CGI Advantage® 4

Getting Started User Guide

Table of Contents

Overview

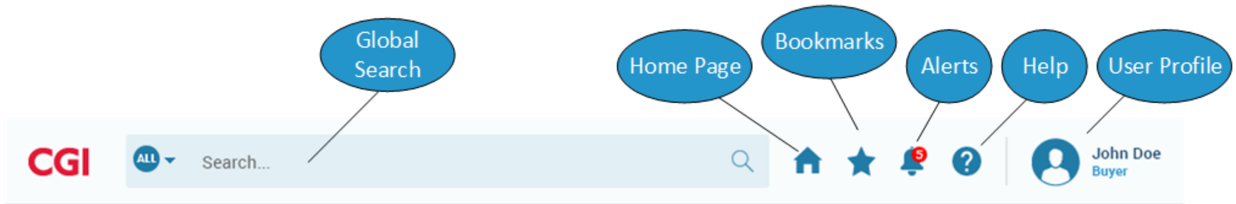
CGI Advantage displays the following different types of application pages:

- Transaction – Used to record financial events (for example, a Journal Voucher) and administrative events into the system. Transactions collect information into a single input form, designed to ease data entry, as well as to consolidate pertinent information for approval and query purposes. Refer to the *CGI Advantage Transactions User Guide* for more information about transactions.
- Inquiries – Used to display summary and detailed information from system-maintained tables. These pages are for viewing and generally cannot be used to modify data (for example, Receivable by Status inquiry). Please refer to the *CGI Advantage Page/Table User Guide* for more information.
- Activity Folders – Used to access various pages associated with similar activities. It is analogous to an actual folder in which many different pages are kept - sparing you from keeping track of numerous individual pages. Please refer to the *CGI Advantage Page/Table User Guide* for more information.
- Reference Tables – User-maintained tables that can be updated by users who have appropriate security authorization, and system-maintained tables that are updated by the system through document updates or offline processes. Please refer to the *CGI Advantage Page/Table User Guide* for more information.

Understanding the above distinctions is important because it makes it easier for you to search for a particular type of page. The *Getting Started User Guide* provides information on the features of CGI Advantage that are not specific to transactions, activity folders, tables, or inquiries.

Global Navigation

The Global Navigation bar is available at the top of the Advantage window and provides access to key pages/features in Advantage as indicated below.



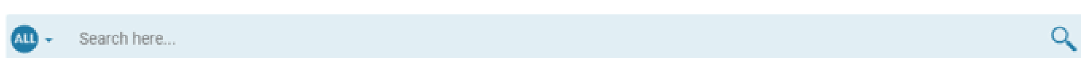
- **Global Search** - Allows you to search for a page and navigate directly to that page.
- **Home Page** - Transitions you to your home page for your selected Business Role (left mouse-click). Using a right mouse-click gives options to open the Advantage application in a new tab or a new window.
- **Bookmarks** - Displays a list of all pages that you have bookmarked.
- **Alerts** - Displays a list of unread alerts and allows you to navigate to the Alerts page where you can view all current alerts.
- **Help** - Displays help associated with the current page.
- **User Profile** - When selected, user profile information is expanded. You can switch between assigned business roles and access Account Settings.

Global Search

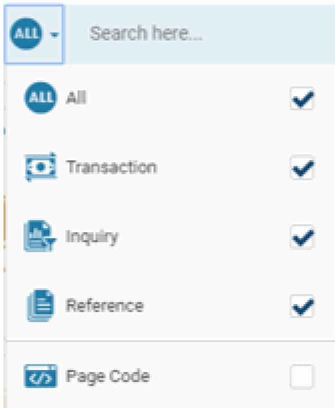
The Global Search bar works in two methods: text or Page Code.

› Text Search

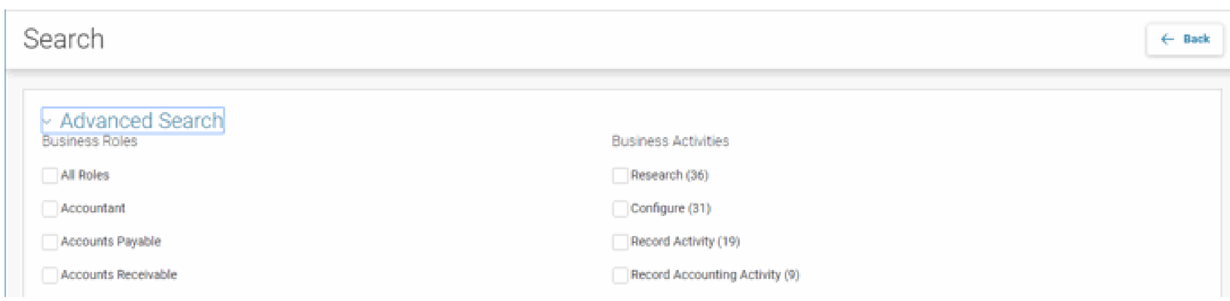
The text searching method goes against all business roles assigned to a logged in user by default. Entering text starts a search against the business activities and system resource targets not only by name, but also by description. Any matches found are displayed beneath the Global Search field. You can click the page's name to transition to that page.



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



If no match is found with a text search, then you are transitioned to an Advanced Search page. You can also access this page by selecting the magnifying glass icon in the Global Search field. In the Advanced Search section, you can select one or more roles to search simultaneously, as well as select *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.



You can select the page name in the Search Results section to transition directly to the page.

- Page Code Search

When searching by Page Code, any matches found are displayed beneath the Global Search field. You can click the page's name to transition to that page. If no match is found that matches the Page Code entered, then a message appears beneath the Global Search field indicating that no match was found.

You can also add a Transaction ID along with the Page Code (Transaction Code) in the Global Search field. Advantage will not show Transaction IDs in the results beneath the Global Search field. After entering your Transaction Code and Transaction ID, select enter or select the transaction name from the results beneath the field (if more than one page is displayed as an option beneath the search field). This will transition you to the Transaction Catalog. Once you transition to the Transaction Catalog for the indicated Transaction Code, the search results only show transactions for the indicated Transaction Code and that include the entered Transaction ID. The asterisk wildcard can be used as part of the entered Transaction ID. For example, you could enter GAX 24* in the Global Search field to find all GAX transactions with a Transaction ID that begins with 24 or you could enter GAX *24 to find all GAX transactions that include 24 anywhere in the Transaction ID. Note: The Transaction ID is not applicable to Performance Budgeting.

The default Global Search preference is *ALL* (*Transaction*, *Inquiry*, and *Reference*).

- Any change to the Global Search preference will remain for the user until the user changes the preference, even if the user switches to a different Business Role, accesses a different Advantage application, or logs out.

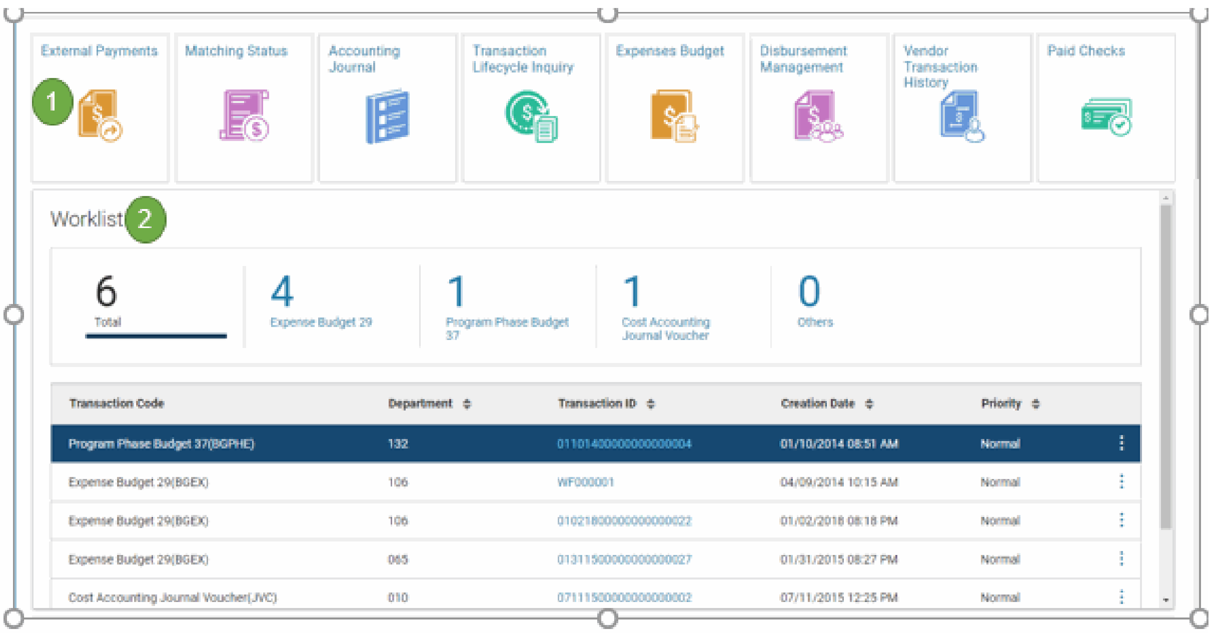
Home Page

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. You can access your Home Page at any time by selecting the Home icon in the Global Navigation bar (left mouse-click). Note: If you right-click on the Home icon, you are given options to open the Advantage application in a new tab or a new window.

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. Refer to the "Worklist" topic in the *Workflow and Collaboration Guide* for information Worklist pages.



Listed below are other common widgets that may be available on your Home Page:

- Browsing History
- Last 10 Transactions

Browsing History

The Browsing History widget lists the recent pages accessed by a user in their current session. Depending on the height of the widget, the display may have a different number of pages. Changing business roles will not clear the history, but logging out will. You can transition directly to any previously viewed page by selecting the link in the Page column. The **View All** button will expand the widget presentation to show a much longer history.

Recent 10 Transactions

The Recent 10 Transactions widget lists the last 10 transactions acted upon by the logged in user. If you are the creator, the transaction will stay in your listing until acting upon the 11th transaction. If you approved, rejected, modified, cancelled, etc. the transaction, then the transaction will remain in your listing until either you act on the 11th transaction or another user acts upon the transaction, whichever comes first. You can transition directly to a transaction by selecting the link in the Transaction ID column.

The LAST_10_TRANS_WID_MAX_DAYS parameter on the Application Parameter (APPCTRL) page indicates the maximum days that the system will retrieve previously visited transactions for the Recent 10 Transactions widget. Valid values are 1 to 365 and the default value is 14. If a value is entered in this field that is greater than 365, then the system will limit the search to 365 days. Changes to this parameter require all VLSs to be bounced for the changes to take effect. **Warning:** Increasing the value in this parameter has a direct impact on performance of the loading of this widget and should be updated after careful consideration of localized impact.

Bookmarks

The Bookmark icon on the Global Navigation bar displays a list of pages that you have marked as a bookmark. You can navigate directly to a bookmarked page by selecting the bookmark name. You can manage your bookmarks by selecting the **Manage Bookmarks** link, which appears after selecting the Bookmark icon on the Global Navigation bar.

On the Manage Bookmarks page you can view all bookmarks that you have created in Advantage. This page provides three views:

- **Alphabetically** - You can sort the bookmarks alphabetically to see an alphabetical list of all bookmarks.
- **By Folder** - If you have created bookmark folders, then you can select By Folder to see all bookmark folders. You can then expand the folders to view any bookmarks added to that folder. Any bookmarks not assigned to a folder you created will appear under the Default section.
- **By Category** - This view allows you to view bookmarks by category (for example, Inquiries, Reference Tables, or Transactions).

The **Create Folder** button allows you to add bookmark folders. Once a folder is added, you can move existing bookmarks to the folder from this page. Also, when new bookmarks are created, you can select this new folder. You can rename folders if the view applied to the page is *By Folder*. Select **Rename Folder** from the folder's menu, enter the new folder name and select OK. You can delete folders by selecting **Delete Folder** from the folder's menu.

You can move a bookmark to an existing bookmark folder by selecting the pencil icon on the bookmark's card. This opens a new window that allows you to select a different folder. You can also rename the bookmark via this window. You can also move a bookmark or multiple bookmarks to a different folder by selecting the bookmarks check box (when in *By Folder* view) and then select **Move to Folder** from the menu. A new window opens that allows you to select the new folder for all selected bookmarks. You can delete a bookmark by selecting the X icon for the bookmark's card. A pop-up window will require you to verify that you want to remove the record. You can also select the check box for a bookmark card or multiple bookmark cards and then choose **Delete Selected** from the menu.

If you want to add a new bookmark for a page, then select the **Star** icon next to the page's name. A pop-up window allows you to provide a personalized name for the page and it allows you to specify the Folder. If you select the *Create Folder* option, then a **Folder Name** field appears that allows you to provide the name of the new folder. After you select **Save,** the new bookmark folder is created and the page will be added to that folder. If you do not specify a folder, then *Default* is selected in the Folder field and the page is added to the end of your bookmark listing (not inside any folder). You can then link directly to the page or transaction by selecting the Bookmark icon (Star) from the Global Navigation bar and then select the bookmark from the pop-up list. If the bookmark was added to a folder, then you must select the folder from the bookmark list and select the desired bookmark.

Alerts

Alerts are used to send messages in CGI Advantage. Alert messages can be used to notify all users, groups of users, or specific users. The sending of alerts is primarily a system administration task and not something that individual users interact with, except to consume what is sent to them.

Examples of alerts:

- Alert message “CGI Advantage will be coming down for maintenance at 6:00 PM tonight. All users must log out of the system by that time.” can be sent to all users in the system.
- Alert message “Your password will expire in 12 days.” Can be sent when a user logs in and his/her password is expiring.
- Alert message “Budget Analysts please submit your Budget Amendments no later than noon on the 10th day of session” can be sent when users that belong to the Budget Analysts role log in.

Accessing Alerts

When the alert icon (a bell) in the Global Navigation area has a red circle with a number, the number indicates the number of alerts you have received but not read. Selecting the alert icon will open a listing of New Alerts. The X icon will remove the icon from the New Alerts listing, but does not delete the alert from your ‘inbox’ of alerts. That full listing of alerts can be opened from the View All button at the bottom of the New Alerts listing. The Alerts page is opened to the Received tab, displaying all alerts that have not expired or personally deleted.

When an Alert is sent with a priority of *Critical* and you are logged in, the message will pop up over what you are currently viewing. If you are not logged in, the alert will appear at the next login, given it has not already expired. The notification includes an OK link that takes you to the New Alerts listing.

› Field Information

Field	Description
1st Column (Alert Priority)	Orange Circle with Down Arrow – Low priority Red Triangle with Left/Right Arrows – Medium priority

	Red Diamond with Up Arrow – High priority (critical)
2nd Column (Read Status)	Unopened Letter - Unread Opened Letter - Read
Message	The message text of the alert, which is bolded if unread.
Type	This field identifies the type of alert with respect to what you should do with the information: • *Info* – The alert provides information to the user, but does not immediate on your part (for example, "The system will come down for maintenance at 6 pm"). • *To-Do* – The alert indicates an action that you need to perform now or in the near future (for example, "Change your password").
From	The name of the user that sent the alert.
Received	The date and time the alert was received, which will be used to age and eventually remove the alert.

› Record Level and Grid Actions

- **Mark as Read – Changes the display of the alert to a read status.**
- **Mark as Unread – Changes the display of the alert back to an unread status for tracking purposes.**
- **Delete – Removes the alert upon demand instead of waiting for it to expire.**

If your implementation has chosen the option of sending alerts either by email or SMS, you can choose to receive alerts through that channel by selecting the Alert Email Notification and Alert SMS Notification indications by entering an Email Address and Phone Number in your Account Settings page through your User Profile.

Help

The Help icon in the Global Navigation bar opens a window that displays help for the current page. Select the **Show Full Help Menu** link in the upper left corner of the window to view the full online help system. You can navigate using links within the online help, using the Table of Contents in the online help, or by using the search feature in the online help. The online help is also provided in an accessible format and can be accessed by selecting the **Accessibility** link in the Footer of the Advantage application.

The footer of the online help window provides a link to the **Site Map** for the entire online help system. A **User Guides in PDF** link is also provided that takes you to a page that allows you to download a PDF version of each guide that is provided in online help format and it allows you to download a PDF version of guides that are only provided in PDF format.

User Profile

The User Profile is accessed by clicking anywhere in the User Profile area in the Global Navigation bar. When the User Profile area is expanded, you can view a list of all roles assigned to you. You can switch to a different role by selecting the role from the list. You can log out of Advantage by selecting the Sign Out button. You can modify personal settings by selecting the Account Setting button, which transitions you to the Account Settings page.

Account Settings

The Account Settings page is divided into the following tabs:

- Personal Information

  The Personal Information tab displays the user's name, email, and contact information. You must contact a site administrator to change any of this information.

- Password Management

  The Password Management tab allows you to change your Advantage password. You must enter your current password in the **Current Password** field and then enter your new password in the **New Password** and **Confirm Password** fields. Select **Save** to save your new password.

- Security Question Management

  The Security Question Management tab allows you to set up a security question and answer that will be used if you forget your Advantage password or you get locked out of Advantage. Select **Save** to save your changes to this tab.

- Preferences

  The Preferences tab allows you to modify your usability preference settings. Select **Save** to save your changes to this tab. Any changes made to the flags in this section will take effect after you log out and log back in:

  - **Enable Auto Tabbing** – This flag allows you to specify your usability preference setting for tabbing. If the **Enable Auto Tabbing** check box is selected, then you can skip icons, such as the calendar icon and the pick list icon, while tabbing. Once you save the preference, it stays until you change it. This feature is applicable across all transactions and pages in Advantage.

  - **Minimize Information Tabs** – This behavior allows you to specify whether you want the information area for all tabs to be minimized or expanded. When minimized, only the first line of information is displayed (including the attachment count, if any). When you expand the tab information for a page, then the change will remain for that page until you log out. Similarly, when you collapse the tab information for a page, then the change will remain for that page until you log out.

  - **Hide Toolbar and Pagination** – If you choose to show the toolbar and pagination area of a read only grid for a page, then the change will remain for that grid until you log out. Similarly, if you choose to hide the toolbar and pagination area of a read only grid for a page, then the change will remain for that grid until you log out. This feature is not available for widgets or grids accessed via a Switcher.

- **Enable Field DB Help** – If your site has enabled the Field DB Information feature by setting the ENABLE_FIELD_DB_HELP parameter on the ERP Application Parameters (ERPCTRL) page to *true*, then users have the option to enable or disable this feature via the Enable Field DB Help check box. If ENABLE_FIELD_DB_HELP is *true* and you have selected the Enable Field DB Help check box, then you will see a dotted underline on the caption of all fields in the application that support this feature. When you hover over the field title the system will display a pop-up containing the field's database information. Refer to the "View Field Database Information" topic in the *CGI Advantage System Administration Guide* for more information and limitations.

› Change Alert Notification Settings

The Change Alert Notification Settings tab allows you to change your Alert Email Notification setting, Alert SMS Notification setting, Phone Number, and your Email Address for receiving the notifications. The Alert Email Notification and Alert SMS Notification feature provides the ability for you to receive an email and SMS respectively, when an alert is sent in Advantage. Select **Save** to save your changes to this tab.

› Business Roles Preferences

The Business Roles Preferences tab allows you to select your primary Business Role. Out of the Business Roles assigned to you, select the drop-down value as *Yes* in the Primary field for the Business Role that you want to keep the default. Once selected, select **Save** to apply the changes. The next time you login to the application, the selected Business Role will load as the default. You also have the flexibility to display the other assigned Business Roles in the display order of your choice. Please provide a numeric and chronological display order per your need to the assigned Business Roles. This tab can be accessed at any given time to update your primary Business Role and display orders.

Advantage Assistant

The Advantage Assistant feature in Advantage enables access to real-time guidance for the Advantage applications. This feature provides a tailored on-screen, step-by-step guidance for the individual pages, business processes, and embedded instructional videos to provide on-demand training for key features and business processes. This feature can be accessed by selecting the Advantage Assistant icon from the lower right side of the Advantage application page. By clicking this icon, the user can obtain guided help or instructional videos mapped to that particular page. Each guided help is provided in the form of a visual help that provides end-to-end steps to complete the specified scenarios.

Note: This feature is disabled by default. Refer to the “ERP Application Parameters” topic in the *CGI Advantage - System Administration Guide* for additional details.

Refer to “Manage Videos” under the Advantage Assistant topic in the *CGI Advantage - System Administration Guide* for adding or modifying videos that are displayed in Advantage Assistant.

Sofia

Sofia is a self-learning virtual assistant that assists you with collecting and analyzing data, processing transactions, and interacting with the knowledge base. This feature can be accessed by selecting the Sofia icon from the lower right side of the Advantage application page.

The following table lists the core features of Sofia that are being used in Advantage:

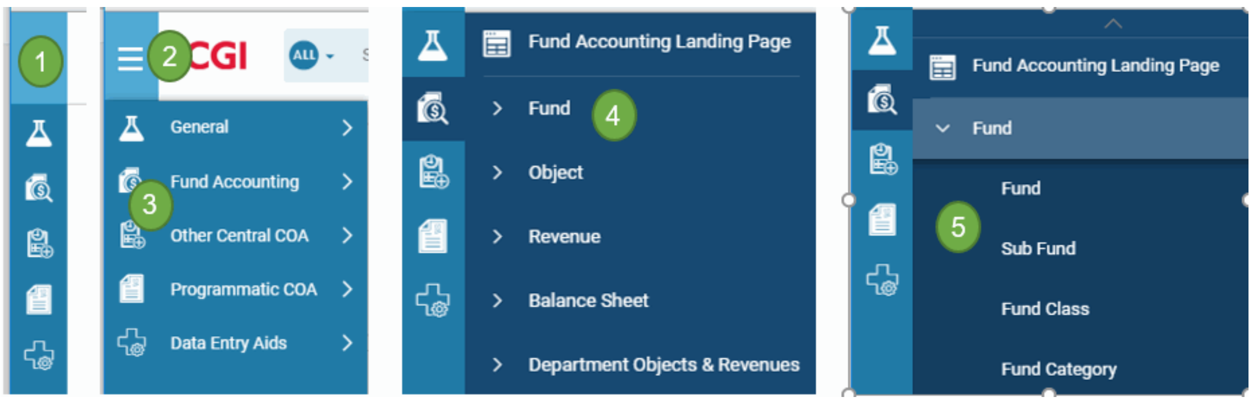
Feature	Feature Description
Self Service bot	ESS - Employee Self Service Bot • Time and Leave - This allows the user to obtain their leave balance and submit the leave request.
Pre-configured and Dynamic suggested actions	A static options list is presented to the user. Example: List of leave types for the user to select based on the user's leave policy setup in Advantage HRM.
Download current conversation as a PDF	The user can download the current conversation through a download link in the bot.
Dialogue flow mapping to Advantage business role	According to the Advantage business roles, dialog flows are displayed in the Sofia pop-over.

Note: This feature is disabled by default. Refer to the "ERP Application Parameters" topic in the *CGI Advantage - System Administration Guide* for additional details.

Primary Navigation

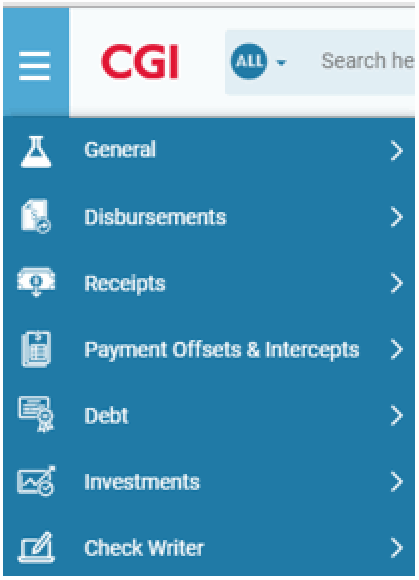
Each business role is intended to have some amount of navigation available from the Primary Navigation (that is, the left panel).

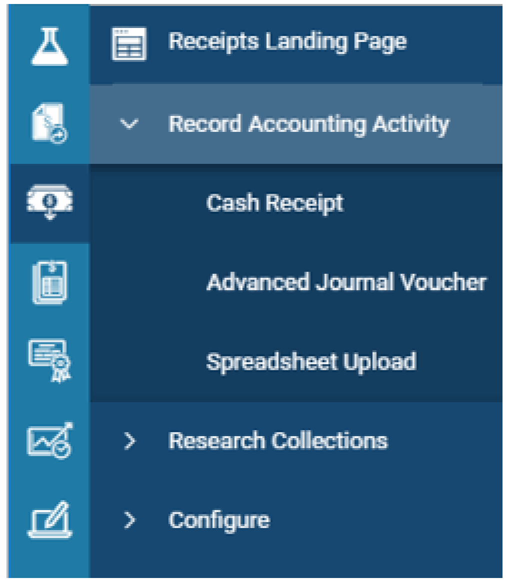
1. Navigation starts with an icon for each business process within a business role.
2. A ‘hamburger’ menu icon to expand the first navigation level.
3. Business process names
4. Each business process has a menu level beneath it called business activity. The *Fund Accounting* business process has been 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.





To view business processes, activities, and resource targets for a different assigned role, select the business role via the User Profile area in the Global Navigation panel.

Footer Navigation

The Footer of the Advantage application includes the following links:

- **About** - This link opens a pop-up window that provides the release number for Advantage along with copyright information.
- **Privacy** - This link opens a pop-up window that includes any privacy information for the application.
- **Important Links** - This link opens a window that includes links to other pages outside of the Advantage application.
- **Accessibility** - This links opens the entire online help system in accessible format for the current Advantage application.

The Footer also displays the CGI Advantage logo, © CGI Inc., and environment details. The information shown for About, Privacy, Important Links, and environment details can be configured on the corresponding Configurable Text (CTEXT) records (ABOUT, PRIVACY, IMPLINKS, and ENVDTL).

Notes:

- The space for displaying the environment details directly in the footer is limited. If you configure the ENVDTL record, limit the contents to display.
- If the Configurable Text is blank for the ENVDTL record, the system displays build information. If you set the Configurable Text for the ENVDTL record, the system uses it to show the environment details for all applications in the same unified environment.
- The system retrieves the configurable text information periodically to display in the Footer. When you update the CTEXT records, the changes may not reflect in the Footer immediately. Please log off, wait for a few minutes, and navigate to the log on page again before verifying that the Footer reflects the updated information.

Favorites

Advantage allows you to mark a record as a favorite by selecting the Favorite icon (that is, heart) next to the page's name when the record is in Edit mode. Once a record is marked as a favorite, it will appear in the Favorites section of the page when the page is in Search mode. The record will also appear in a Favorites drop-down for the key field any time the key field is used on another page in Advantage. For example, if you have marked a vendor record as a Favorite on the Vendor/Customer page, then the vendor will appear in a Favorites drop-down for the Vendor Customer field on all pages that include that field. You can remove a Favorite by selecting the X icon listed next to the Favorite in the drop-down.

Note: The maxFavoriteCardCount property for the favorite parameter in the feature.conf file determines the maximum number of records that can be marked as a Favorite for each page. If a user is marking a record as a Favorite and the maximum number of cards are already reached, then the oldest Favorite Card is removed and the new Favorite Card is added and the record associated with the oldest Favorite Card is no longer marked as a favorite.

Dual Factor Authentication User Info

The Dual Factor Authentication User Info (DFAINFO) page allows the update to the phone number and email address that is used if Dual Factor Authentication (DFA) is enabled for your site. This information can also be updated by an authorized system administrator via the DFA User Information fields on the User Information page.

When this feature is enabled and the User ID and password are successfully authenticated on the Login page for a particular user, the system navigates the user to a new screen to provide the preferred choice for sending the token. If a preference is not selected, then the default preference is used. After clicking **Send** on the Sign In Verification page, the token is sent to the registered email/phone number and an Access Code field appears, which allows the user to enter the token received via email/text. A message with a countdown timer appears beneath the Access Code field. The Access Code must be entered before the timer reaches 0:00. The **Resend** button can be used to send a new token to the email/phone number selected on the previous screen. The timer starts over when the Resend button is selected. Once the Access Code is entered, the user then clicks the **Verify** button to login to the system.

Note: If the token is invalid or is expired, the system will not allow the user to login to the system. The user must click the **Resend** button on the validation screen to resend the token.

Page Search

The Page Search (PGSRCH) page allows you to search for and open any page in the Advantage application that has the Searchable check box selected on Application Page Registration (APGS or ERPAPGS). You can narrow your search using the search fields. Select the **Open Page** row-level action to transition to the corresponding page.

Report Search

The Report Search page enables you to locate and open any report in Advantage. You can narrow your search by Folder and/or Report Name. Select the **Report Summary** row-level action to transition to the Report Summary page for the selected report. Refer to the "Job Summary" topic in the *System Processing Guide* for more information about the Job Summary page.

Browser Settings

Pop-up windows and JavaScript must be enabled (through the standard Safari settings in the iPad Settings app).