



CGI ERP Navigation and Account Setting

Table of Contents

- ❖ [Overview](#)
- ❖ [Global Navigation](#)
- ❖ [Primary Navigation](#)
- ❖ [Homepage](#)
- ❖ [Bookmarks](#)
- ❖ [Alerts](#)
- ❖ [User Profile](#)
- ❖ [Account Setting](#)
- ❖ [Business Role](#)

OVERVIEW

CGI **Advantage 4 (Adv4)** is now a unified application with Financial (FIN), Human Resources Management (HRM), and Performance Budgeting (PB). This provides a single URL and user experience across all applications. This procedure will provide end-users with Advantage4 basic navigation.

WHAT'S NEW

Single log-in experience across all applications. Users only need their **employee ID** to access Advantage 4.

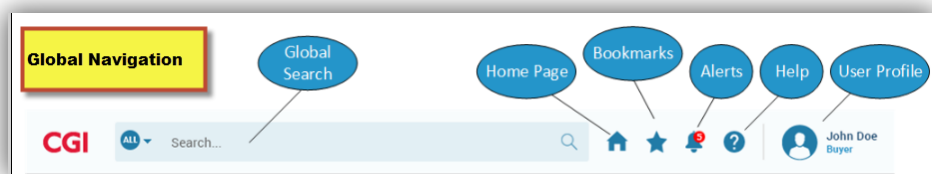
ERP 3.10	ERP Advantage 4
ERP Advantage HRM	<p>Log in: Employee ID</p>
Employee Self Service (ESS)	
ERP Advantage Financial	
ERP Advantage Performance Budgeting	

TERMINOLOGIES

ERP 3.10	ERP Advantage 4
Documents	Transactions
Favorites	Bookmarks
Security Role	Business Role

GLOBAL NAVIGATION

The **Global Navigation** bar is available at the top of the Advantage window and provides access to key pages and features.



🏠 HOMEPAGE

Each business role has an associated *home page* which contains a combination of quick links to application pages, widgets that display both common and business area information, and various other types of media. You can access your Home Page at any time by selecting the home icon in the Global Navigation bar (left mouse-click).

★ BOOKMARKS

The *Bookmark* icon in the **Global Navigation** bar displays a list of pages that you have marked as a bookmark. You can navigate directly to a bookmarked page by selecting the bookmark name.

🔔 ALERTS

Alerts are used to send messages in CGI Advantage. These broadcast important system information, so users need to take time to review them.

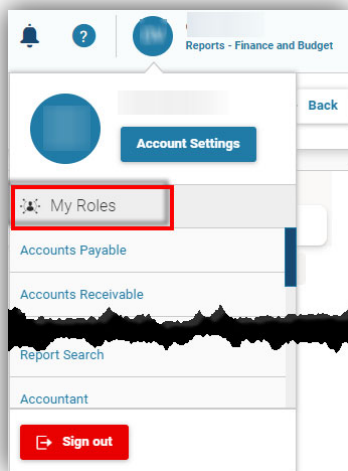
Examples of alerts:

- “CGI Advantage will be coming down for maintenance at 6:00 PM tonight. All users must log out of the system by that time.” can be sent to all users in the system.
- “Your password will expire in 12 days.” can be sent when a user logs in and his/her password is expiring.

USER PROFILE

The **User Profile** is accessed by clicking anywhere in the User Profile area in the **Global Navigation** bar. The following can be accessed when the **User Profile** area is expanded.

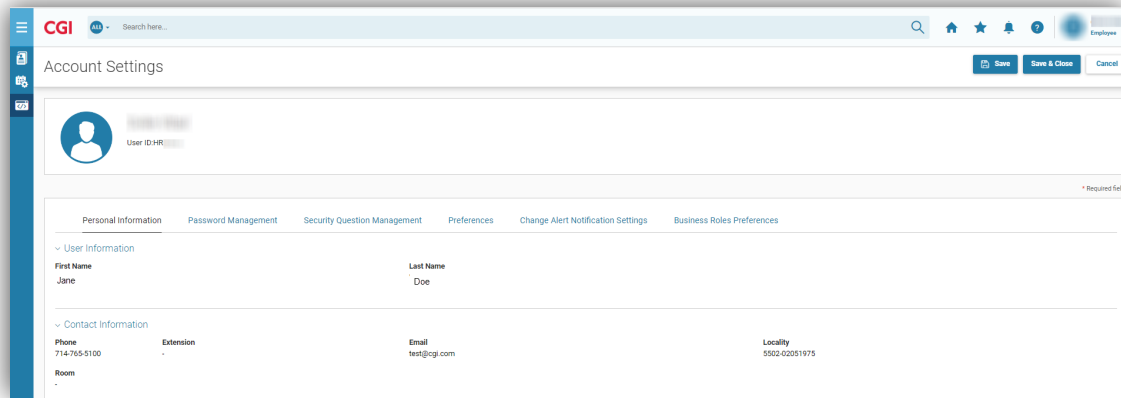
1. [Account Settings](#)
2. [Business Roles](#)
3. Sign Out



ACCOUNT SETTINGS

Account Settings allow users to view personal information, password management, modify preferences including business role display order.

When selected, the *User Profile* information expands and allows access to *Account Settings*, and the business roles assigned.



The *Account Settings* is divided between the following tabs:

1. Personal Information.
2. Password Management.
3. Security Question Management.
4. Preferences
5. Change Alert Notification Settings
6. Business Role Preferences.

BUSINESS ROLE

Business Roles are at the heart of the user experience in CGI Advantage. The business roles are assigned to individual users that pull all components of the application together for easy navigation and searching. Upon logging in, each user is placed into the business role marked as the primary role.

Business roles assigned to each user will be displayed under *My Roles*. This can also be accessed from *Account Settings > Business Roles Preferences*, where users can modify the order in which the business roles appear.

RELATED PROCEDURES

1. CGI Advantage – Account Settings (Password and Preferences)
2. CGI Adv 4 ERP – Bookmarks