CGI Advantage® 4

Page/Table User Guide

CGI

Table of Contents

Page Overview

CGI Advantage pages display many different types of data to users. Often, many of these pages are referred to as tables/reference pages/inquiries. In most cases, a page displays data from one database table. However, there are cases where a page can show multiple database tables, just one record from a database table, or display information that does not come from a database table. In other instances, there are multiple pages that show different aspects of records in a single database table. Please keep in mind the interchangeability of the terms page and table when reading other documentation. For purposes of this user guide, pages are all presentations to a user besides those of a transaction.

Pages are referred to in two different ways. The first is by the **Page Description**. The second is by the **Page Code**. Both values are established on the Application Page Registration (APGS) page. As indicated in the previous sentence, the description is given first, followed by the Page Code in parenthesis. Almost every page in the application can be referred to this way, with only a very limited number of exceptions.

This guide is separated into the following topics:

- Source of Data
- Presentation Styles
- User Interactions
- Common Business Tasks

Note: All samples given in this user guide may appear differently to the reader online because of configuration changes.

Source of Data

CGI Advantage has several different types of data found on pages that are best categorized by what or who updated the data. While just one source is common, there are some pages that take data from multiple sources.

- Transaction Processing
- Batch Processing
- User-Maintained
- Delivered in the Application

Transaction Processing

Transaction processing pages are updated automatically by the system when information is added, changed, or deleted with a transaction. Direct updates by and large are not allowed by users to these pages. A select few will have the abilities for a user to update a record, but never to add or delete records.

As a rule, the processing of a transaction will update at least one page with information from that transaction. All transactions created or loaded into the application update the Transaction Catalog. All transactions processed to a Transaction Phase of *Pending* will update the Worklist page. The subsequent application of approvals to the pending transaction will update the Approval Log page. All transactions processed to a Transaction Phase of *Final* will update the Transaction History Query page. Depending on the transaction type and information on the transaction, updates can then happen to a variety of other pages.

Documentation in the many other users' guides will point out what pages are updated from transaction processing in different areas of the application. Please see those guides for more information on this type of page data.

Batch Processing

This type of page is updated from batch processing automatically by the system when a batch job, chain job, or a report job is run. Besides the pages directly related to running a batch program (that is, Job Summary and Job Log pages), other system-maintained pages can be updated. There are even some database tables updated that do not have a page for user access. Direct updates are usually not allowed by users to pages updated by batch processing, but there are exceptions. A select few of these batch processing pages will have actions for users on these pages.

Documentation in the many other user guides and run sheets will point out what pages are updated from batch processing in different areas of the application. Please see those guides and run sheets for more information on this type of page data.

User-Maintained

User-maintained pages allow users to add and maintain data, often referred to as reference data, because the data is referred to during transaction and batch processing. With the proper security authorization, one can add, change, and delete information in these pages. These pages are used to define transaction processing rules, system options, security, batch defaults, and valid values (often called codes) that can be used on transactions, as well as other user-maintained pages.

Documentation in the many other user guides will point out what user-maintained pages are to be setup in each area of the application. Please see those guides for more information on this type of page data.

Delivered in the Application

A certain amount of data and other types of information are delivered with the application. One term used to refer to a large portion of this type of information is Day Zero or Day One Data. Help files make up the remainder of this type of information. Much of the information is not editable and presented to users in the form of Coded Value Lists (CVLs) found when a drop-down listing appears on a page or transaction. The remainder is found on pages that are user-maintained. There are guidelines in different user guides for what pages can have records added, changed, or deleted without adverse system impacts.

Presentation Styles

Opening Mode

When a page opens, there are three choices for the initial presentation. When opening a page after doing a Global Search by Page Code, the mode is controlled by the Application Page Registration (APGS) setting for Initial Mode. When opening from a text search on Global Search, from Primary Navigation, or from a Business Process Landing Page, the mode is controlled by the Initial Page Mode on the Resource Target (RSRCTGT) page. When opening from a Home Page Quick Link or from a Related Page choice within the menu of a reference page or inquiry page, the mode is controlled by what is built into the Quick Link or Related Page link. Please see the later section on "Locating & Opening" for more information on the different location points for pages.

- **Query** – The user is presented with search fields for a reference page or filter fields for an inquiry page. There are no records presented until a search/filter is done. A limited number of previous searches, pinned or not, are displayed for quick access to a record set previously located.
- **Browse** – The user is presented with search fields for a reference page or filter fields for an inquiry page. Additionally, the system will retrieve and display an initial set of records. Previous searches, pinned or not, are displayed for quick access to a record set previously located.
- **Add** – The user is presented with a page that has a new row inserted where all fields without a default are blank. This mode is rare, but used when a user needs to add a new record. When a page is opened in one of the other two modes, the Create button will transition the user to the same view that the Add mode opens.

Analytics

For those pages where the analytic feature has been enabled, when the page is opened in *Query* mode, an Analytical View section will appear after a filter or search has been performed.

Record Presentation

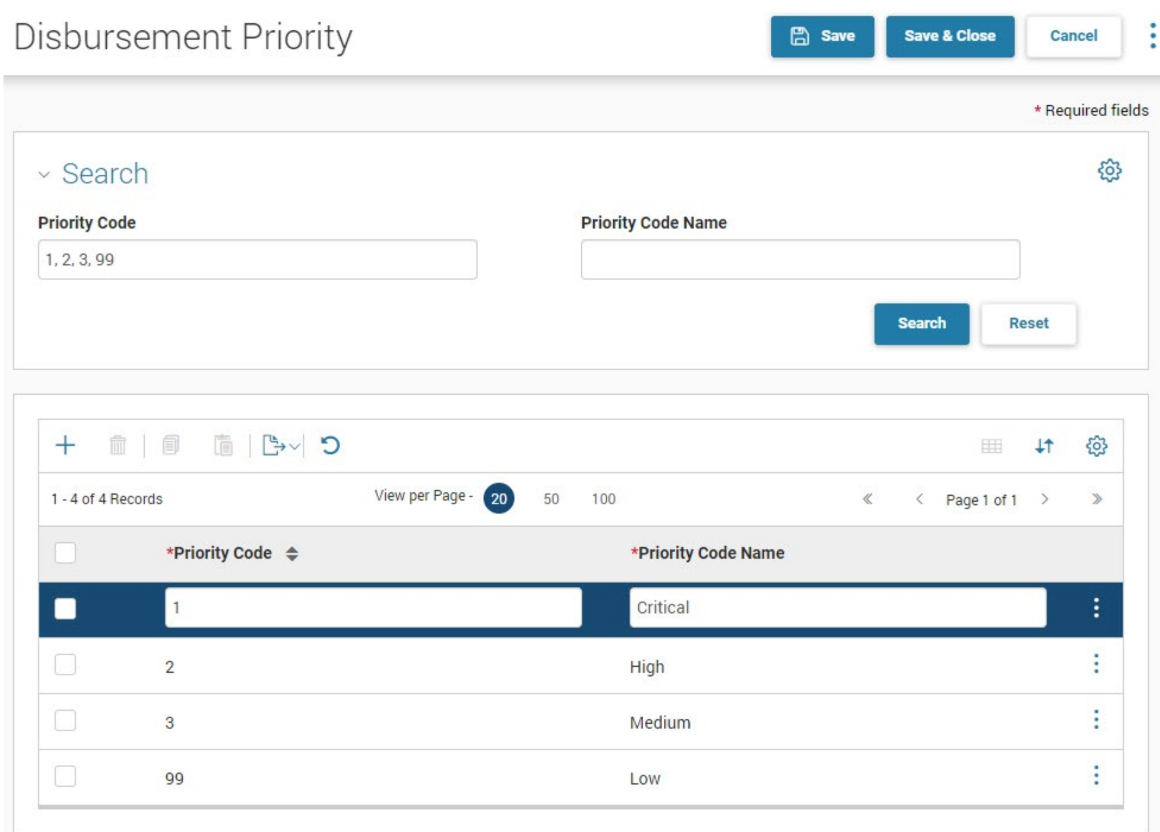
As CGI Advantage is primarily designed in a style known as 'progressive display' where users are presented with a limited amount of information initially with the ability to request more details. The structure of data also controls how the information is presented as the more fields invoke different presentation styles. Common terms in progressive display are Bite, Snack, and Meal, where each progresses to show more information.

While there are exceptions, the styles listed above are the primary presentations for reference data and inquiry pages.

The simplest presentation style is just a grid (or table) of records where all fields are displayed as columns and new records can be inserted directly and updates to existing ones can be done directly in the grid, given adequate security. This style is not the most prevalent.

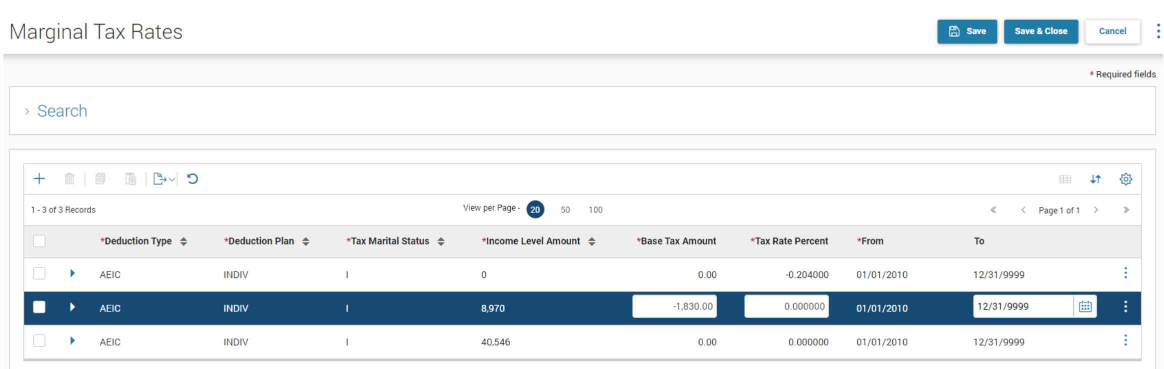
- Sample 1: Disbursement Priority (DISP)

  The data elements on this page are so few that the bite view is the same as the meal view.



- Sample 2: Marginal Tax Rates (DEDX)

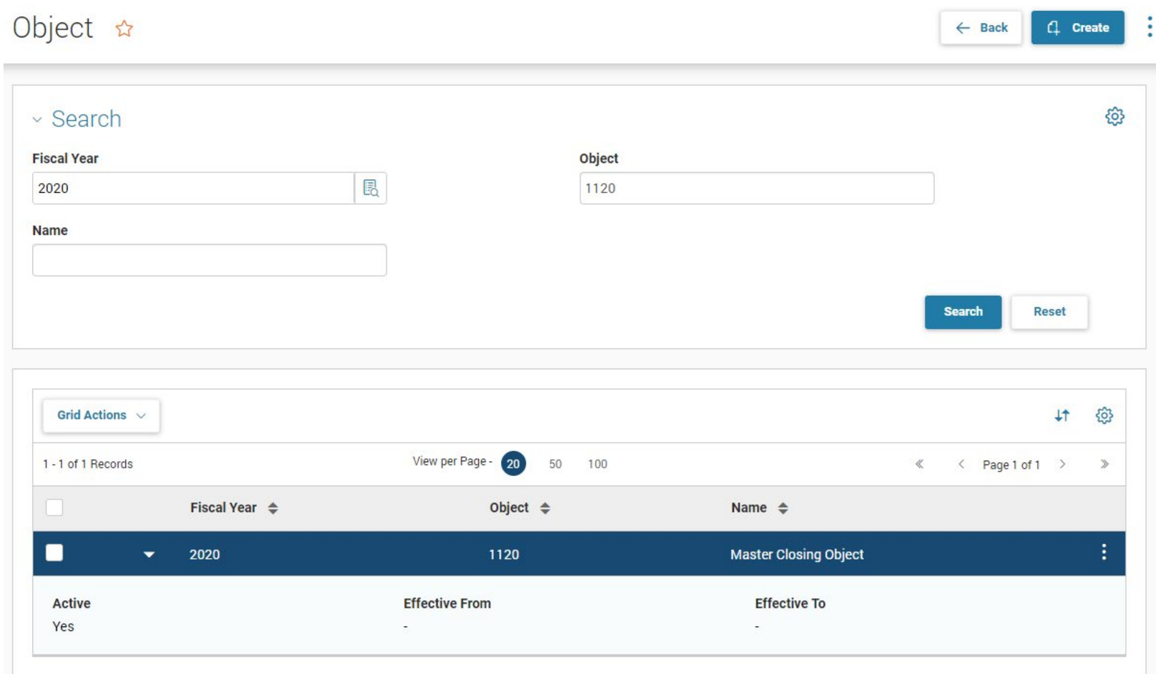
  The data elements on this page are enough to fill the grid (bite) and then flow over into a meal view that shows the remainder. The triangle icon on the left opens and closes the meal view.



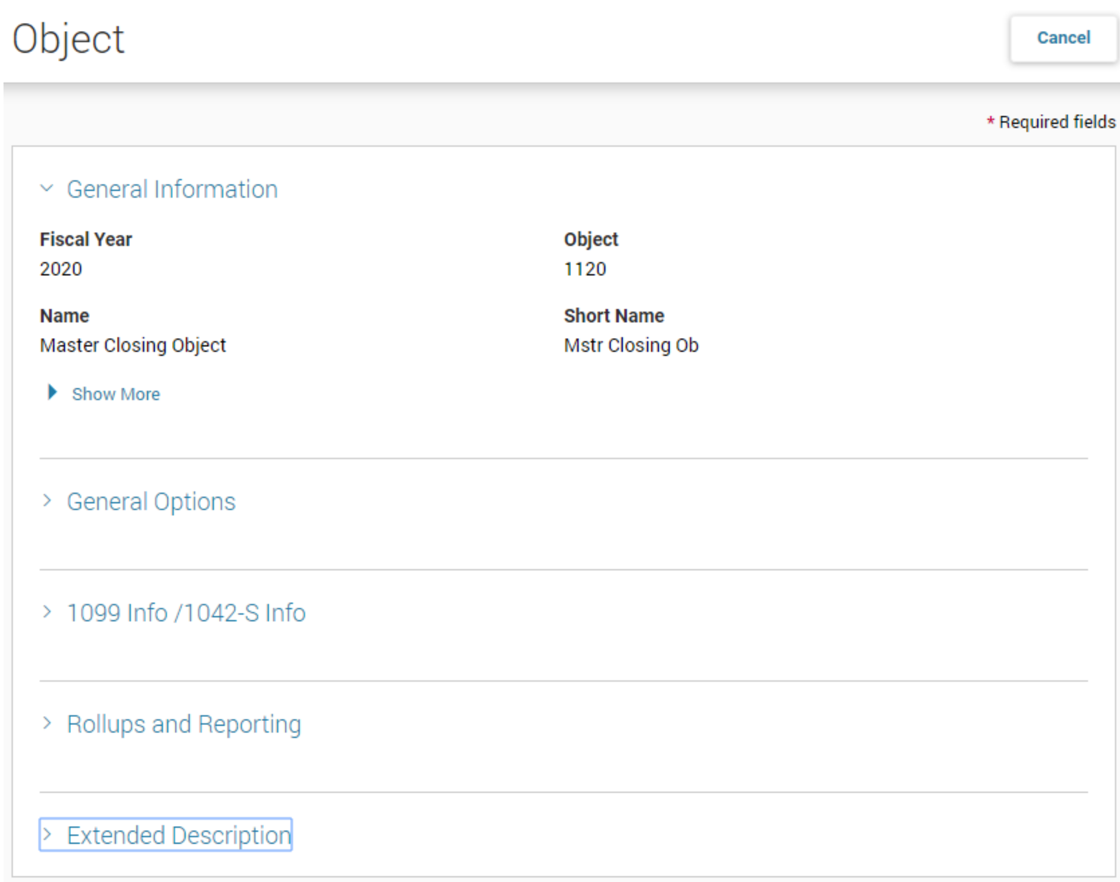
The next record presentation style is where reference data is not structured but the number of elements on a single record is so large that the snack view cannot present all of the information.

- Sample: Object (OBJ)

  The data elements on this reference page are enough to fill the grid (bite) and then flow over into a snack view that shows a limited number of additional fields.



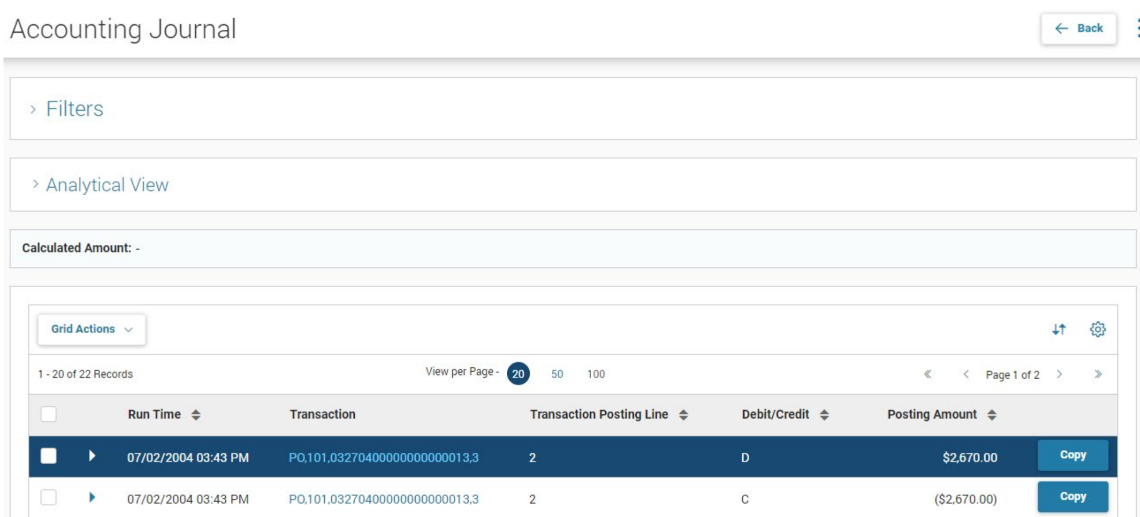
From the record menu, options of *View, Copy,* and *Edit,* as well as the *Create* button at the top, open up a presentation of the entire record (meal view), which is shown below in a read-only presentation. With this page there are multiple sections of data, but certain pages will open without sections.


Object
Cancel
* Required fields
General Information
Fiscal Year
2020
Object
1120
Name
Master Closing Object
Short Name
Mstr Closing Ob
Show More
General Options
1099 Info /1042-S Info
Rollups and Reporting
Extended Description

The next record presentation style is where inquiry data is not structured, but the amount of elements on a single record is so large that the snack view was skipped and instead, a meal view is presented.

- Sample: Accounting Journal (JACTG)

  The data elements on this inquiry page are enough to fill the grid (bite) and then flow over into a meal view that shows all additional fields grouped into horizontal sections as opposed to the vertical sections of a reference data record. This presentation allows for comparing multiple records in a single view.

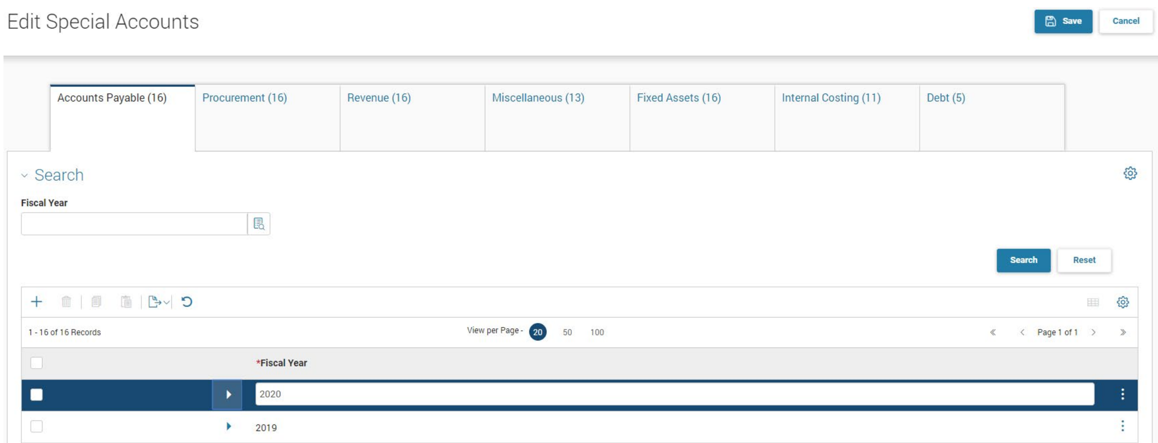


With the triangle on the left, the following expanded view is opened.

When data is structured (parent and child records) or multiple pages of similar information are pulled together, the presentation style changes.

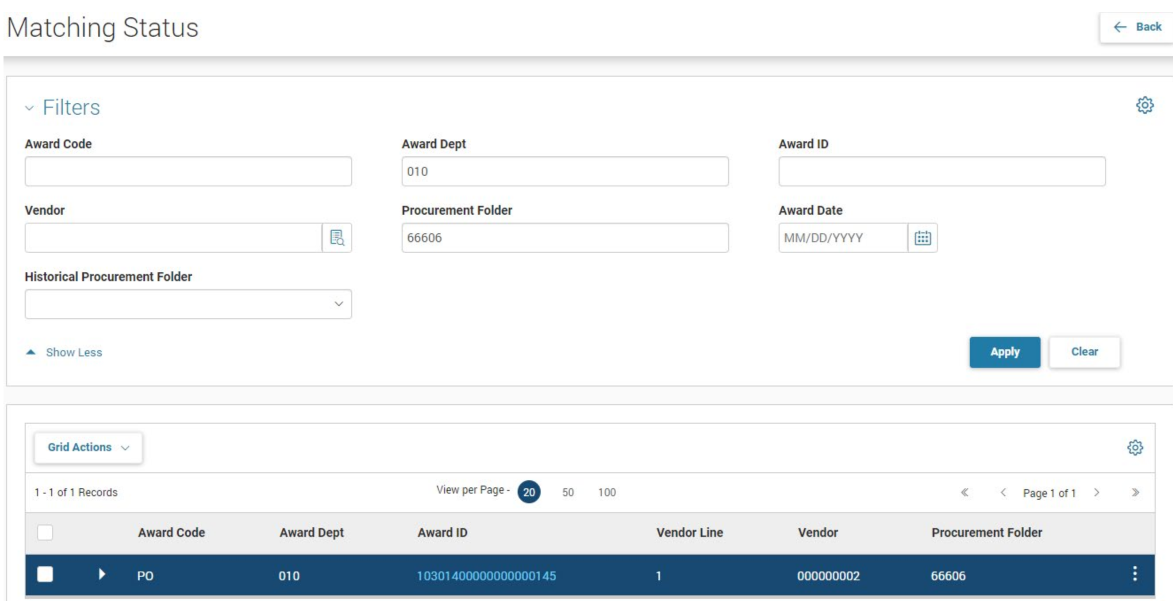
- Sample 1: Special Accounts (SPEC)

  This page is an example of a group of like reference pages pulled together with a single point of access.

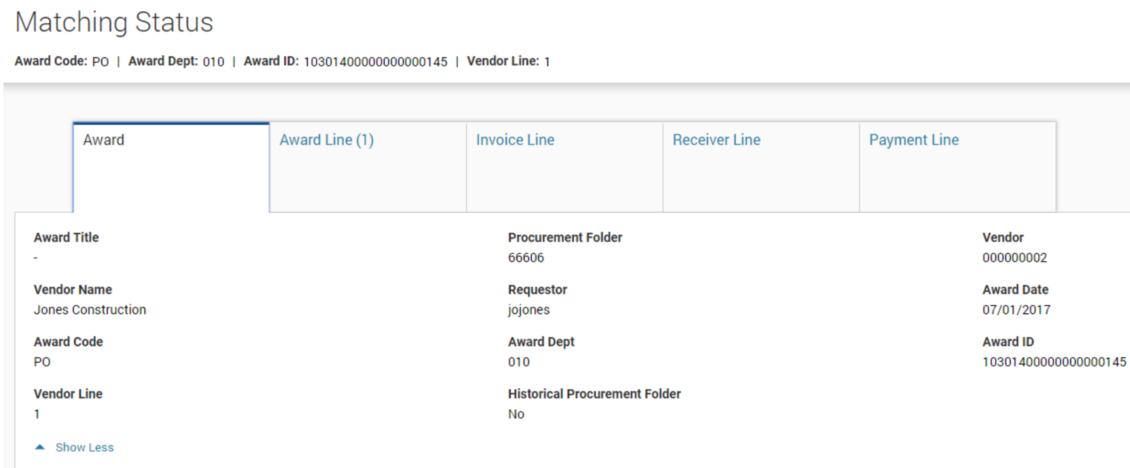


- Sample 2: Matching Status (MATA)

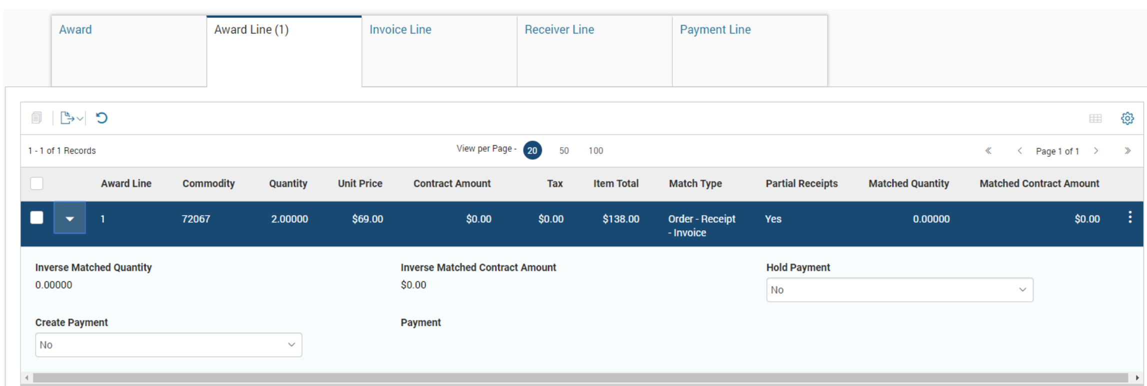
  This inquiry page is an example of structured data with different layers of data (Award, Award Lines, Invoice Line, Receiver Line, and Payment Line). The initial presentation of the page is tailored to the user locating and selecting a particular award.



When the award is located, the record menu choice of *View* will open a presentation that contains each of the layers of data on separate tabs. The first tab has no grid because it is a single award, but the others have grids because multiple records can exist. When selecting a row in a grid, any navigation to a later tab enables you to view data on that second tab that corresponds to the selected record in an earlier tab.

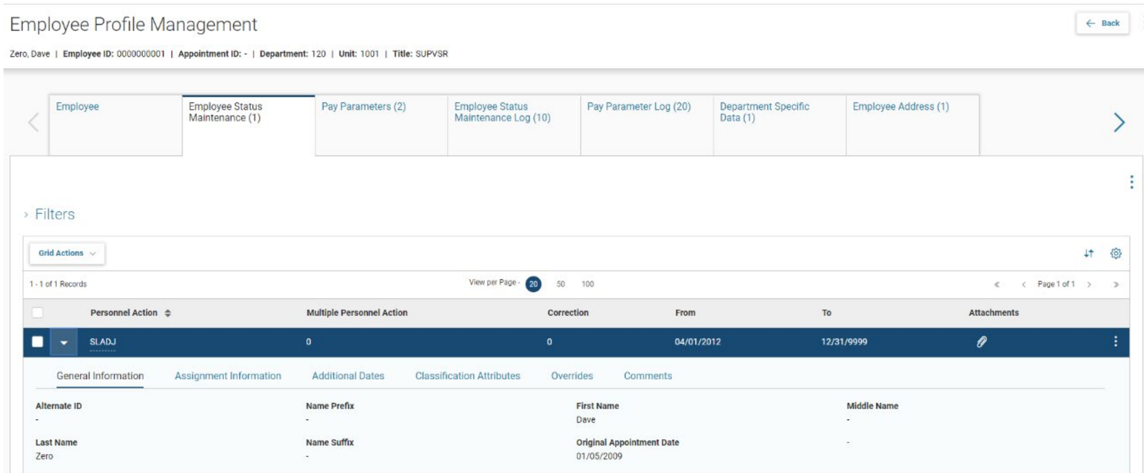


The data in each tab is not so extensive that horizontal or vertical sections are necessary, as seen with the Payment Line example below.



› Sample 3: Employee Profile Management (EPM)

With this page, the data on several tabs is so extensive that the horizontal sections are necessary to present the data in an organized fashion.



User Interactions

The user interaction with a page can be one of many different types depending on security, how data should be created on the page, and how data should be modified on the page. A page is not limited to just one of the many interactions described in the following topics:

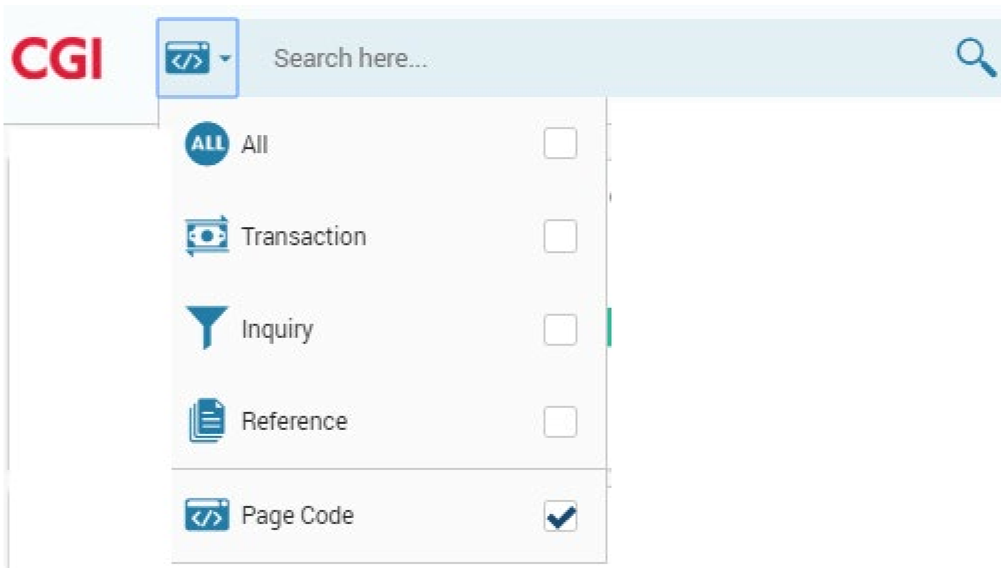
- Locating & Opening
- Search & Browse
- Navigation & Record Selection
- Configure Columns
- Reset User Preferences
- Move Columns
- Resize Columns
- Freeze Columns
- Sorting
- Advanced Grid
- Export Grid Results
- Add a Record
- Modify a Record
- Delete a Record
- Attach Files to a Record
- System Feedback

Locating & Opening

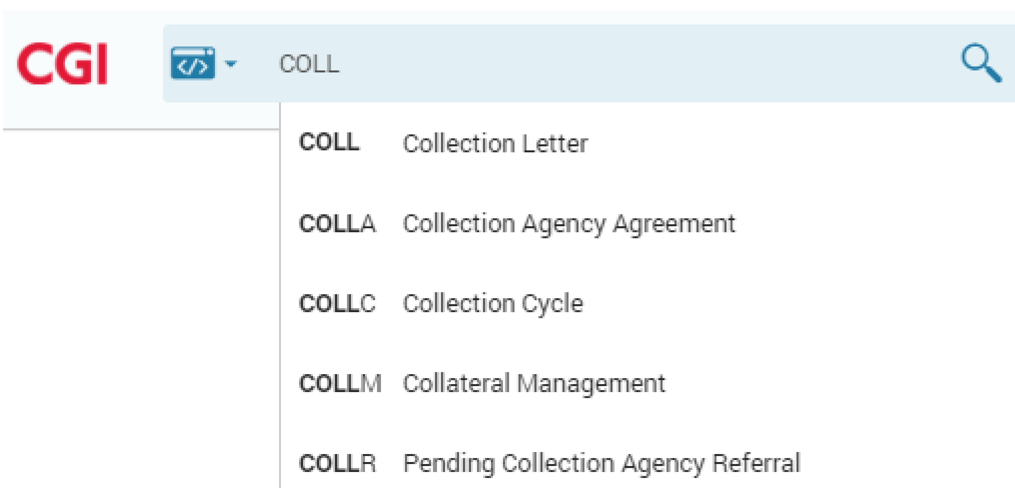
Pages can be located and opened in many different locations throughout the application. Shown below are some of the most common locations.

› Sample 1: Global Search by Page Code

The Global Search bar in the Global Navigation Panel allows you to search for a specific page by Page Code:

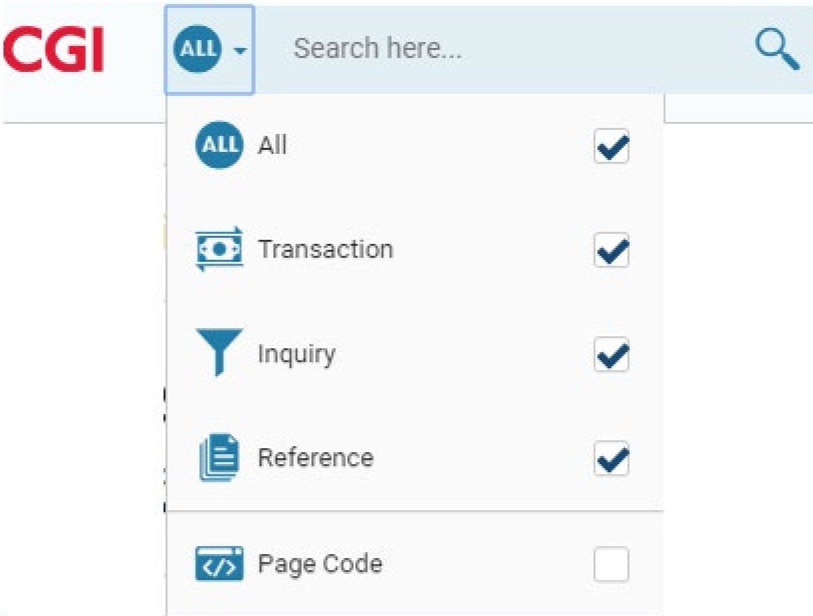


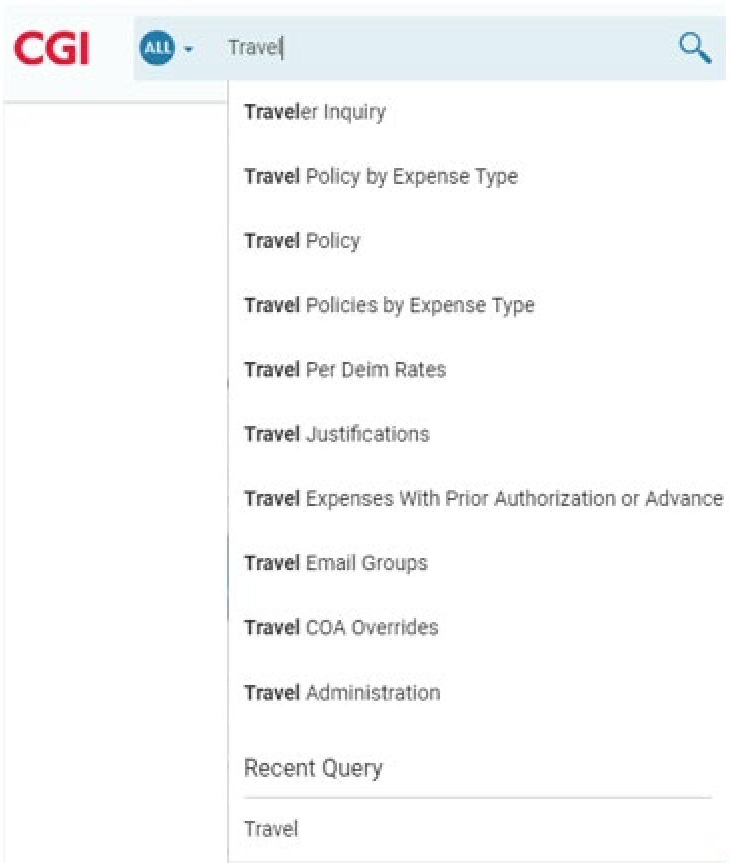
As you enter text into the Global Search field, matches will appear. You can transition directly to one of the pages by selecting the listing in the search results:



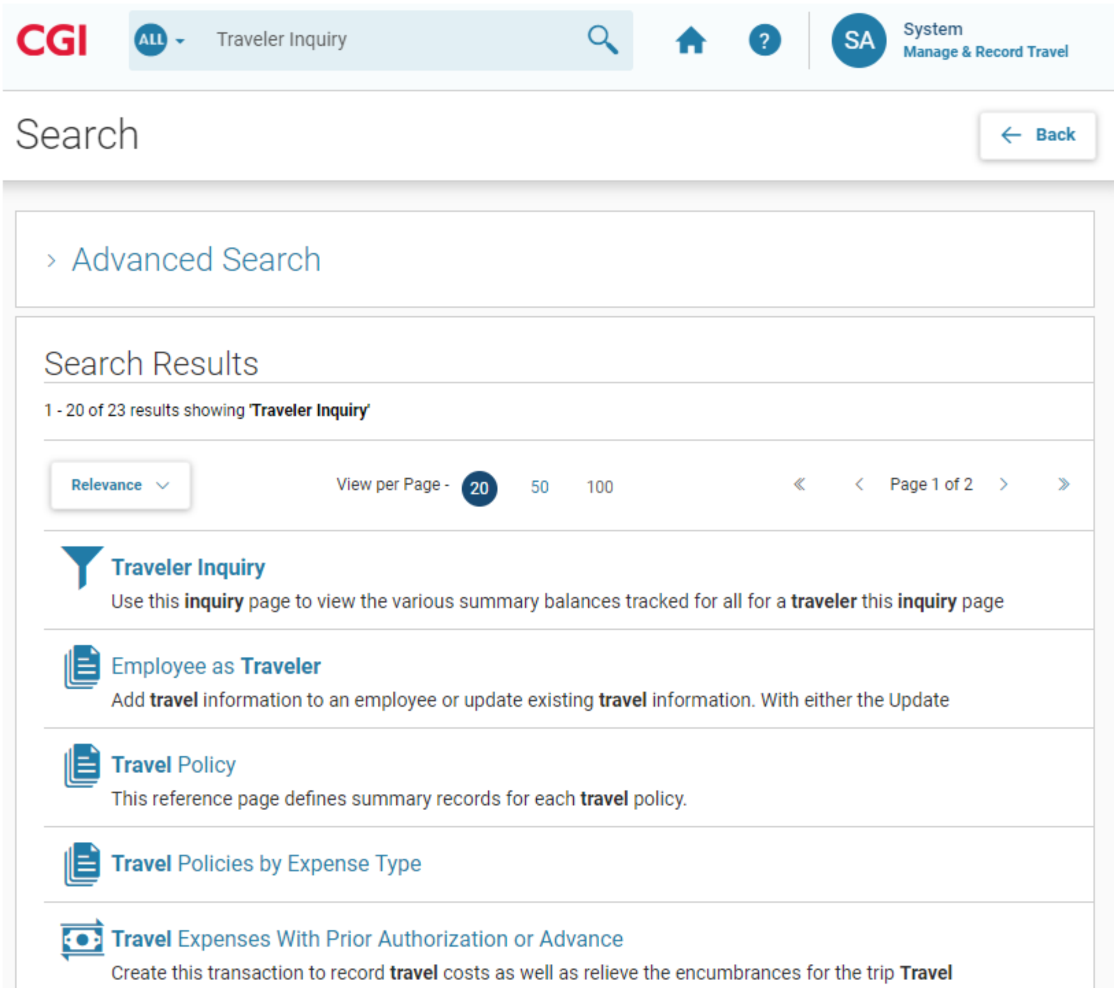
› Sample 2: Global Search of Current Business Role

If you do not know the exact name of a page, then you can enter some text that is part of the page's name in the Global Search field. If any pages are found, then they will be listed beneath the Global Search field. This search is only against the System Resource Target Names and the System Resource Target Descriptions in the current Business Role.



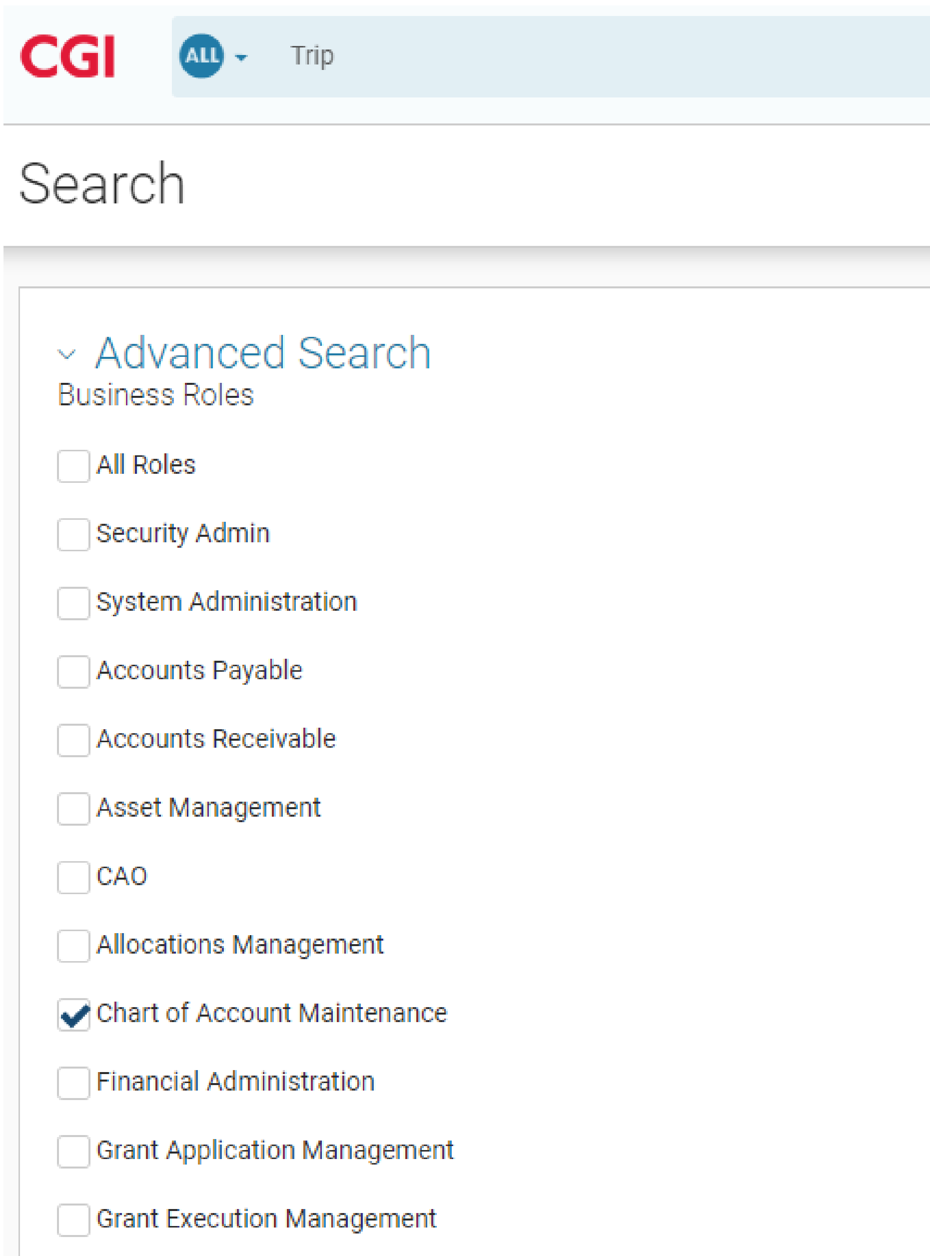

CGI
ALL
Travel
Traveler Inquiry
Travel Policy by Expense Type
Travel Policy
Travel Policies by Expense Type
Travel Per Deim Rates
Travel Justifications
Travel Expenses With Prior Authorization or Advance
Travel Email Groups
Travel COA Overrides
Travel Administration
Recent Query
Travel

When selecting an item in the listing, you are transitioned to a listing that gives information on what type of page a selection is with an icon for reference, inquiry, or transaction, along with the description for the System Resource Target. The selection of an item in this presentation will open the page.



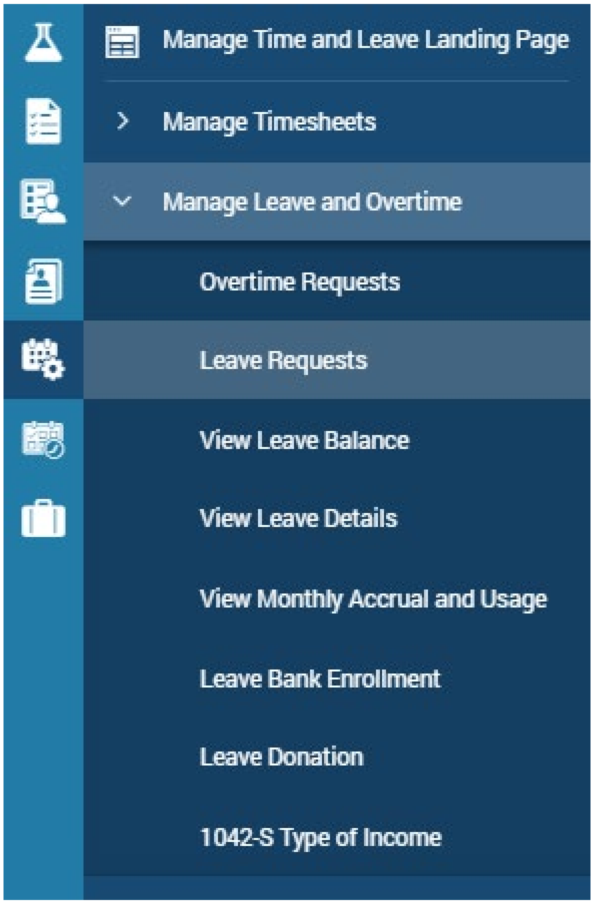
› Sample 3: Global Search Beyond the Current Business Role

Notice in the presentation above there is a section above Search Results that is labeled Advanced Search. Clicking the magnifying glass icon within the Global Search bar will also open the presentation above. In that Advanced Search section is a listing of each Business Role you can access. Only one is selected but you can select more or use the All Roles choice to select all roles to search across more than the currently selected role.



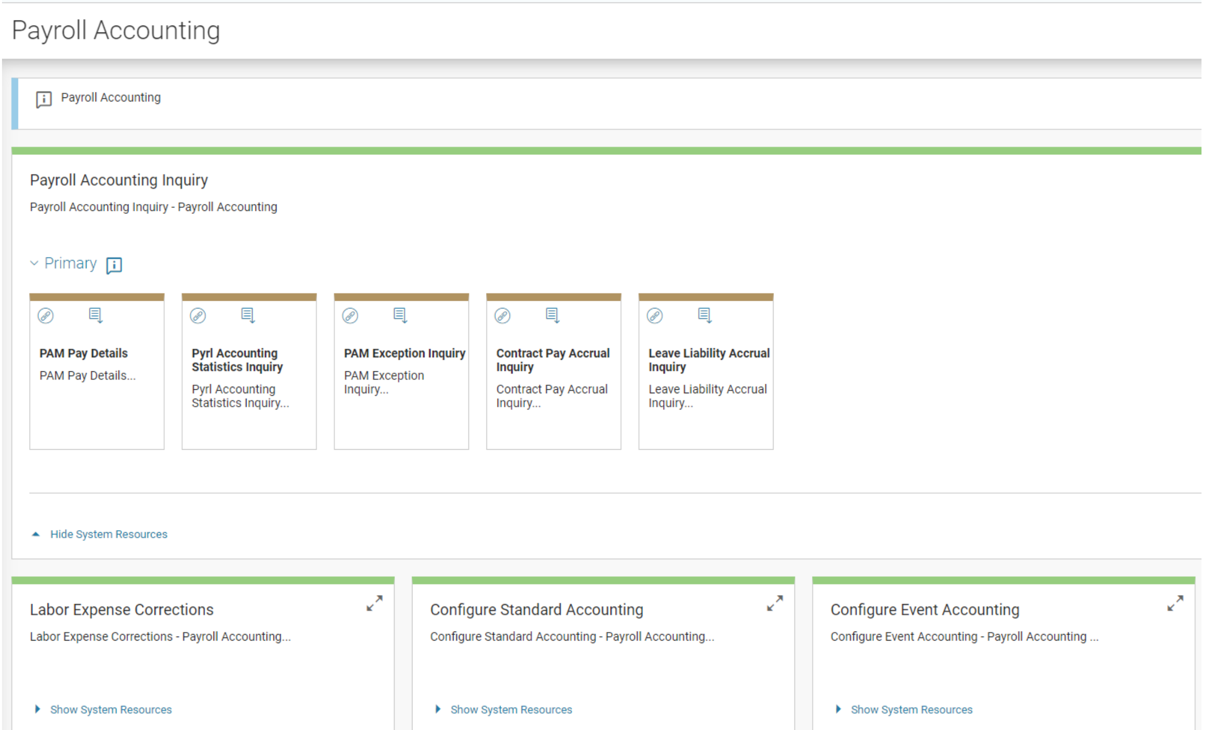
- Sample 4: Primary Navigation Panel

Pages can also be accessed via the Primary Navigation Panel, based on site specific setup. Refer to the *Getting Started Guide* for more information.



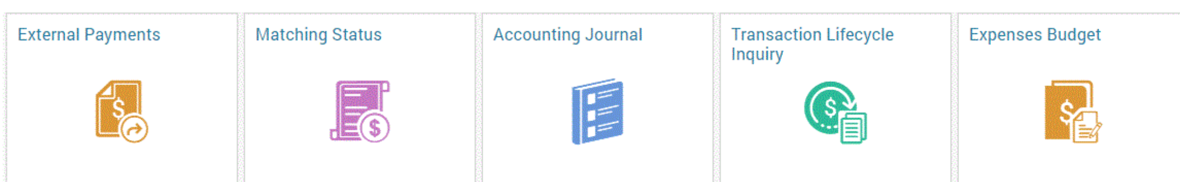
› Sample 5: Business Process Landing Page

Pages can also be accessed via a Business Process Landing Page, based on site specific setup. Refer to the *Getting Started Guide* for more information.



› Sample 6: Home Page Quick Link

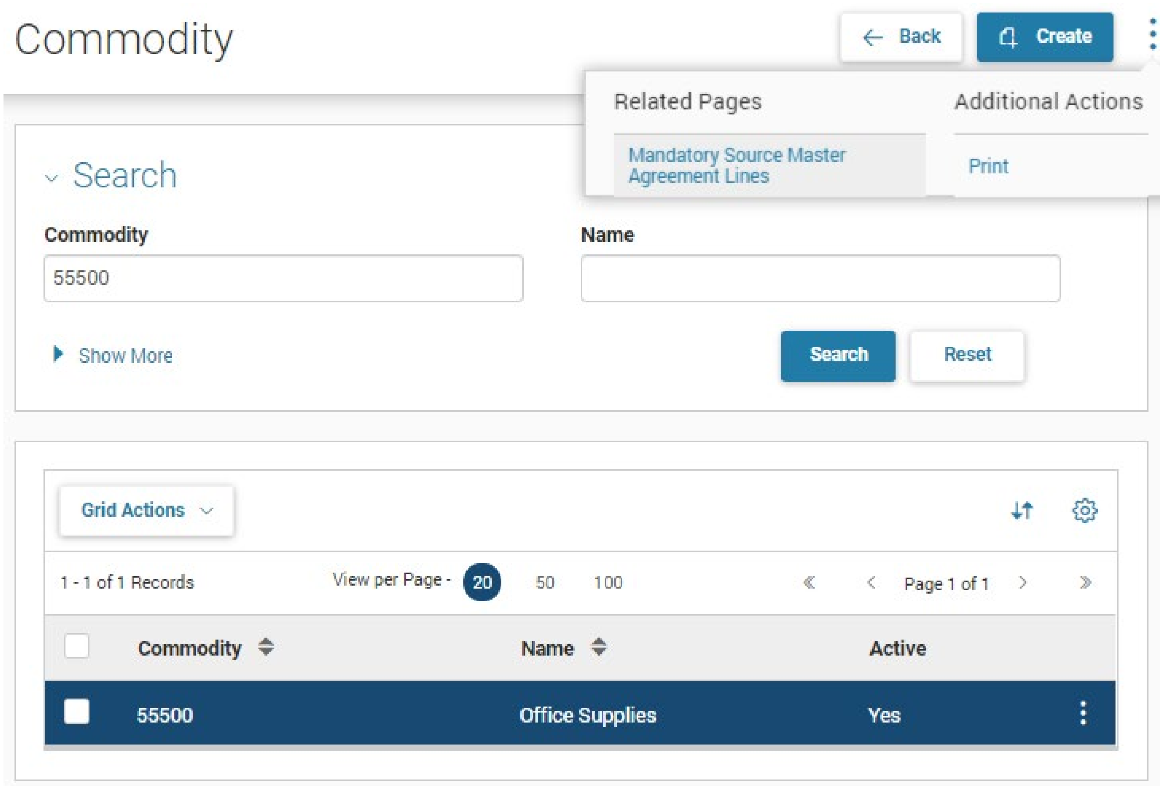
Pages can also be accessed via a quick links designed into a Home page, based on site specific setup. Refer to the *Getting Started Guide* for more information.



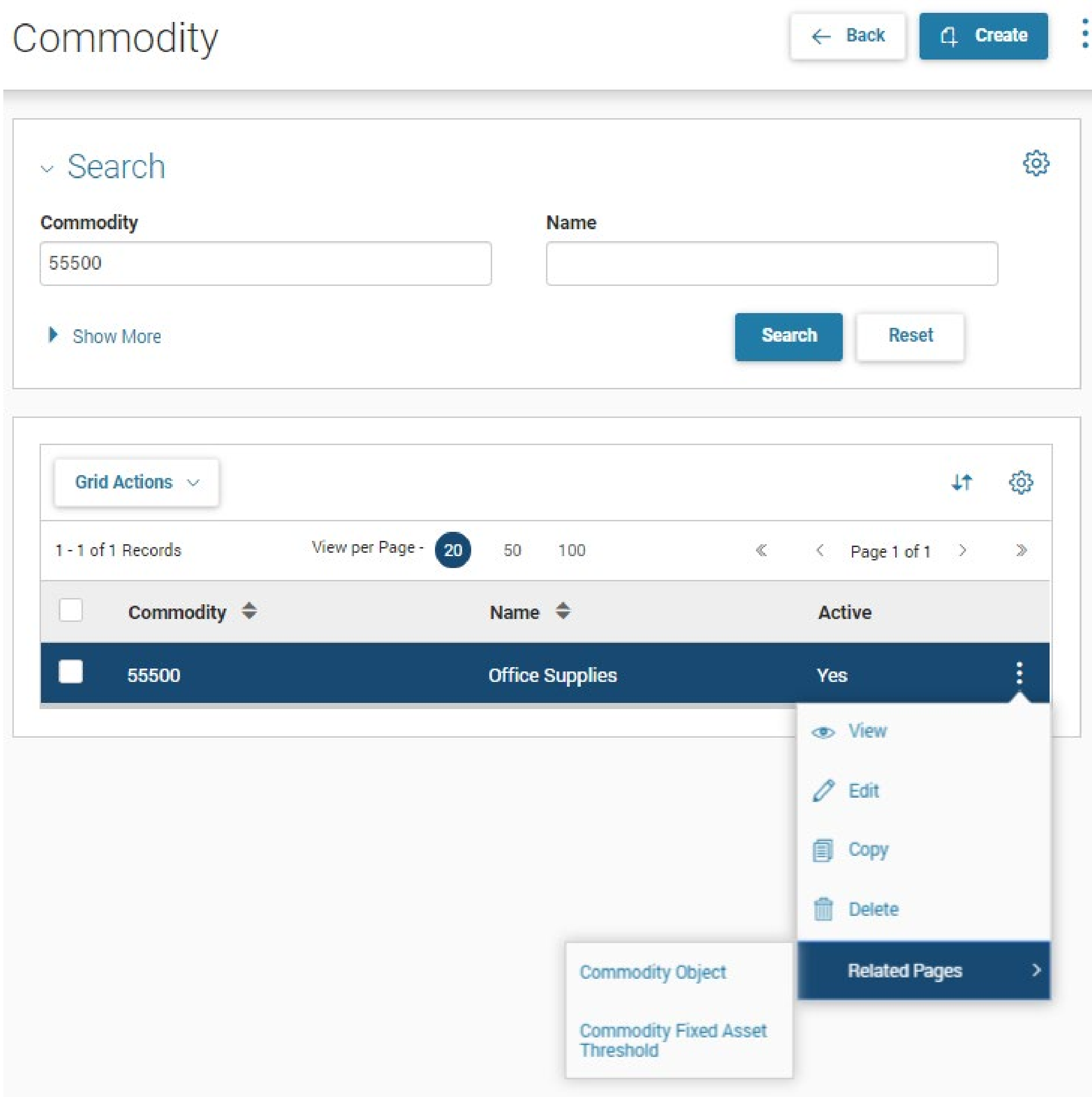
› Sample 7: Related Page Link from Within a Page

Many reference data and inquiry pages have links designed into them to transition a user to a very common page, often used in conjunction with the first page. These transitions may just open the additional page for a user to search or the transition may take information from the currently selected record on the first page and do a search on the second page with some or all of the key information of that record.

These links can be in the page-level menu as shown below where they are typically just a navigation to another page and not a search.



These links can be in the page-level menu as shown below where they are likely a navigation with a search.



Search & Browse

Searching and browsing is provided on most pages throughout Advantage. If no information is entered, all records are returned. There are several instances for pages with a large quantity of data where the user will be required to enter a minimum number of search fields and may be prohibited from searching with a wildcard (see below). The search functionality uses values entered in a set of fields presented directly on the page to perform a query. Here again, there may be pages that require certain fields for browsing or prohibit the use of wildcards.

The application supports the following features for finding records on a page and each of these can be combined:

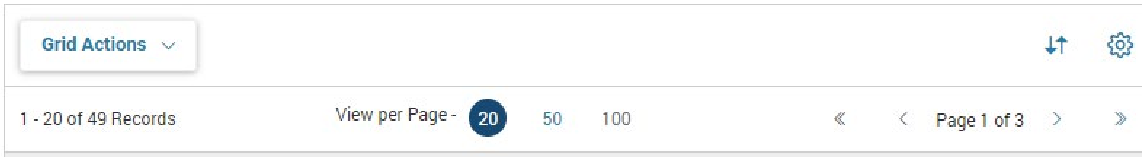
- Text can be typed in upper or lower case. All text will automatically be converted to upper case.
    - Type 1 complete value, name, date, description, etc. to search for a single record.
    - Using commas to separate, type more than one value, name, date, description, etc. to search for a group of records.
    - When searching for data than contains commas, enclose the search criteria with single quotes. For example, type 'Construction, Inc.', in the Vendor Legal Name search field to view the Construction, Inc. vendor record.
- Wildcard searching is supported by the asterisk (*) symbol. For example, if 01* is entered, the system will return records 0100 to 0199 and any records that have letters or symbols after 01.
- Upper and Lower Range searching is supported by the colon (:) symbol. For example, type 1/1/2008: 1/15/2008 in the Create Date field on the Transaction Catalog to view all transactions created on or after 1/1/2008 and on or before 1/15/2008.
- Upper Range searching is supported by the greater than (>) symbol. For example, type >1/14/2008 in the Create Date field on the Transaction Catalog to view all transactions created after January 14, 2008. Adding the equal sign (>=) after the greater than symbol will result in transactions created on or after January 14, 2008.
- Lower Range searching is supported by the less than (<) symbol. For example, type <1/14/2008 in the Create Date field on the Transaction Catalog to view all transactions created before January 14, 2008. Adding the equal sign (<=) after the less than symbol will result in transactions created on or before January 14, 2008.

With each successive search, the system saves the criteria and displays it as a search card in the Recent Searches section of the page. A single click of the search card will initiate the search again. The search card displays only a limited amount of search criteria, but all the criteria can be viewed with the more information icon. The maximum number of search cards that can be displayed is controlled by site specific settings for the maxRecentSearchCardCount property for the recentSearch parameter in the feature.conf file. If the limit has been reached and a new search is initiated, then the oldest search card is removed and a new search card is added for the newly entered search criteria. Searches can be saved by clicking the pin icon and the search card will not be removed after the limit has been reached. The maximum number of search cards that can be pinned is controlled by the maxRecentSearchPinnedCardCount property for the recentSearch parameter in the feature.conf file. Note: The search cards for a page will only be displayed if the page is configured by the system administrator to open with the *Query* setting for Initial Mode.

Navigation & Record Selection

Grid Navigation

Any page that presents more than one record will have navigation actions. The following screen shot shows an example of the navigation actions available for a grid of records. These actions may not be enabled every time a page is viewed. The application only activates them when there are more records after (next and last) or before (first and previous) the current record(s) displayed.



- Advantage indicates the total count of records returned along with the set of records that are currently displayed on the grid, for example, *1 -20 of 49* or *21 - 41 of 49*. This feature is available on all grids within the application, unless disabled through metadata configuration change.

- By default, grids only display 20 records at a time; however, you can change the number of records that are displayed in the grid by selecting one of the View per Page options: *20*, *50* or *100*. The above example has 20 selected. If you select 50 on one page, then the value changes to 50 on all pages that have the View per Page option. After you log out of Advantage, the value defaults back to 20. This feature is available on all grids within the application, unless disabled through metadata configuration change.

  For grids where the system cannot determine the actual record count or page count, a "+" suffix is displayed after the record and/or page count. This indicates that there are more than the indicated number of records or indicated number of pages. The following example shows how the plus (+) sign is used to indicate for a grid that has more than 20 records and more than 1 page.

- Additionally, a site has the ability to add a pagination option of 500 by setting the enable_500_pagination_option property to *true* in the ui_preferences.conf file. If the option is enabled, the pagination options for all grids will be 20, 50, 100, and 500. Selecting the 500 pagination link allows users to view 500 rows on the standard grid. Administrators can refer to the "UI Preferences Configuration" topic in the *CGI Advantage System Administration Guide*, for more information.

- A site has the option to enable more than 500 records to be viewed on a grid page if the showViewAllonGrid property is set to *true* in the metadata for the grid and the viewAllRecordsOnGrid feature flag is enabled. The view_all_max_row_count property in the ui_preferences.conf file indicates the maximum numbers of records that can be displayed in a grid. The default value for this property is 1000. The grid pagination displays a numbered link based on the value of this property and the pagination link is enabled if there are more than 500 records returned from the search results. For example, if the value is 1000, then a 1000 link is added in the grid pagination and up to 1000 records are returned when the 1000 link is selected. The value of this property should be greater than 500 and must be numeric. When a pagination link greater than 500 is selected, the grid's view changes and some of the Advanced Grid features are available. Refer to the "Advanced Grid" topic for more information.

- Navigation actions are provided that assist you in navigating between the first (<<), previous (<), next (>) and last (>>) record in the grid.

- Some pages allow you to export selected records or all of the records in the grid to a CSV file. Refer to the "Export Grid Results" topic for more information.

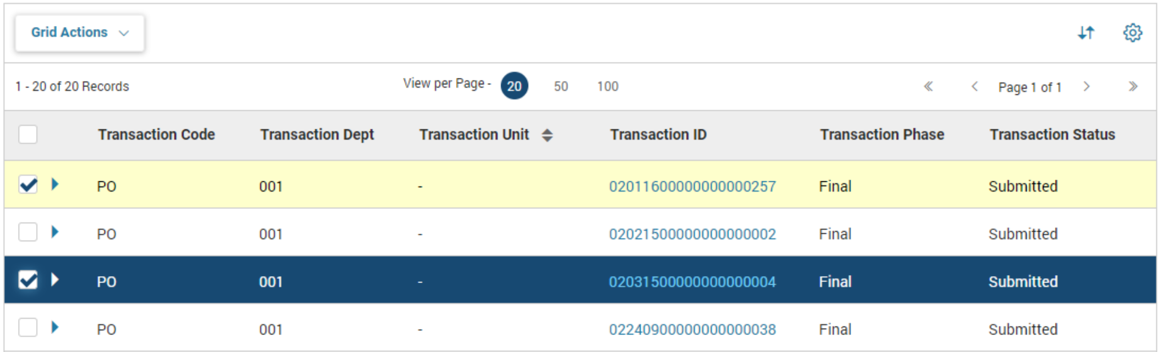
- A Show/Hide icon appears above the grid, which allows you to show/hide the toolbar and pagination area of read only grids. By default, the toolbar and pagination area is displayed for all grids; however, you can select the Hide Toolbar and Pagination field on the Preferences tab of Account Settings via User Profile, if you want to hide the toolbar and pagination area of read only grids on all pages by default. You can then show the toolbar and pagination area of a read only grid for a specific page by selecting the Show/Hide icon above the grid. This setting will remain for that page until you log out, then the default specified on your Account Settings for the application will take precedence the next time you log in and access the page. Refer to the “Account Settings” topic in the CGI Advantage Getting Started User Guide, for more information on the Hide Toolbar and Pagination field.

- Additionally, Advantage Framework supports the column pagination feature that can be enabled on pages that have a need to apply pagination at the column level. For example, the Salary Table Amounts (STBL) page on the Salary Table Maintenance (STBL) page has 100s of columns. To drive optimized performance on this page, the column pagination feature is enabled at the page level, so that users can work through a set of columns (10) at one time and go to next 10 columns, enter data and so forth.

  How to enable this feature?
  Sites can enable the *ENABLE_COLUMN_PAGINATION* parameter on the ERP Application Parameters (ERPCTRL) page. If this global parameter is set to true, then the column pagination feature is enabled only on those pages where the page metadata property "enableColumnPagination" is *true*.

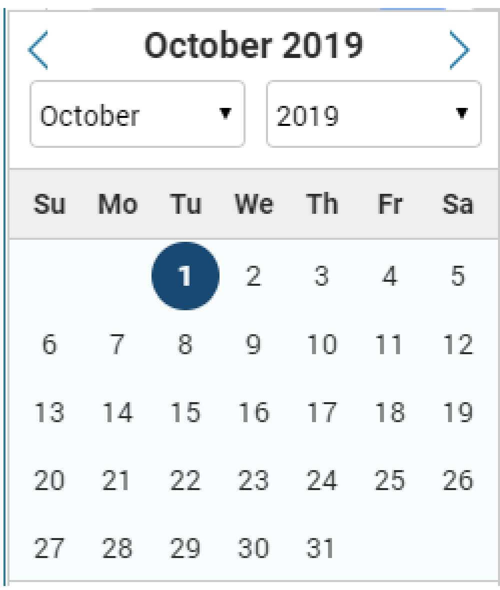
  How the feature works?
  The column pagination feature works only with the standard grid and is currently enabled for the Salary Table Amounts (STBL) page of the Performance Budgeting application. Column Pagination allows users to do pagination at the column level. For example, columns 1-10 of 200, and has the ability to do first, previous, next, and last paginations at the column level.

At the end of navigation, a record is often selected to copy, update, and sometimes delete. The application provides different methods of identifying a selected grid record. The most common is the placement of a check mark to the left of the record or records that you want to select. The last record selected is highlighted in dark blue and the other records selected are highlighted in yellow. The other method is to check the **Selection** check box in the grid header, which selects all records on the page. On scalar-only pages where navigation is allowed, selection of a record happens when navigation ends on a record. For pages that have a scalar tab with a grid, the information shown in the scalar changes to that of the selected record automatically.

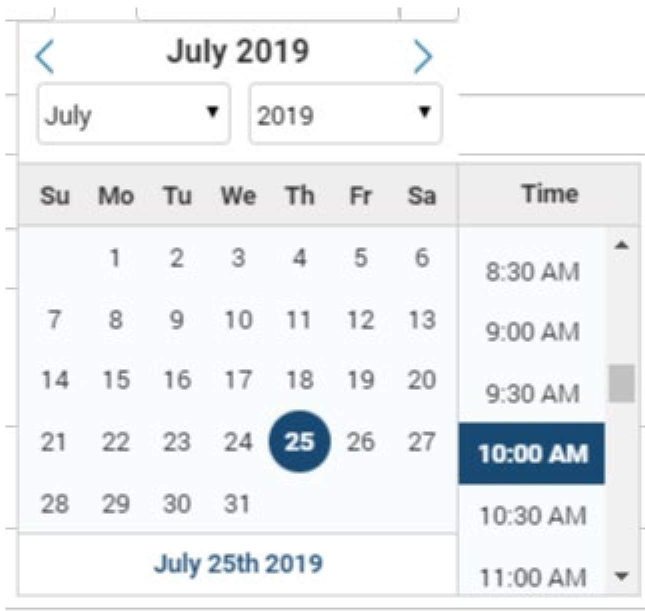


› Calendar Selection

A Calendar window is accessed by selecting the calendar ( ) icon. After selecting a date, the calendar window closes and the date that was chosen is populated in the date field.

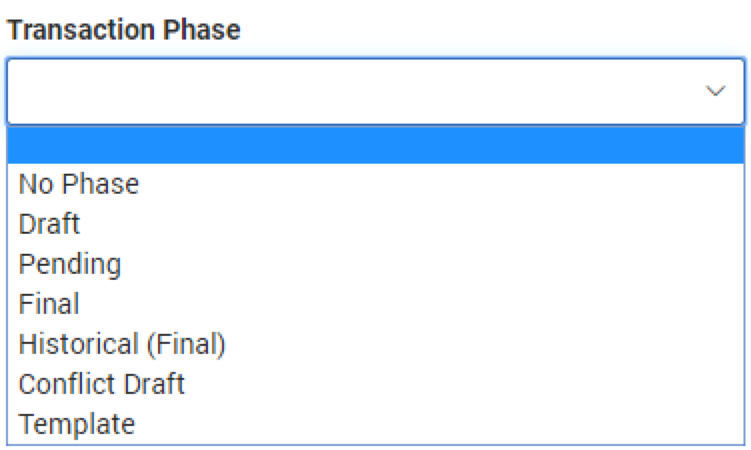


Some date fields also capture the time. After selecting a date and a time, click outside of the calendar window and the date and time selected are entered in the corresponding field.



- Drop-down Selection

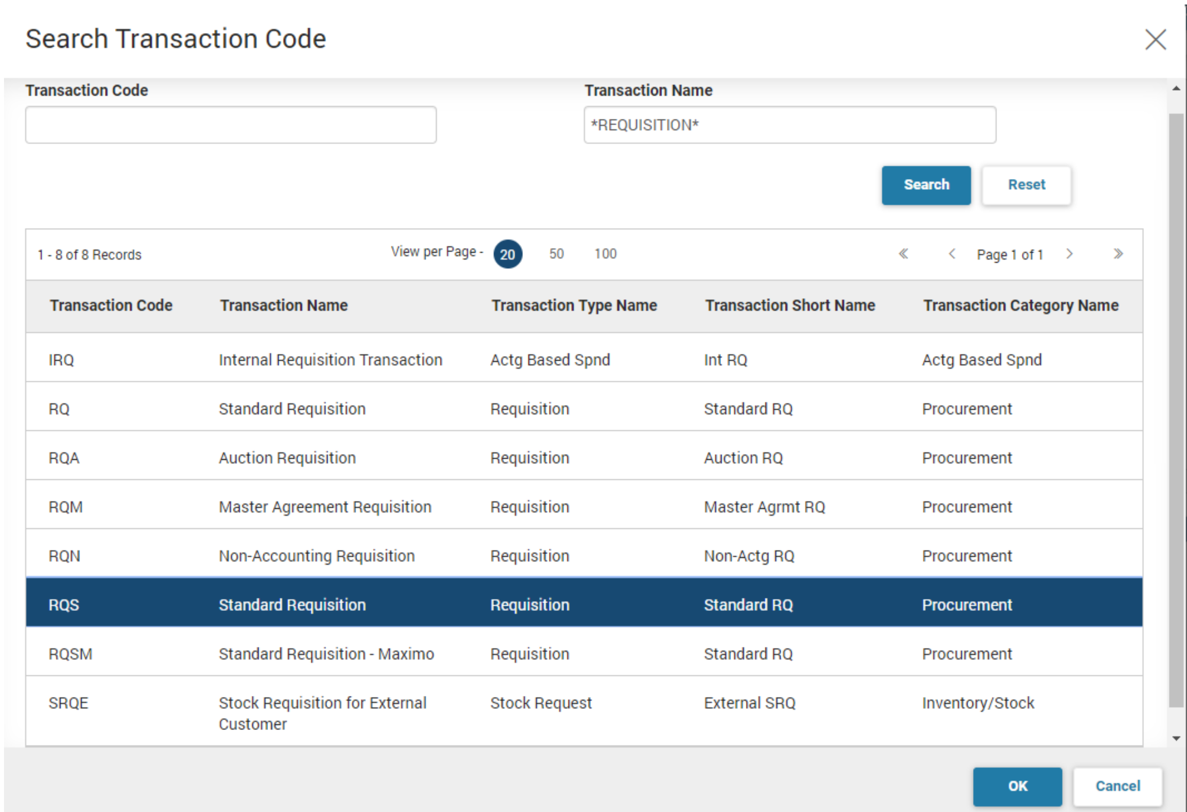
  Many fields in Advantage have pre-defined values that are available in a drop-down menu by selecting the drop-down arrow in the field's text box. You can select a value using the pointer or by using the up and down keys to highlight a value. When a value is selected by a left mouse click, the drop-down disappears and the selected value is shown in the field. When selection is done by the up and down keys, a user must select the Enter key to select a value.



- Pick List Selection

  The Pick List icon is available for many fields in Advantage to assist with searching and selecting a valid value for the field.

After selecting the Pick List icon, a modal window appears that displays records that can be selected. You can narrow search results by entering values in the search fields. Once the desired record is chosen, select the OK button. This closes the pick list modal window and enters the selected value in the pick list field.



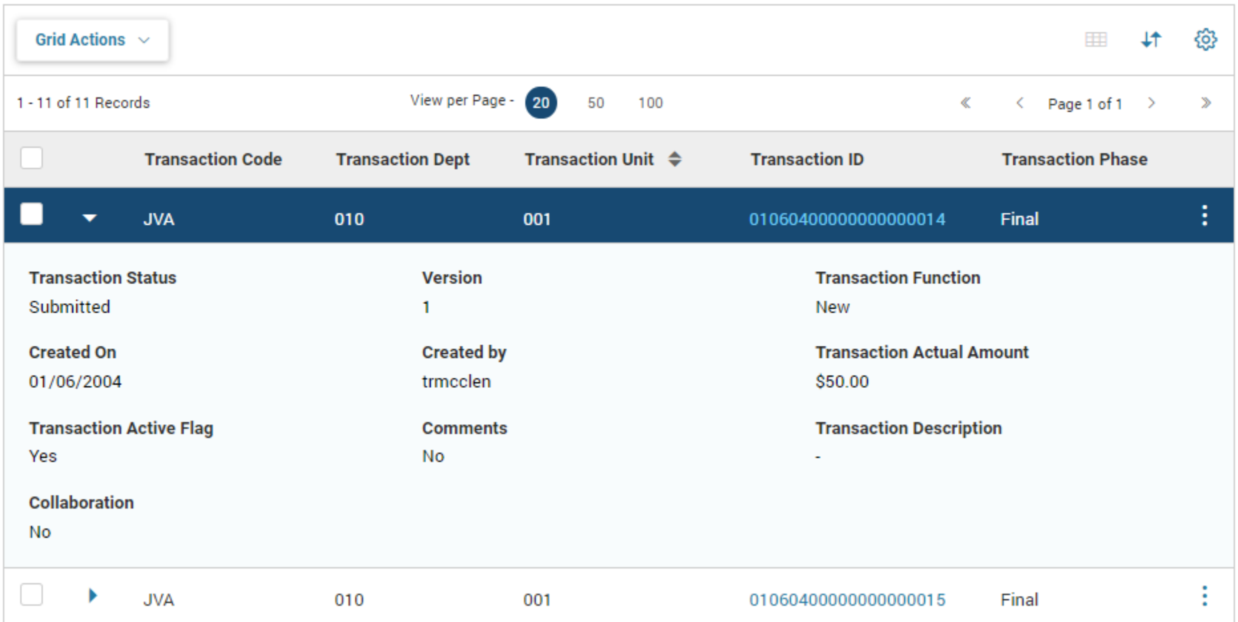
› Change Employee

The Change Employee ( ) icon transitions you to a search pop up that allows you to search for and select an employee to view. Select the row for the Employee ID you wish to select and then OK to return to the previous page.

Configure Columns

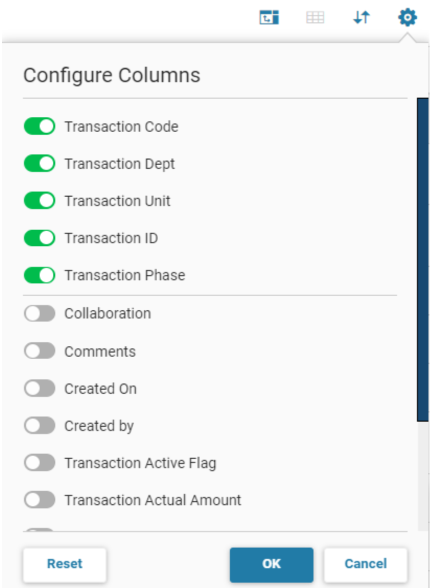
Pages with a grid include a Configure Column feature, which allows you to determine which columns should appear as a column header in the grid. This adjustment will only apply to you and remain until you adjust the columns once again or select **Reset** to revert the page to the default grid columns or the page reverts to the default grid columns from an administration action.

For some grids, all available columns are displayed by default. For other grids, only some of the columns are displayed by default and any additional fields are displayed when the row is expanded. In the following example, two of the available fields (Effective From and Effective To) are not available as a column in the table; therefore, the fields appear when the row is expanded. If you want to add fields to the column header in the grid, then select the **Configure Columns** icon, which opens the Configure Columns window.



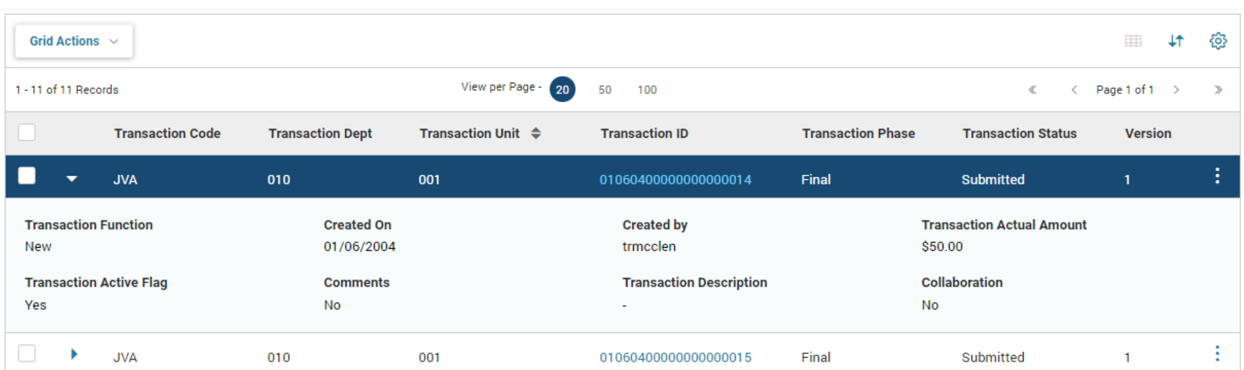
The Configure Columns window lists all fields that are available in the table. All fields that are currently listed as a column header have the column header switch turned on (that is, green). All fields that are not listed as a column header have the column header switch turned off (that is, grey).

A separator (horizontal line) is displayed in the Configure Columns pop-over to differentiate the Primary fields (that are switched on) from the Secondary fields (that are switched off). The fields enabled by default or via user selection are displayed before the separator and are displayed in the same order as per the field rank or the column positioning on the page. The fields that are not enabled under the Configure Columns pop-over are displayed after the separator and are sorted in alphabetically ascending order.



If you select the switch for additional available fields, then the additional fields will appear as a column in the grid after selecting **OK**. The columns are added to the far right of the grid. This user preference setting will remain until you change the settings.

Once a field has been added as a column on the grid, it is removed from the expanded scalar view for the record, as shown below. If all fields are selected as a column header, then the row will not provide the expand option anymore.

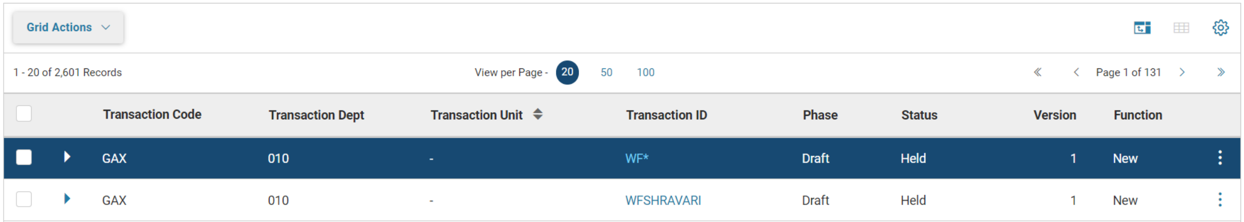


If you select the **Reset** action, the user preferences are removed and the page reverts to the default grid columns.

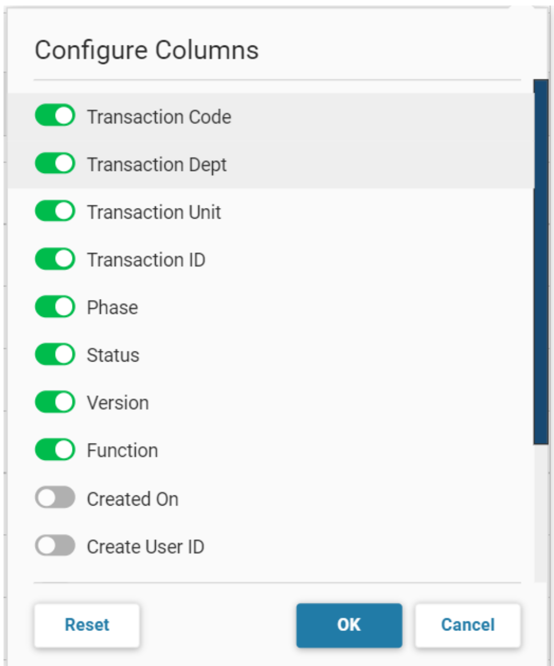
Reset User Preferences

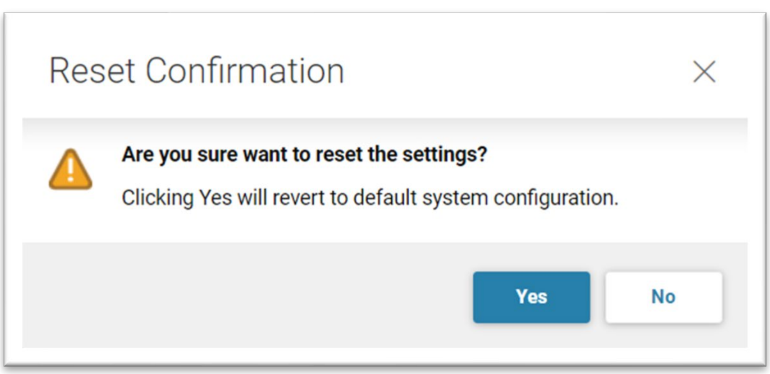
Using Configure Column you can apply user preferences. If you decide to discard previously applied user preferences, select **Reset** and the user preferences are removed. The page is reverted to the default configurations.

In the following example, the Version and Function columns are added using Configure Column.

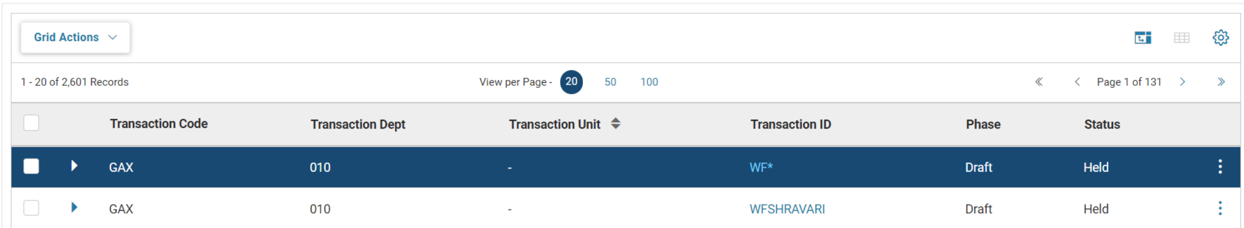


To discard the user preferences, selecting **Reset** requires confirmation of the action.



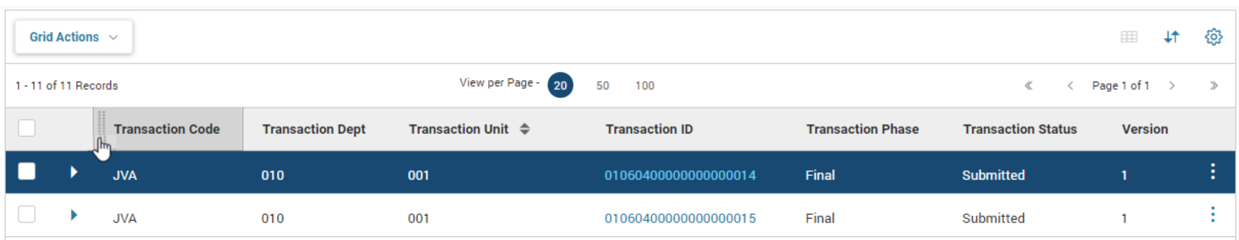


Selecting **No** will not apply any changes and the page be displayed with the user preferences previously applied. Selecting **Yes** will remove the user preferences and revert the page back to the default configuration as shown below.



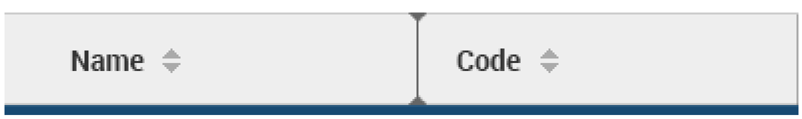
Move Columns

You can re-arrange the display order of the columns in a grid by dragging and dropping a column to the desired location. Hover your mouse over the column that you want to move. The cursor will change to a hand icon, as shown below. Drag the column to the desired location. Once the column is moved, the user preference will remain until changed by the user.

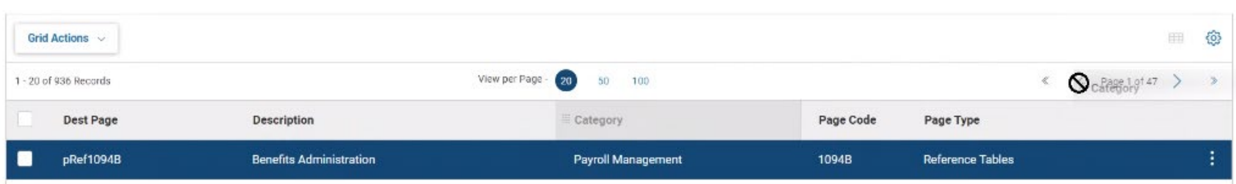


Please make a note of following restrictions in moving columns in a grid.

- You can only move columns to a location that includes the column drop visual indication as shown in the following screen shot between the Name and Code columns:

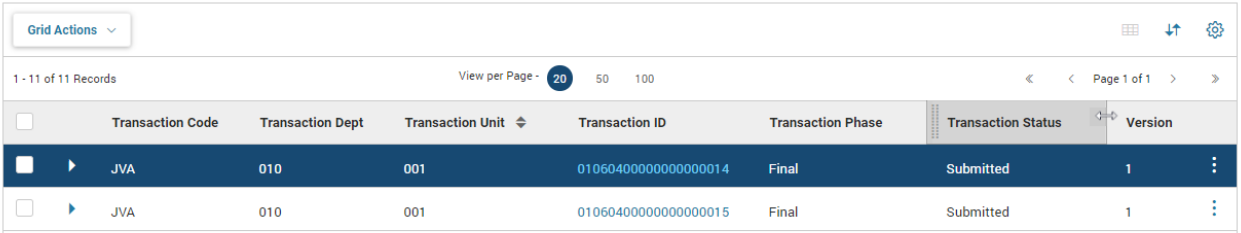


- A column cannot be moved to the right of the last column in the grid. The column drop visual indication will not be displayed to the right of the last column in the grid. Also, a deny symbol (circle with a slash through it) will be displayed if you try to drag a column to the right of the last column in the grid.

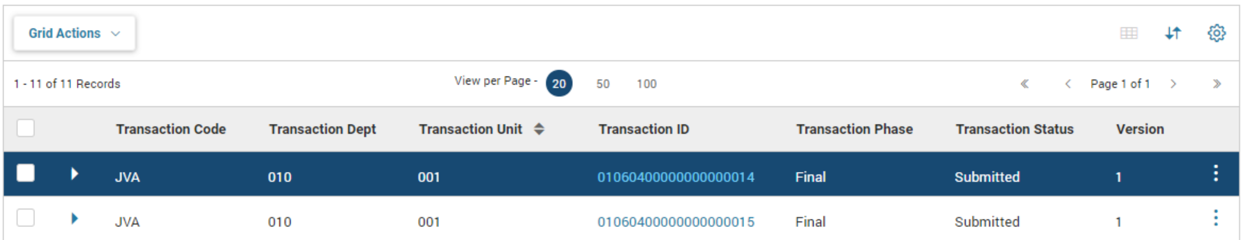


Resize Columns

Pages with a grid contain the ability to make columns wider or narrower. Selecting the left or the right edge of a column changes your pointer to a line with arrows at both ends. Hold that spot and drag the edge of the column to change the width of the column. This feature may not always be available due to the number of fields in the grid and is not available on the left edge of the first column and the right edge of the last column. Certain columns cannot be resized, such as check box columns, three dot menu columns, attachment columns, and the expand/collapse row columns.

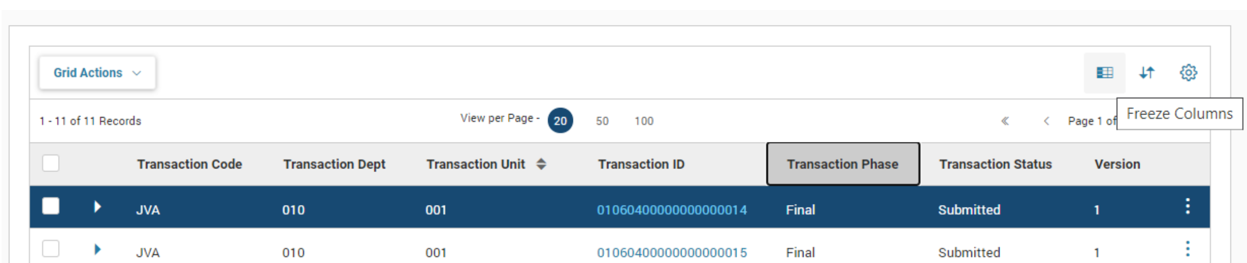


The following image shows how the grid looks after resizing columns.

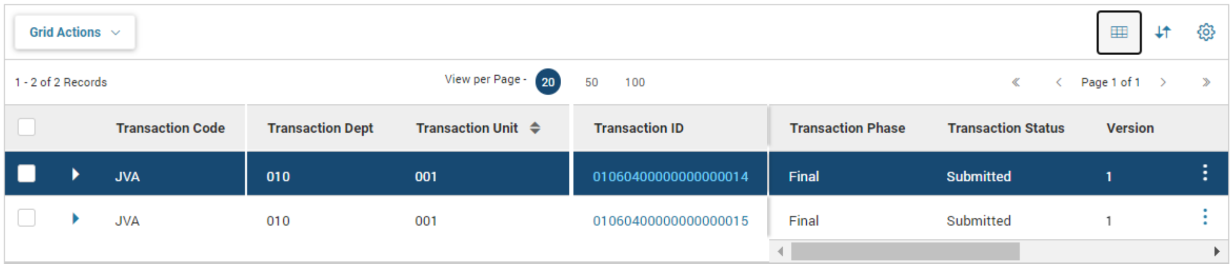


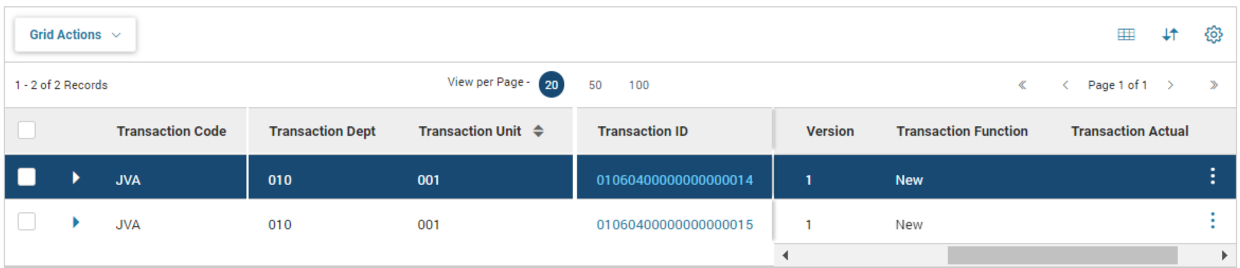
Freeze Columns

Pages with a grid contain the ability to freeze one column so that horizontal scrolling keeps a targeted amount of information in view for reference. To use this feature, select the column for which you want the column to the left not to change when scrolling. Please note that you are not selecting the right-most column to freeze, but the one just after that column. Selecting the column header will activate the **Freeze Columns** icon on the upper right. You must select that icon to freeze the columns. That freeze will remain while you are on the page or until you select the column and the icon again to unfreeze.

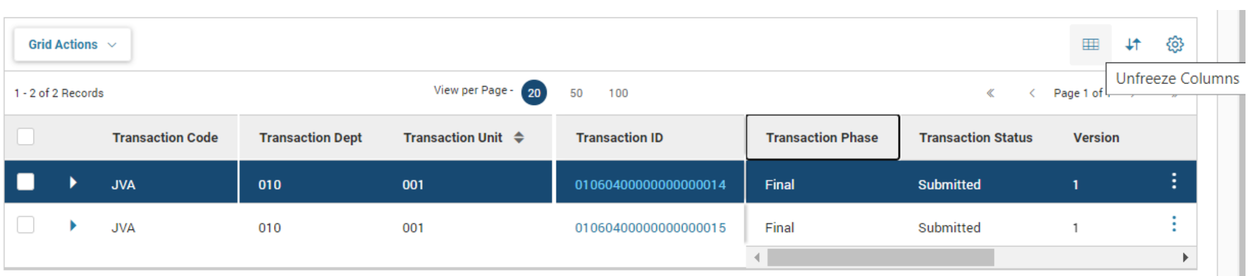


In the following example, everything to the left of Transaction Phase is frozen and the scroll bar can be used to see additional columns that are enabled for the grid.





Select the column and then select the **Unfreeze Columns** icon to remove the freeze.

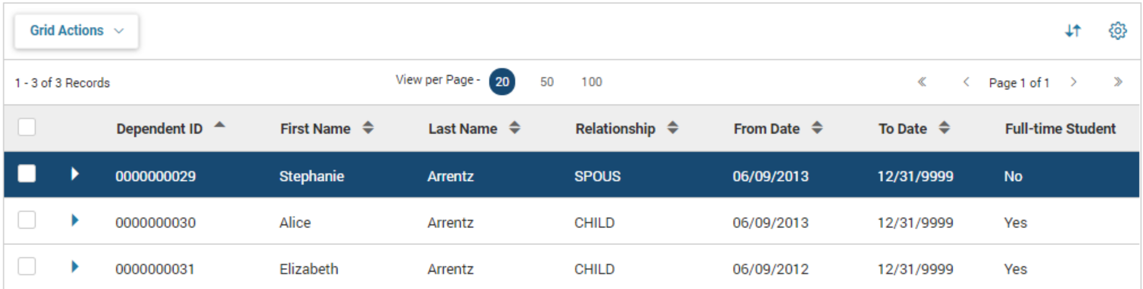


Sorting

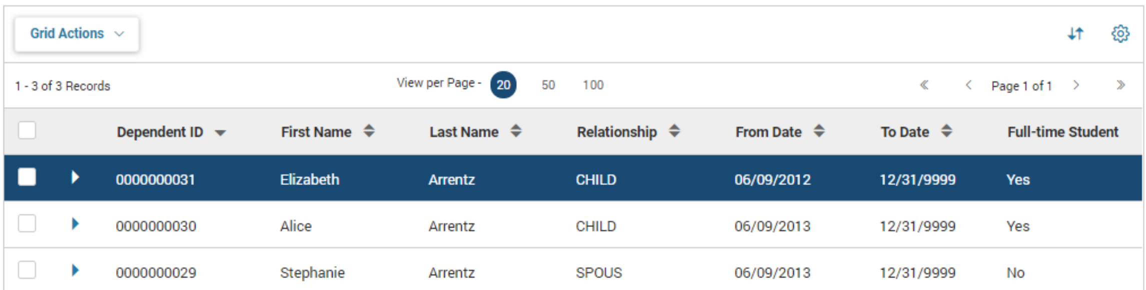
Pages with a grid can have the sorting feature. A system recommendation is to not invoke sorting on a page that is known to have a large amount of data without first narrowing down that data set with a search or browse; for example, a page that has a code field that goes up to 1230. If the last 30 records are intended, then a user should search/browse with the following >1200 to get the intended records.

The ability to sort is denoted by the sort icon (up and down arrows) next to the column name. In the following example, the grid can be sorted by all columns except for the Full-time Student column, since the sort icon does not appear by the column name.

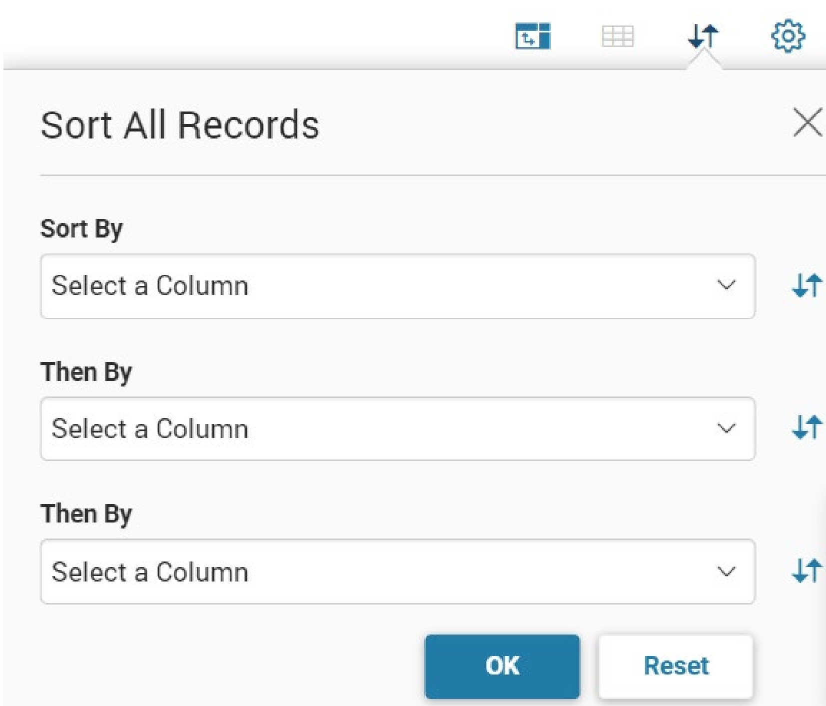
1. Select the sort icon once to sort the grid by the corresponding column, in ascending order. In the following example, the grid is sorted in ascending order by Dependent ID, which is denoted by only an up arrow next to the column name.



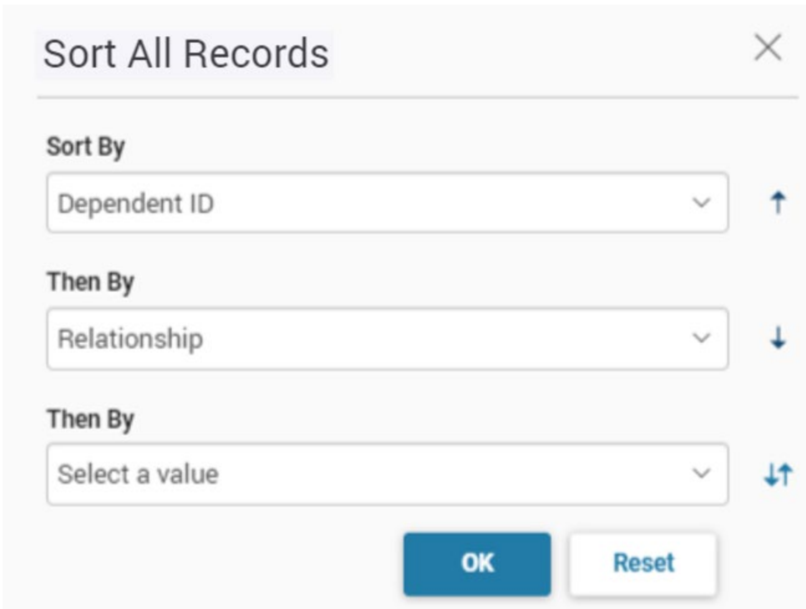
2. Select the up arrow next to Dependent ID to sort the grid in descending order by Dependent ID. This switches the sort icon to a down arrow, as seen below:



3. When a grid allows you to sort by more than one column heading, then the multi-sort icon will appear above the grid. Selection of the Multi Sort icon will open the Sort window that allows you to sort the grid by up to three columns. The columns that allow sorting appear as values in the three drop-downs on the Sort window.



4. You can also specify whether you want to sort the columns in ascending or descending order by selecting the multi-sort icon next to the Sort By and Then By fields on the Sort window. For example, in the following example, the grid is first sorted by Dependent ID in ascending order, as indicated by the up arrow. The grid is then sorted by Relationship in descending order, as indicated by the down arrow. Select OK when you are done making your selections on the Sort window.



Advanced Grid

Editable grids in Advantage also include an Advanced Grid icon that transforms the grid into a format providing advanced grid capabilities. Advanced Grids include a column menu accessed by hovering your mouse over the column heading and then selecting the column menu icon that appears. Additionally, a side bar displays the **Columns** and **Filters** sections in collapsed mode. You can expand the Columns sidebar to access the Pivot table and make changes to the Pivot table as needed. Expand the Filters sidebar to access filter options.

The following functionality is available via the Advanced Grid column menu:

- **Pin Column** – You can pin any column to the left or right side of the grid by selecting one of the following options from the column's menu: Pin Column > Pin Left or Pin Column > Pin Right. This moves the column to the far left or right side of the grid, based on your selection. This allows you to scroll to the right or left and the pinned column does not move. The Pin Left and Pin Right actions can be selected for more than one column, if desired. Select Pin Column > No Pin to remove the pin from a column.

- **Autosize This Column** – Automatically resizes a column based on the width of the data in the column.

- **Autosize All Columns** – Automatically resizes all columns based on the width of the data in each column.

- **Group by <Column Name>** – Groups all records based on the values in the column. You can also drag columns to the header area of the grid where it says “Drag here to set row groups”. You can remove a grouping by selecting the “x” next to the column name. Note: For performance reasons, grouping by columns is not available if you have selected to view more than 100 records in the grid pagination.
- **Reset Columns** – Sets all columns back to the delivered view.
- **Expand All** – This action is only displayed if the grid is grouped by a column. Selecting this action expands all groups.
- **Collapse All** – This action is only displayed if the grid is grouped by a column. Selecting this action collapses all groups.
- **Filter** – The Filter tab on the column menu allows you to filter by column values.
- **Columns** – The Columns tab on the column menu allows you to remove columns from the grid by clearing the check box next to the column name. This is the same functionality offered via the Configure Columns icon.

Sorting Functionality on Advanced Grid

- To sort all returned rows from the table, it is recommended to perform sorting on the standard grid before switching to the Advanced Grid, if needed.
- Once you are in the Advanced Grid view, the column level sort will apply sorting to the current set of records displayed in the grid.
- If all rows from the table need to be sorted on the Advanced Grid, then you can use the multi sort icon to apply single or multi column sort to all records. Note: Multi sorting on the Advanced Grid can be a performance intensive task, if you are on a higher ‘View per Page’ such as *5000*.

Export Grid Results

Some pages in Advantage allow you to export either all records in the grid (including those on other pages of the grid) or only those selected in the grid (including those selected on other pages of the grid) to a CSV file. If this feature is enabled for a page, then the following actions may be available via the Grid Actions menu what records and columns are exported to the CSV file:

- The **Export** > **Viewable Columns** action exports only the records that are selected in the grid (including those selected on other pages of the grid). This action only exports the columns that can be viewed as a column on the grid or in the scalar section of the grid.
- The **Export All** > **Viewable Columns** action exports all records in the grid results (including those on other pages of the grid). This action only exports the columns that can be viewed as a column on the grid or in the scalar section of the grid.
- The **Export** > **Available Columns** action exports only the records that are selected in the grid (including those selected on other pages of the grid). This action exports all columns (including those fields that are not displayed on the grid or grid scalar).

- The **Export All** > **Available Columns** action exports all records in the grid results (including those on other pages of the grid). This action exports all columns (including those fields that are not displayed on the grid or grid scalar).

Warning: If a field is stored as encrypted in the Database and is used on the page, then the field's decrypted value is displayed. The decrypted value is also exported with the Available Columns and Viewable Columns actions. If a field is masked using UI Field Security, then the field is exported as masked.

The generated CSV file can be opened in Microsoft Excel through an import wizard. Refer to the "Export Grid Results to CSV" topic under Common Business Tasks for detailed instructions on how to export the results to a CSV file and how to use an import wizard to open the file in Microsoft Excel.

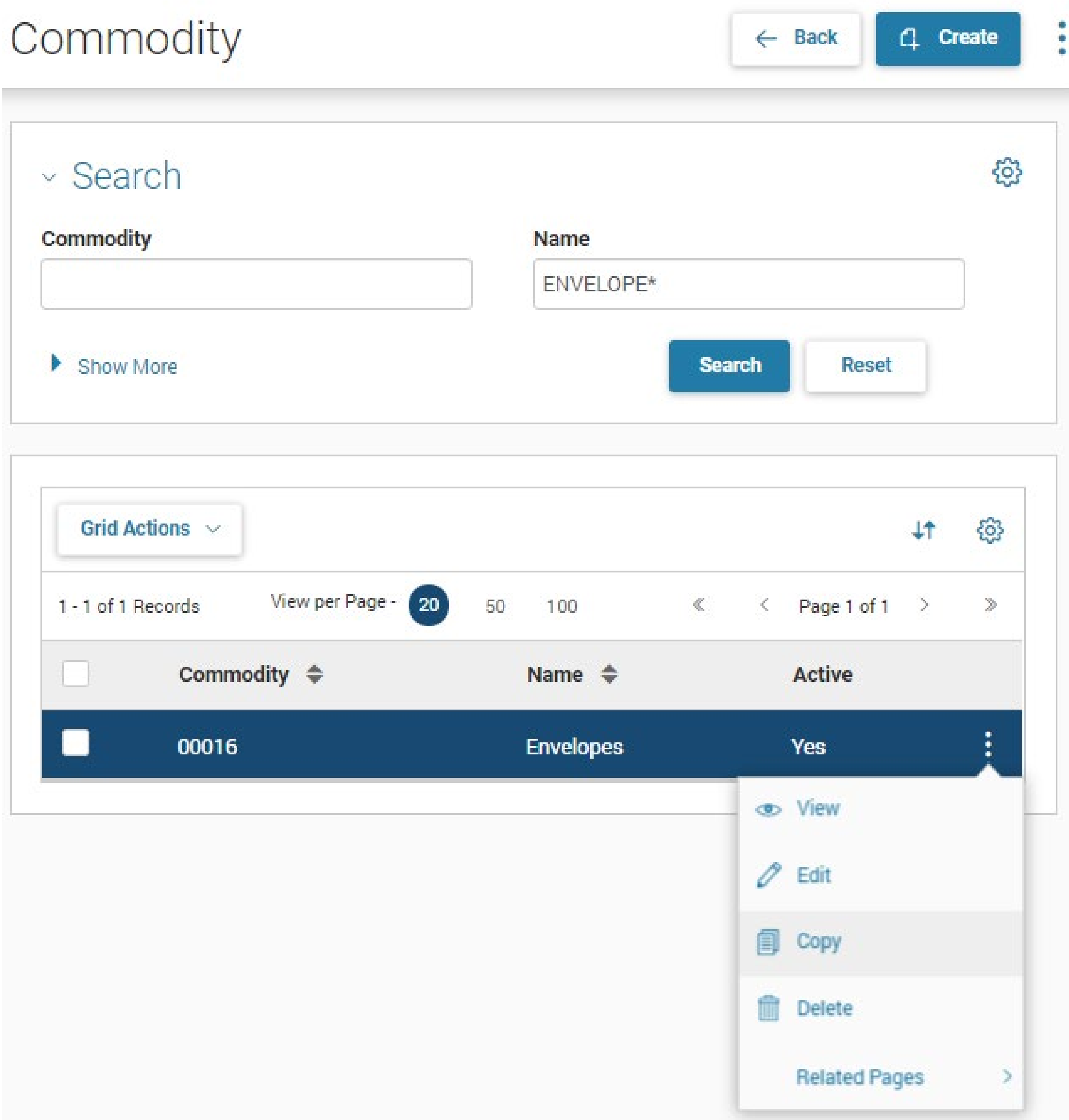
The MAX_DOWNLOAD_LINES (Max Download Lines for Download) parameter on the Application Parameters page in the Administration application sets the maximum number of lines that can be exported to the CSV file. If the total number of records exceeds this limit, then a message "Results are limited to Application Parameter value" is displayed in the generated csv file. Please narrow your search results and then select the Export option again. Please note that row and column limits are also set by Microsoft Excel and other similar products.

Note: While performing the **Export** > **Viewable Columns** and **Export All** > **Viewable Columns** actions, the CSV output from a page with a complex grid (a grid that has an internal scalar section with multiple tabs) limits the download of data only to the columns that are selected as primary columns by the user. The system does not support downloading the secondary columns from a page with a complex grid. As a solution, it is recommended to make the desired field that is currently in the scalar section as primary using the Configure Columns icon. This will display the field as a column in the grid, and can then be exported to a CSV file successfully.

A page with a simple grid (that is, a grid that has a single scalar and not multiple tabs), exports both Primary and Secondary data to CSV.

Add a Record

A record can be added to a reference page by selecting the Create button on the page or by selecting the Copy action from the row-level menu.



- The Create button creates a new blank record and transitions you to a "create" record view that allows you to enter all required information along with any optional information that you want to specify for the new record. Once all information is provided, the Save & Close button will save the new record and return you to the search and grid view for the reference page. The Save button allows you to save your work, but remains on the new record. The Cancel button will discard the new record if not saved yet. If saved, the Cancel button will return you to the main reference page.

- The Copy action copies all information from the selected record to a new record that gets created when the Copy action is selected. On the "copy" record view, you must change any key fields that must be unique for the record and you can change any other information, as needed. This action assists with creating records that have similar information, to reduce data entry time.

The same three buttons exist to save or cancel a copied record, as discussed above for creating a record.

When adding records, fields that have a red asterisk must be completed, if a value does not default. Other fields may be conditionally required that do not have the red asterisk because of other data entered on the record or based on site-specific setup.

Modify a Record

In the modification of an existing record, the user starts with searching for the record to change. When that record is found and selected (see earlier topics), the user either types the changes onto an editable grid or more likely, selects Edit from the row-level menu. The Edit action transitions the user to an "edit" mode for the record. Care should be taken not to change the key fields (those that make the record unique from all others on the page). Most pages where reference data is established have a feature activated that prevents the changing of these key fields. If allowed, the changing of such fields is effectively a deletion of an existing record and the addition of a new one.

The following actions are provided in Edit mode:

- Select **Save** to save the changes and remain in Edit mode.
- Select **Save & Close** to save the record and return to the search results view.
- Select **Cancel** to return to the search results view without saving any information. If the record has been saved, it is not discarded and you are only returned to the search results.

Delete a Record

Deletion of a record is not a common exercise for many users. The scenario starts by searching for the record to delete. When that record is found and selected (see earlier topics), the user selects the Delete action from the row-level menu or from the Grid Actions menu. Some records cannot be deleted if already used in other areas of the application. Others cannot be deleted without first starting with the deletion of child records on another page. For example, an Activity code cannot be deleted if any Sub Activity codes have been defined for it. In that case, the sub codes (children) must be deleted first before the primary code (parent).

Note: The Delete action is only activated when the records are selected and the application is ready to perform the Delete action. The number of records selected determines the time it takes until the Delete action is activated.

Attach Files to a Record

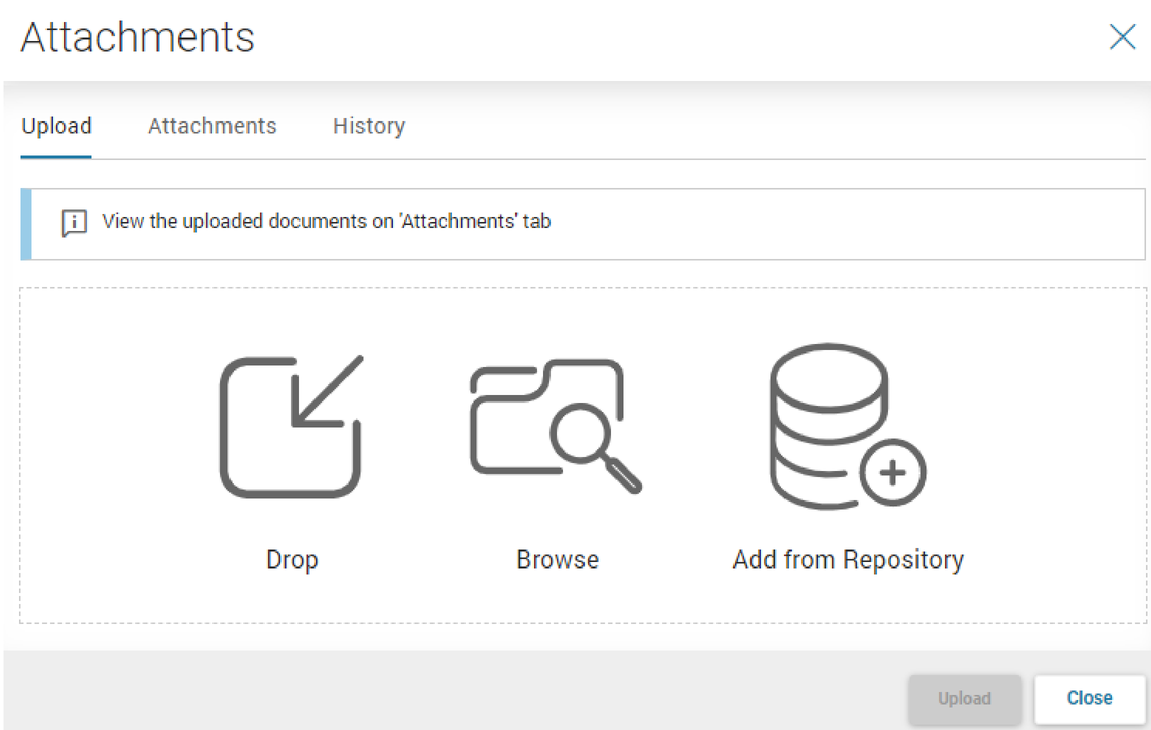
Some pages allow you to attach a file to a record. If this option has been enabled for a page and your associated Security Role ID has the Attach indication set to *true* for the associated Resource Group ID on the Access Control (SCRACS) security setup page, then attachments can be added, deleted, or viewed on both the results grid from a search and from within the meal view of record. In the grid attachment, management is facilitated by the paperclip icon. Within the meal view of a record, there is an Attachments button.

The number of existing attachments is indicated next to the paperclip icon in the grid and is indicated within the Attachment button. If the record does not have any existing attachments, then a number is not listed.

When the Attachment button is selected or the paperclip icon is selected, the Attachments window opens. The Attachments window has three tabs:

- Upload

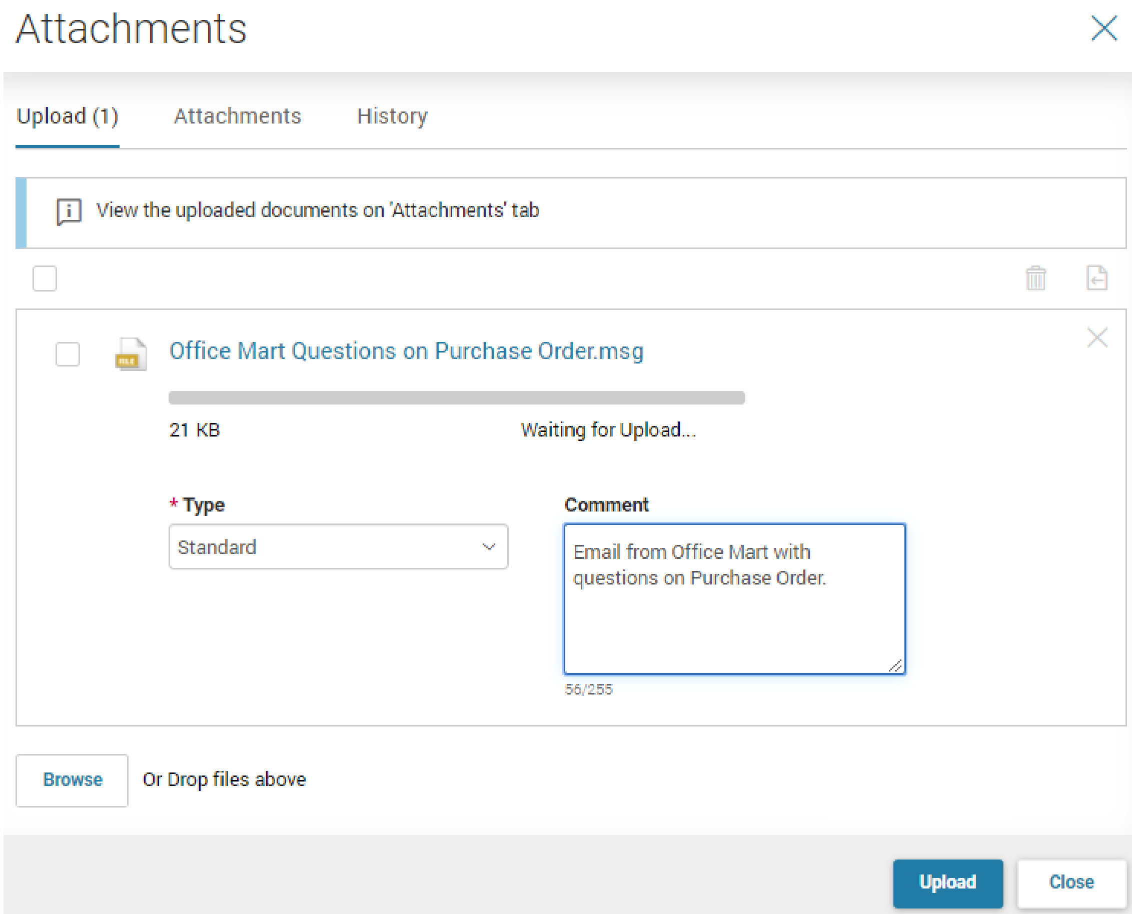
  From the Upload tab, you can upload files that you want associated with the record.



You can add records in one of three ways:

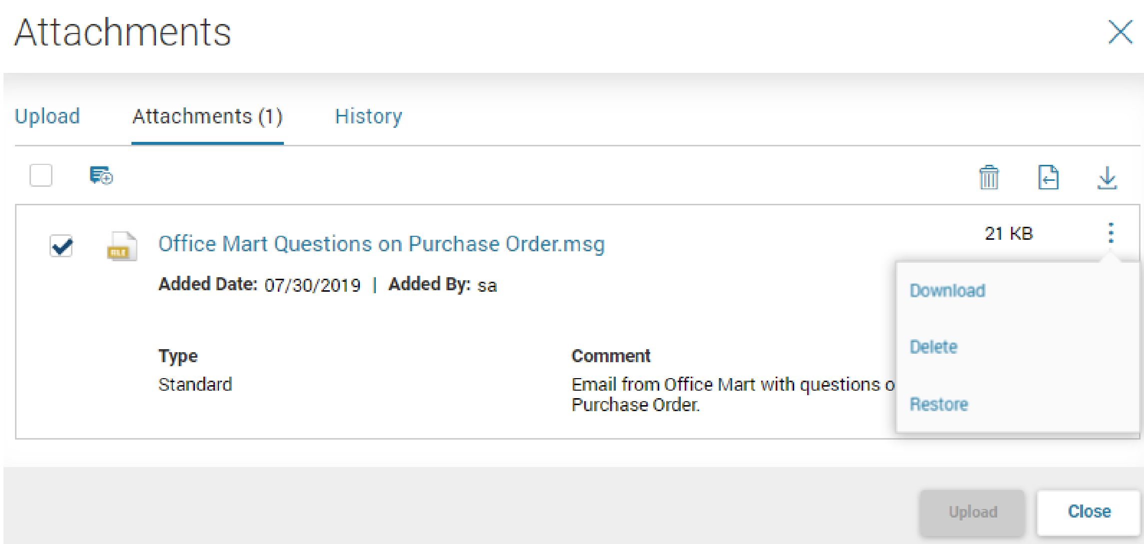
- Drop - Drag a file from your computer to the Upload tab.
- Browse - Select this option to browse your computer or other server you can access.
- Add from Repository - Select this option to select a file that is available via an Enterprise Content Management (ECM) repository.

After selecting the attachment via the Browse option or after dropping a file on the Upload tab, you must populate the Type field and you can optionally specify a Comment that describes the attachment. Select Upload to upload the file to the reference page for the selected record. Files that are successfully added can be viewed via the Attachments tab.



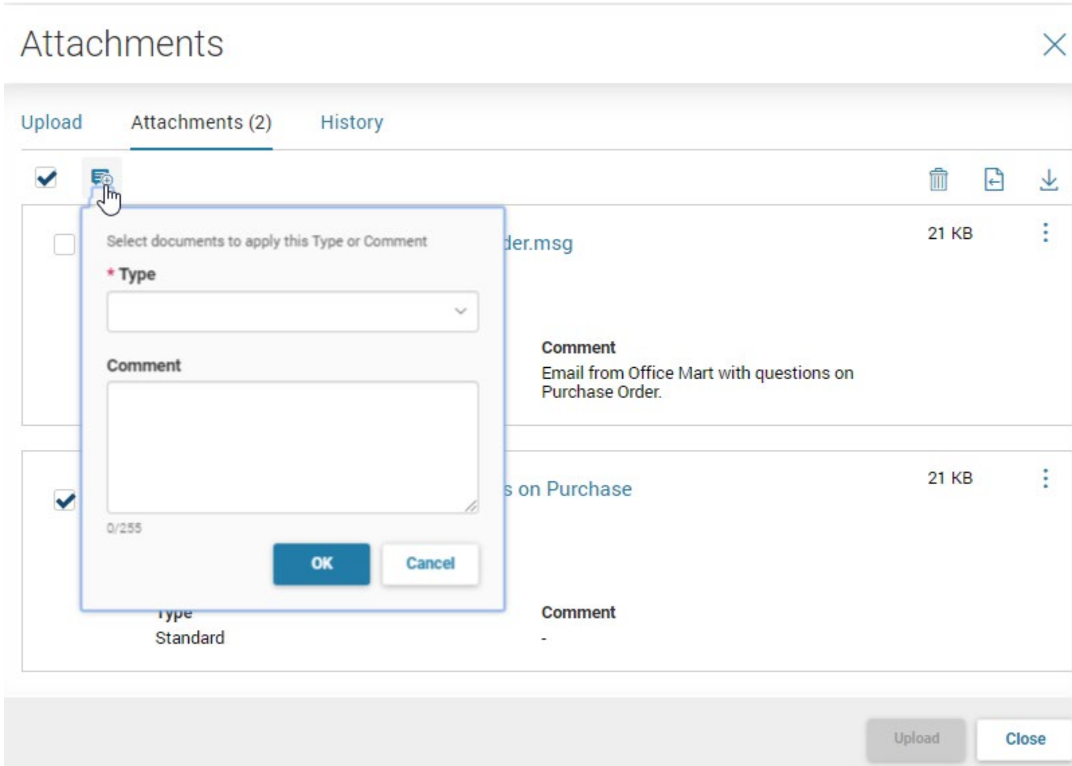
› Attachments

The Attachments tab lists all attachments associated with the selected record.



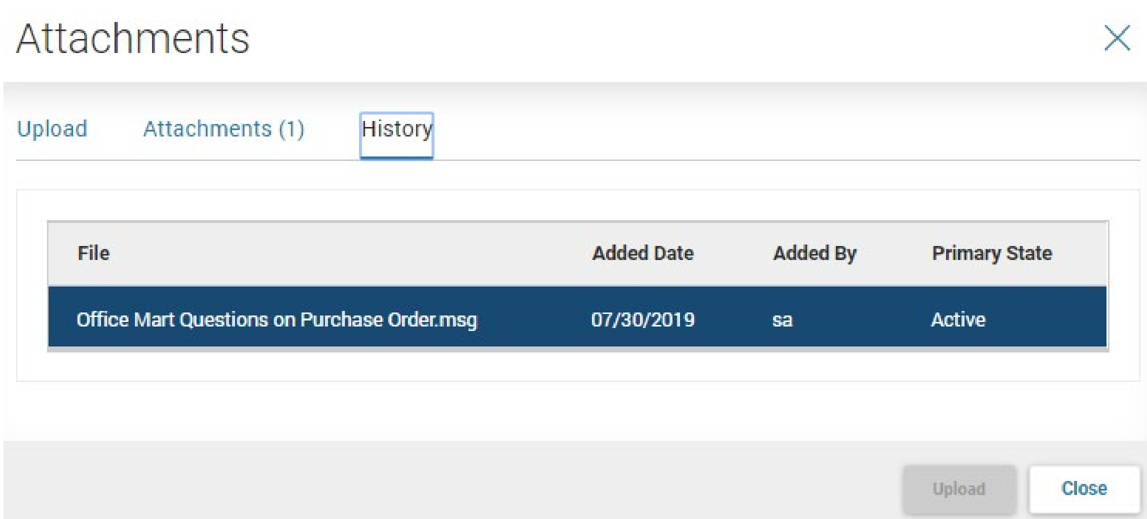
From this tab you can perform the following actions:

- View the attachment by selecting the attachment name hyperlink.
- Download the attachment by selecting the Download action from the row-level menu.
- Download all attachments listed on the Attachments tab to a zip file, by selecting the Download All icon above the attachments listing.
- Delete the attachment by selecting the Delete action from the row-level menu.
- You can restore an attachment if the upload of the attachment was cancelled before it was uploaded, by selecting the Restore action from the row-level menu. Note: The Restore function is available in the Advantage Financial, HRM, and Admin applications only.
- This tab also allows you to add a comment to an attachment or add the same comment to all selected attachments, by selecting the Add Comment Selected icon. In the following example, only one attachment was selected when the Add Comment Selected icon was selected; therefore, the values provided in the Type and Comment field will only apply to the selected attachment.



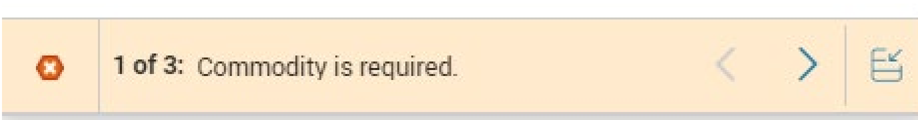
- History

  The History tab allows you to view a complete list of attachments ever associated with the selected record. This list shows the attachment file name, the User ID of the user that uploaded the attachment, and the date the attachment was added. The Primary State indicates the current status of the attachment (for example, Active or Deleted).

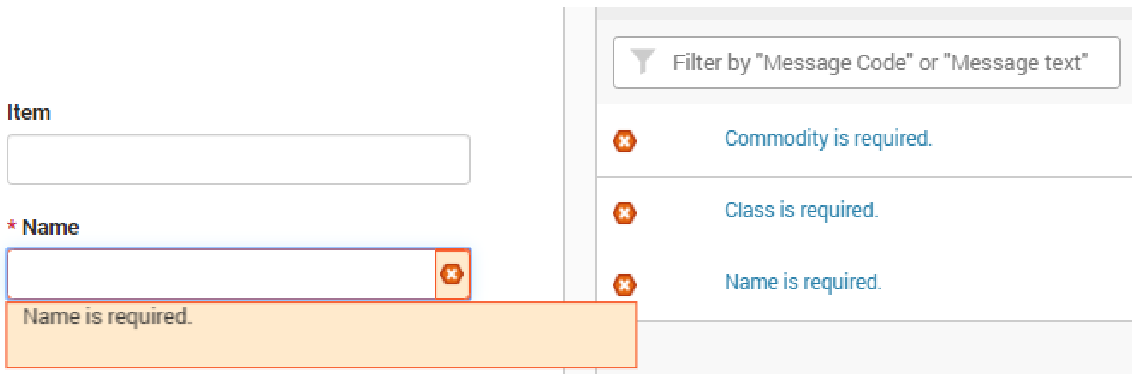


System Feedback

The primary action that can generate system feedback is when you select **Save** or **Save & Close**, invoking system edits. If the system finds any issues, it displays a message at the top of the page and it adds an icon representing the severity of the issue (*Informational, Warning,* or *Reject*) in a system feedback bar that appears at the top of the page. The short message for the issue, or the first issue if there are multiple, is displayed along with the total number of issues. For example, a “1 of 3” indicates that there are a total of three messages and the first one is displayed. You can navigate through the list of error messages by selecting the Next and Previous icons to the right.



1. Select the Show All Messages along with Details icon to the far right to view all of the error messages. You can filter the list of error messages by entering text in the Filter field.
2. If you select an error message from the error message window, then the error also appears beneath the associated field. Or you can select the error icon for the field and the error message will appear beneath the field.

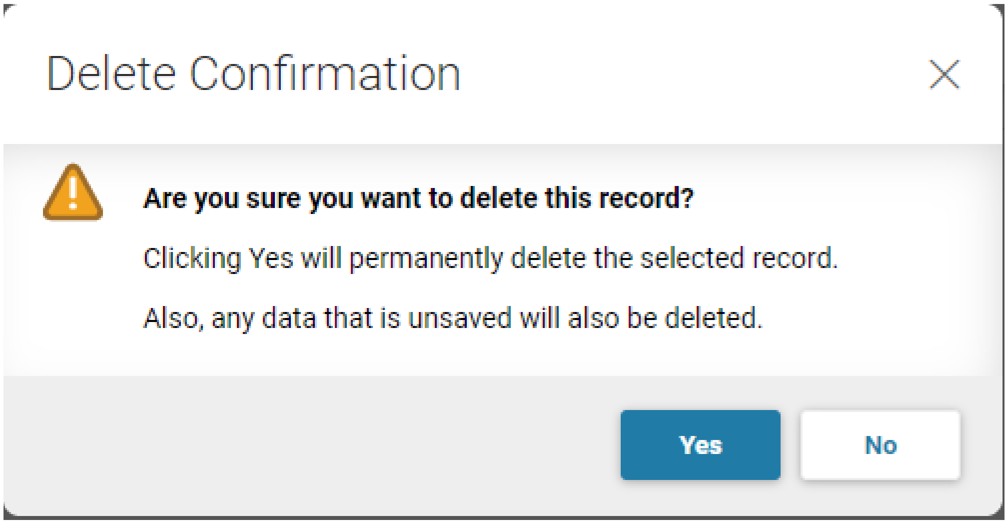


Error messages with the following severity levels and meanings can be raised during page/table record insertions, deletions, or updates:

- **Informational** - Informational messages, as the name suggests, are for informational purposes only and do not affect the determination of whether a record will be saved.
- **Error** - When error messages are encountered, the record fails to save and any updates or changes are not committed to the database.
- **Not Displayed -** When a message Severity level is set to *Not Displayed* on the Messages (MESG) page, system feedback is bypassed and not shown on the application page. This message does not affect the determination of whether a transaction will be accepted to the next phase or not. It is recommended to set this option with caution especially when the original error Severity is *Error* or *Severe*.

Overrideable and warning messages are found on transactions and are not available for page/table processing.

Less frequent system feedback occurs when the application warns that an action taken will result in the loss of data to verify that is what your intention is. This type of feedback will be issued when navigating away from a record in edit mode when a save has not occurred since the last update. Another instance is when you have chosen to delete a record, as shown below.



Configurable Inquiries

Configurable Inquiries offer a seamless integration between the Advantage application and Advantage Insight (the Advantage business intelligence solution) by providing a guided experience for users that may be unfamiliar with report development tools. Users can define their own filters, reporting columns, visualizations, and format settings with Configurable Inquiries. In addition, Configurable Inquiries provide the flexibility to save and share an inquiry with other users, as well as expand the reporting capability to users who do not have access to create and configure reports.

The CREATCI Page Code from the Global Search bar routes you to a Create Configurable Inquiry wizard page. It is also possible to navigate to the CREATCI page via an Advantage QuickLink or an Advantage Bookmark. Some of the key differentiations that Configurable Inquiries possess over Standard Inquiries are as follows:

- Ability to save and share an inquiry with users and business roles.
- Ability to apply formatting for number, date, and currency fields.
- Ability to save search, analytical view, and grid settings.
- Ability to use aggregate functions on the grid data.
- Ability to do drill-down and drill-up up to three levels on the grid data.

Refer to the following topics for more information:

- Configurable Inquiry Business View
- Create Configurable Inquiry
- Created Inquiry
- My Configurable Inquiries

Configurable Inquiry Business View

The Configurable Inquiry Business View (CIBUSVW) reference page is used to create new Business Views by Selecting fields from an existing Advantage Insight BI Model Name and BI Perspective Name.

Field Name	Field Description
BI Model Name	The Advantage Insight reporting model name to which the user is connecting for creating inquiries (for example, AP Payment Request, Personnel, Budgeting Reference Data).
BI Perspective Name	The sub-set of a BI model in which you are making an inquiry (for example, Commodity Spend Analysis Inquiry and Utility Billing are some of the Perspectives defined under the AP Payment Request model).
Business View	User specified name of Business View.

Field Name	Field Description
Minimum Filters Required	This field indicates the minimum number of searchable fields required for the specified Business View. The default value of this field is *1* but any value between 1 and the value configured in the maxSearchFieldsLimit parameter in the config_inquiry.conf file can be entered. Based on the value entered for this field, the user must select at least that number of searchable fields while creating or saving the inquiry for the specified Business View.
Business View Description	User text defining the purpose and usage of a Business View. This field provides information on why the business view was created.
Selected Fields	Displays a list of selected fields from the Insight Model and Perspective. The Add / Select Fields action on the Create and Edit page provides an option to the user to select and add fields for Business View. **Consideration while Selecting Fields** • The Perspective may contain a few technical fields (for example, fields with “Key” keyword) which are used for the Power BI repot development using the Insight model. These fields shall be ignored while creating a Business View.

Create Configurable Inquiry

This section assumes that Configurable Inquiry Business Views have been created and are ready to use.

- **Inquiry Information** – Within the Create Configurable Inquiry wizard page, you first select the Business View and provide a name and description. Select the **Continue** button to continue to the next step in the wizard.
- **Define Columns** – In this step, select columns from the Business View that you want to appear on the inquiry. Using the arrow buttons, users can add or remove columns from the Available Columns panel to the Select Columns panel. It is also possible to change the order of the columns.
    - Site wide default values for the minimum and maximum number of columns are determined by the config_inquiry.conf file. Refer to the “Create a Configurable Inquiry Business View” and “Configuration Setup” topics in the *CGI Advantage System Administration Guide* for more information.
- **Define Filters** – Similar to the define columns step, this step allows you to select columns from the Business View that you want to filter on. Using the arrow buttons, users can add or remove columns from the Available Columns panel to the Select Columns panel. It is also possible to change the order of the columns. The Populate From Selected Columns will evaluate the columns identified in the Define Column step and pre-populate the Select Filters panel. Note, not all columns are filterable.

- Note that the minimum number of filters per Business View is configured while creating a new Business View record.
- Site wide default values for the minimum and maximum number of columns are determined by the config_inquiry.conf file. Refer to the "Create a Configurable Inquiry Business View" and "Configuration Setup" topics in the *CGI Advantage System Administration Guide* for more information.

- **Chart Settings** – This is an optional step that allows users to configure a visualization for the Configurable Inquiry. Typically, the X-Axis is set to a dimension/attribute column and the Y-Axis is set to a measure/amount column.
- **Format Settings** – The format settings such as the number of decimal places, date format, and currency format are establish here.
- **Preview** - After populating all required information, select **Save** and then select the **Execute Inquiry** button to transition to the created inquiry. A Configurable Inquiry must be saved, prior to execution.

Refer to the "Created Inquiry" topic for information on using/modifying the created inquiry. A configurable inquiry that is saved can later be modified by opening the inquiry from the My Configurable Inquiries page. On the My Configurable Inquiries page, click the inquiry name hyperlink. Once the inquiry is opened, you can execute, modify, and save the inquiry.

Created Inquiry

The created inquiry is accessed after selecting the **Execute Inquiry** button on the Create Configurable Inquiry wizard page. The created inquiry can also be accessed by selecting the hyperlink in the Inquiry Name column on the My Configurable Inquiries (CIMYINQ) page. From the created inquiry page, you can make changes to the filters (must meet restrictions established on the Configurable Inquiry Business View page and in the config_inquiry.conf file), modify the format for selected fields, save the inquiry, and execute the inquiry. You can also share the inquiry and make a copy of the inquiry. Refer to the "Create a Configurable Inquiry Business View" and "Configuration Setup" topics in the *CGI Advantage System Administration Guide* for more information.

You must provide the desired values for required filters, then upon clicking the **Apply** button, the grid will display the desired results. The inquiry can be saved by clicking the **Save As** button. In order to generate the visualization, navigate to the Analytical View section and click the **Generate** button.

- Page Level Actions
  - **Print Page** – This action can be used to send the page results to a printer.
  - **Format Fields** – This action is used to redefine the number, date, and currency data type fields.
  - **Share** – This action provides the ability to share an inquiry to other business users and roles. Alerts will be sent to those users to notify them of the shared inquiry.
  - **Copy** – This action allows the user to copy a saved inquiry in order to create a new inquiry. The user must save the new inquiry by clicking on the **Save As** button.
  - **My Inquiries** – This action allows users to navigate back to the My Inquiries page.
- Page Specific Actions (in the Filter section)

- **Manage Fields** – Selecting this grid icon allows you to re-define the filters of the Configurable Inquiry.
- **Configure Search Criteria** – Selecting this gear icon allows you to configure which fields should be displayed as search filters.

› Grid Level Actions

- **Advanced Grid** – Refer to the Advanced Grid topic of this document for details on this feature.
- **Manage Aggregations** – Selecting this grid icon allows you to define aggregation for columns available on the grid. The system supports all allowed aggregation types (Average, Maximum, Minimum, Sum, Median, and Count) for numeric data type fields and Count aggregation type for other data type fields.
- **Drilldown** – This action allows you to see information at three different levels of granularity. Once you activate the switch, drill-down is applied to the first three non-measure (Varchar, Character, Date, Boolean, String, and so forth) columns of the grid. The breadcrumb component, available just above the grid, can be used for moving up drill levels. While drill-down is in effect, some of the actions (such as Search, Manage Filters, Manage Fields, Manage Aggregations, and so forth) will be disabled. These actions will be enabled once the drill-down is deactivated.
- **Standard Grid** – This action is only available in drilldown mode. The icon will toggle back to standard grid view and deactivates the drill-down mode.
- **Sort All Records –** This action allows users to sort the standard grid by three columns.
- **Personalize your columns** – Selecting this grid icon allows you to re-define the result columns of the Configurable Inquiry.

Best Practices

- Apply Aggregation to Amount fields using the Manage Aggregations feature for executed inquiries for seeing the summarized result.
- Avoid having fields with Transaction level granularity (for example, Transaction ID, Accounting Line, and so forth) in the inquiry because it will fetch a huge number of records that makes it difficult to navigate to the required information and it is not performance friendly.
- Use the Drill Down feature to effectively navigate from summary to detail level of information especially for situations that needs transaction header and line information (for example, Transaction ID, Accounting, Commodity Line, and so forth) in the inquiry.

Limitations

- Sites will only see CI compatible models in the BI Model Name pick of the Create Business View (CIBUSVW) page. These models are preconfigured in config_inquiry.conf.
- The InMemory models (suffixed as InMemory in the Model name) supports only the data that has been loaded into memory. Typically, this is the last three Fiscal Years of data and can be referred

to as “Hot” data. Please refer to the “Special Considerations and Reporting Tips” section in the CGI_Advantage_Insight_4_Semantic_Model_Guide.pdf for a better understanding and details about the InMemory models.

- The Available Fields in the Define Filters section shows only indexed fields (Amount fields are exception). This is to ensure optimal performance of the inquiry. Site defined indexed fields are not supported and will not appear under the Define Filters section.
- The Field Level description information is not available for the Configurable Inquiry pages because the description information available to the system are Advantage Insight field names and not the Advantage database field names.
- The Power BI query execution time and record count limit apply for Inquiry queries. The default limit is 1 Mn records but can be configured for the site. This parameter is configured on the Power BI services.
- There is a system level control to timeout long running queries after two minutes. In this situation, the recommended option is to provide more filters to the inquiry.
- Search values are case sensitive.

Capabilities

- Number field filters support the use of conditional operators such as Less than (<), Greater than (>), Less than or equal to (<=), Greater than or equal to (>=), Number range (:).
- Varchar field filters support wildcard searching using the asterisk (*) symbol. For example, if 01* is entered, the system will return records 0100 to 0199 and any records that have letters or symbols after 01.
- By default, configurable inquiry grids are sorted based on rank placement of sortable fields from left to right on the grid.
- In addition, a user has an ability to apply single sort or multiple column sort. This setting overrides default sort by the system and is retained during the Save inquiry option. If a change happens on the grid, such as add/remove columns or re-ordering via the user actions such as Manage Columns, Personalized Columns, Aggregation and so forth, the system switches to the default sort mode.

My Configurable Inquiries

This page works as a repository for all saved inquiries that are created by you or shared with you by other users. An inquiry can be accessed by clicking the hyperlink displayed in the Inquiry Name column in the grid, and subsequently other desired actions can be performed by a user. As an alternative, the user can access these inquiries from the My Inquiries widget on the user’s home page. Refer to the “Created Inquiry” topic for information on using/modifying the created inquiry.

› Row Level and Grid Actions

  - Delete – This action removes the inquiry from the system and from the My Inquiries page. This action is only allowed for the creator of the inquiry.

- Share – This action is used to share an inquiry to business users and/or roles. A user can only share the inquiries created by that user.

Common Business Tasks

The following common business tasks can be accomplished on a variety of pages. To demonstrate many of the features mentioned in the prior tabs, the following tasks will use several different pages with reference data.

- Export Grid Results to CSV
- Export Grid Results to Spreadsheet

Export Grid Results to CSV

Various pages and transactions in Advantage that contain grids may also contain Export actions that allows you to download records in the grid to a CSV file. Refer to the "Export Grid Results" topic for additional information and an important warning regarding encrypted fields.

To export records in the grid, follow these steps:

1. Select **Grid Actions** and then choose one of the following actions based on the desired result:
    a. **Export All** > **Viewable Columns** to export all records in the grid and only the columns that can be viewed on the grid (including grid scalar fields).
    b. **Export All** > **Available Columns** to export all records in the grid including all columns (that is, those fields that are not displayed on the grid or grid scalar).
    c. **Export** > **Viewable Columns** to export only the records that are selected in the grid (including those records selected on other pages of the grid). This action only exports the columns that can be viewed on the grid (including grid scalar fields).
    d. **Export** > **Available Columns** to export only the records that are selected in the grid (including those records selected on other pages of the grid). This action exports all columns (including those fields that are not displayed on the grid or grid scalar).
2. Follow the prompts to save the csv file to your computer.
3. From the Data section in Microsoft Excel, select the From Text icon.
4. Select the .csv file you downloaded from Advantage and click Import.
5. Select the *Delimited* radio button as the Original data type on Step 1 of the Text Import Wizard.
6. Select the *Comma* check box for Delimiters on Step 2 of the Text Import Wizard.
7. On Step 3 of the Text Import Wizard, *General* is automatically selected as the default Column data format. You must select each column and choose *Text* instead of *General* for the Column data format. Otherwise, values such as 020 for the Dept will appear as 20 in the excel file.
8. Select Finish.
9. On the Import Data window, select New worksheet, and then select OK.
10. Based on the export actions selected in Step 1, the records and columns are displayed in the new Microsoft Excel Worksheet. Select **File** > **Save As** to save your excel file.

The MAX_DOWNLOAD_LINES (Max Download Lines for Download) parameter on the Application Parameters page in the Administration application sets the maximum number of lines that can be exported to the CSV file. If the total number of records exceeds this limit, then a message “Results are limited to Application Parameter value” is displayed in the generated csv file. Please narrow your search results and then select the Export option again. Please note that row and column limits are also set by Microsoft Excel and other similar products.

Note: While performing the **Export** > **Viewable Columns** and **Export All** > **Viewable Columns** actions, the CSV output from a page with a complex grid (a grid that has an internal scalar section with multiple tabs) limits the download of data only to the columns that are selected as primary columns by the user. The system does not support downloading the secondary columns from a page with a complex grid. As a solution, it is recommended to make the desired field that is currently in the scalar section as primary using the Configure Columns icon. This will display the field as a column in the grid and can then be exported to a CSV file successfully.

A page with a simple grid (that is, a grid that has a single scalar and not multiple tabs), exports both Primary and Secondary data to CSV.

Export Grid Results to Spreadsheet

In addition to the option that allows you to export grid results to a CSV file, Advantage allows you to export grid results to a spreadsheet using a pre-defined excel template. This feature comes handy if you want quick reports from a page that stores different types of data.

For example, on a page such as Fixed Asset Registry in Advantage Financial, someone wants a quick report from the page (one for vehicles and another one for buildings). The Export to CSV action gets all fields that belong to different types of data shown on the page. Alternatively, you can build templates applicable to each unique type of asset with relevant information, and then use the Spreadsheet option and choose the corresponding template to download filtered search results to a spreadsheet.

Although the Spreadsheet action is available on all Advantage grids, it is hidden by default. You need to activate the action using a file-based extension on an application page to use the functionality.

Advantage allows you to specify the Excel template for download in the following ways:

1. **Using application metadata:** In this approach, you can set download template name and download file name via the Spreadsheet action when activated for a specific grid. This option allows a single template per grid.
2. **Using Reference Page:** In this approach, excel template details for an application page are added on the Grid Download Template (PDTPL) page and metadata values not populated on the action. Refer to the “Grid Download Template Setup” topic in *CGI Advantage System Administration Guide* for more information.
3. If template details are added in the metadata and on the reference page, the system uses setup defined on the reference page ignoring metadata values. This is the recommended approach and allows multiple download templates for the same grid to download unique types of data.
4. If the Spreadsheet action is used without specifying a template using either of the options, the system uses a default template style for the downloaded spreadsheet file.

To export records in the grid to a spreadsheet using reference page configuration, follow these steps:

1. Define excel template.

   a. Prior to configuring an Excel template using available options in Advantage, the System Administrator must create the template as per site needs.
   b. Save the file in the required version of XLSX. If the excel template contains macros, save it as an .XLSM file.
   c. After finalizing the template, the System Administrator must place the template in the reserved directory location on the server.
   d. The directory location (that is, path) of the templates is specified in the **server.conf** file. The templates are placed under a sub-directory named exactly same as the UI Package value defined for the application page on the Application Page Registration (APGS) page.
   e. Here is an example:

      Template name created: Fixed_Asset_Vehicles.xlsx

      Page Code: FARHDR

      UI package for Page code FARHDR: Fixed_Asset

      Directory location on server.conf file: pageResourcePath = apps/CGIADV/RTFiles/fin/PageResources

   In the above example, template Fixed_Asset_Vehicles.xlsx must be placed under: apps/CGIADV/RTFiles/fin/PageResources/Fixed_Asset folder on the server.

2. Once a template is uploaded on the server, an entry must be made on the Grid Download Template (PDTPL) page.
3. You can define multiple templates for the same page to download unique types of data stored in the grid.
4. Navigate to the application page for which the template(s) is configured for and select the following from **Grid Actions**.
   a. **Export All > Spreadsheet** to export all records in the grid using a template including rows displayed behind the pagination.
5. On selecting the action, the user is navigated to the Grid Templates selection page.
6. Select a desired template record in the grid and then select the **Generate File** row action.
7. Grid results are downloaded to the default download location on the local computer using the template selected. The downloaded file is named exactly as the download file name is specified on the selected record.

The MAX_DOWNLOAD_LINES (Max Download Lines for Download) parameter on the Application Parameters (APPCTRL) page sets the maximum number of lines that can be exported to the spreadsheet. If the total number of records exceed this limit, then a message (“Results are limited to Application Parameter value”) is displayed in the generated spreadsheet file. Narrow your search results and then select the Export All > Spreadsheet option again. Note that row and column limits are also set by Microsoft Excel and other similar products.

