CGI Advantage® 4

Business Role
User Guide

Table of Contents

Business Role Overview

Business Roles are at the heart of the user experience in CGI Advantage. The business roles are assigned to individual users that pull all components of the application together for easy navigation and searching. Upon logging in, each user is placed into the business role marked as the *primary* role. Any other roles available to a user are displayed in the User Profile area in the upper right corner. A single click in this area opens the listing of roles, from which a user can select a different role when necessary.

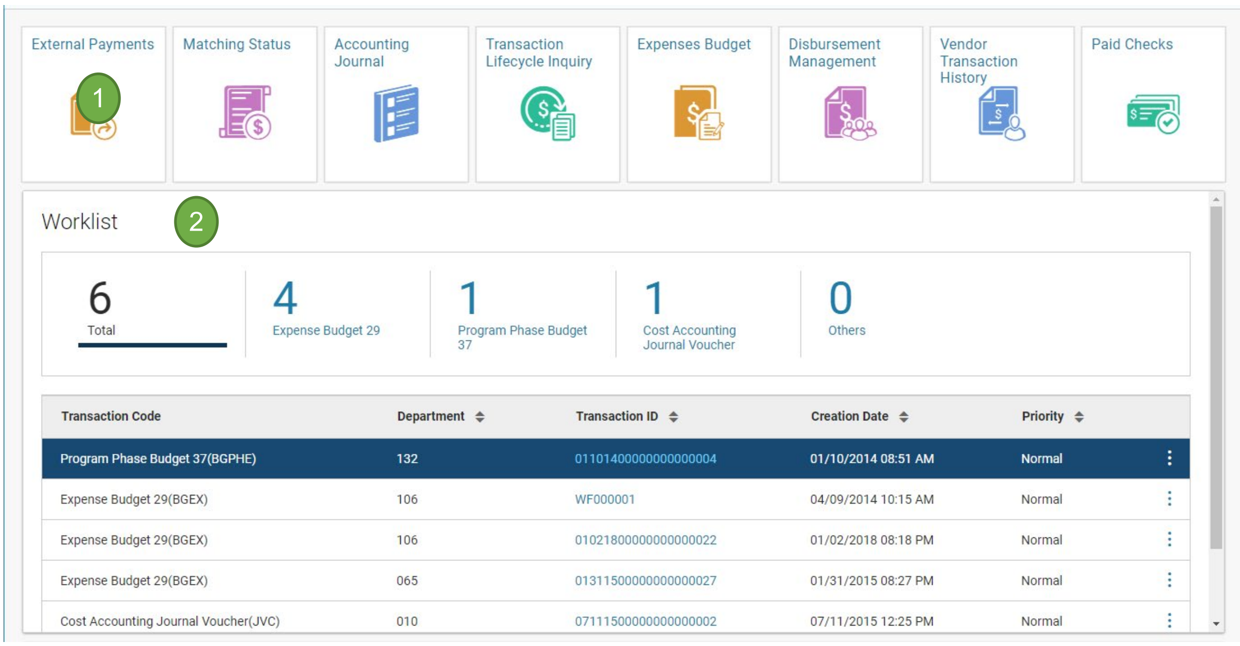
A business role controls four methods of system navigation, each displaying the pages within CGI Advantage required for completing everyday tasks, as well as infrequently used pages. Those four methods are:

- The home page associated with the role,
- The primary navigation menus that expand out from the left panel of Advantage,
- The business role landing pages available from the navigation menus, and
- The text searches available from the Global Search bar found in the top panel.

Home Page

Each business role has an associated home page that contains a combination of quick links to application pages, widgets that display both common and business area information, and various other types of media. Displayed below is a sample home page with:

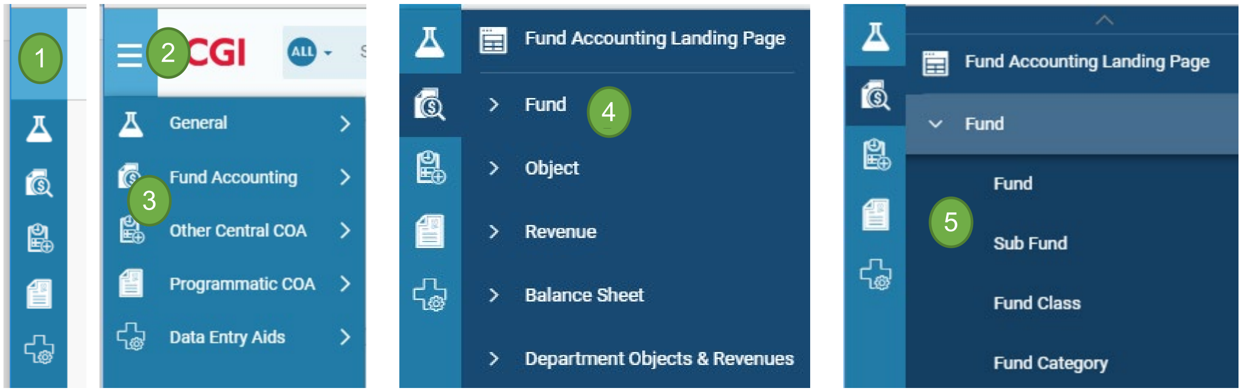
1. Quick links that open the most commonly-used system pages (reference, inquiry, or create a transaction)
2. Worklist widget showing transactions in a user's worklist (Note: Widgets cannot be refreshed individually. Select the Home Page icon in the Global Navigation bar to reload the Home page, which will refresh all widgets on the page.).



Primary Navigation

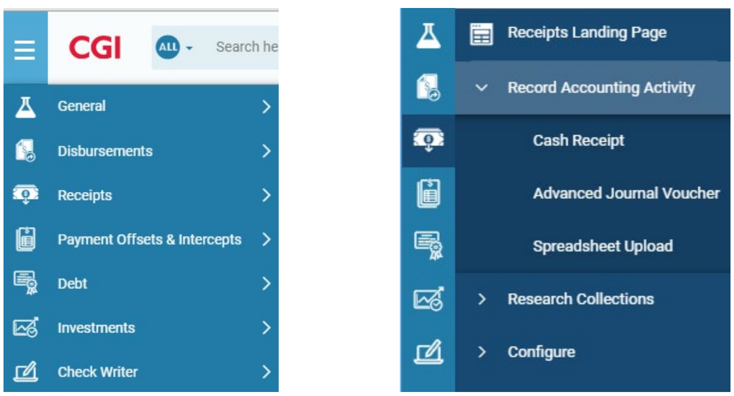
Each business role is intended to have some amount of navigation available from the left panel.

1. Navigation starts with an icon for each business process within a business role.
2. A 'hamburger' menu icon to expand the first navigation level.
3. Business process names
4. Each business process has a menu level beneath it called business activity. The *Fund Accounting* business process has been expanded to show the five business activities within the process.
5. The *Fund* business activity has been expanded to show the first four system resource targets available.



Business process and business activity are just organizational folders that help to organize the system resource targets. The setup of a business role does not have to try to make them actual processes and activities performed. While that type of organization may be chosen for a role, it does not have to be as the *Chart of Account Maintenance* business role above shows.

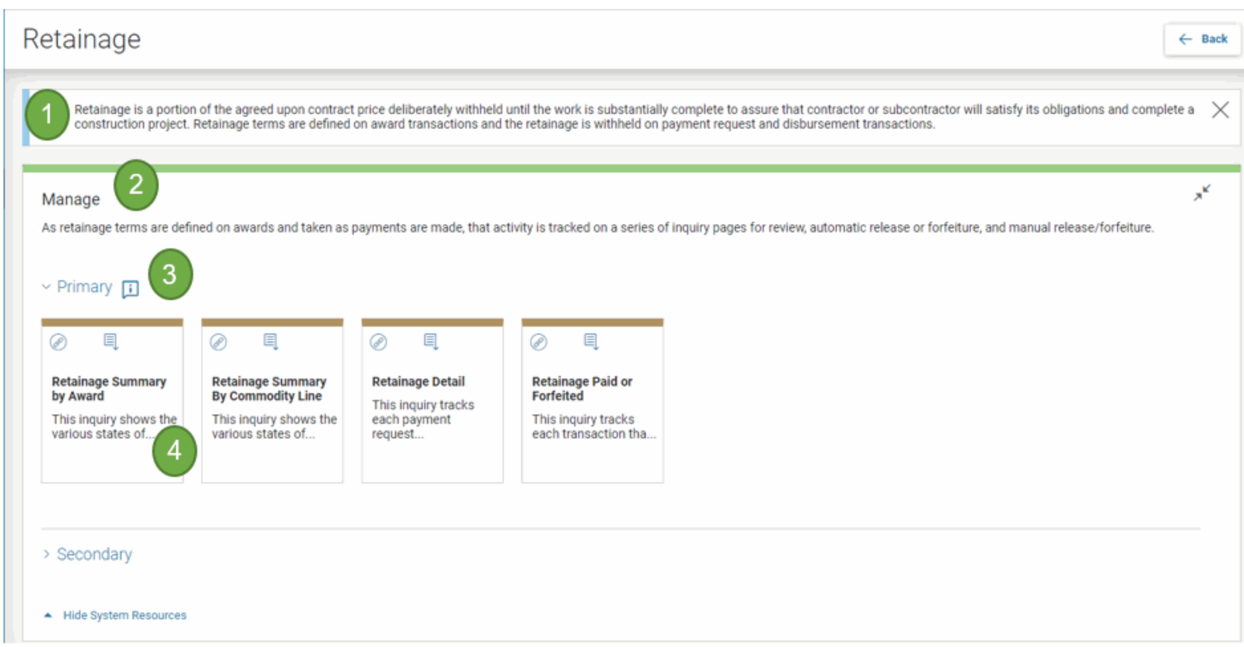
The *Treasury Management* business role depicted below is organized into typical business processes and activities, which users in a treasury department would perform.



Business Process Landing Page

The "Primary Navigation" topic includes screen captures that show a landing page listing at the top of each business process. Selecting the landing page opens a business process landing page where the home page had been displayed. This type of page is intended to give support to new users and even existing users who are performing a task that is unfamiliar to them. A landing page displays the business activities and system resource targets of the primary navigation. It also displays extensive amounts of text, which provides details on what is contained within a business activity and for what a system resource target can be used. This page also contains instructional messages about the steps a user would take to complete their task.

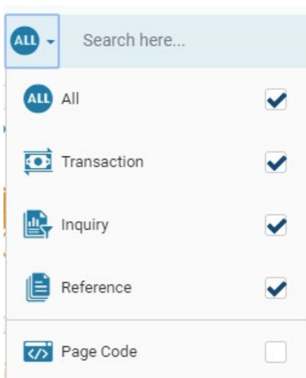
1. Business process description
2. Business activity description
3. Primary and secondary sections assist by separating less-used system resources into a collapsed section that can be opened on demand.
4. Resources targets with a given name and description. The common 'more information' icon at center top opens to reveal the entire description.



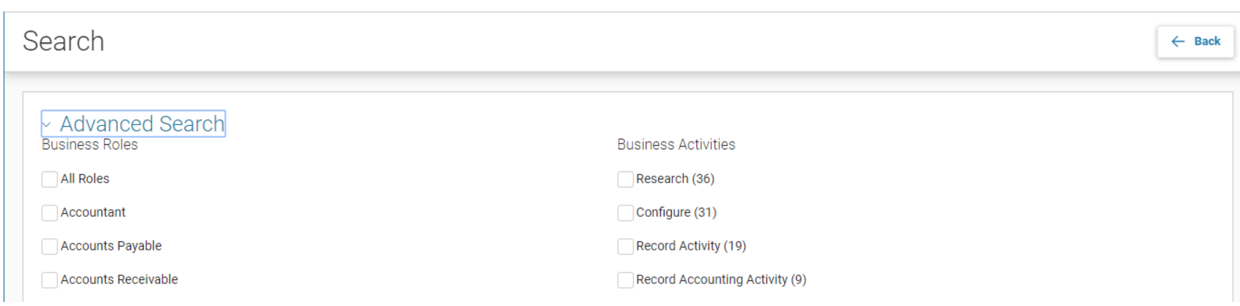
Global Search

The Global Search bar works in two methods: text or by page code. Page code searching goes against Application Page Registration data. The text searching method goes against the currently selected business role by default. Entering text starts a search against the business activities and system resource targets not only by name, but also by description.

By default, all types of system resource targets are searched with an option to filter results down to just those of a particular type.



The magnifying glass icon opens up the following panel that can be used to adjust a text search. Adjustments include selecting one or more roles to search simultaneously, as well as selecting *All Roles*. Within a role, a search can be narrowed down to one or more business activities. The results appear beneath the Advanced Search section.



Configuration

Configuration of a business role consists of the following pages in group 1 with optional work done in group 2 if the business role is to have a new home page.

Group 1

- Business Role
- Business Process
- Business Activity
- Resource Target
- Business Role Association
- User to Business Role Association
- Business Role to User Association
- LDAP User to Business Role Association
- LDAP Business Role to User Association

Group 2

- Publish
- Widget Library
- Widget Parameters
- QuickLink Library
- Home Page Configuration

Business Role

The Business Role (BUSROLE) reference page is used to define each instance of a business role. Note: The Enterprise Search Lite Indexer job must be run after changes are made to this page.

› Field Information

Field Name	Description
Business Role ID	A unique identification of a business role for system use. Business Role IDs less than 500000 are reserved for delivered and sample business roles. Numbering is controlled by a Unique Numbering record of R_BUS_ROLE.

Field Name	Description
Business Role Name	A required long descriptive name of a business role. This value is displayed to users in the User Profile panel. This value is displayed to users in the User Profile panel.
Business Role Short Name	A required short descriptive name of a business role.
Business Role Description	A required lengthy description of a business role that is intended to capture the intended type of users for a business role.
Internal Business Role Description	An optional lengthy descriptive field to capture any type of internal information for subsequent business role administrators about a business role.
Active	An indication that can be used to prevent the association of a business role to a user. When not active, a role cannot be associated with a user and if already associated before being deactivated, the system will not display the role within the User Profile panel.
Home Page ID	The identification of the home page associated with the business role. A successful save of the business role updates the Parent Business Roles field on the Home Page Configuration reference page. Mobile home page is filtered out from pick list, so that only a regular home page can be associated to a Business Role.
Home Page Name	The inferred Home Page Name for the selected Home Page ID for informational purposes.
Role Type Information	This optional setting for a business role extends certain system features to a subset of business roles. • *Manager, Employee,* or *Clock User* determine how certain Human Resource Management pages (for example, Travel, Time and Leave, and Employee Search) are displayed. Note: If *Manager* or *Employee* is selected, then a User Type can be specified on the User to Business Role Association page. • *Customer* is the setting designed for use with Customer Self Service but can be used for any external user business role. When selected, the application landing page has many features turned off to keep the user on just what is presented

Field Name	Description
	on the home page or in the Primary Navigation Panel (left panel). Roles that do not need this distinction should leave the field blank.
Primary Application	This field is not used at this time.
Available when Restricted	When a business role should be available in an external application (for example, Vendor Self Service), this indication must be *true.* An indication of *false* will prohibit the role in an external application.
Enable General Business Process	This check box should be selected if the Business Role should display the General Business Process menu in the Primary Navigation Panel (left panel). This check box is delivered not checked.
Enable Business Intelligence Business Process	This check box should be selected if the Business Role should display the Business Intelligence Business Process menu in the Primary Navigation Panel (left panel). This check box is delivered not checked.

› Delivered Business Roles

The following table lists the delivered Business Roles, along with important information. Please read carefully before making any changes to Business Roles in this table!

Business Role ID / Business Role Name	Description	Important Warnings
501 / Employee	This is the delivered Business Role for Employees. The Role Type Information field is set to *Employee* and should NOT be changed. The Role Type Information determines how certain HRM pages are displayed in the application.	This Business Role record should NOT be deleted and must always be associated with the *Employee* Role Type Information. The Business Role ID should not be changed (that is, must be 501).
502 / Manager	This is the delivered Business Role for Managers. The Role Type Information field is set to *Manager* and should NOT be changed. The Role Type Information determines how certain HRM pages are	This Business Role record should NOT be deleted and must always be associated with the *Manager* Role Type Information. The Business Role ID should not be changed (that is, must be

	displayed in the application.	502).
300001 / System Administration	This role contains all of the configuration and inquiry pages for managing the CGI Advantage ERP.	
400000 / Vendor	This is the delivered role for the VSS Vendor user that can access the functionality made available to external vendors. This can include Account Maintenance, Financial Inquiries, Business Opportunities, Catalog Management, and Grant Opportunities, depending on the site's configuration.	This Business Role record should NOT be deleted. The Business Role ID should not be changed (that is, must be 400000).
400001 / VSS Administrator	This is the delivered role for the VSS Administrator. A user that logs into VSS with this role is able to access administrator pages and the online help in VSS is specific to the administrator role.	This Business Role record should NOT be deleted. The Business Role ID should not be changed (that is, must be 400001).
400002 / Internal Vendor	This is the delivered role for the internal vendor. VSS Administrators can be assigned this business role to view the system as a selected vendor would see the Vendor Self Service environment. When logged in as this role, the system prevents updates to vendor specific data.	This Business Role record should NOT be deleted. The Business Role ID should not be changed (that is, must be 400002).
400003 / Customer Self Service Role	This is a sample delivered role for Customer Self Service. It requires the Role Type Information setting of *Customer* in order to trim down the presentation of CGI Advantage to an external user.	This Business Role record should NOT be deleted. The Business Role ID should not be changed (that is, must be 400003).

Business Process

The Business Process (BUSPROC) reference page is used to define each unique instance of a business process. Please note that a business process is independent of a business role, which allows a process to be shared across multiple roles and be defined only once. Note: The Enterprise Search Lite Indexer job must be run after changes are made to this page.

› Field Information

Field Name	Description
Business Process ID	A unique identification of a business process for system use. Business Process IDs less than 500000 are reserved for delivered and sample business processes. Numbering is controlled by a Unique Numbering record of R_BUS_PROC.
Business Process Name	A required long descriptive name of a business process. This value is displayed to users in the primary navigation menu and used for the title of the business process landing page.
Business Process Short Name	A required short descriptive name of a business process. When multiple business processes have the same name (for example, *Configuration* or *Research*), it is helpful to use this field or the Internal Business Process Description field to clearly differentiate the records.
Business Process Description	A required lengthy description of a business process that is intended to convey a user that the process contains the resource target necessary to complete their task. This information appears at the top of a business process landing page.
Internal Business Process Description	An optional lengthy descriptive field to capture any type of internal information for subsequent business role administrators about a business process.
Active	An indication that can be used to prevent the display of a business process within all associated business roles without deleting that association. This feature allows the retention of 'future use' processes.
Icon	The required icon from the icon repository used to represent the business process in the primary navigation menu. In order to make a new icon available here, the icon file must first be placed in the ADV_ICON_REPO database table through DML. Before using the file, the following files have to be updated followed by a rebuild and deployment of the UI project: advantage-icon.eot, advantage-icons.svg, advantage-icons.ttf, advantage-icons.woff, and app.component.css.
Parent Business Roles	A system-maintained field that lists each Business Role ID that a business process is associated with for informational purposes in the event, a modification to the process is being considered and the impact of that change needs to be known. Updates to this field are made when adding associations on the Business Role Association page.

Business Activity

The Business Activity (BUSACTV) reference page is used to define each unique instance of a business activity. Please note that a business activity is independent of a business role or business process, which allows an activity to be shared across multiple roles or even multiple times within a single role, and be defined only once. Note: The Enterprise Search Lite Indexer job must be run after changes are made to this page.

- Field Information

Field Name	Description
Business Activity ID	A unique identification of a business activity for system use. Business Activity IDs less than 500000 are reserved for delivered and sample business activities. Numbering is controlled by a Unique Numbering record of R_BUS_ACTV.
Business Activity Name	A required long descriptive name of a business activity. This value is displayed to users in the primary navigation menu and used for the title of the business process landing page.
Business Activity Short Name	A required short descriptive name of a business activity. When multiple business activities have the same name (for example, *Record Activity*), it is helpful to use this field or the Internal Business Activity Description field to clearly differentiate the records.
Business Activity Description	A required lengthy description of a business activity that is intended to convey to a user that the activity contains the system resource necessary to complete their task. This information appears at the top of each business activity section on a business process landing page.
Internal Business Activity Description	An optional lengthy descriptive field to capture any type of internal information for subsequent business role administrators about a business activity.
Active	An indication that can be used to prevent the display of a business activity within all associated business roles without deleting that association. This feature allows the retention of ‘future use’ activities.
Type of Activity	A required setting that defines the primary use of an activity: *Reference Data, Research,* and *Business Data Entry.* Currently, this field is not used by the application.

Field Name	Description
Parent Business Process	A system-maintained field that lists each Business Process ID and Business Process Name that a business activity is associated with for informational purposes in the event, a modification to the activity is being considered and the impact of that change needs to be known. Updates to this field are made when adding associations on the Business Role Association page.

Resource Target

The Resource Target (RSRCTRGT) reference page is used to define each unique instance of a system resource that will be the target of a business role. Each system resource must also be defined as an Application Page (APGS) record first. Additions to the Application Page reference page are rare. Much of the information for a resource target will default from the Application Page record. A target can have the same name or changed to a different name so that a user can quickly determine to use the resource or not.

Please note that a resource target is independent of a business role, business process, and business activity, which allows a target to be shared across multiple roles or even multiple times within a single role, and be defined only once. Note: The Enterprise Search Lite Indexer job must be run after changes are made to this page.

› Field Information

Field Name	Description
Resource Target ID	A unique identification of a resource target for system use. Business Activity IDs less than 500000 are reserved for delivered and sample resource targets. This ID is not displayed online. Numbering is controlled by a Unique Numbering record of R_RSRC_TRGT.
Resource ID	A unique identification of a resource target for configuration purposes. Using the Page Code from the Application Page record is often used as the initial Resource ID, but can be amended or changed if desired.
Resource Name	A required long descriptive name of a resource target. This value is displayed to users in the primary navigation menu and used in the tiles of a business process landing page.
Resource Short Name	A required short descriptive name of a resource target. When multiple resource targets have the same name, it is helpful to use this field or the Internal Resource Description field to clearly differentiate the records.

Field Name	Description
Resource Description	A required lengthy description of a resource target that is intended to convey to a user that the resource is the correct one for their task and provide an amount of helpful information in the use of the resource. This information will appear on demand for each resource target card on a business process landing page.
Internal Resource Description	An optional lengthy descriptive field to capture any type of internal information for subsequent business role administrators about a resource target.
Active	An indication that can be used to prevent the display of a resource target within all associated business roles without deleting that association. This feature allows the retention of 'future use' resources.
Resource Type	An indication of what type of resource target is being defined. This determines the icon shown when using the Global Search. Of the values, only *Transaction, Page (i.e. reference page),* and *Inquiries* are used currently. The other values will become supported in future releases.
Initial Page Mode	When opening a resource target from any of the navigation components (discussed in the Overview section), this mode determines how the page is presented. Valid values include: • *Add* – This mode does not apply to inquiry pages. It can be used with reference pages where data is constantly being added so the user is presented with the 'create record' page. Transactions are the resource most commonly found with this setting as it transitions not to the Transaction Catalog but the Create Transaction page. • *Browse* – This mode takes you to the reference page, inquiry page, or Transaction Catalog with the filter section opened but no recent or pinned searches will be presented. • *Query* – This mode also opens with the filter section visible, and the recent searches section is visible.
Application Name	A field set from the Application Page record for system use.
Where Clause	An optional where clause to have the page open with an initial search performed.

Field Name	Description
Order By	An optional order by clause to have the page open with data pre-sorted.
Target View	An optional field that can reduce the amount of a page that displays to a user accessing the resource (for example, the middle tab of a three-tab page). A view is collection of components (sections, cards, components, fields, and so on) that show data in a particular cohesive manner.
Parent Business Activities	A system-maintained field that lists each Business Activity ID and Business Activity Name that a resource target is associated with for informational purposes in the event, a modification to the target is being considered and the impact of that change needs to be known. Updates to this field are made when adding associations on the Business Role Association page.

Business Role Association

The Business Role Association (BUSROLAS) reference page consists of several tabs for associating business processes to business roles, business activities to business processes, and resource targets to business activities. As with other structured reference data pages, this one starts with a search to locate a particular business role. Note: The Enterprise Search Lite Indexer job must be run after changes are made to this page.

› Record Actions

- **View** & **Edit** – Both actions transition you to a page with four tabs. The first is just a protected view of the Business Role page as discussed earlier. The other tabs are defined below.

<u>Business Role and Business Process (tab)</u>

› Field Information

Field Name	Description
Row ID	A hidden field to identify each association uniquely. Numbering is controlled by a Unique Numbering record of R_BUSROLE_BUSPROC.
Business Process ID	The identification of an individual business process associated with the selected business role.
Business Process Name	The inferred name of the Business Process ID entered/selected.

Field Name	Description
Display Order	The desired order of presentation of the business processes within the business role. If left blank, then display is done in the order added after those with a display order.

› Related Actions

- **Delete** – This action deletes the association but does not delete the business process.
- **Link to Business Role** – This action transitions you to the Select Business Role pop-up window where you can search and select another business role in the application to which you want to link the current business process. Once selected, click **OK** to complete the linking action.

› Related Pages

- **Business Process** – A transition to the Business Process reference page for instances where the business process being associated needs an update or a new business process needs to be created for association.

Business Process and Business Activity (tab)

› Field Information

Field Name	Description
Row ID	A hidden field to identify each association uniquely. Numbering is controlled by a Unique Numbering record of R_BUSPROC_BUSACTV.
Business Process Name	The inferred name of the Business Process ID selected on the previous tab.
Business Activity ID	The identification of an individual business activity associated with the selected business process.
Business Activity Name	The inferred name of the Business Activity ID entered/selected.
Display Order	The desired order of presentation of the business activities within the business process. If left blank, then display is done in the order added after those with a display order.

› Related Actions

- **Delete** – This action deletes the association but does not delete the business activity.
- **Link to Business Process** – This action transitions you to the Select Business Process pop-up window where you can search and select another business process in the application to which you want to link the current business activity. Once selected, click **OK** to complete the linking action.

› Related Pages

- **Business Activity** – A transition to the Business Activity reference page for instances where the business activity being associated needs an update or a new business activity needs to be created for association.

Business Activity and Resource (tab)

› Field Information – Many fields that are display-only were not mentioned as they are defined earlier in the Resource Target reference page section.

Field Name	Description
Row ID	A hidden field to identify each association uniquely. Numbering is controlled by a Unique Numbering record of R_BUSACTV_RSRCTRGT.
Business Activity Name	The inferred name of the Business Activity ID selected on the previous tab.
Resource ID	The identification of an individual resource target associated with the selected business activity.
Resource Name	The inferred name of the Resource ID entered/selected.
Grouping	When there are resource targets for an activity where some are the main ones used and others are seldom used, the two values – *Primary* and *Secondary* for this field makes that distinction on the business process landing page.
Display Order	The desired order of presentation of the business activities within the business process. If left blank, then display is done in the order added after those with a display order.

› Related Actions

- **Delete** – This action deletes the association but does not delete the business activity.

› Related Pages

- **Resource Target** – A transition to the Resource Target reference page for instances where the resource target being associated needs an update or a new resource target needs to be created for association.

Note: A page using carousel menu usually has one resource target defined for each carousel tile on the page. When you configure a carousel menu to hide a link, you should also update the BUSROLAS setup so that the corresponding system resource target is not displayed.

User to Business Role Association

The User to Business Role Association (USRBROLE) reference page consists of two tabs for associating business roles to users. An authorized user can also submit a User Maintenance type transaction to manage business roles for a user. As with other structured reference data pages, this one starts with a search to locate a particular user. Then, the View and Edit actions will transition to a page with two tabs. The first is just a protected view of the Business Role page, as discussed earlier. Note: The Enterprise Search Lite Indexer job must be run after changes are made to this page.

Current Business Roles (tab)

- Field Information

Field Name	**Description**
Business Role ID	The identification of an individual business role associated with the selected user.
Business Role Name	The inferred name of a business role.
Business Role Description	The inferred description of a business role.
Primary	A yes/no indication of which role will be the default for the user upon logging in. The first role associated will have this field defaulted to yes.
Display Order	The desired order of presentation of the business processes within the business role. If left blank, then display is done in the order added after those with a display order.
User Type	The level of security access that a user should have for a business role when the Role Type Information is set to *Manager* or *Employee* for the Business Role on the Business Role table. The level of security can vary from *User 1* to *User 10*, which either is pre-defined or can be defined on the Application Roles Security page.

- Related Actions

- **Remove Current Role** – This action deletes the association but does not delete the business role.

› Related Pages

- **Business Role** – A transition to the Business Role reference page for instances where the administrator needs more information on the business role to make or remove an association.
- **User Information** – A transition to the User Information reference page for instances where the administrator needs more information on the user, such as what security roles have been assigned.

Available Business Roles (tab)

› Field Information

Field Name	Description
Business Role ID	The identification of an individual business role associated with the selected user.
Business Role Name	The inferred name of a business role.
Business Role Description	The inferred description of a business role.

› Related Actions

- **Add Available Role** – This action adds a business role for the selected user.

› Related Pages

- **Business Role** – A transition to the Business Role reference page for instances where the administrator needs more information on the business role to make or remove an association.
- **User Information** – A transition to the User Information reference page for instances where the administrator needs more information on the user such as what security roles have been assigned.

Business Role to User Association

The Business Role to User Association (BROLEUSR) reference page consists of two tabs for associating users to business roles. As with other structured reference data pages, this one starts with a search to locate a particular business role. Then, the View and Edit actions will transition to a page with two tabs. The first is just a protected view of the User Information page.

Current Users (tab)

- Field Information

Field Name	Description
User ID	The identification of an individual User ID associated with the selected business role.
Name	The inferred name of a user.

- Related Actions
  - **Remove Current User** – This action deletes the association but does not delete the user.
- Related Pages
  - **Business Role** – A transition to the Business Role reference page for instances where the administrator needs more information on the business role to make or remove an association.
  - **User Information** – A transition to the User Information reference page for instances where the administrator needs more information on the user such as what security roles have been assigned.

Available Users (tab)

- Field Information

Field Name	Description
User ID	The identification of an individual User ID associated with the selected business role.
Name	The inferred name of a user.
First Name	First name of a user.
Last Name	Last name of a user.

- Related Actions
  - **Add Available User** – This action adds a user for the selected business role.
- Related Pages
  - **Business Role** – A transition to the Business Role reference page for instances where the administrator needs more information on the business role to make or remove an association.

- **User Information** – A transition to the User Information reference page for instances where the administrator needs more information on the user such as what security roles have been assigned.

LDAP User to Business Role Association

This is a LDAP specific page and can be utilized by sites which are using Lightweight Directory Access Protocol (LDAP) as the means of user authentication and user information data storage. The LDAP User to Business Role Association (LUSRBROL) reference page consists of two tabs for associating business roles to users. An authorized user can also submit a User Maintenance type transaction to manage business roles for a user. As with other structured reference data pages, this one starts with a search to locate a particular user. Then, the View and Edit actions will transition to a page with two tabs. The first is just a protected view of the Business Role page, as discussed earlier. Note: The Enterprise Search Lite Indexer job must be run after changes are made to this page.

<u>Current Business Roles (tab)</u>

› Field Information

Field Name	Description
Business Role ID	The identification of an individual business role associated with the selected user.
Business Role Name	The inferred name of a business role.
Business Role Description	The inferred description of a business role.
Primary	A yes/no indication of which role will be the default for the user upon logging in. The first role associated will have this field defaulted to yes.
Display Order	The desired order of presentation of the business processes within the business role. If left blank, then display is done in the order added after those with a display order.
User Type	The level of security access that a user should have for a business role when the Role Type Information is set to *Manager* or *Employee* for the Business Role on the Business Role table. The level of security can vary from *User 1* to *User 10*, which either is pre-defined or can be defined on the Application Roles Security page.

› Related Actions

- **Remove Current Role** – This action deletes the association but does not delete the business role.

› Related Pages

- **Business Role** – A transition to the Business Role reference page for instances where the administrator needs more information on the business role to make or remove an association.
- **User Information** – A transition to the User Information reference page for instances where the administrator needs more information on the user, such as what security roles have been assigned.

<u>Available Business Roles (tab)</u>

› Field Information

Field Name	Description
Business Role ID	The identification of an individual business role associated with the selected user.
Business Role Name	The inferred name of a business role.
Business Role Description	The inferred description of a business role.

› Related Actions

- **Add Available Role** – This action adds a business role for the selected user.

› Related Pages

- **Business Role** – A transition to the Business Role reference page for instances where the administrator needs more information on the business role to make or remove an association.
- **User Information** – A transition to the User Information reference page for instances where the administrator needs more information on the user such as what security roles have been assigned.

LDAP Business Role to User Association

This is a LDAP specific page and can be utilized by sites which are using Lightweight Directory Access Protocol (LDAP) as the means of user authentication and user information data storage. The LDAP Business Role to User Association (LBROLUSR) reference page consists of two tabs for associating users to business roles. As with other structured reference data pages, this one starts with a search to locate a particular business role. Then, the View and Edit actions will transition to a page with two tabs. The first is just a protected view of the User Information page.

Current Users (tab)

› Field Information

Field Name	Description
User ID	The identification of an individual User ID associated with the selected business role.
Name	The inferred name of a user.

› Related Actions

- **Remove Current User** – This action deletes the association but does not delete the user.

› Related Pages

- **Business Role** – A transition to the Business Role reference page for instances where the administrator needs more information on the business role to make or remove an association.
- **User Information** – A transition to the User Information reference page for instances where the administrator needs more information on the user such as what security roles have been assigned.

Available Users (tab)

› Field Information

Field Name	Description
User ID	The identification of an individual User ID associated with the selected business role.
Name	The inferred name of a user.
First Name	First name of a user.
Last Name	Last name of a user.

› Related Actions

- **Add Available User** – This action adds a user for the selected business role.

› Related Pages

- **Business Role** – A transition to the Business Role reference page for instances where the administrator needs more information on the business role to make or remove an association.

- **User Information** – A transition to the User Information reference page for instances where the administrator needs more information on the user such as what security roles have been assigned.

Publish

The Publish (PUBLISH) page is used to perform the Publish action on all changes made by a user for a business role. Updates include not only the business role, process, activity and resource target structure, but also to home pages associated with business roles.

The Publish action also publishes the Mobile Home Page even though it is not associated with any Business Role.

› Related Actions

- **Publish** – After a new role has been created or an existing one updated, this action will push out the updates so that they are available upon the next use of the role. Note: The online.extension.db.mode property in the server_bootstrap.properties file must be set to *true* in order for the Publish action to publish the changes. When online.extension.db.mode = *false*, the System Administrator must run the post_cd process, which is a combination of multiple processes (or jobs), followed by a bounce of the application to publish the changes. When making a large number of updates to different roles, it is recommended that batch processing be used to register the updates. Please see the Advanced – Batch Processing section for more details.

Widget Library

Widgets must first be defined on the Widget Library (WIDLIB) before they can be used on a home page. The Widget Library page is separated into two sections: General Information and a table of Widget Parameters at the bottom. (Note: Widgets added to other pages in Advantage cannot be refreshed individually. Instead, you must reload the page to refresh all widgets on the page.)

› General Information

Field Name	Description
ID	This is a unique identification automatically assigned by Advantage when a widget is added to the Widget Library. IDs less than 500000 are reserved for delivered and sample widgets. Numbering is controlled by a Unique Numbering record of ADV_WIDGET_LIBRARY.
Name	Indicates the name of the widget that appears online for user reference.
Type	Indicates the type of widget for editing and system processing. Valid values are:

Field Name	Description
	• *Application Page* – Requires the selection of a value in the Page Code field to connect to a widget page (for example, ADMWL for the Worklist of ADMN). • *Audio* – Requires a value in the Component URL that connects the widget to the external audio file. • *Power BI Analytic* – Requires the selection of a value in the Report Name field to connect to the analytic. • *Image* – Requires a value in the Component ID to connect to an image. • *Summary Number* – Requires the selection of a value in the Page Code field to connect to the summary number page. • *Video* – Requires a value in the Component URL that connects the widget to the external video file. • *Visualization* – Requires the selection of a value in the Page Code field to connect to the visualization page. • *Power BI Dashboard* – Requires the selection of a value in the Report Name field in the General Information section to connect to the dashboard. • *Power BI Paginated Report* – Requires the selection of a value in the Report Name field to connect to the paginated report.
Description	An optional description of the widget for informational purposes to expand upon what is in the Name field.
Mobile	Indicates whether the widget is to be used on a mobile or non-mobile home page. • If selected, the widget can only be used on a mobile home page. • If not selected, the widget can only be used on non-mobile home pages.
Height	Each widget requires a defined height in pixels (for example, *600px*). On a Mobile widget, Height is not editable and defaults to 180 px.

Field Name	Description
Width	Each widget requires a defined width in columns. Valid values are 1 to 8. On a Mobile widget, Width is not editable and defaults to 1 column.
Application Name	An inferred field indicating the application associated with the selection made for Page Code for system processing purposes.
Page Code	The Advantage page to connect an application page, summary number, or visualization page to the Advantage page that is the widget.
Component ID	If the Type is *Image*, then this field indicates the image file name. The image has to be placed under RTFiles at this folder admbase/standard/images. The value in the Component ID field should be: '{{image/imagefilename.png}}'. If the image is new, then you must run the Key Value Metadata Generator process to add the image to the image.pdb file. The system must be bounced after pdb deployment. Then the image can be associated with a home page.
Component URL	The URL to connect an audio or video widget to what is retrieved for the home page user.
Report Name	The Power BI Paginated Report, Power BI Dashboard, or Power BI Analytics name that will be retrieved from the Advantage Insight Server. Reports can be searched by the Power BI workspace name too
Workspace Name	This field is visible only when the Type selected is *Power BI Analytic*, *Power BI Dashboard,* or *Power BI Paginated Report*. When a record is selected from the Report Name pick, the Workspace Name field is populated from the selected record in pick.

› Widget Parameters

Widget Parameters holds the additional attributes required for a widget to load. For example, Row level security (RLS) for analytics required an additional parameter to support the analytics to load (RLSRole = Department Security).

When creating a new record on the Widget Library page, the Add Record action in the Widget Parameters section is enabled after successfully saving information in the General Information section.

Field Name	Description
Parameter Name	Indicates the parameter necessary for the widget. You can only select from valid widget parameters established on the Widget Parameters page for the selected Widget Type (for example, *RLSRole*).
Parameter Value	Indicates the parameter value for the parameter. For example, if Parameter Name is *RLSRole*, valid values for delivered Insight Models (Datasets) are *Department Security, Department Unit Security,* and *No Security.* For PB reports, use *PB Security* or *No Security.*
Description	Description of the parameter that is intended to capture the intended use or content of the parameter.
Report Name	If the Type field is set to *Power BI Dashboard*, then the Report Name field is available in the Widget Parameter grid. This field provides a pick list that lists all reports that belong to the Power BI Dashboard.

› Validating Power BI widgets

Power BI Analytic, Power BI Dashboard, and Power BI Paginated reports can be validated using the **Validate Power BI Embedding** button while creating/updating a widget on the WIDLIB page.

The validation result will appear in the form of a grid in a pop-up window. It will display the outcome of each step of the Power BI report validation process. This helps identify issues with the setup while creating the Power BI widget. If there are no errors on the validation window then a “Report Validation Successful” message is displayed verifying that setup is correct and the Power BI report will load properly.

Note: For multi-dataset Power BI Analytic or Power BI Paginated Report, the RLS role configured would be passed to all datasets. For example, a report uses two datasets (General Accounting and Accounts Receivable Transaction) and the Department Security role is configured as a widget parameter, then the same role would be passed to both and data would be retrieved accordingly.

Widget Parameters

The Widget Parameters (WIDPARAM) page holds the additional attributes that can be applied to a particular widget. For example, the Row level Security (RLS) attribute can be applied to the Power BI widget by providing a Name of *RLSRole* and Widget Type of *Embedded Analytics*.

› Field Information

Field Name	Description
Value	Provides a unique identification for this record.
Name	Indicates the name of the widget, for example, *RLSRole* or *WorkGroup*.
Widget Type	Indicates type of widget this overflow attribute can be applied to (for example, *Embedded Analytics*).
Description	Provides an optional description for the widget parameter.

QuickLink Library

Quick links must first be defined on the QuickLink Library (QUICKLNK) page before they can be added to a home page.

- Field Information

Field Name	Description
ID	A unique identification of a quick link for system use. IDs less than 500000 are reserved for delivered and sample quick link. Numbering is controlled by a Unique Numbering record of R_QUICKLINK_LIB.
Name	Indicates the name that will appear in the quick link when placed on a home page.
Type	Indicates the type of quick link for editing and system processing. Valid values are: • *Page* – This type of quick link requires the selection of a value in the Page Code field to connect to a page. • *External Link* – This type of quick link requires a value in the External Link URL field to connect the user to the external location. • *Webi Report* – This type of quick link requires a value in the Report ID field to connect the user to the Business Object report. • *External Application* – This type of quick link provides Single Sign On (SSO) access to an external application.

Field Name	Description
	This type of quick link requires the selection of a value in the Application Type field. • *Power BI Analytic* – This type of quick link requires the selection of a value in the Report Name field. • *Power BI Dashboard* – This type of quick link requires the selection of a value in the Report Name field. • *Power BI Paginated Report* – This type of quick link requires the selection of a value in the Report Name field.
Description	Provides an extended description of the quick link to supplement the Name.
Icon	The required icon from the icon repository used to represent the quick link on each home page. In order to make a new icon available here, the icon file must first be placed in the ADV_ICON_REPO database table through DML. Before using the file, the following files have to be updated followed by a rebuild and deployment of the UI project: advantage-icon.eot, advantage-icons.svg, advantage-icons.ttf, advantage-icons.woff, and app.component.css.
Page Code	Indicates the Page Code that will open with the quick link to an Advantage page.
External Link URL	Indicates the external URL that will open in a new browser window from the quick link.
Initial Page Mode	Indicates the initial mode of the associated Advantage page, when the quick link is accessed: *Add, Browse*, or *Query*.
Application Name	An inferred field Indicating the application associated with the selection made for Page Code for system processing purposes.
Page Type	An inferred field from the Application Page Registration record for the page code selected for system processing: *Transactions*, *Reference Tables*, *Inquiries*, and *Widgets*. This field is visible only when the Type (QuickLink Type) selected is *Page*.
Mobile	Indicates whether the QuickLink is to be used on a mobile or non-mobile home page.

Field Name	Description
	• If selected, the QuickLink can only be used on a mobile home page. • If not selected, the QuickLink can only be used on non-mobile home pages.
Bypass Transaction Catalog	Indicates if the QuickLink should bypass the Transaction Catalog and open the transaction page directly. This field is visible only when the Page Type is *Transactions*.
Report ID	Indicates the entire report path that is used to access the Business Object report. The path must include the folders and name of the report (for example, CGI infoAdvantage R41 Financial Reports/Accounts Payable/OFIN-AP-0001 Check Listing). This field is visible only when the Type (QuickLink Type) selected is *Webi Report*.
Report Name	This field is only visible when the Type (QuickLink Type) selected is Power BI Analytic, Power BI Dashboard, or Power BI Paginated Report. Based on selection of one of those three values, the pick list only displays records from the Widget Library table with a corresponding value in the Type field. For example, if the Type field on QuickLink Library is set to *Power BI Analytic*, then the pick list for Report Name will only show records from the Widget Library table that have *Power BI Analytic* selected in the Type field. Reports can be searched by the Power BI workspace name too.
Application Type	This field is only visible when the Type (QuickLink Type) selected is *External Application*. Valid values are determined by the settings in the sso.config file. Refer to the "SSO Configuration" section in the *System Administration Guide* for more information. If the Type field is *External Application* and this field does not appear, then the ability to set up links to an external application is not enabled in the feature.conf file for your site. Refer to the "Feature Flag Configuration" section in the *System Administration Guide* for information on the ssoForExternalApplication flag, which enables this functionality.
Workspace Name	This field is visible only when the Type selected is *Power BI Analytic*, *Power BI Dashboard*, or *Power BI Paginated Report*. When a record is selected from the Report Name pick, the Workspace Name field is populated from the selected record in pick. This field is a non-persistent field (that is, it is not saved to the database).

› Additional Configuration Information

Config file - boreport_config.conf should be deployed to the adv_conf folder in VLS\bin. This file contains all details regarding the Business Object server name, port, and so forth.

Field Name	Description
enabled	Indicates if this feature to access the business object report from the quick link should be enabled or not.
open_doc_url	Indicates the API and syntax for opening the business object report. This field contains the Web server name that is used for opening the BO report. The webservername in this field may/may not be different from boservername indicated in base_url. For example: open_doc_url="http://**webservername**:8080/BOE/OpenDocument/opendoc/openDocument.jsp?iDocID=<WEBI_ID>&sIDType=CUID&token=<logon>"
base_url	Indicates the base url for connecting to the business object server. This field contains the BO server name that is used to get the login token. The boservername in this field may/may not be different from webservername indicated in open_doc_url. For example: base_url="http://**boservername**:6405/biprws"
sap_trusted_user_token	Indicates the token required in the HTTP request for trusted authentication.
sap_logon_token	Indicates the token to login to SAP business object server.

Home Page Configuration

The Home Page Configuration (HOMEPG) reference page is used to define each instance of a home page available for association to a business role. Refer to the "Home Page Configuration" common business task for pre-requisites and steps for setting up a home page.

This page consists of two separate tabs.

› General Information

Field Name	Description
ID	A unique identification of a home page instance for system use. IDs 1, 2, and 3 are reserved for the following delivered home pages: *Basic home page*, *Employee Page 1*, and *HRM Manager Page 1*.
Name	A required long descriptive name of a home page.
Short Name	A required short descriptive name of a home page.
Description	A required lengthy description of a home page that is intended to capture the intended use or content of the home page.
Internal Description	An optional lengthy descriptive field to capture any type of internal information for subsequent business role administrators about a home page.
Active	An indication that can be used to prevent the association of a home page to a business role.
Mobile	Display only indicator of Mobile or non-Mobile Home Page. Only one mobile home page can be set up. You will not be able to copy or delete the mobile home page.
Associated Business Roles	A system-maintained field that lists each Business Role ID and Business Role Name that a home page is associated with for informational purposes in the event, a modification to the home page is being considered and the impact of that change needs to be known.

- Workspace

  The Workspace tab is used to define the layout of a home page. It pulls widgets and quick links from the Widget Library and QuickLink Library pages. Those items can then be added and aligned in the workspace area by dragging and dropping each to the desired location.

  On the Mobile Home Page, if the Workspace layout is not defined, the system will provide a default layout.

Common Business Task

The following common business tasks are available for the Business Role User Guide.

- Home Page Configuration

Home Page Configuration

The following pre-requisites are required before a user can create a new home page in Advantage and associate the home page with a business role.

- The user has access to the Publish and Home Page Configuration pages.
- All QuickLinks and widgets required for creating the home page are defined on the QuickLink Library and Widget Library pages, respectively.
- A Business Role should exist in the system associated with the new home page. The only exception is the mobile home page, which is not associated to any business role. If you need to associate the home page with a new business role, then refer to the "Business Role" topic for creating a new Business Role.

The following steps should be followed to create a home page, associate the home page with a business role and publish the home page.

Step 1: Create a Home Page

Refer to the following steps for creating a home page.

1. Navigate to the Home Page Configuration (HOMEPG) page.
2. Select the Create button to create a new home page.
3. On the General Information tab, populate all required fields. (Note: The Associate Business Roles field will be blank at this time.)
4. On the Workspace tab, Widgets and QuickLinks are available to add to a home page layout. Here, the contents are filtered based on the Mobile setting. On a mobile home page, only widgets and quick links with Mobile as Yes are displayed. On all other home pages, only widgets and quick links with Mobile as No are displayed.
5. On the Workspace tab, select Widgets from the Widgets tab in the left panel and then select the **Add** button to add the Widgets to the Workspace area in the right panel. You can also drag and drop Widgets from the Widgets tab to the Workspace area.
6. On the Workspace tab, select QuickLinks from the QuickLinks tab in the left panel and then select the **Add** button to add the QuickLink to the Workspace area in the right panel. You can also drag and drop QuickLinks from the QuickLinks tab to the Workspace area.
7. On the Workspace tab, in the Workspace area you can move the QuickLinks and Widgets around to the desired location.

   On a non-mobile home page: You can add up to 8 QuickLinks horizontally. The width of the Widgets will determine how many widgets you can add horizontally. Vertically, the Workspace area does not have any restrictions. (Note: The height and width of the widgets can be adjusted on the Widget Library page.) You can add the Blank QuickLink to your Workspace to add spacing between the widgets and quick links. This QuickLink can be used on your Workspace as many times as necessary. Users will not see the QuickLink when they view the home page; instead, they will only see a blank space equal to the size of the QuickLink.

On the mobile home page: The Workspace area is used to determine the relative ordering of the Widgets and QuickLinks rather than the actual spacing between them. If both Widgets and QuickLinks are defined on the layout, then on the actual mobile home page, Widgets are shown first, appearing left to right, then top to bottom order, followed by QuickLinks in a similar fashion. Widgets and QuickLinks appear with the same size on the Mobile Home Page. If Widgets and QuickLinks are not added on the Workspace tab, then the default home page is generated based on the home page file linked to the mobile home page configuration.

8. You can remove Widgets and QuickLinks from the Workspace area by selecting the X on the top right corner of the Widget or QuickLink.
9. Once you have added all required QuickLinks and Widgets in the Workspace area, then you can select the **Save & Close** button to save and close out of the record.
10. Refer to "Step 2: Associate a Home Page with a Business Role" for associating a home page with a Business Role.

Step 2: Associate a Home Page with a Business Role

Refer to the following steps for associating a home page with a Business Role. Mobile home page is not linked to any Business Role.

1. Navigate to the Business Role (BUSROLE) page.
2. Search for the Business Role that should be linked to the home page you created in "Step 1: Create a Home Page".
3. Select **Edit** from the row-level menu for the selected Business Role.
4. Select the home page from the Home Page ID pick list.
5. Select the **Save & Close** button to save and close out of the record.
6. Refer to "Step 3: Publish Business Role and Home Page" for publishing the changes made to the business role, including the associated home page.

Step 3: Publish Business Role and Home Page

Refer to the following steps for publishing the changes made to the Business Role and the new home page. Note: This step assumes that the online.extension.db.mode property in the server_bootstrap.properties file is set to *true*. If online.extension.db.mode = *false*, then the System Administrator must run the postcd process, which is a combination of multiple processes (or jobs), followed by a bounce of the application, to publish the changes.

1. Navigate to the Publish (PUBLISH) page.
2. Select the **Publish** button to publish all the changes made for the Business Role including the associated home page.
3. The following message “Publishing pending Business Roles. Notification will be sent once it is complete” will be displayed. You will receive an Alert once the Publish action has successfully completed, if Alerts are configured for the system.
4. Log out and then log in with the User ID that is mapped to the Business Role selected during “Step 2: Associate a Home Page with a Business Role”. If the User ID is mapped to more than one Business Role, then you can select the desired Business Role from the User Profile (in the far right corner of the Global Navigation bar) to view the Home Page.

Advanced - Setup

While setup and maintenance of business role data can be done with all the reference pages listed in the Configuration section, an alternative method is to upload the data from spreadsheets where the Business Role Administrator can easily see an entire role at once. Beyond the few business roles that come delivered in place, there is a large number of roles delivered outside of the application in spreadsheet form. These roles are all-inclusive, that they contain all the transactions created online, all the inquiry pages, and every reference page in each business area.

These roles serve to short cut the analysis process of what is present in CGI Advantage for a given business area before building a business role. The roles can even be loaded with minor adjustments, such as making business processes, business activities, and resource targets inactive that are not currently used to prevent them from displaying. The description fields are very site-specific and can be updated along with some of the names displayed. Other items that may be updated are the primary/secondary ranking as well as display orders. Any cloned transaction codes can also be inserted at the proper location.

Of particular note, if a user is granted a business role to which they do not have security rights to access all the resource targets within the role, they can still see those items listed, but when they try to open them, they will receive a security error. For this reason, it is recommended that such resources be placed in the secondary grouping and ordered to display at the bottom of the primary navigation menus. The alternative way is to maintain two different roles or place such resources into a business process that clearly indicates by name that most of the items cannot be accessed.

A macro reads the setup data in this setup spreadsheet and generates CSV files that can then be loaded with the System Maintenance Utility. Data should be loaded in the order of the tables listed below:

1. R_BUS_ROLE (Business Role)
2. R_BUS_PROC (Business Process)
3. R_BUS_ACTV (Business Activity)
4. R_RSRC_TRGT (Resource Target)
5. R_BUSROLE_BUSPROC (Business Role Association – Business Role and Business Process tab)
6. R_BUSPROC_BUSACTV (Business Role Association – Business Process and Business Activity tab)
7. R_BUSACTV_RSRC_TRGT (Business Role Association – Business Activity and Resource tab)

Delivered Power BI Analytics

A limited number of Power BI analytics are available in the Artifact Library. These can be downloaded and tweaked, as necessary. Sites can then convert the analytic to a widget to add to the widget library, so they can be used on a home page. Your site will need a Power BI license in order to use Power BI analytics on the home page.

After an Embedded Analytic has been added to the widget library, links to the analytic can be added to the page-level menu for the following types of pages:

- Transaction pages

- Activity folders
- Reference pages
- Inquiry pages

Refer to the “How to add a Power BI Analytic to an Application Page” topic in the *CGI Advantage System Administration Guide* for instructions on how to update the metadata for a page to add a link to an analytic from the page-level menu.

If an analytic needs to be displayed on a carousel page, then it will be added as a carousel tile, and when the tile is selected, the Power BI Analytic is displayed on the page. Refer to the “How to add a Power BI Analytic to a Carousel Tile” topic in the *CGI Advantage System Administration Guide* for instructions on how to update the metadata for a page to add a carousel tile for an analytic.

The following is just a sample listing of Power BI Analytics that are delivered with CGI Advantage.

- Financial:
    - FIN - Organizational Cash Flow (Line and Clustered Column chart)
    - FIN - Retiring Assets by Location (Geo maps with Drill through functionality)
- HRM:
    - HRM - Employee Attrition (Clustered Column chart with Drill down functionality)
    - HRM - Employee Onboarding (Clustered Column chart with Drill down functionality)
    - HRM - Position Vacancy (Stacked Column chart with Drill down functionality)
- Performance Budgeting:
    - PB - Strategic Plan Watch List (Multiple visualizations including Gauge and Table with Drill Through functionality)
    - PB - Monitor Budget vs Actual (Line and Clustered Column chart)

Advanced - Batch Processing

Batch Processing for Business Roles includes the following category:

- Batch Jobs

Batch Jobs

The batch jobs for Business Roles are listed alphabetically in the below table. For detailed information on the jobs (such as when to run, input, output, and process parameters), refer to the associated run sheet in the following user guide: *CGI Advantage - Administration Utilities Run Sheets.*

Job Name	Description
Enterprise Search Lite Indexer	This batch job creates Lucene Indexes for all Page Codes and System Resource Targets for Enterprise Search Lite Enterprise Search. The system uses these indexes during runtime for fast text-based searches. This job must be run after changes are made to any of the Application Page Registration (APGS or ERPAPGS) pages; in order for the changes to appear as part of the Global Search. The job only selects records that have the **Searchable?** check box selected. This process must also be run after making changes to the Business Role Configuration pages (Business Role, Business Process, Business Activities, Resource Target, Business Role Association, and User to Business Role Association).
Business Process Metadata Generation	This batch job reads the business role configuration data and creates page metadata in the form of xml for Primary Navigation and Business Process Landing pages. It also creates the extensions for Home Pages. This XML will then be used by the Key Value Metadata generator process and add all the respective pages and extensions into the PALDB.