays the current name in a field that you can edit.

3. To change the name, type a new name in the **Rename** field and click the **Save** button.

The system validates the new name.

If all is okay, the dialog box closes and:

- A success message appears.
- The **Favourites** list refreshes and displays the new name.

If there is an error, an error message appears and the contact name remains unchanged.

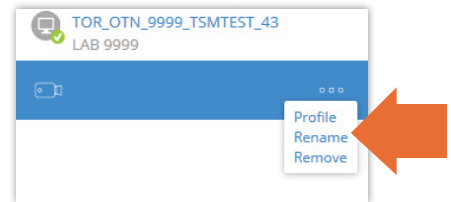


Figure 6: Favourite with pop-up menu

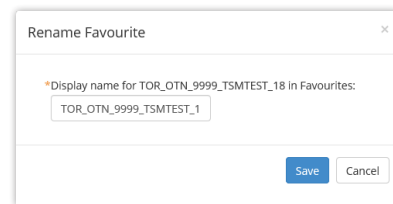


Figure 7: Rename confirmation pop-up



Removing a Favourite

If you no longer need a specific contact in your **Favourites**, you can remove them from the list. There are two ways to remove a favourite.

One-Step Removal Process

From a search results list or a profile details screen, click the associated **Favourite** button (★).

A success message appears, the screen refreshes, and an **Add Favourite** icon (★) replaces the Favourite button.



Figure 8: Favourite buttons in search results

Two-Step Removal Process

1. Locate the desired contact in your **Favourites list** and click the name.

An action bar appears under the favourites entry.

2. Click the **More** button (☰) and select **Remove**.

A dialog box appears asking you to confirm your deletion request.

3. To confirm the deletion, click **Remove**.

The system validates your removal request.

If all is okay, the dialog box closes and:

- A success message appears.
- The **Favourites** list refreshes and no longer displays the deleted user/system.

If there is an error, an error message appears and the user/system remains listed in the **Favourites List**.

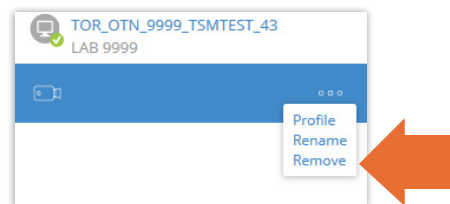


Figure 9: Favourite with pop-up menu

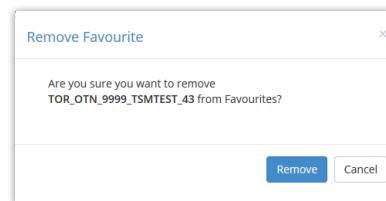


Figure 10: Remove confirmation pop-up

