

Advantage 3.11- On Demand Training

Class Title: How to Access Help Features in Advantage 3.11

Creation Date: 02/23/2018

Revised Date:

Goal & Objectives

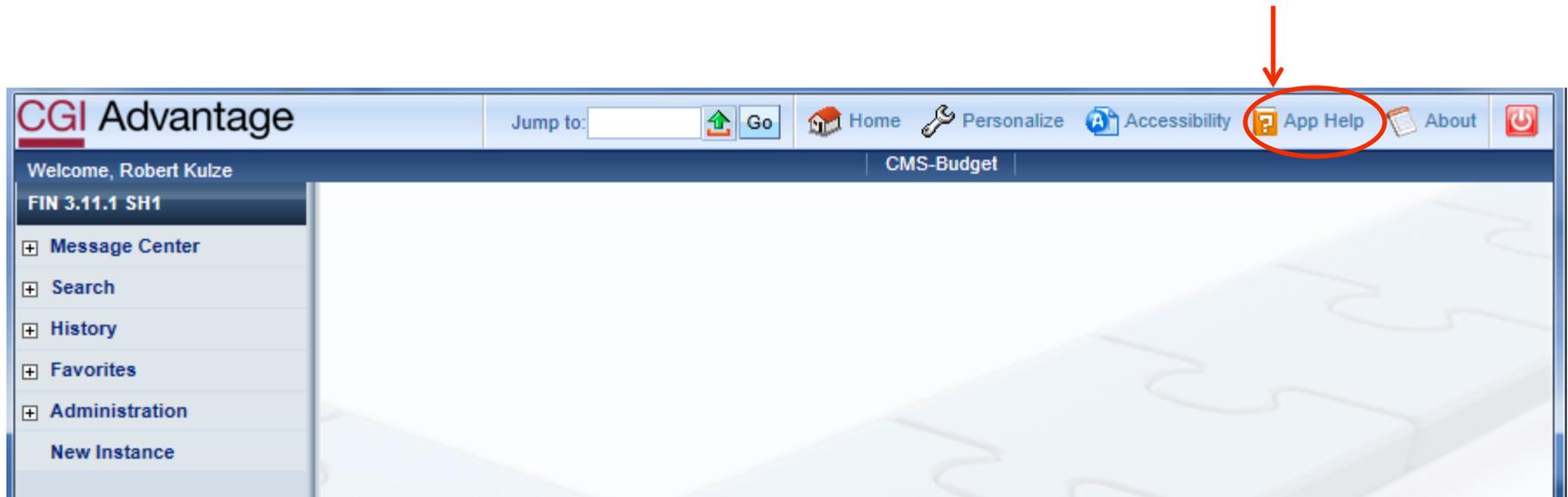
Goal: After taking this class, students will know how to access help features in Advantage 3.11.

Objectives:

- Show students how to access App Help in FIN and HRM
- Show students how to access User Guides in FIN and HRM
- Show students how to access Page Help in FIN and HRM
- Show students how to access the User Guide in ESS
- Show students how to search for Help in ESS
- Show students how to access the User Guide in PB
- Show students how to access the User Guide in infoAdv

How to Access App Help in FIN and HRM

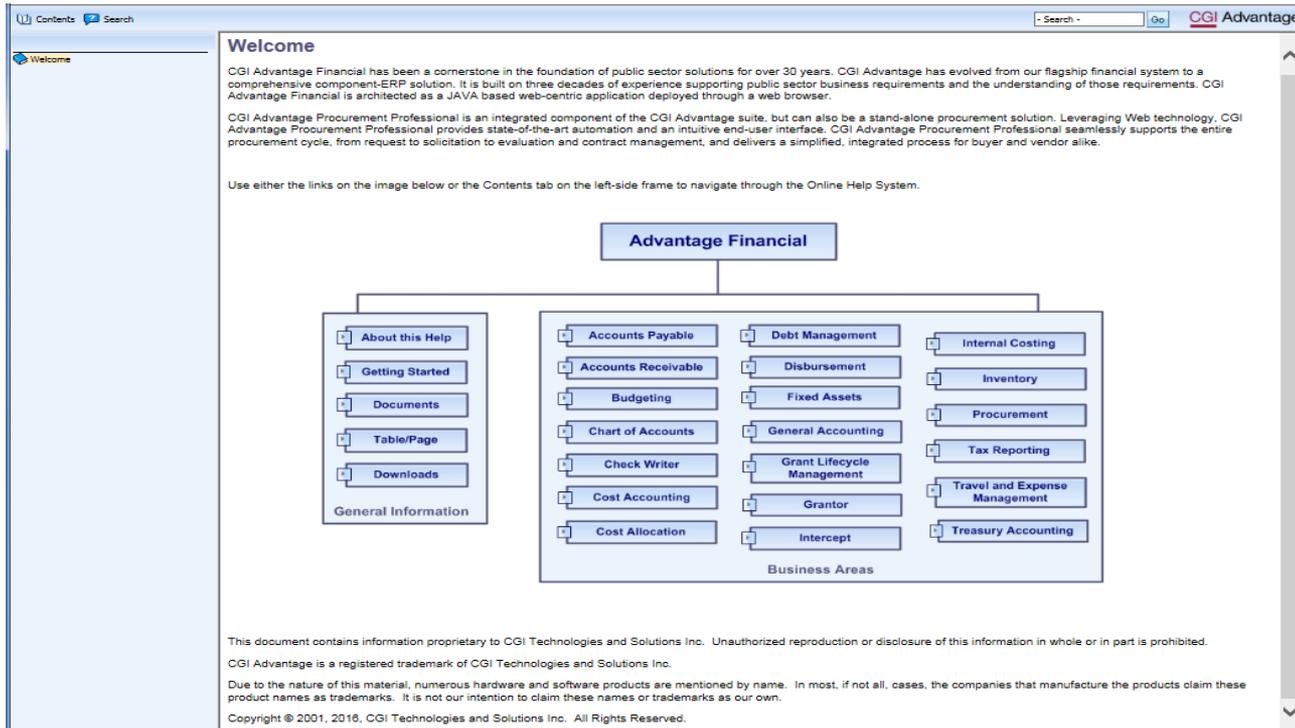
The **App Help** button is a very powerful search tool in the FIN and HRM systems.



How to Access App Help in FIN and HRM

After selecting **App Help**, a separate window will appear.

NOTE: *The **App Help** feature will have the same structure for FIN and HRM, but DIFFERENT functional area topics.*



Contents Search

Welcome

CGI Advantage

Welcome

CGI Advantage Financial has been a cornerstone in the foundation of public sector solutions for over 30 years. CGI Advantage has evolved from our flagship financial system to a comprehensive component-ERP solution. It is built on three decades of experience supporting public sector business requirements and the understanding of those requirements. CGI Advantage Financial is architected as a JAVA based web-centric application deployed through a web browser.

CGI Advantage Procurement Professional is an integrated component of the CGI Advantage suite, but can also be a stand-alone procurement solution. Leveraging Web technology, CGI Advantage Procurement Professional provides state-of-the-art automation and an intuitive end-user interface. CGI Advantage Procurement Professional seamlessly supports the entire procurement cycle, from request to solicitation to evaluation and contract management, and delivers a simplified, integrated process for buyer and vendor alike.

Use either the links on the image below or the Contents tab on the left-side frame to navigate through the Online Help System.

Advantage Financial

- General Information
 - About this Help
 - Getting Started
 - Documents
 - Table/Page
 - Downloads
- Business Areas
 - Accounts Payable
 - Accounts Receivable
 - Budgeting
 - Chart of Accounts
 - Check Writer
 - Cost Accounting
 - Cost Allocation
 - Debt Management
 - Disbursement
 - Fixed Assets
 - General Accounting
 - Grant Lifecycle Management
 - Grantor
 - Intercept
 - Internal Costing
 - Inventory
 - Procurement
 - Tax Reporting
 - Travel and Expense Management
 - Treasury Accounting

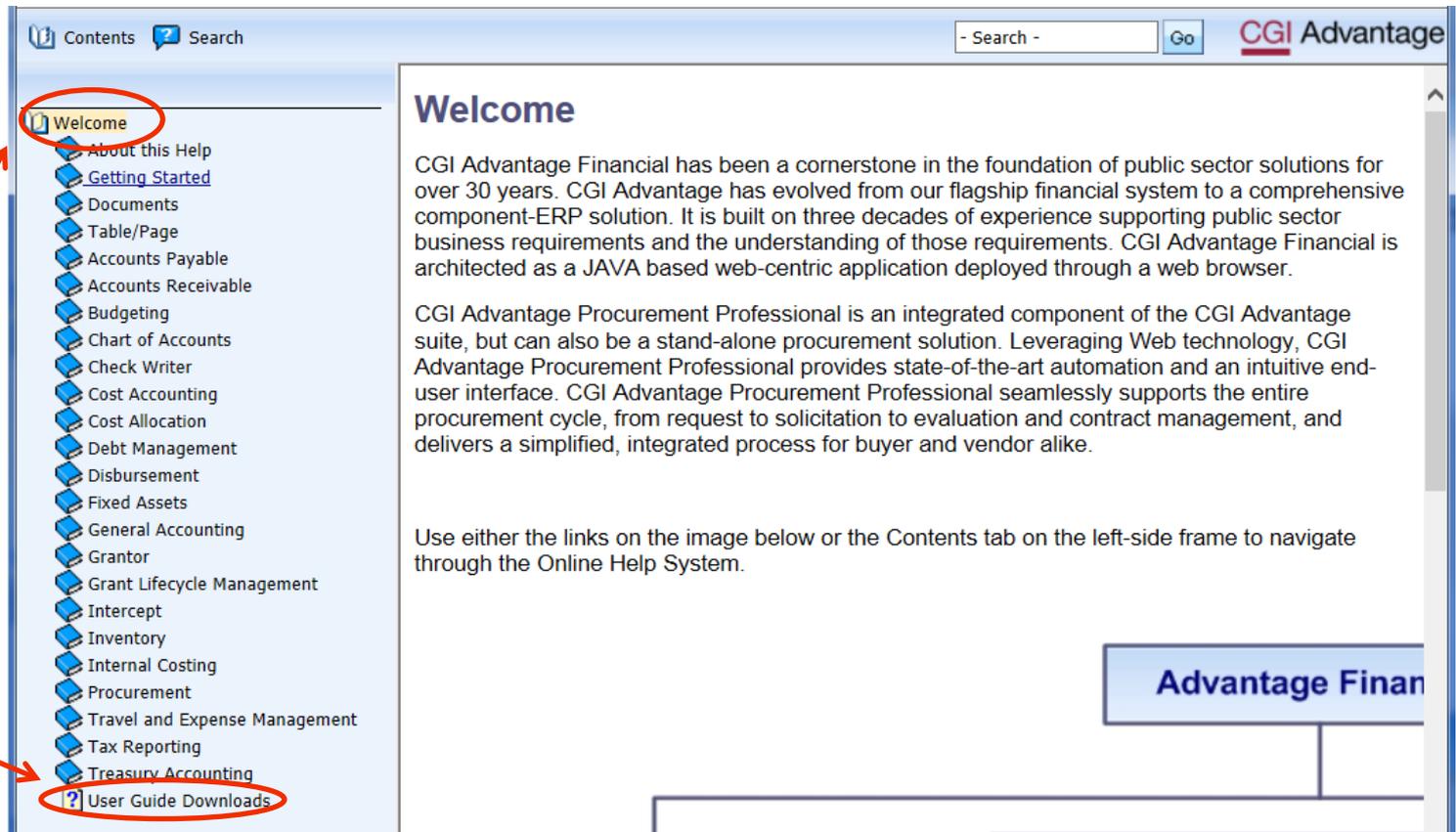
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Due to the nature of this material, numerous hardware and software products are mentioned by name. In most, if not all, cases, the companies that manufacture the products claim these product names as trademarks. It is not our intention to claim these names or trademarks as our own.

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How to access User Guides in FIN and HRM

Within the **App Help** window, select the **Welcome** hyperlink to expand the table of contents. At the bottom of the table, select the **User Guide Downloads** link.



The screenshot shows the CGI Advantage Financial help system interface. The left sidebar contains a table of contents with the following items:

- Welcome
- About this Help
- Getting Started
- Documents
- Table/Page
- Accounts Payable
- Accounts Receivable
- Budgeting
- Chart of Accounts
- Check Writer
- Cost Accounting
- Cost Allocation
- Debt Management
- Disbursement
- Fixed Assets
- General Accounting
- Grantor
- Grant Lifecycle Management
- Intercept
- Inventory
- Internal Costing
- Procurement
- Travel and Expense Management
- Tax Reporting
- Treasury Accounting
- User Guide Downloads

The main content area displays a "Welcome" message:

Welcome

CGI Advantage Financial has been a cornerstone in the foundation of public sector solutions for over 30 years. CGI Advantage has evolved from our flagship financial system to a comprehensive component-ERP solution. It is built on three decades of experience supporting public sector business requirements and the understanding of those requirements. CGI Advantage Financial is architected as a JAVA based web-centric application deployed through a web browser.

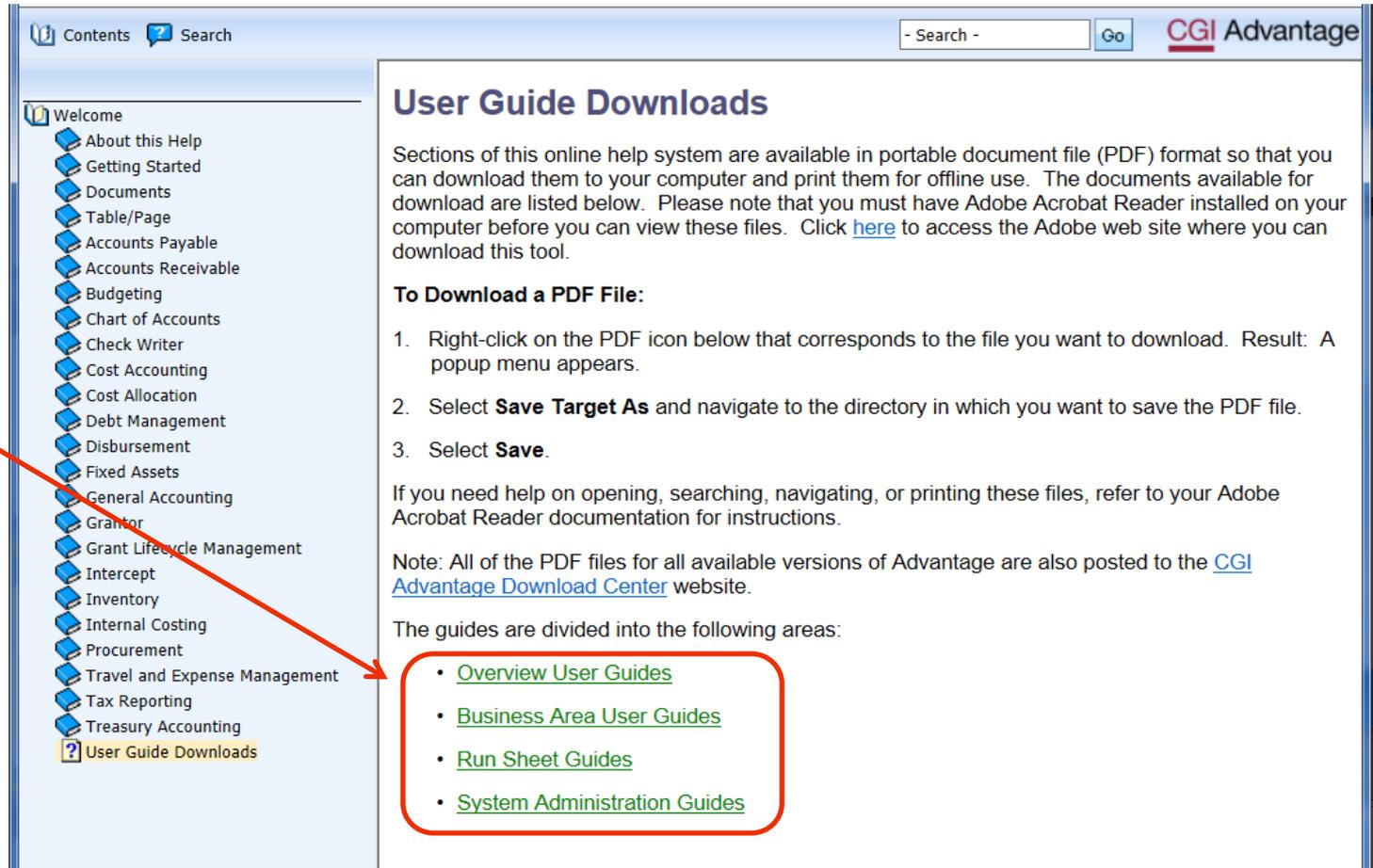
CGI Advantage Procurement Professional is an integrated component of the CGI Advantage suite, but can also be a stand-alone procurement solution. Leveraging Web technology, CGI Advantage Procurement Professional provides state-of-the-art automation and an intuitive end-user interface. CGI Advantage Procurement Professional seamlessly supports the entire procurement cycle, from request to solicitation to evaluation and contract management, and delivers a simplified, integrated process for buyer and vendor alike.

Use either the links on the image below or the Contents tab on the left-side frame to navigate through the Online Help System.

Advantage Finan

How to access User Guides in FIN and HRM

Once within the **User Guide Downloads** section, you will see four functional areas that contain PDF user guide documentation.



Contents Search - Search - Go CGI Advantage

User Guide Downloads

Sections of this online help system are available in portable document file (PDF) format so that you can download them to your computer and print them for offline use. The documents available for download are listed below. Please note that you must have Adobe Acrobat Reader installed on your computer before you can view these files. Click [here](#) to access the Adobe web site where you can download this tool.

To Download a PDF File:

1. Right-click on the PDF icon below that corresponds to the file you want to download. Result: A popup menu appears.
2. Select **Save Target As** and navigate to the directory in which you want to save the PDF file.
3. Select **Save**.

If you need help on opening, searching, navigating, or printing these files, refer to your Adobe Acrobat Reader documentation for instructions.

Note: All of the PDF files for all available versions of Advantage are also posted to the [CGI Advantage Download Center](#) website.

The guides are divided into the following areas:

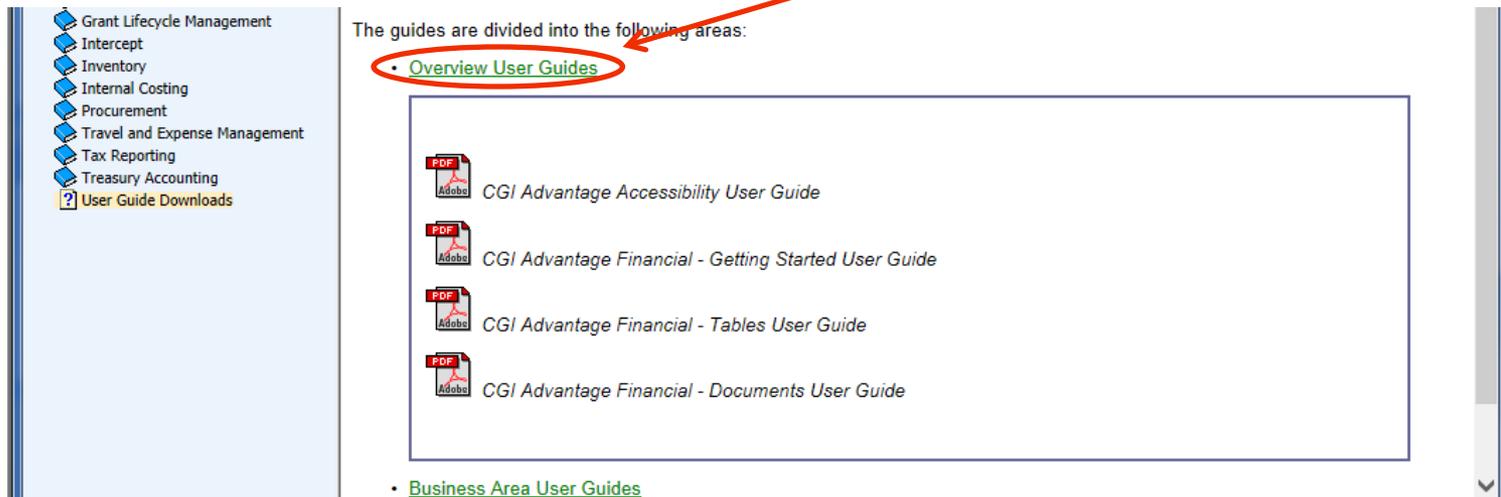
- [Overview User Guides](#)
- [Business Area User Guides](#)
- [Run Sheet Guides](#)
- [System Administration Guides](#)

Navigation menu (left sidebar):

- Welcome
- About this Help
- Getting Started
- Documents
- Table/Page
- Accounts Payable
- Accounts Receivable
- Budgeting
- Chart of Accounts
- Check Writer
- Cost Accounting
- Cost Allocation
- Debt Management
- Disbursement
- Fixed Assets
- General Accounting
- Grantor
- Grant Lifecycle Management
- Intercept
- Inventory
- Internal Costing
- Procurement
- Travel and Expense Management
- Tax Reporting
- Treasury Accounting
- User Guide Downloads**

How to access User Guides in FIN and HRM

The user guides within each function area may be accessed by clicking on the **User Guides** link for that functional area.



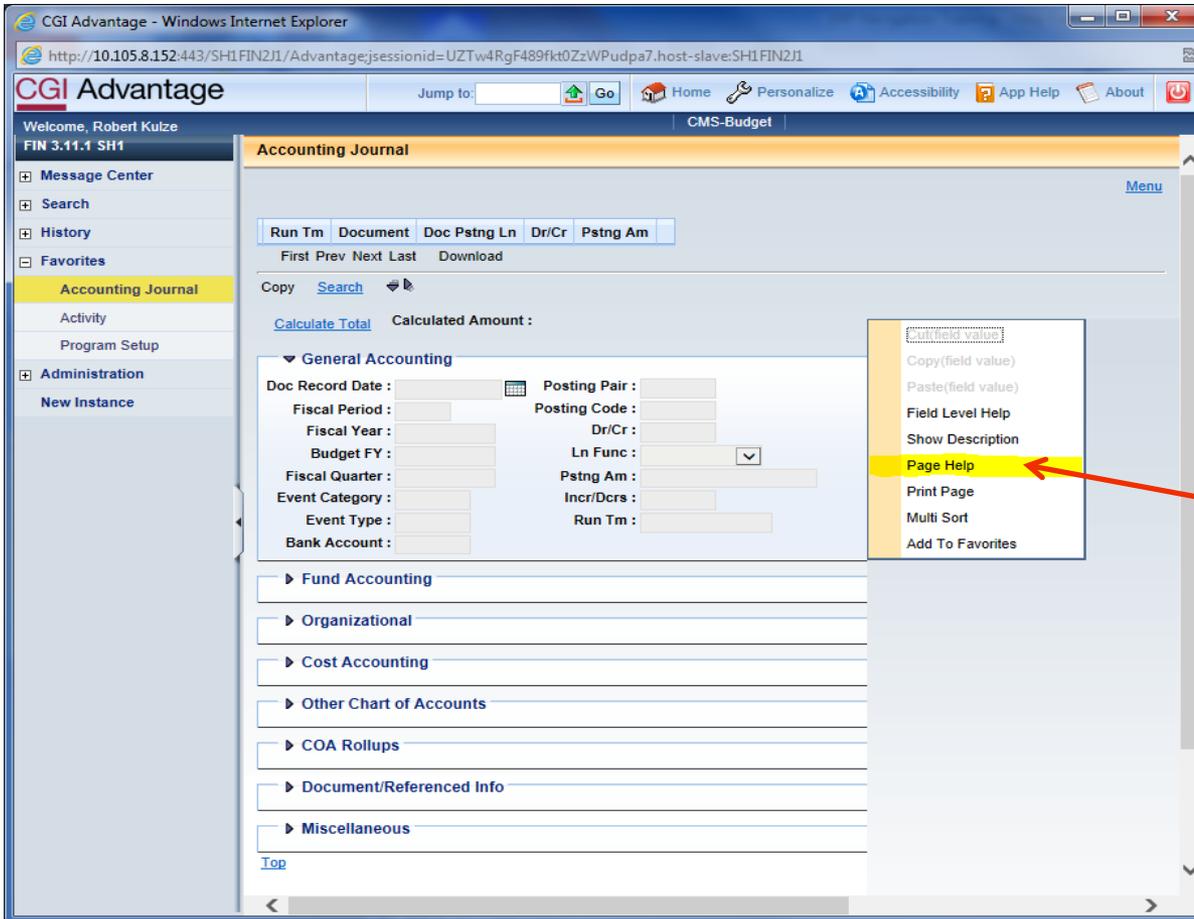
The guides are divided into the following areas:

- [Overview User Guides](#)

-  *CGI Advantage Accessibility User Guide*
-  *CGI Advantage Financial - Getting Started User Guide*
-  *CGI Advantage Financial - Tables User Guide*
-  *CGI Advantage Financial - Documents User Guide*

- [Business Area User Guides](#)

How to access Page Help in FIN and HRM

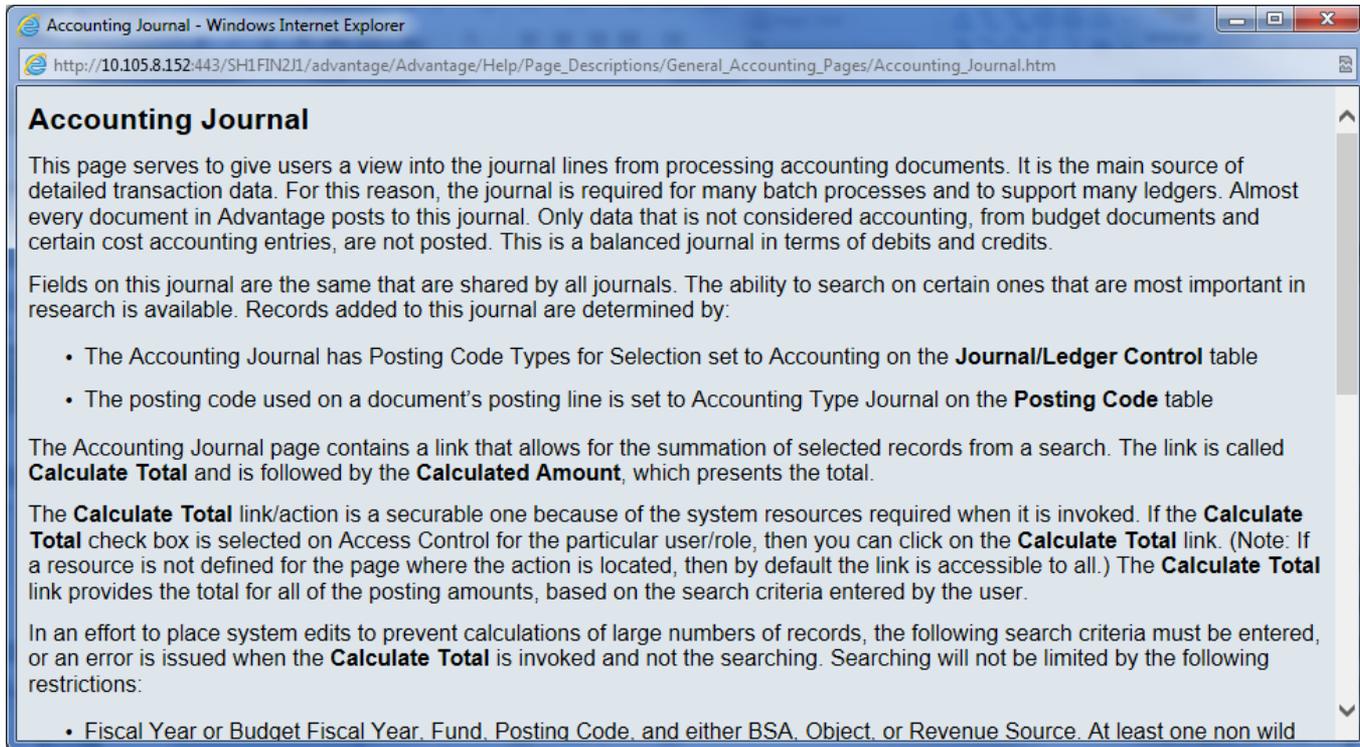


The screenshot shows the CGI Advantage web application interface. The browser window title is "CGI Advantage - Windows Internet Explorer". The address bar shows the URL: <http://10.105.8.152:443/SH1FIN2J1/Advantage;jsessionid=UZTw4RgF489ft0ZzWPudpa7.host-slave:SH1FIN2J1>. The page title is "CGI Advantage". The user is logged in as "Welcome, Robert Kulze" and the current page is "Accounting Journal". The left sidebar contains navigation options: Message Center, Search, History, Favorites, Accounting Journal (selected), Activity, Program Setup, Administration, and New Instance. The main content area displays the "Accounting Journal" page with a table header: "Run Tm | Document | Doc Pstng Ln | Dr/Cr | Pstng Am". Below the header are navigation buttons: "First Prev Next Last Download". There are also buttons for "Copy" and "Search". A "Calculate Total" button and "Calculated Amount:" label are present. The "General Accounting" section contains various input fields for "Doc Record Date", "Fiscal Period", "Fiscal Year", "Budget FY", "Fiscal Quarter", "Event Category", "Event Type", "Bank Account", "Posting Pair", "Posting Code", "Dr/Cr", "Ln Func", "Pstng Am", "Incr/Dcrs", and "Run Tm". A right-click context menu is open over a blank area, with the "Page Help" option highlighted in yellow. A red arrow points to the "Page Help" option. The menu options are: "Full field value", "Copy(field value)", "Paste(field value)", "Field Level Help", "Show Description", "Page Help", "Print Page", "Multi Sort", and "Add To Favorites".

To access the **Page Help** feature, right click anywhere on a page that is blank and is not a data input field. A menu will appear with various options. Select **Page Help**.

How to access Page Help in FIN and HRM

After **Page Help** is selected, a pop-up window will display information about the page that the user is currently using within the application.



Accounting Journal - Windows Internet Explorer

http://10.105.8.152:443/SH1FIN2J1/advantage/Advantage/Help/Page_Descriptions/General_Accounting_Pages/Accounting_Journal.htm

Accounting Journal

This page serves to give users a view into the journal lines from processing accounting documents. It is the main source of detailed transaction data. For this reason, the journal is required for many batch processes and to support many ledgers. Almost every document in Advantage posts to this journal. Only data that is not considered accounting, from budget documents and certain cost accounting entries, are not posted. This is a balanced journal in terms of debits and credits.

Fields on this journal are the same that are shared by all journals. The ability to search on certain ones that are most important in research is available. Records added to this journal are determined by:

- The Accounting Journal has Posting Code Types for Selection set to Accounting on the **Journal/Ledger Control** table
- The posting code used on a document's posting line is set to Accounting Type Journal on the **Posting Code** table

The Accounting Journal page contains a link that allows for the summation of selected records from a search. The link is called **Calculate Total** and is followed by the **Calculated Amount**, which presents the total.

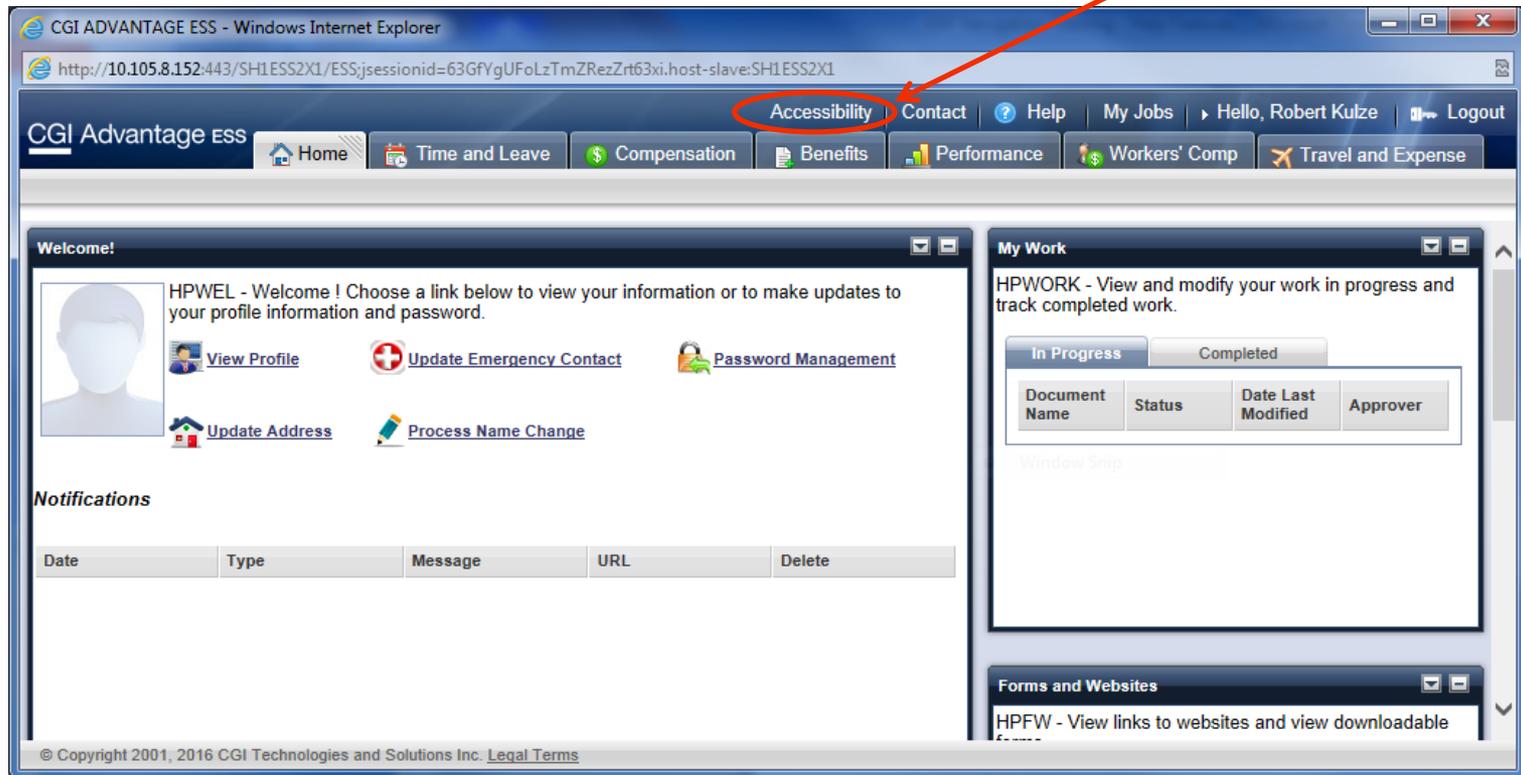
The **Calculate Total** link/action is a securable one because of the system resources required when it is invoked. If the **Calculate Total** check box is selected on Access Control for the particular user/role, then you can click on the **Calculate Total** link. (Note: If a resource is not defined for the page where the action is located, then by default the link is accessible to all.) The **Calculate Total** link provides the total for all of the posting amounts, based on the search criteria entered by the user.

In an effort to place system edits to prevent calculations of large numbers of records, the following search criteria must be entered, or an error is issued when the **Calculate Total** is invoked and not the searching. Searching will not be limited by the following restrictions:

- Fiscal Year or Budget Fiscal Year. Fund. Posting Code. and either BSA, Object, or Revenue Source. At least one non wild

How to access the User Guide in ESS

The user guide in ESS can be accessed from any screen by selecting the **Accessibility** button.



CGI ADVANTAGE ESS - Windows Internet Explorer

http://10.105.8.152:443/SH1ESS2X1/ESSjsessionid=63GfYgUFoLzTmZRezZrt63xi.host-slave:SH1ESS2X1

CGI Advantage ess

Home Time and Leave Compensation Benefits Performance Workers' Comp Travel and Expense

Accessibility Contact Help My Jobs Hello, Robert Kulze Logout

Welcome!

HPWEL - Welcome ! Choose a link below to view your information or to make updates to your profile information and password.

[View Profile](#) [Update Emergency Contact](#) [Password Management](#)

[Update Address](#) [Process Name Change](#)

Notifications

Date	Type	Message	URL	Delete
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My Work

HPWORK - View and modify your work in progress and track completed work.

In Progress Completed

Document Name	Status	Date Last Modified	Approver
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Window Snip

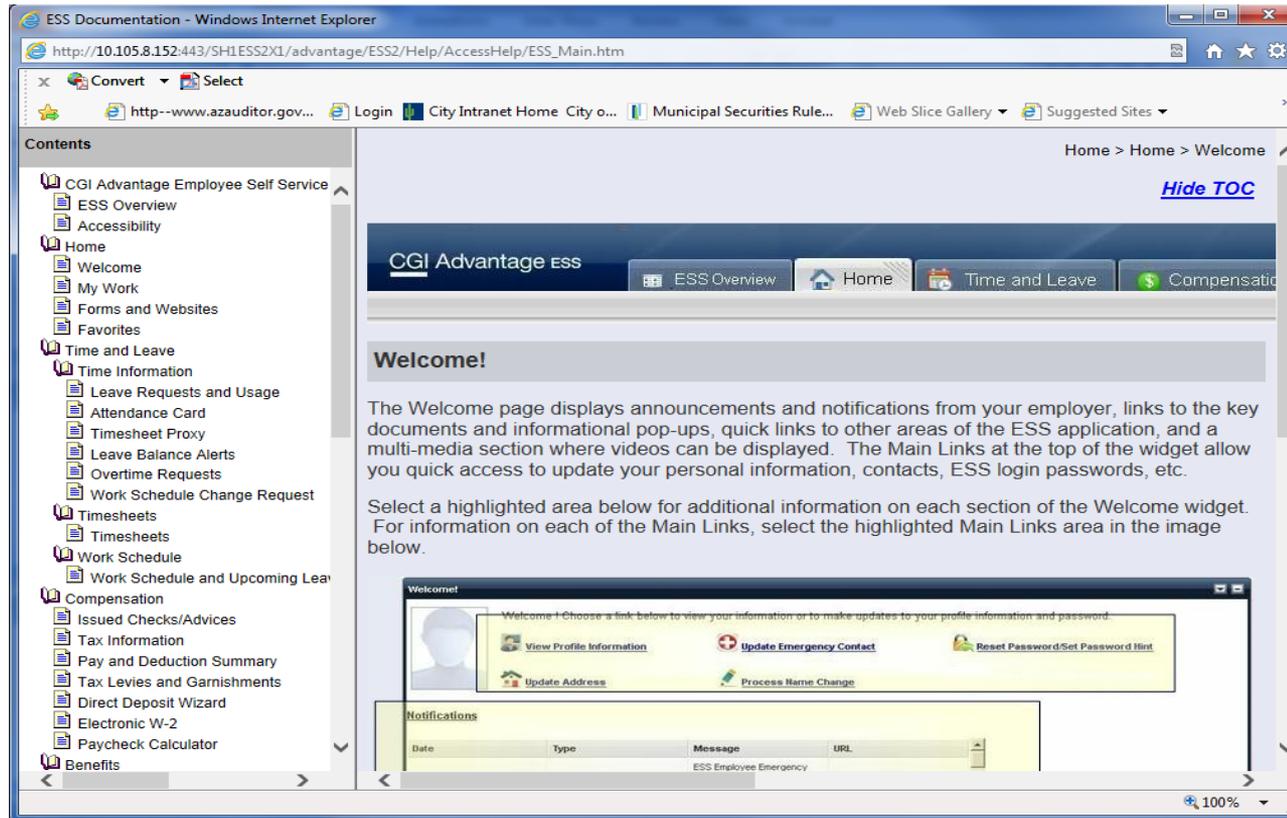
Forms and Websites

HPPFW - View links to websites and view downloadable forms

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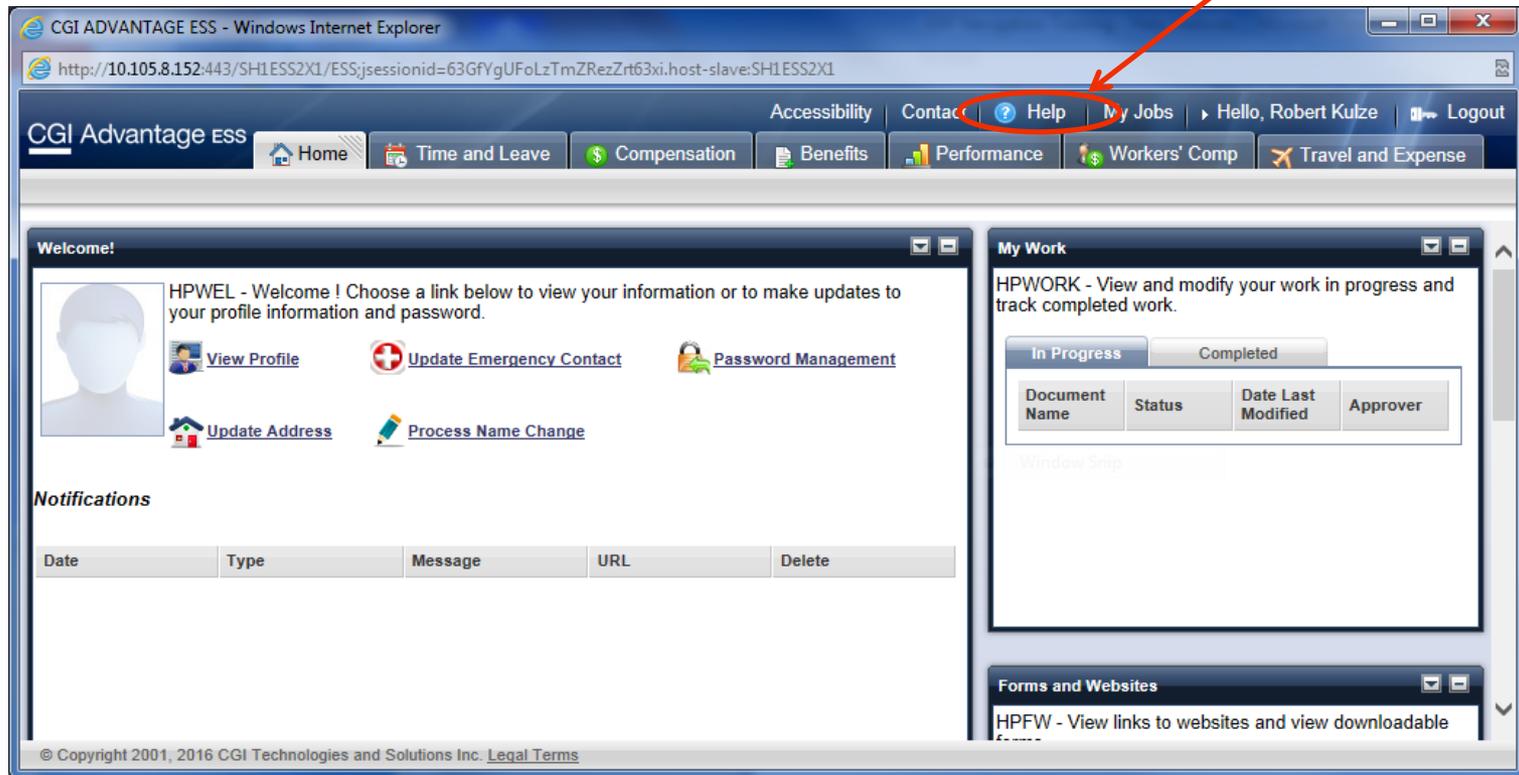
How to access the User Guide in ESS

After the **Accessibility** button is selected, a pop-up window will display the user guide.



How to search for help in ESS

The search feature can be accessed from any screen by selecting the **Help** button.



CGI Advantage ESS - Windows Internet Explorer

http://10.105.8.152:443/SH1ESS2X1/ESSjsessionid=63GfYgUFoLzTmZRezZr63xi.host-slave:SH1ESS2X1

Accessibility Contact **Help** My Jobs Hello, Robert Kulze Logout

CGI Advantage ESS Home Time and Leave Compensation Benefits Performance Workers' Comp Travel and Expense

Welcome!

HPWEL - Welcome ! Choose a link below to view your information or to make updates to your profile information and password.

[View Profile](#) [Update Emergency Contact](#) [Password Management](#)

[Update Address](#) [Process Name Change](#)

Notifications

Date	Type	Message	URL	Delete
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My Work

HPWORK - View and modify your work in progress and track completed work.

In Progress Completed

Document Name	Status	Date Last Modified	Approver
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Window Snip

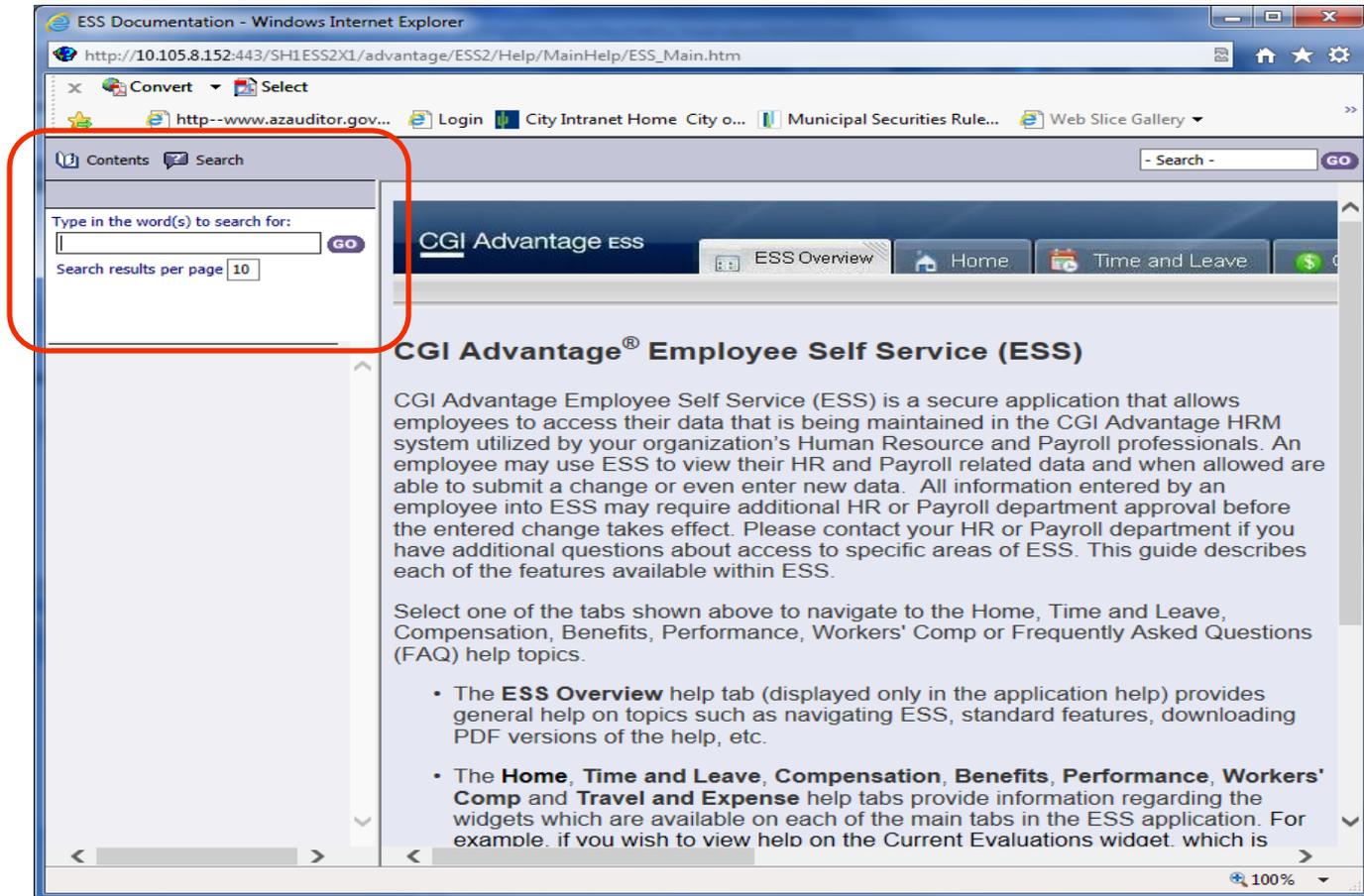
Forms and Websites

HPFW - View links to websites and view downloadable forms

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How to search for help in ESS

After the **Help** button is selected, a pop-up window will display the search feature.



The screenshot shows a web browser window titled "ESS Documentation - Windows Internet Explorer". The address bar displays the URL: `http://10.105.8.152:443/SH1ESS2X1/advantage/ESS2/Help/MainHelp/ESS_Main.htm`. The browser's address bar contains several bookmarks, including "http--www.azauditor.gov...", "Login", "City Intranet Home", "City o...", "Municipal Securities Rule...", and "Web Slice Gallery".

The search interface is located in the top left corner of the page content. It features a search box with the placeholder text "Type in the word(s) to search for:" and a "GO" button. Below the search box is a "Search results per page" dropdown menu set to "10". The search box and its associated controls are highlighted with a red rectangle.

The main content area of the page is titled "CGI Advantage[®] Employee Self Service (ESS)". It contains a paragraph of introductory text and a list of navigation options:

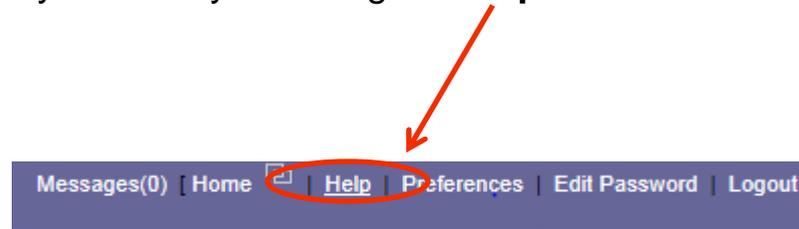
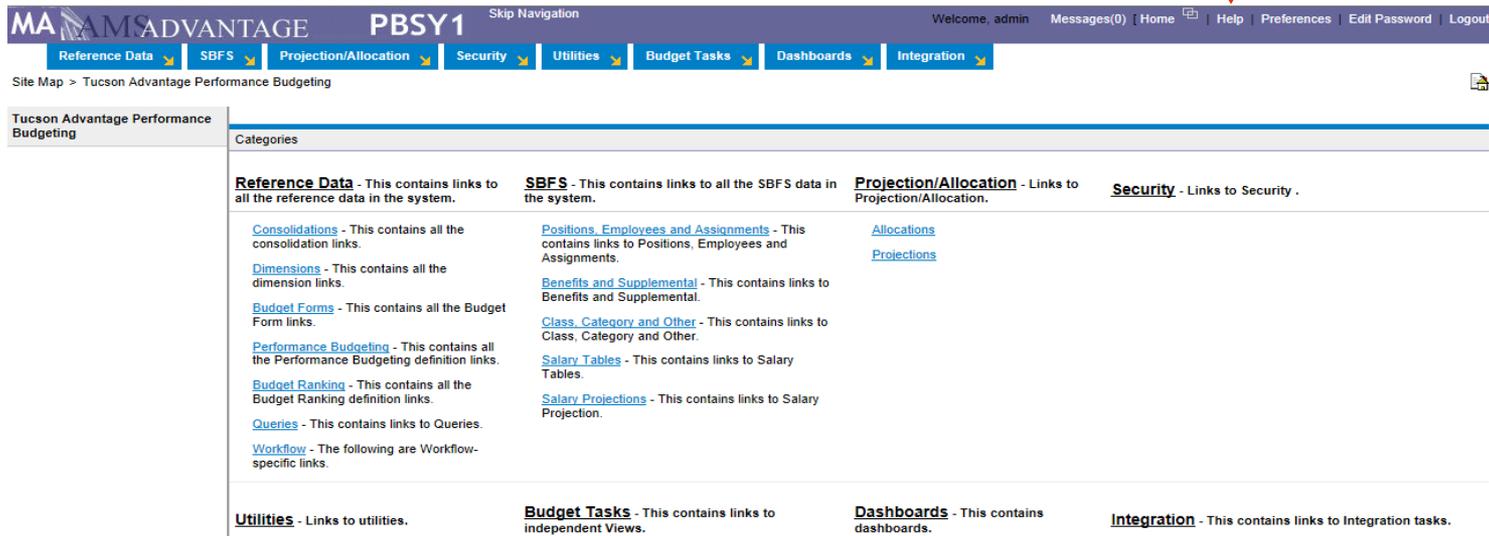
CGI Advantage Employee Self Service (ESS) is a secure application that allows employees to access their data that is being maintained in the CGI Advantage HRM system utilized by your organization's Human Resource and Payroll professionals. An employee may use ESS to view their HR and Payroll related data and when allowed are able to submit a change or even enter new data. All information entered by an employee into ESS may require additional HR or Payroll department approval before the entered change takes effect. Please contact your HR or Payroll department if you have additional questions about access to specific areas of ESS. This guide describes each of the features available within ESS.

Select one of the tabs shown above to navigate to the Home, Time and Leave, Compensation, Benefits, Performance, Workers' Comp or Frequently Asked Questions (FAQ) help topics.

- The **ESS Overview** help tab (displayed only in the application help) provides general help on topics such as navigating ESS, standard features, downloading PDF versions of the help, etc.
- The **Home, Time and Leave, Compensation, Benefits, Performance, Workers' Comp and Travel and Expense** help tabs provide information regarding the widgets which are available on each of the main tabs in the ESS application. For example, if you wish to view help on the Current Evaluations widget, which is

How to access the User Guide in PB

The user guide in PB can be accessed from any screen by selecting the **Help** button in the navigation bar.

MA ADVANTAGE PBSY1 Skip Navigation Welcome, admin Messages(0) | Home | Help | Preferences | Edit Password | Logout

Reference Data | SBFS | Projection/Allocation | Security | Utilities | Budget Tasks | Dashboards | Integration

Site Map > Tucson Advantage Performance Budgeting

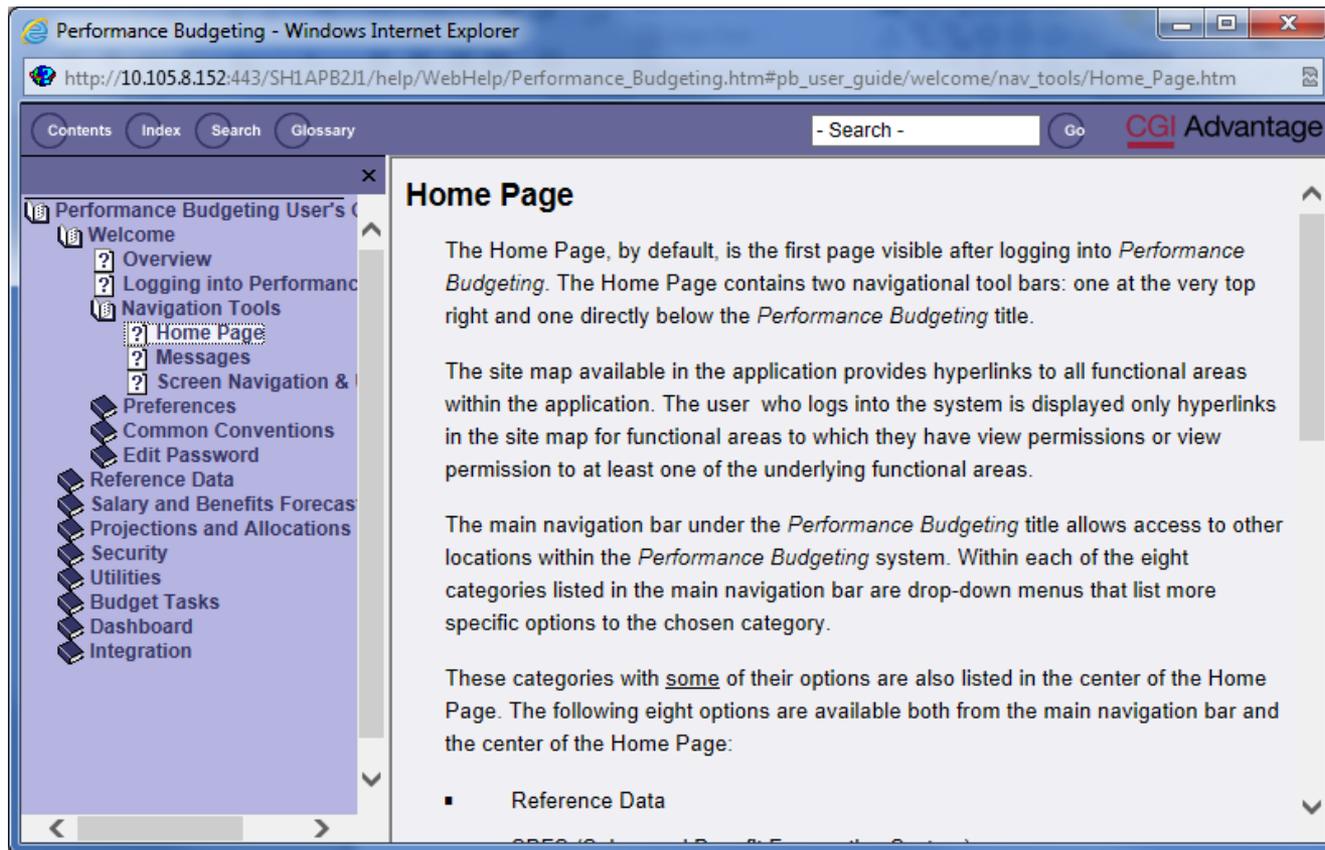
Tucson Advantage Performance Budgeting

Categories

<p>Reference Data - This contains links to all the reference data in the system.</p> <ul style="list-style-type: none"> Consolidations - This contains all the consolidation links. Dimensions - This contains all the dimension links. Budget Forms - This contains all the Budget Form links. Performance Budgeting - This contains all the Performance Budgeting definition links. Budget Ranking - This contains all the Budget Ranking definition links. Queries - This contains links to Queries. Workflow - The following are Workflow-specific links. 	<p>SBFS - This contains links to all the SBFS data in the system.</p> <ul style="list-style-type: none"> Positions, Employees and Assignments - This contains links to Positions, Employees and Assignments. Benefits and Supplemental - This contains links to Benefits and Supplemental. Class, Category and Other - This contains links to Class, Category and Other. Salary Tables - This contains links to Salary Tables. Salary Projections - This contains links to Salary Projection. 	<p>Projection/Allocation - Links to Projection/Allocation.</p> <ul style="list-style-type: none"> Allocations Projections 	<p>Security - Links to Security .</p>
<p>Utilities - Links to utilities.</p>	<p>Budget Tasks - This contains links to independent Views.</p>	<p>Dashboards - This contains dashboards.</p>	<p>Integration - This contains links to Integration tasks.</p>

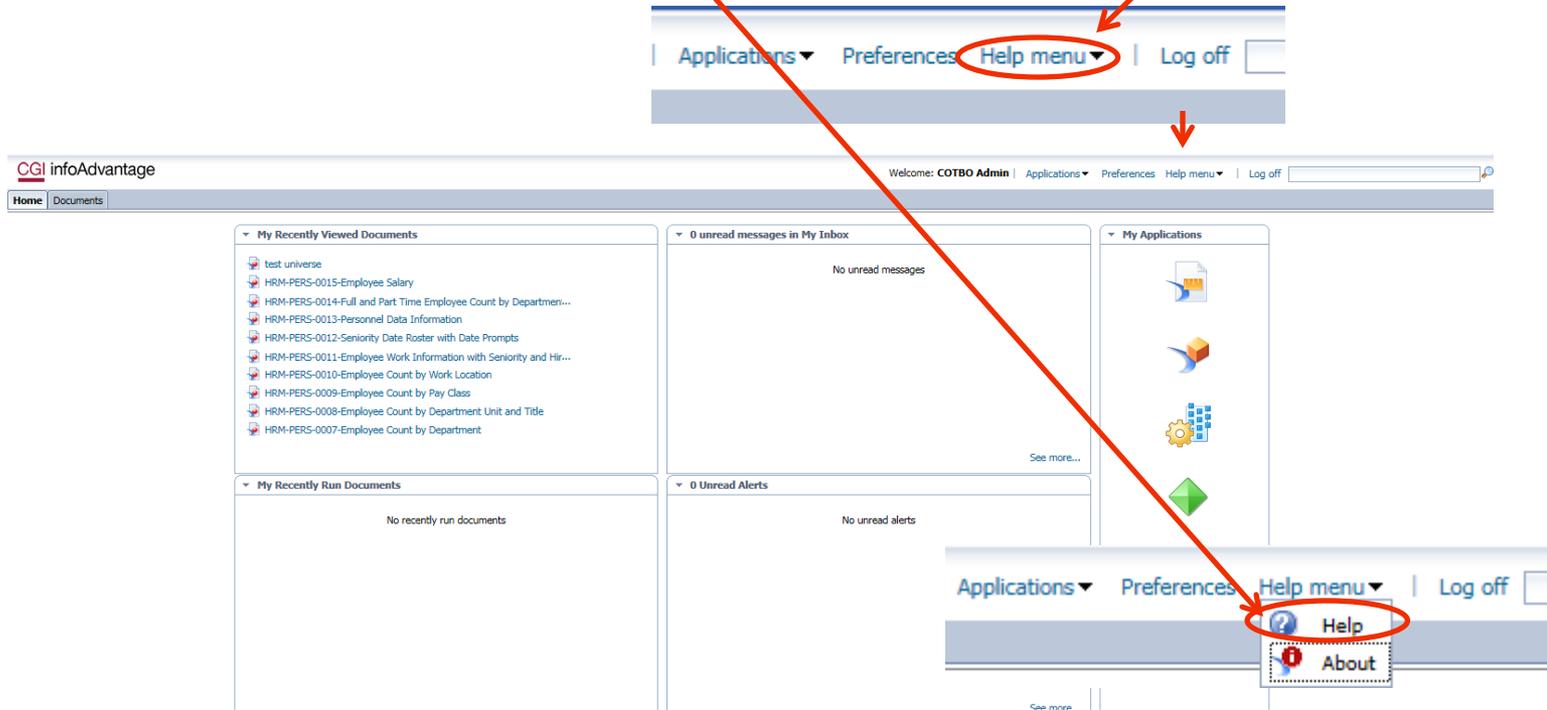
How to access the User Guide in PB

After the **Help** button is selected, a pop-up window will display the user guide.



How to access the User Guide in infoAdv

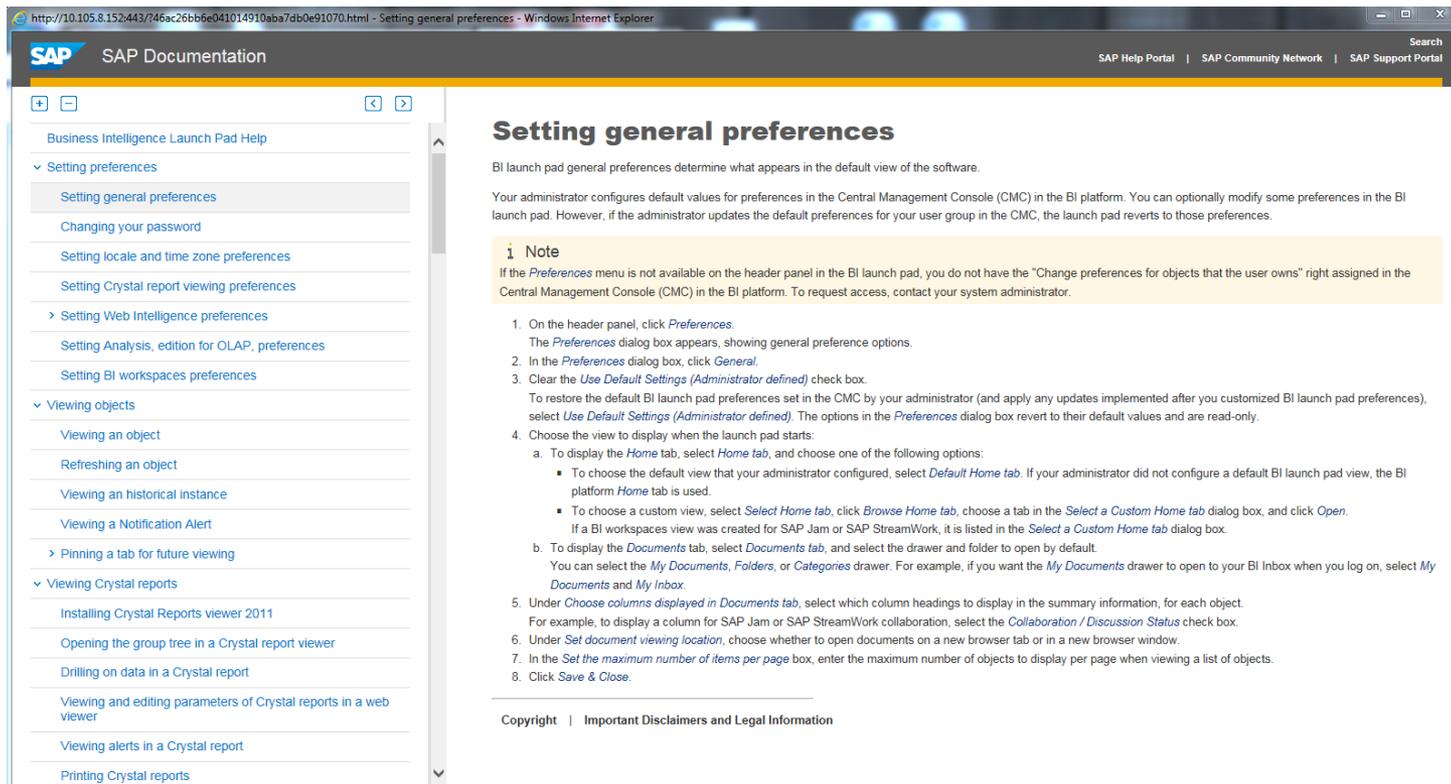
The user guide in infoAdv can be accessed from any screen by selecting the **Help menu** button on the navigation bar and then selecting the **Help** button.



The screenshot displays the infoAdv application interface. The navigation bar at the top contains the following items: Applications, Preferences, Help menu, and Log off. The Help menu is circled in red, and a red arrow points to it. Below the navigation bar, the main content area is divided into several sections: My Recently Viewed Documents, My Recently Run Documents, 0 unread messages in My Inbox, 0 Unread Alerts, and My Applications. The My Applications section contains several icons representing different applications. A second red arrow points from the Help menu in the navigation bar to the Help button in the dropdown menu. The Help button is also circled in red, and a red arrow points to it. The dropdown menu also includes an About button.

How to access the User Guide in infoAdv

After the **Help** button is selected, a pop-up window will display the user guide.



The screenshot shows a web browser window displaying the SAP Documentation page for "Setting general preferences". The browser address bar shows the URL: http://10.105.8.152:443/746ac26b6e041014910aba7db0e91070.html - Setting general preferences - Windows Internet Explorer. The page title is "SAP Documentation" and it includes links for "SAP Help Portal", "SAP Community Network", and "SAP Support Portal".

The left sidebar contains a navigation menu with the following items:

- Business Intelligence Launch Pad Help
- Setting preferences
 - Setting general preferences
 - Changing your password
 - Setting locale and time zone preferences
 - Setting Crystal report viewing preferences
- Setting Web Intelligence preferences
 - Setting Analysis, edition for OLAP, preferences
 - Setting BI workspaces preferences
- Viewing objects
 - Viewing an object
 - Refreshing an object
 - Viewing an historical instance
 - Viewing a Notification Alert
- Pinning a tab for future viewing
- Viewing Crystal reports
 - Installing Crystal Reports viewer 2011
 - Opening the group tree in a Crystal report viewer
 - Drilling on data in a Crystal report
 - Viewing and editing parameters of Crystal reports in a web viewer
 - Viewing alerts in a Crystal report
 - Printing Crystal reports

The main content area is titled "Setting general preferences" and includes the following text:

BI launch pad general preferences determine what appears in the default view of the software.

Your administrator configures default values for preferences in the Central Management Console (CMC) in the BI platform. You can optionally modify some preferences in the BI launch pad. However, if the administrator updates the default preferences for your user group in the CMC, the launch pad reverts to those preferences.

Note

If the *Preferences* menu is not available on the header panel in the BI launch pad, you do not have the "Change preferences for objects that the user owns" right assigned in the Central Management Console (CMC) in the BI platform. To request access, contact your system administrator.

- On the header panel, click *Preferences*.
The *Preferences* dialog box appears, showing general preference options.
- In the *Preferences* dialog box, click *General*.
- Clear the *Use Default Settings (Administrator defined)* check box.
To restore the default BI launch pad preferences set in the CMC by your administrator (and apply any updates implemented after you customized BI launch pad preferences), select *Use Default Settings (Administrator defined)*. The options in the *Preferences* dialog box revert to their default values and are read-only.
- Choose the view to display when the launch pad starts:
 - To display the *Home* tab, select *Home tab*, and choose one of the following options:
 - To choose the default view that your administrator configured, select *Default Home tab*. If your administrator did not configure a default BI launch pad view, the BI platform *Home* tab is used.
 - To choose a custom view, select *Select Home tab*, click *Browse Home tab*, choose a tab in the *Select a Custom Home tab* dialog box, and click *Open*.
If a BI workspaces view was created for SAP Jam or SAP StreamWork, it is listed in the *Select a Custom Home tab* dialog box.
 - To display the *Documents* tab, select *Documents tab*, and select the drawer and folder to open by default.
You can select the *My Documents*, *Folders*, or *Categories* drawer. For example, if you want the *My Documents* drawer to open to your BI Inbox when you log on, select *My Documents* and *My Inbox*.
- Under *Choose columns displayed in Documents tab*, select which column headings to display in the summary information, for each object.
For example, to display a column for SAP Jam or SAP StreamWork collaboration, select the *Collaboration / Discussion Status* check box.
- Under *Set document viewing location*, choose whether to open documents on a new browser tab or in a new browser window.
- In the *Set the maximum number of items per page* box, enter the maximum number of objects to display per page when viewing a list of objects.
- Click *Save & Close*.

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Thank You!

This concludes the navigational
training for access to help features in
Advantage 3.11