User Reference

UI Console - R12

By CMiC

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Computer Methods International Corp.
4850 Keele Street
Toronto, Ontario M3J 3K1
Canada

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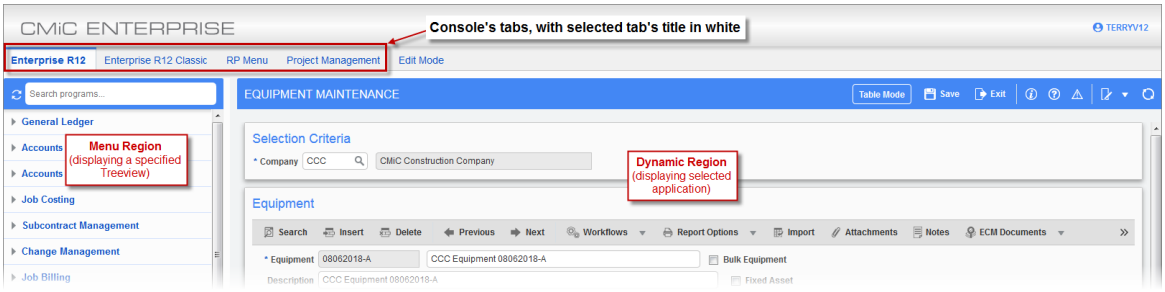
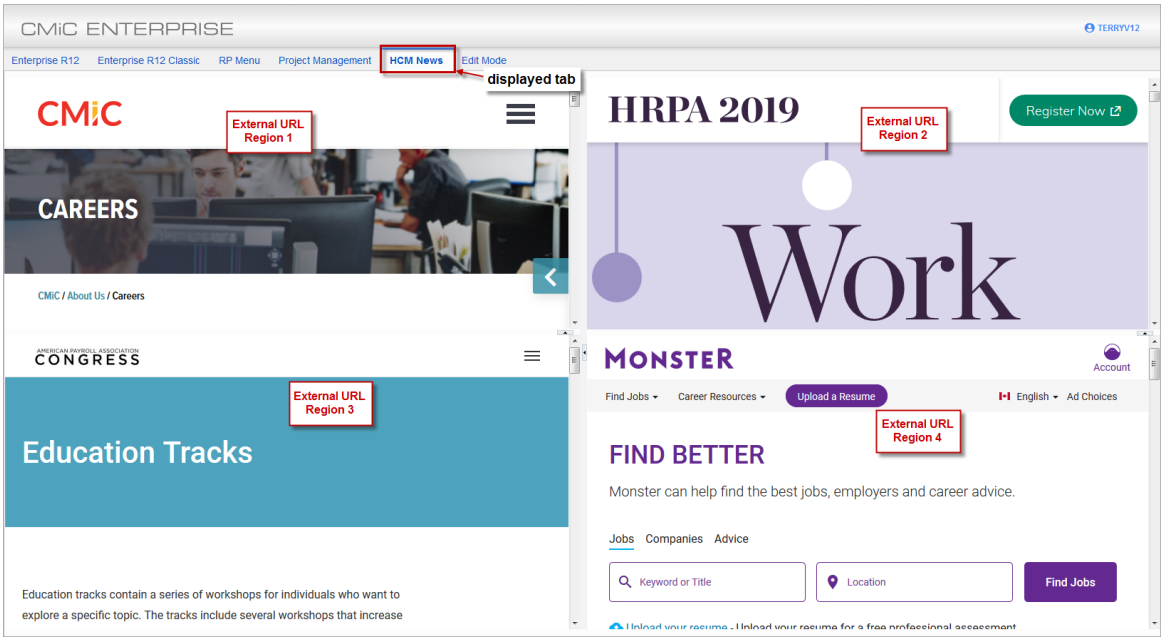
UI Console – R12 Tool

Overview – UI Console



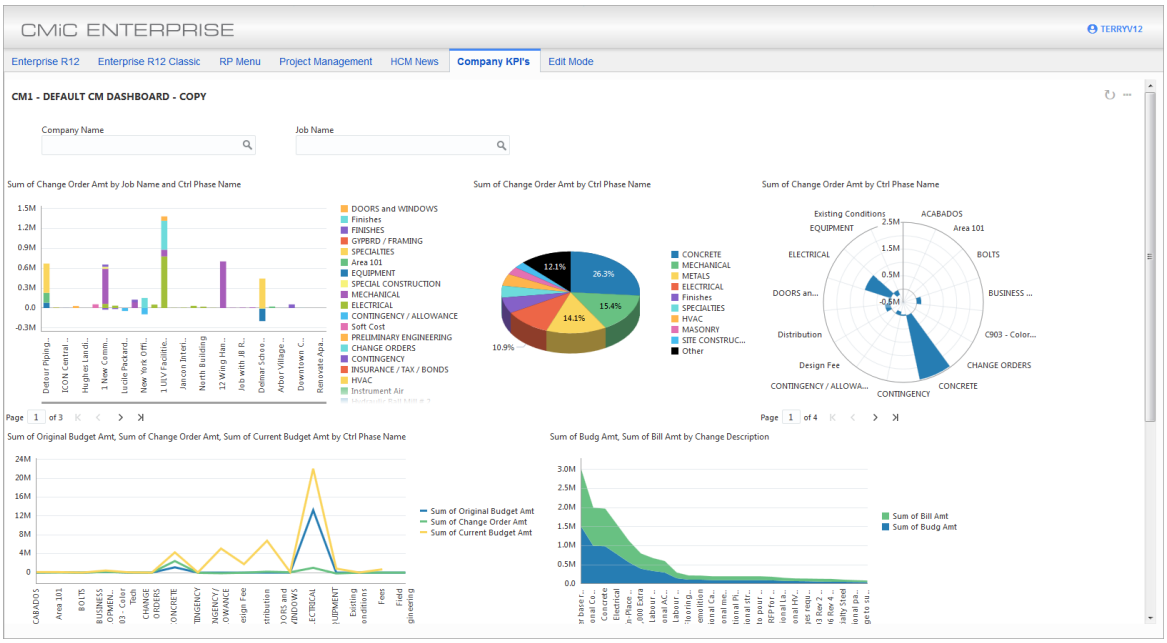
Customized UI Console with user defined tabs, a menu region, and a dynamic region



Customized UI Console, displaying a tab for Human Resources related content.

A User Interface (UI) Console is a customizable, named object that functions like a window into the CMiC Enterprise system, or into any other system that may be reached via an internet or intranet address. Customized consoles are designed to facilitate a user's tasks in Enterprise by providing menus and modules relevant to them, and to facilitate the making of informed business decisions by providing information relevant to their particular needs. To achieve this, consoles contain tabs, and the tabs contain customizable regions, such as: a Treeview region to launch Enterprise modules, and a dynamic region to display the launched modules. Additionally, regions can display things like a company's intranet home page, custom logs, custom dashboards, RSS feeds, or websites.

As an example, to further illustrate the potential of a customized console, one tab could be customized to facilitate a user's PM related tasks, a second tab could facilitate a user's tasks related to PM reports, a third tab could display the company's intranet home page, and a fourth tab could display web feeds.



Tab displaying some KPIs

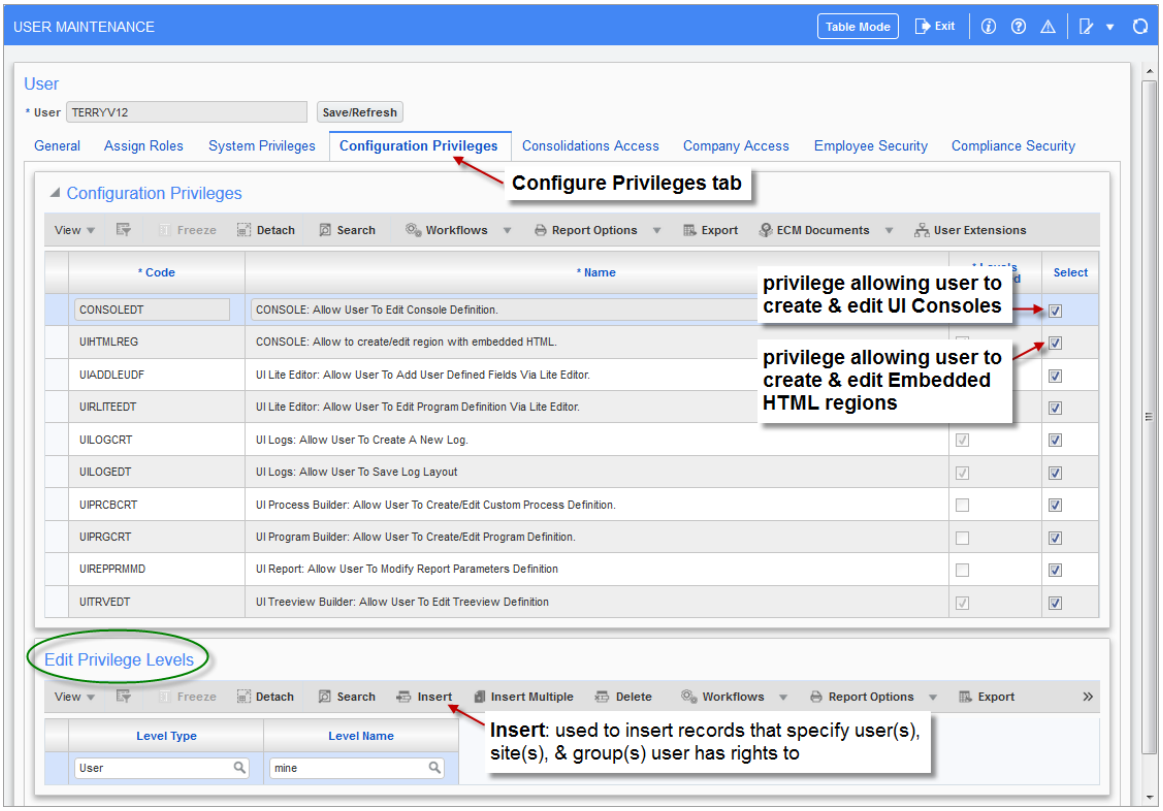
To further aid the making of informed business decisions, Enterprise Console also includes intuitive dashboard and log building solutions that are second to none in helping users bridge the gap between data and usable information in a manner that is flexible and accurate. More specifically, Enterprise Console can be configured to display customized logs of crucial information, and display Key Performance Indicators (KPIs) via dials, graphs (CMiC Analytics), alerts, and dashboards.

Setup for UI Console

Grant User UI Console Privileges

For a target user to create and edit consoles, and to use the embedded HTML and notes content types in a console's regions, an administrative user with the rights to alter a user's security settings must grant the target user the relevant privileges. The screen, shown in the following screenshots, to alter the relevant security settings is User Maintenance (standard Treeview path: *System* > *Security* > *Users* > *User Maintenance*).

Configuration Privileges – Tab



Pgm: SDUSRMNT – User Maintenance; standard Treeview path: System > Security > Users > User Maintenance

Grant Privilege to Access UI Console

From the User Maintenance screen, search for and select the target user. The security setting that grants a user rights to the console is found on the screen's Configuration Privileges tab, shown in the previous screenshot, and it is titled 'CONSOLE: Allow User To Edit Console Definition'. Ensure that this privilege's checkbox is checked so that the target user has rights to run the console.

Grant Embedded HTML Privilege

A second privilege for the console is available, just below the privilege to run the console, titled 'CONSOLE: Allow to create/edit region with embedded HTML'. It allows a user to create an embedded HTML region on a console's tab.

Grant Configuration Level Privileges for UI Console

In the Edit Privilege Levels section, encircled by the green oval, click the [**Insert**] button. For the new row, assign the user a level type privilege and a corresponding level name privilege.

The first field, Level Type, specifies the level at which the target user is able to customize a console. The following table provides details about the available level type privileges:

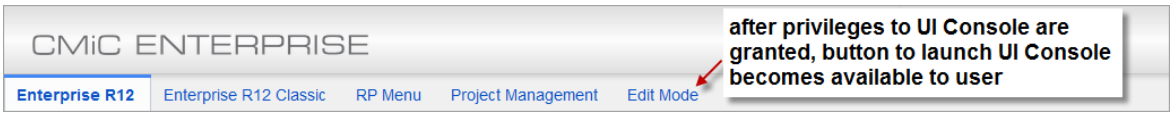
Level Type (Customization Level)	**Details**
User	User Level: privilege to manage consoles for individual users.
UIC Group	Group Level: privilege to manage consoles for a UIC. For details about setting up UIC groups, please refer to the following section, *UIC Group Maintenance*.
Site	Site Level: privilege to manage consoles for all users at the site level (aka system/client level).

The values available for the second field, Level Name, depend on the value selected for the Level Type field. The Level Name field specifies the user ID, site, or UIC group for which the target user may customize consoles. The following table provides details about the available Level Name privileges.

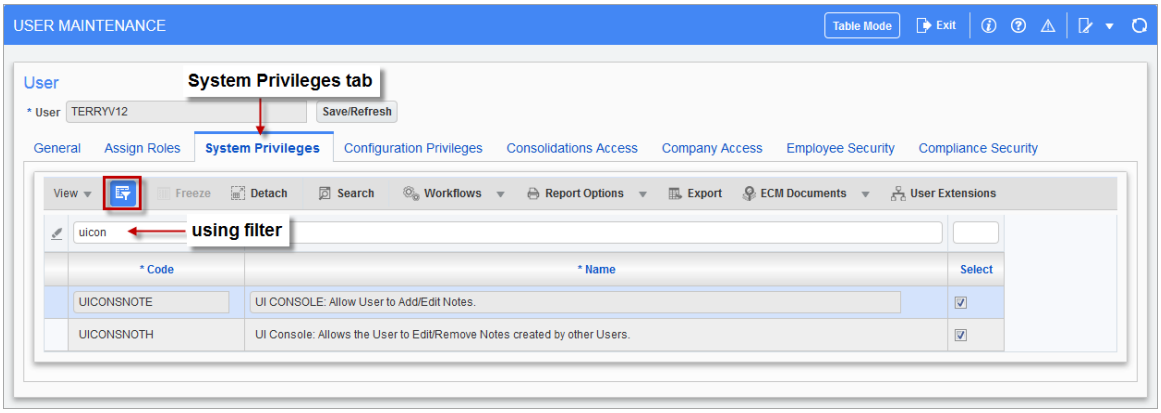
Level Name [Set of User(s)]	**Details**
mine	If "User" is selected for the first field, "mine" means my User ID; if "Site" is selected for the first field, "mine" means my site; if "Group" is selected for the first field, "mine" means my group.
<User ID>	If "User" is selected for the first field, user IDs are available, along with the "mine" and "all" options.
<UIC Group Code>	If "Group" is selected for the first field, UIC group codes are available, along with the "mine" and "all" options.

To review, if the Level Type field is set to "User" and the Level Name field is set to "mine" the user can customize consoles for themselves; and if Level Type is "Site" and Level Name is "mine", the user can customize consoles for everyone at the site level.

Shown in the below screenshot, after privileges to the UI Console tool are granted, the [**Edit Mode**] button used to launch the UI Console tool becomes available to the user.



System Privileges – Tab



Pgm: SDUSRMNT – User Maintenance; standard Treeview path: System > Security > Users > User Maintenance – System Privileges

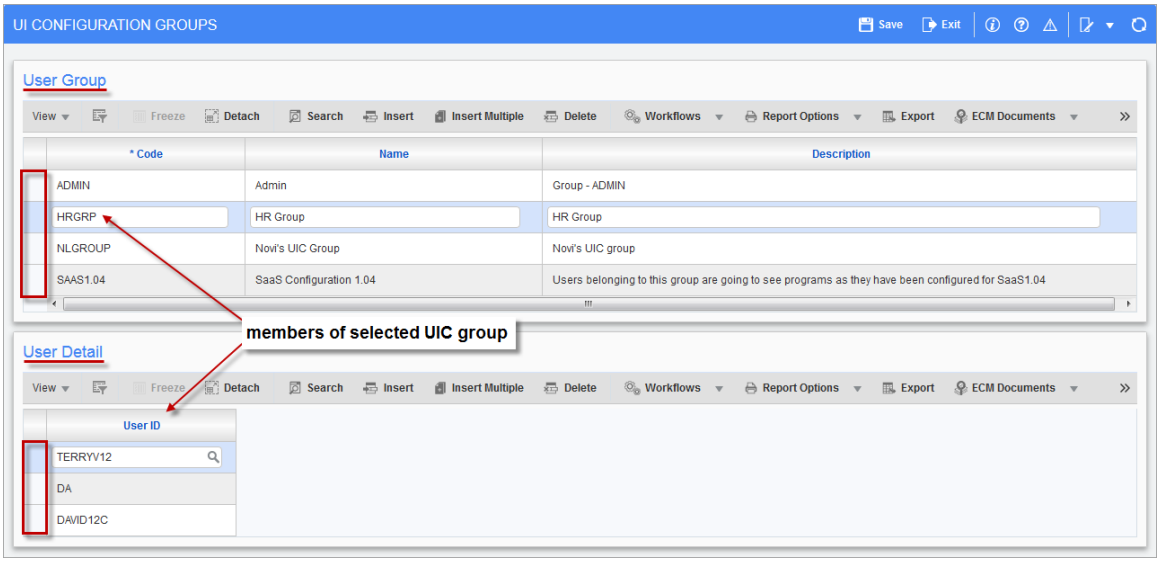
Grant Privileges for Notes Content Type

There are two privileges related to the notes content type. To quickly find them, use the filter option on the Block Toolbar, as shown in the above screenshot.

The 'UI Console: Allow User to Add/Edit Notes' security privilege allows a user to add and edit notes in a console region with the notes content type.

The 'UI Console: Allow the User to Edit/Remove Notes created by other Users' system privilege allows a user to edit and remove notes created by other users, in console regions with the notes content type.

UIC Group Maintenance



Pgm: SDUICONFIGGROUP – UI Configuration Groups; standard Treeview path: System > Setup > User Interface Configuration

The User Interface Configuration screen is the maintenance screen for UI configuration groups (UIC groups). UIC groups are used to group users for the purpose of assigning them a customized console, a customized Treeview, or a customized screen (via Lite Editor) at the group level.

For instance, human resources personnel can be added to a UIC group titled “HRGRP”, and when a customized console, Treeview, or screen is created for the group, the customized version would be saved at the group level, for the HRGRP UIC group.

User Group – Section

The User Group section lists all of the created UIC groups. For the UIC group selected in this section, the User Detail section displays its members.

Add UIC Group

To add a UIC group, click [**Insert**] on the User Group section’s Block Toolbar. For the Code field, provide an identifying code for the UIC group; for the Name field, provided a name for the UIC group; and for the Description field, provide a description for the group. Click [**Save**] to commit the addition.

Edit UIC Group Name or Description

Select the group’s row, using the section area (framed by the red rectangle in the previous screenshot), then edit the group’s name or description using the Name or Description fields. Click [**Save**] to commit the changes.

Delete UIC Group

Select the group’s row, using the section area (framed by the red rectangle in the previous screenshot), then click [**Delete**] on the User Group section’s Block Toolbar. Click [**Save**] to commit the deletion.

User Detail – Section

The User Detail section displays members of the UIC group selected under the User Group section.

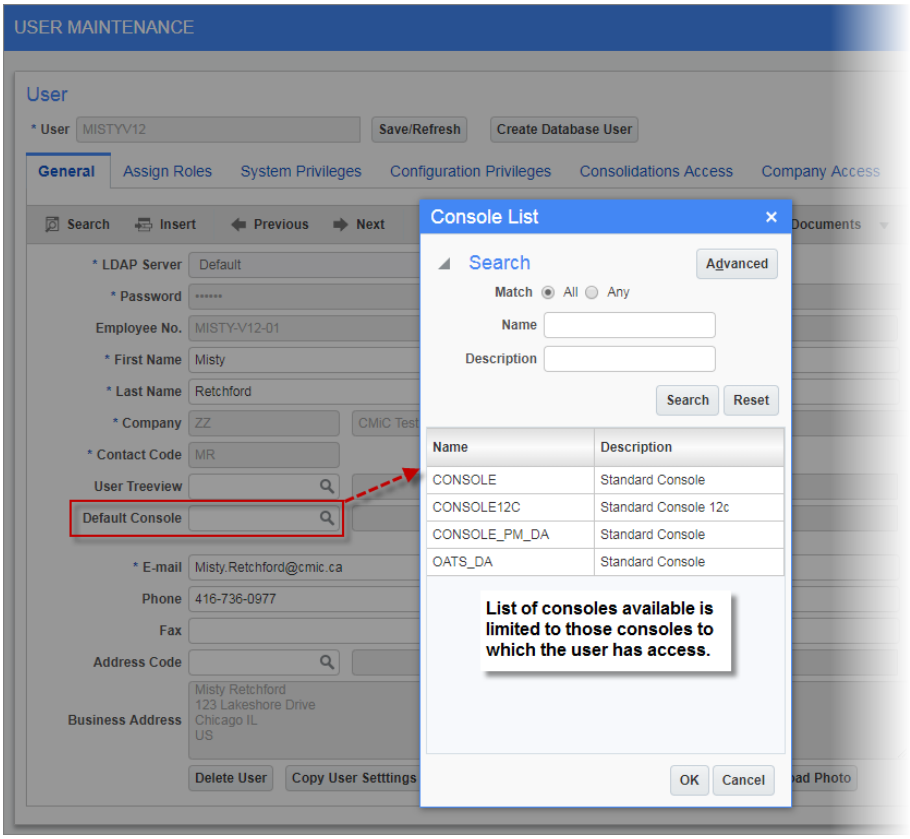
Add Member to UIC Group

To add a member to a selected UIC group, click [**Insert**] on the User Detail section’s Block Toolbar. Select a user ID from the list of values. Click [**Save**] to commit the addition.

Delete Member from UIC Group

Select the member’s row, using the section area (framed by the red rectangle in the previous screenshot), then click [**Delete**] on the User Detail section’s Block Toolbar. Click [**Save**] to commit the deletion.

User Maintenance – Setting a Default Console



Pop-up window launched from Default Console LOV on the General tab of the User Maintenance screen (standard Treeview path: System > Security > Users > User Maintenance - General tab)

This field is used to set a user's default console so that when the user logs into Enterprise, the default console loads automatically, skipping the console selection screen.

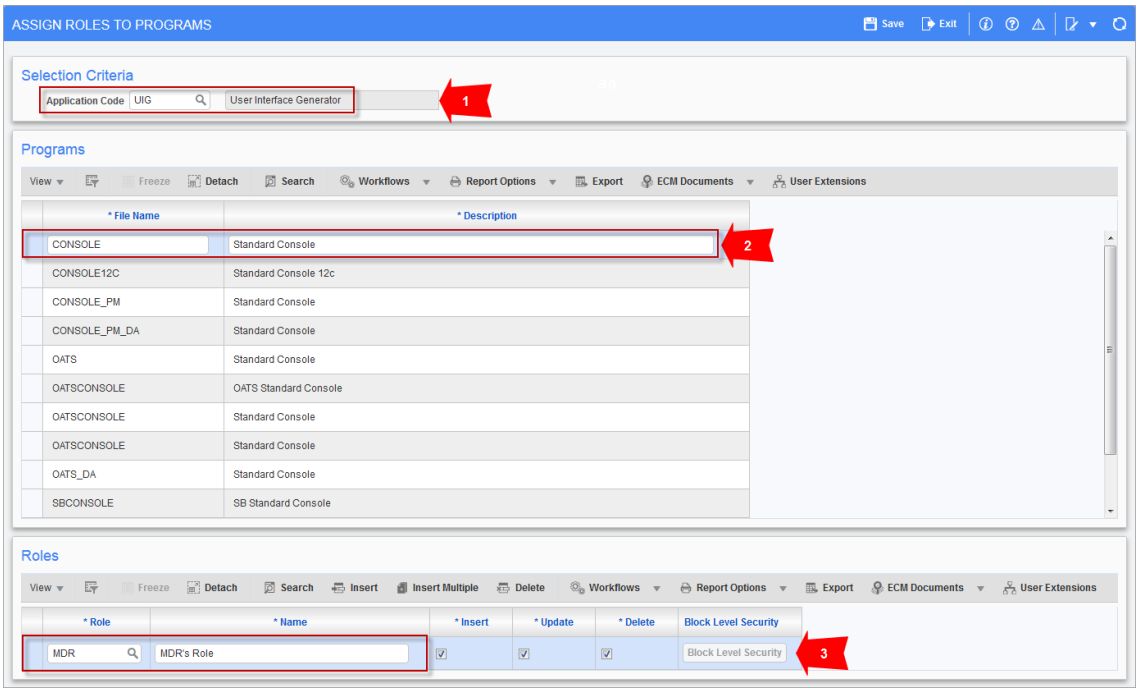
If a default console is not set (i.e. Default Console field is left empty), when the user logs into Enterprise, the console selection screen will appear, allowing the user to select a console from a list of available consoles to which the user has access.

A user's access to a console is driven by two levels of security: User Interface Generator (UIG) Customization Levels and Role Security. If both levels of security requirements are not met, the user may not be able to access the console.

To set a default console for a user, ensure the following two security steps have been followed.

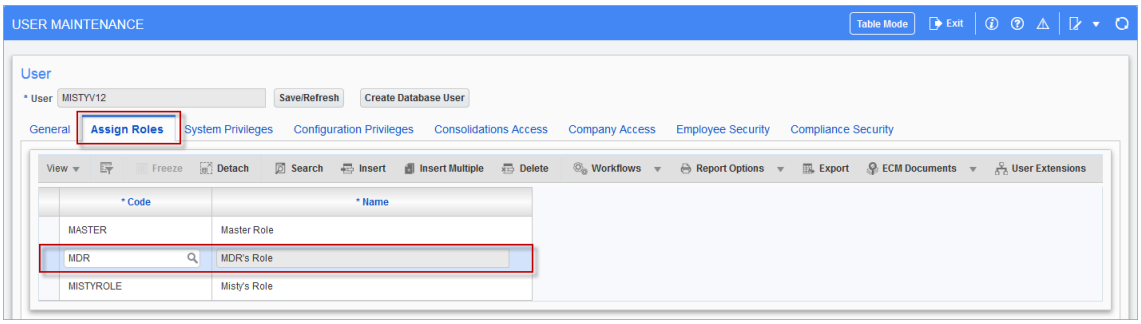
1. **UIG Customization Levels**: Click on the Default Console field's LOV to select a console. The list of consoles available in the LOV is limited to only those consoles to which the user has access. For a user to gain access to a console, the console must be defined at the Standard level, Site (Client) level, Group (UIC) level the user belongs to, or at the User level. Access is defined on the Configuration Privileges tab of the User Maintenance screen (standard Treeview path: *System > Security > Users > User Maintenance – Configuration Privileges tab*).

2. **Role Security**: Since consoles (standard and custom defined) can also be secured by security roles, verify that the user has access to the default console as per role security. Role security is assigned to a console on the Assign Roles to Programs screen in the System module, as shown in the screenshot below (standard Treeview path: *System > Security > Roles > Assign Roles to Programs*).

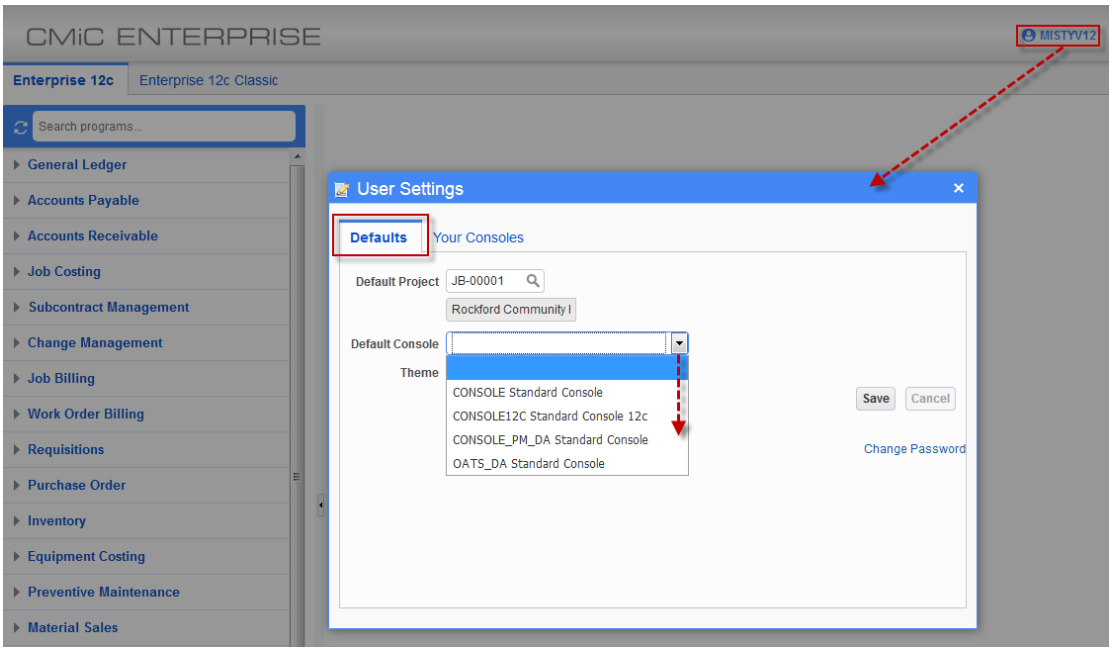


Pgm: FORMROLE – Assign Roles to Programs; standard Treeview path: System > Security > Roles > Assign Roles to Programs

In the Application Code field, select “UIG”. A list of available consoles will be displayed in the Programs section of the screen. Select a console in the Programs section of the screen to display the roles assigned to that console in the Roles section of the screen below. If the console has no roles assigned, then it is available to everyone. Otherwise, if a role is assigned to the console, the console will only be available to users that have the required role. In the example above, for a user to see the selected console, the user must have the required role displayed in the Roles section. Roles are assigned to users on the User Maintenance screen, as shown in the screenshot below.

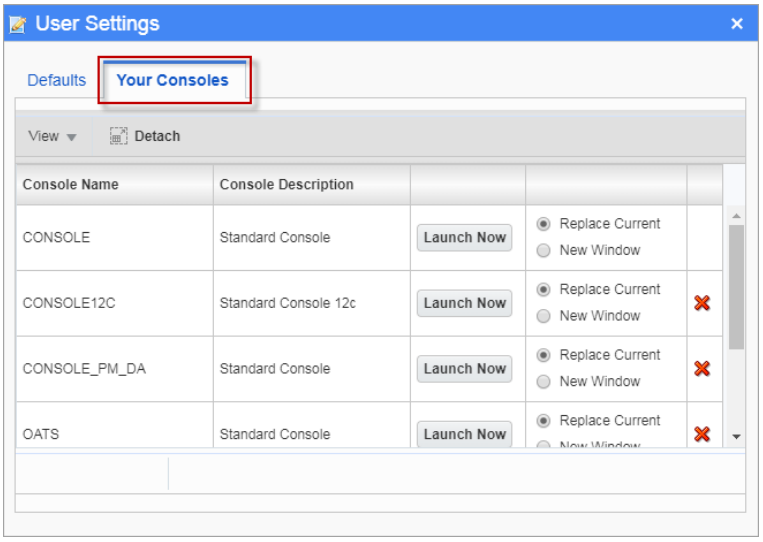


Pgm: SDUSRMNT – User Maintenance; standard Treeview path: System > Security > Users > User Maintenance – Assign Roles tab



User Settings pop-up window launched from username link on UI Console – Defaults tab

A default console can also be defined in the Defaults tab of the User Settings pop-up window launched from the username link on the UI Console tool. If a default console was already set in the General tab of the User Maintenance screen for the user, then it will default here in this pop-up window if the user still has access to it as per role security. The drop-down menu in the Default Console field in this pop-up window follows the same security rules as the Default Console field on the General tab of the User Maintenance screen.



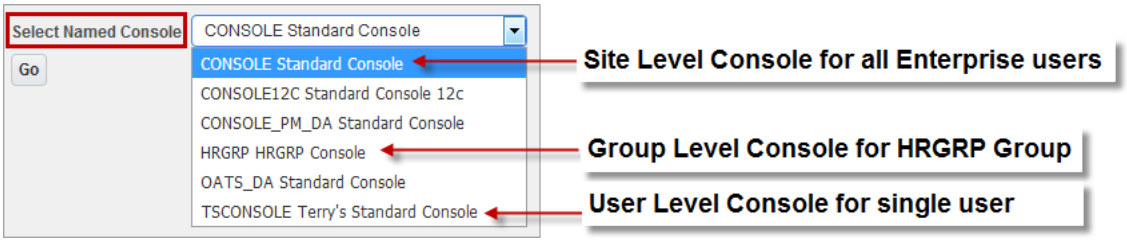
User Settings pop-up window launched from username link on UI Console – Your Consoles tab

The Your Consoles tab in the User Settings pop-up window only lists consoles to which the user has access. This tab is used to launch a different console or to delete a named console and all of its variants from the system. For more information, please see the *User Console Settings – Pop-up Window* section of this guide.

Customizing & Editing Consoles

Loading & Saving Consoles

Terms: Named Console & Base Console Level, User's Set of Consoles



When launching Enterprise, if a user has more than one console available, the user selects which console to load.

Named Console

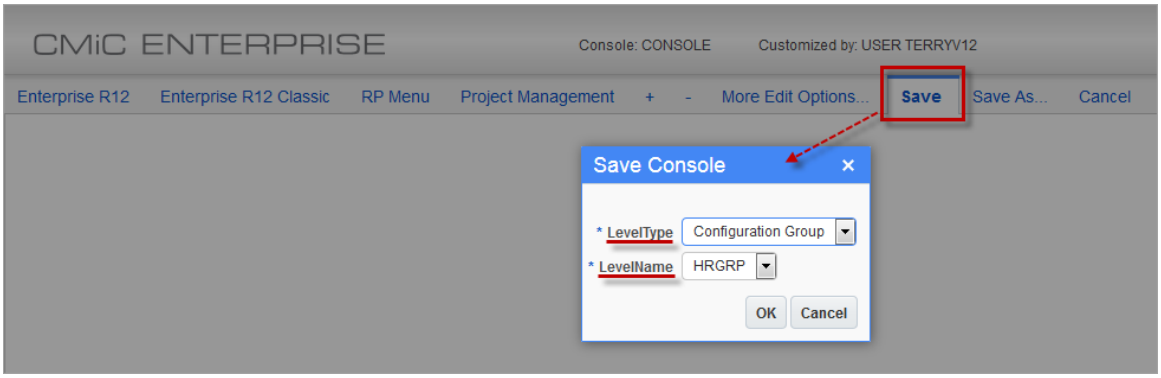
A named console is any console that is visible and available to users, and is not a console named and provided by CMiC. A named console is created by starting with an existing console, making customizations to it, and saving the customized version with a new name by using [**Save As**] instead of [**Save**]. The customization level at which a new named console is saved is referred to as the base console level.

Named consoles appear in lists of consoles for users, such as the list of consoles available to users when logging into the system, as shown above.

Base Console Level

The level at which a new named console is created is referred to as the base console level. This is the level at which a named console was first created.

When variants of a named console at its base console level are created, by saving variants using the [**Save**] option to save them with the same name, but at different customization levels (as shown below), the variants are considered customizations to the named console. This is necessary to know when deleting customizations to a named console, and when deleting a named console and all of its variants entirely, as per the *Deleting Consoles & Removing Customizations* section in this guide.



Console Edit Mode – Save Console pop-up window

System Levels & System Level Objects

When a customized Console is saved, it is saved at a particular Enterprise system level, for a particular system level object (site, UIC group, or user ID). The following table provides details about the system levels, their objects, and the availability of consoles for particular system level objects:

System (Customization) Level	System Level Object(s)	Console Availability & System Level Objects
Site Level	Only 1 object at the site level, the site, which is the Enterprise system.	A console at the site level is available to all Enterprise users.
Group Level	UI Configuration Groups: UIC groups categorize users in order to assign them to customized consoles.	A console at the group level is tied to a particular UIC group, and it is only available to members of that UIC group.
User Level	User IDs	A console at the user level is tied to a particular user ID, and it is only available to that user.

Since a console is saved for a particular user, user interface configuration group (UIC group), or at the site level, the user can save a customized console without changing the name and overwriting the console it was based on, using [**Save**] instead of [**Saves As**]. This is possible because a console is not only distinguished by its name, but also by the system level object (site, UIC group, or user ID) for which it was saved. As long as the modified console is going to be saved for a different system level object, using [**Save**] results in a variant being created, without overwriting the loaded console. As would be expected, if the modified console is loaded and saved for the same system level object, using [**Save**] results in the loaded console being overwritten.

Example

> If the user logs into Enterprise with a console that is at the site level, use the UI Console tool to modify it, then use [**Save**] to save it at the group level for a particular UIC group, the loaded console at the site level remains unmodified, and a variant is created for the particular UIC group. Behind the scenes, the system is able to distinguish between the two, and it will load the variant for members of the UIC group, and it will load the site level version for all other users.

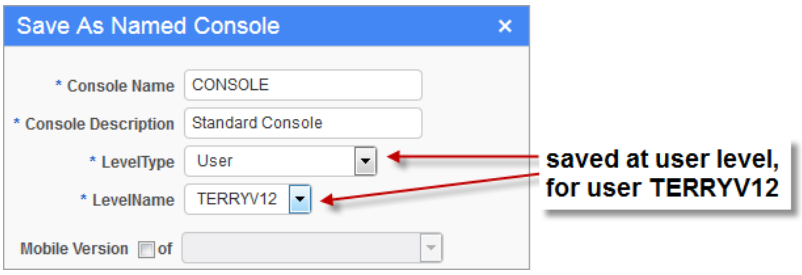
Load Console – Part 1

The first step in editing a console or creating a customized version of a console is to log into Enterprise with the relevant console.

When this UI Console tool is launched to edit a console or to create a customized version of a console, the console selected when the user logs into the system is the one to be edited or used as the starting point for a customized version.

There are additional factors that must be considered when loading a console for editing or customization, to ensure that the console being loaded is at the required level (site, UIC group, or user). To understand what factors need to be considered, it is necessary to understand the options for saving an edited or customized version of a console.

Saving Customized Consoles – [Save] vs [Save As]



The UI Console tool was designed to be versatile. One of the intended results of this versatility is that the UI Console tool allows for the simplification of a user's set of named consoles. This simplification for end-users, however, comes at the cost of a steeper learning slope for administrators.

Specifically, the UI Console tool provides 2 saving protocols for maintaining sets of named consoles for users (set of consoles made available to users for selection), as shown by the following example, and detailed in the following sections:

Saving Protocol 1: Hierarchical Set of Named Consoles

Saving Protocol 2: Flat Set of Named Consoles

Saving Protocols Overview – Examples

The following are examples of the sets of named consoles available to user BillyB created using the 2 saving protocols. Note, user BillyB is a member of the AP Console UIC group.

Saving Protocol 1 Example: Hierarchical Set of Named Consoles

Using this saving protocol, user BillyB would only see the following two consoles, and the console loaded for this user would be the customized version for the user, as explained by the following section: *Load Console – Part 2: Hierarchy for Determining Which Console is Loaded*.

User's Set of Consoles	Base & Variant Levels	Notes
1**. Standard Console**	Site (Base Console Level) User – BillyB (Variant Level)	Site level version is not relevant to BillyB, only the customized version is.
2. **AP Console**	Group – AP Group (Base Console Level) User – BillyB (Variant Level)	Group level version is not relevant to BillyB, only the customized version is.

Saving Protocol 2 Example: Flat Set of Named Consoles

Using this saving protocol, user BillyB would see the following four consoles, with each console being at only one customization level.

User's Set of Consoles	Levels
1. **Standard Console – Site**	Site (Base Console Level)
2. **Standard Console - BillyB**	User – BillyB (Base Console Level)
3. **AP Console**	Group – AP Group (Base Console Level)

User's Set of Consoles	Levels
4. **AP Console - BillyB**	User – BillyB (Base Console Level)

Load Console – Part 2: Hierarchy for Determining Which Console is Loaded

When a user logs into Enterprise, the user selects which named console to use from the list of named consoles that apply to the user. The system assumes that all named consoles potentially have variant versions for the user, thus, the first thing the system does is it checks if there is a variant version of the selected console at the user level for the user. If none is found, the system then checks if there is a variant of the selected console at the group level for the user's UIC group. If none is found again, the system uses the selected console at the site level.

The first customized version the system encounters in the preceding order is the version loaded for the user, and if no customized version is found, the console loaded is a site level console. The system does not check if there is a version of the selected console at the site level, since all users have access to consoles at the site level.

Saving Protocol 1: Hierarchical Set of Named Consoles *(Each Named Console Can Have Variants at Various Customization Levels)*

NOTE: These two suggested saving protocols are intended to give the user an idea of a consistent protocol their company could establish to maintain its set of named consoles. One of them may be adopted, or their company could choose to create its own protocol that is a combination of the two.

This saving protocol for creating consoles is used by administrators that wish to have a smaller, neater set of named consoles, to simplify the choosing of consoles by not cluttering LOVs with irrelevant consoles (e.g., Consoles at the system level would not be relevant to users that have customized versions).

NOTE: By design, administrators were intended to create and edit consoles at the site and group level, and variants at the user level were intended to be created by users themselves, not by administrators. However, an administrator can create and edit a variant for a single user by adding the user to a UIC group, in which case the user would be the sole member of the group.

Create Variant

To save a customized version of a loaded console, use [**Save**] instead of [**Saves As**] to save it for a particular user or group. Since the modified console is not saved with a new name, it does not become a new named console. It becomes a variant of the named console on which it was based, and the loaded console remains unmodified. Behind the scenes, the system is able to distinguish between the two, as they are associated to different system level objects (site, UIC group, user ID). When a user logs in, if the system finds a customized version for the user, it loads the customized version, otherwise it loads the site level version.

NOTE: Due to the order in which variants are searched and loaded, explained in the preceding *Load Console – Part 2: Hierarchy for Determining Which Console is Loaded* section, if variants of a particular named console exist for a user at the user level and at the group level, only the user level version is loaded, since user level variants are searched for first and the first variant found is loaded. Thus, for each named console, a user can have either a user level variant or a group level variant, but not both.

Create New Named Console

If a new named console is required in the set of named consoles, use [**Save As**] to save the customized console with a new name. As expected, since the console is saved with a new name, it becomes a named console, visible to the users for which it was saved (if saved at the site level, available to all users; if saved at the group level, available to all members of the group; if saved at the user level, available to that user).

Edit Console

To edit a named console, load the console for the relevant system level object (site, UIC group, or user ID). For details about ensuring that the correct console is loaded, by adhering to a rule, please refer to the *Load Console – Part 3: Customizing Consoles as Administrator* section.

When saving the modified console, save it for the same system level object using [**Save**]. The result is that the loaded console is overwritten with the modified version.

NOTE: Due to the order in which variants are searched and loaded, explained in the preceding *Load Console – Part 2: Hierarchy for Determining Which Console is Loaded* section, if variants of a particular named console exist for a user at the user level (created by user himself/herself) and at the group level, only the user level version is ever loaded, since user level variants are searched for first, and the first variant found is the one that gets loaded. Thus, for each named console, a user can have either a user level variant or a group level variant, but not both.

Saving Protocol 2: Flat Set of Named Consoles *(Each Named Consoles is at Single Customization Level)*

If administrators wish to have variant consoles and the consoles they were based on in the set of named consoles, use [**Save As**] instead of [**Save**] to save new variant consoles with a different name. As expected, since the variant is saved with a new name, it becomes a named console, completely detached from the console on which it was based. To distinguish between the base and variant versions, include the system level object's name for which the variant was saved.

To summarize, if this option is used, the set of named consoles will contain the base consoles and all of their variants, and the name used to save them is used to distinguish them. Since variants are in the set of named consoles, variants are also named consoles.

Create New Named Console – Base or Variant

To create a new named console, based on the loaded console, use [**Save As**] to save the modified console with a new name. As part of the name, specify the system level object (UIC group, or the site) for which it was created. Since the console is saved with a new name, it becomes a named console, visible to the users for which it was saved.

Edit Console – Base or Variant

To edit a named console or a variant for a UIC group or the site, load the console for the relevant system level object (UIC group or the site). For details about ensuring that the correct console is loaded, please refer to the *Load Console – Part 3: Customizing Consoles as Administrator* section.

When saving the modified console, save it for the same system level object using [**Save**]. The result is that the loaded console is overwritten with the modified version.

Load Console – Part 3: Customizing Consoles as Administrator

Since an administrator can also have customized versions of consoles, at the user or group level, one of the following rules should be adopted and followed to ensure that when an administrator sets out to load a user or group level console in order to edit it or create a customized version from it for other users, the selected console is the expected version and not a customized version for the administrator.

Rule 1 – No Custom Consoles for Administrator

The administrator cannot have any customizations of consoles at the user or group level, so that when a console is loaded, the version for the administrator is not accidently loaded.

Rule 2 – Administrator Uses Second User ID to Manage Consoles

A second user ID can be used by the administrator for the sole purpose of managing consoles, which would have no customized consoles.

Customizing Consoles for UIC Groups as Administrator

In order for an administrator to load and save a customized console for a UIC group, the administrator must belong to that UIC group, otherwise, that console will not be available to the administrator.

A user can only belong to one UIC group at a time, so, if the administrator belongs to a different UIC group, the first step is to remove the administrator from that UIC group. With the administrator not belonging to any UIC group, add the administrator to the UIC group for which a console is to be modified.

If adhering to Rule 1 above, after the administrator saves the modified console, the administrator should be removed from the UIC group so that the administrator does not have a customized version of the console at the group level.

Deleting Consoles & Removing Customizations

The following two subsections are about deleting named consoles and removing customizations to named consoles (deleting variants of named consoles).

To delete a named console and all of its variants from the system, refer to the following *Deleting Consoles* section.

To leave the named console that is at the base console level in the system, but delete a variant version of it, refer to the following *Removing Customizations* section in this guide.

Deleting Consoles

This option is used to delete a named console at the base console level, and all of its variants from the system.

As per the previous *Terms: Named Console & Base Console Level, User's Set of Consoles* section, the level at which a new named console is created is referred to as the base console level.

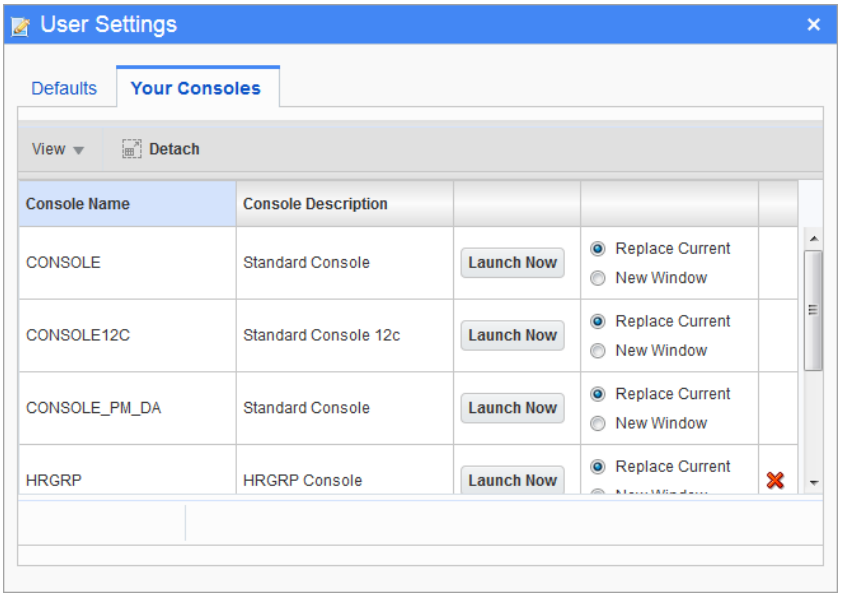
For a user to delete a named console and all of its variants, the user must have the configuration privilege required to edit consoles for the system level object (site, UIC group, or user ID) the named console at the base console level was created. So, if a new named console was created for a UIC group titled AP Console, for a user to delete that named console and any of its variants that may have

been created at the user level, the user must have the configuration privilege required to edit consoles for the AP Console UIC group.

The following are the steps for deleting a named console and all of its variants from the system:

Step 1: **Launch User Console Settings Popup**

Step 2: **Delete Named Console**



User Settings pop-up window

The User Settings pop-up window lists consoles to which the user has rights.

If the user has the configuration privilege required to edit a console for the system level object (site, UIC group, or user ID) the console at the base console level was created, a Delete icon (✖) is available for that console. Clicking the Delete icon deletes the console and all of its variants from the system.

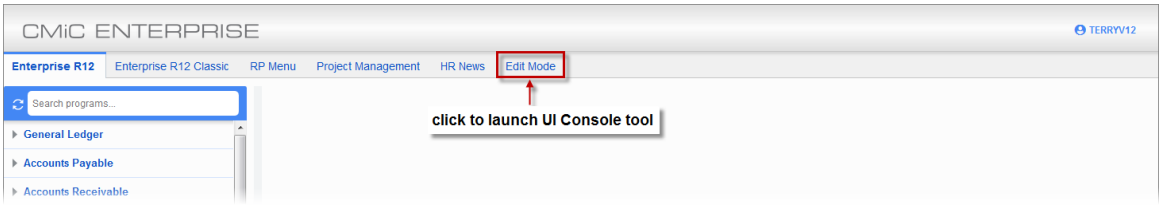
Removing Customizations (Deleting Variants)

To delete just a variant version of a named console, which would be a variant of the named console that is not at its base console level, follow the following steps.

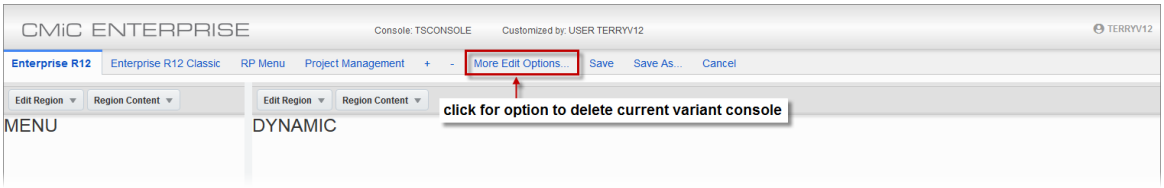
Step 1: **Load Console Variant to Delete**

Log into the system with the variant of the console that is to be deleted.

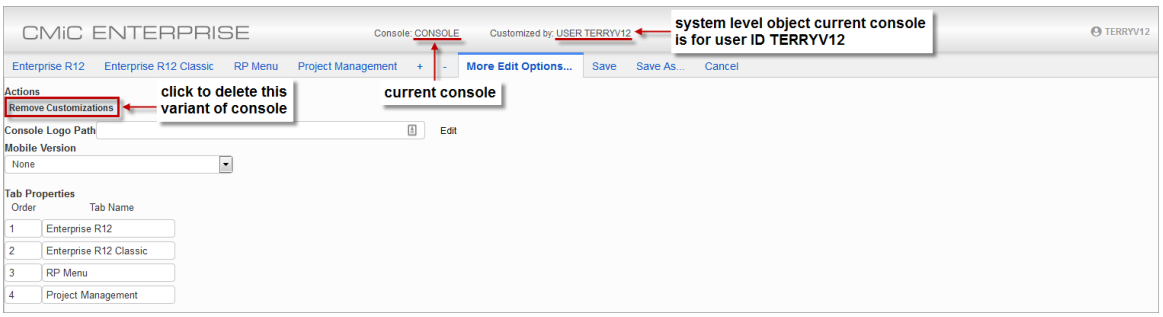
Step 2: **Launch UI Console Tool**



Step 3: **Click [More Edit Options…] Button**

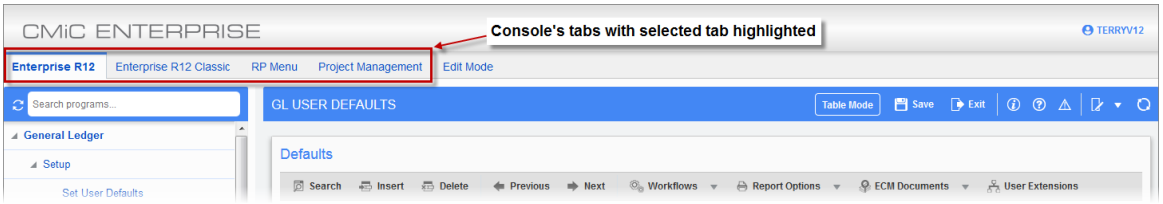


Step 4: **Click [Remove Customizations] Button**



Console Tabs

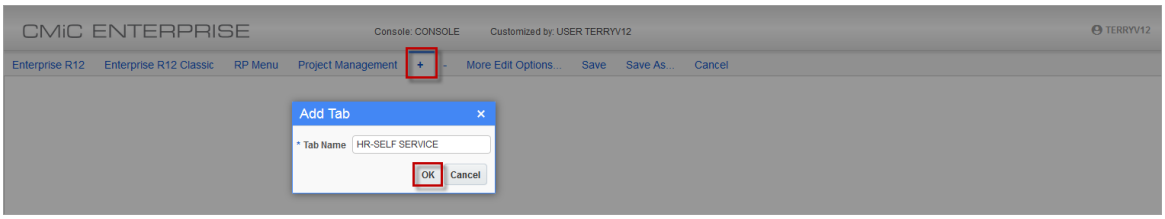
Overview – Console Tabs



A console contains one or more tabs, and when a console is loaded, the first tab's contents are displayed. The displayed tab's title is highlighted, and the displayed regions are for that tab. Each tab has its own configurable regions, and tabs can be added and removed from a console. Hence, the configuration of a console primarily involves its tabs.

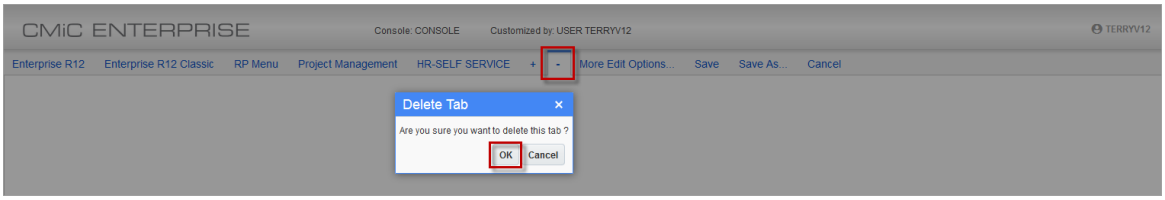
Add New Tab

To add a new tab, run the UI Console tool by clicking the [**Edit Mode**] button. With the console in edit mode, click the [+] button, shown below, and a pop-up window will ask the user to name the new tab.

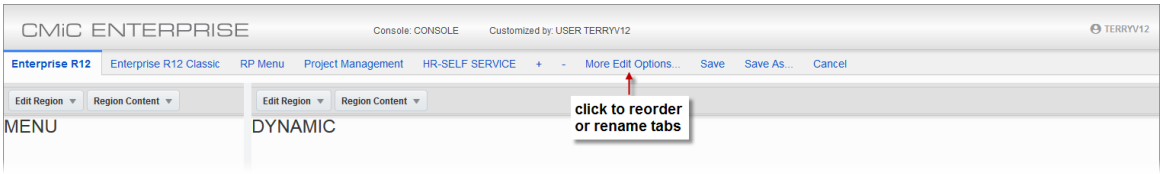


Delete Tab

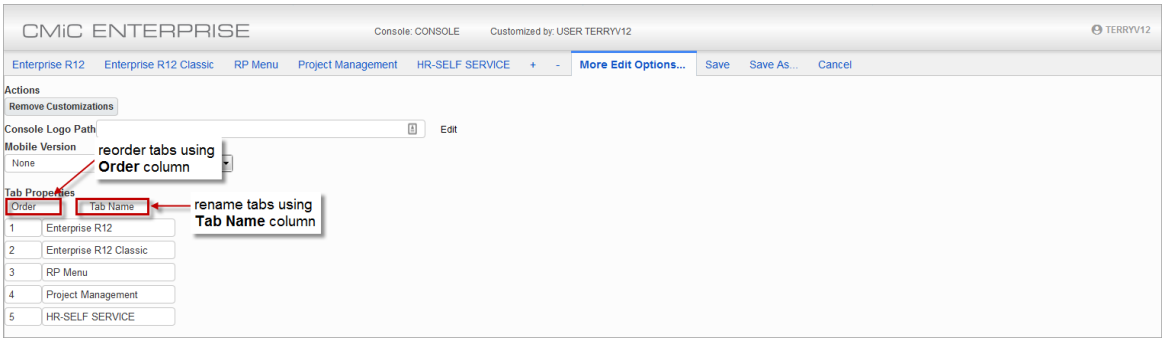
To delete a tab, run the UI Console tool by clicking the [**Edit Mode**] button. With the console in edit mode, select the tab by clicking it (its text will become highlighted), and click the [**-**] button. Click [**OK**] on the confirmation pop-up, and the selected tab will be removed.



Rename & Reorder Tabs

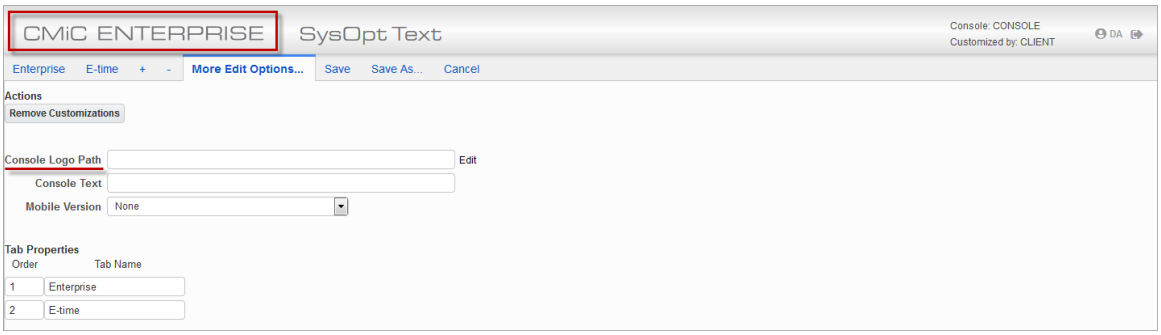


To rename a tab or to rearrange the order of the tabs, run the UI Console tool by clicking the [**Edit Mode**] button, and with the console in edit mode, click [**More Edit Options**].

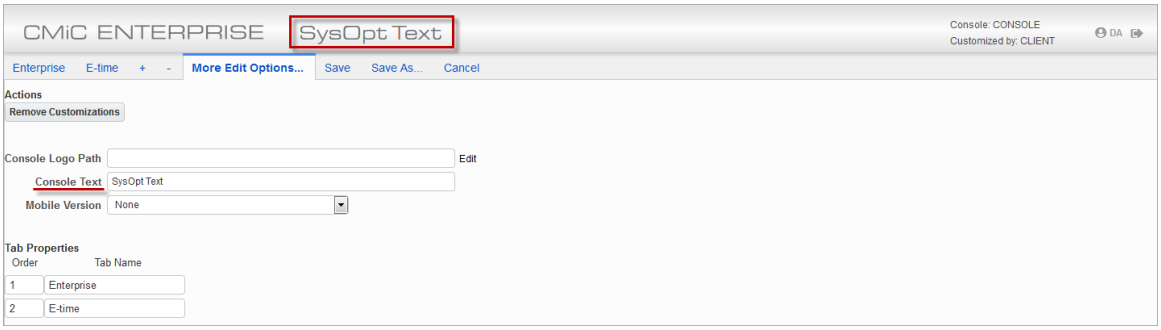


As shown in the above screenshot, the Order and Tab Name columns become available to edit the order and name of the tabs. Simply edit the text of the fields under these columns to make changes.

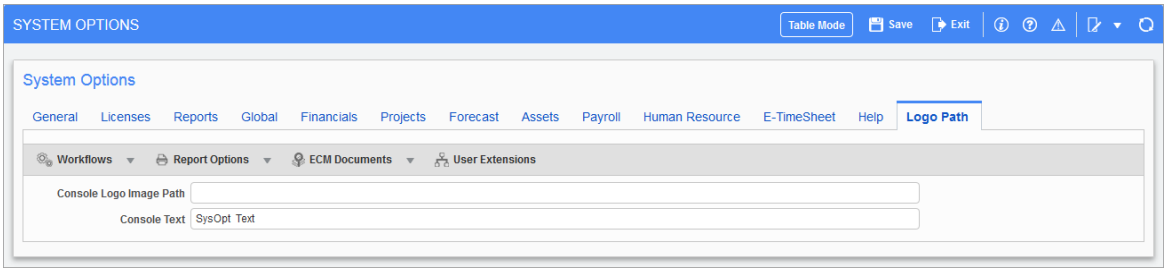
More Edit Options Tab



To update the logo that appears in the section outlined in red in the above screenshot, click the Edit link next to the Console Logo Path field. In the Image Upload pop-up window, click the [**Browse…**] button to select an image from Windows Explorer or use the drag and drop feature to upload an image. Click [**Upload**] to upload the file, or [**Cancel**] to exit the pop-up window without uploading an image.

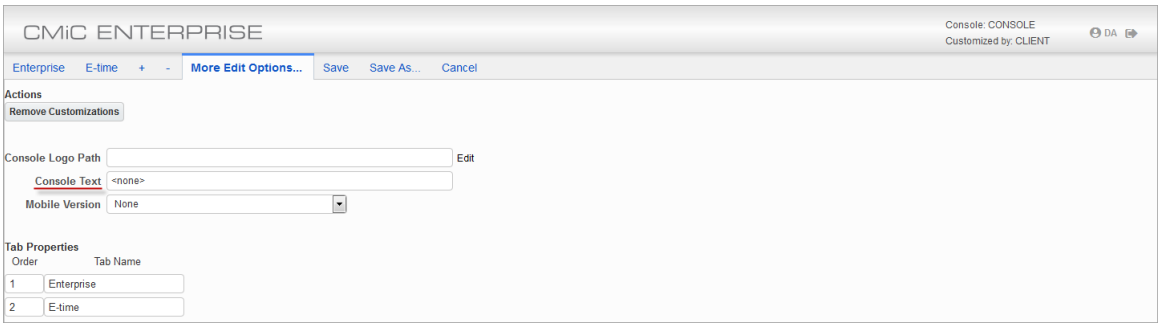


To create or edit the console text that appears in the section outlined in red in the above screenshot, update the Console Text field. This can also be updated at the system level by going to the System Options screen and editing the Console Text field found on the Logo Path tab, as shown in the screenshot below.



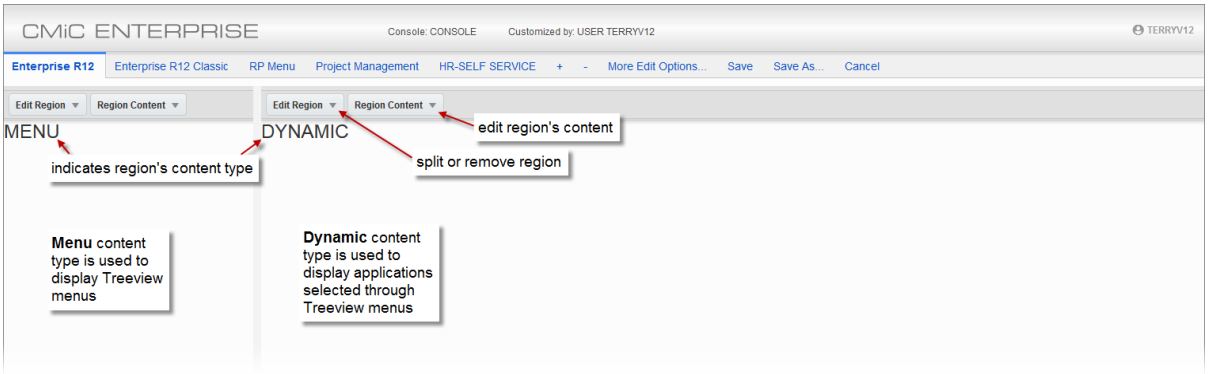
Pgm: SYSOPT – System Options; standard Treeview path: System > Setup > System Options – Logo Path tab

To remove the console text that has been created at the system level, type “<none>” into the Console Text field in the More Edit Options tab, as shown in the screenshot below.



Console Regions

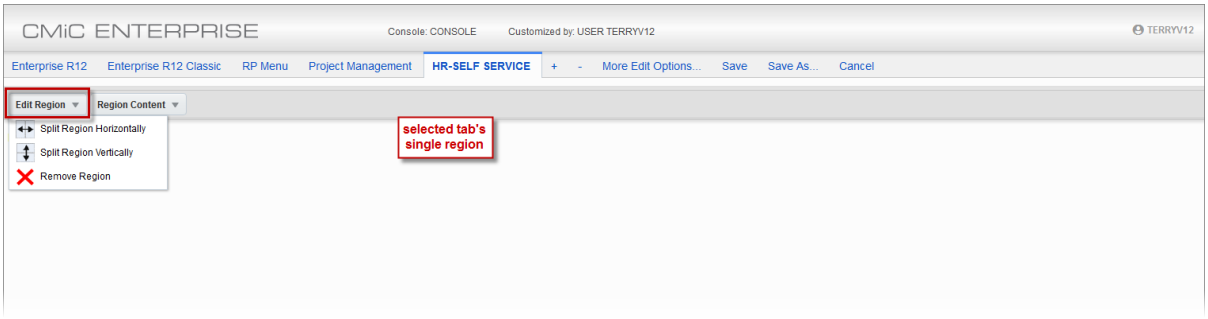
Overview – Regions



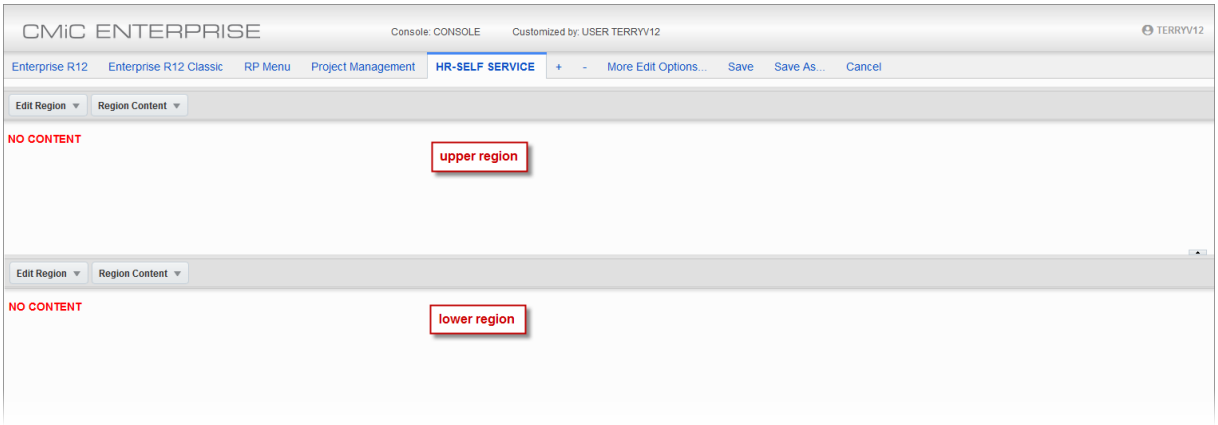
Each tab is composed of different regions that can contain different content. A new region can be added by splitting a single region into two regions, using a region's Edit Region drop-down menu, and a region's content can be selected and defined using a region's Region Content drop-down menu.

Add & Delete Region

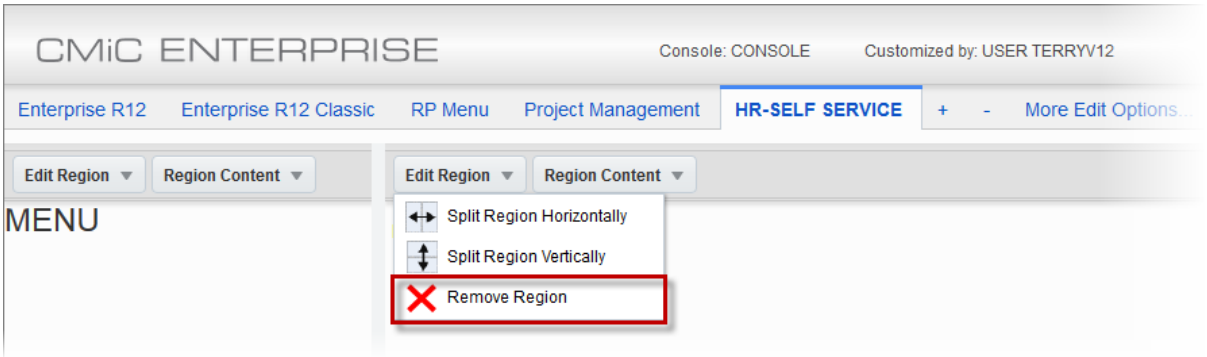
Add Region – Split Single Region into Two



A new region is added by splitting a selected region into two, horizontally or vertically. If a region is split horizontally, the resulting two regions are next to each other, horizontally. If a region, such as the one in the above screenshot, is split vertically, one of the regions will be over the other, vertically, as in the following screenshot.

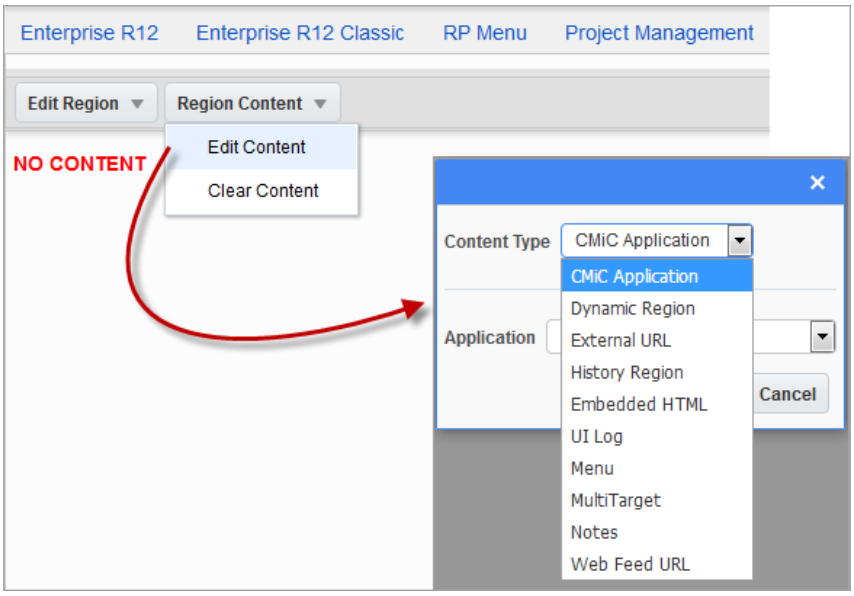


Delete Region



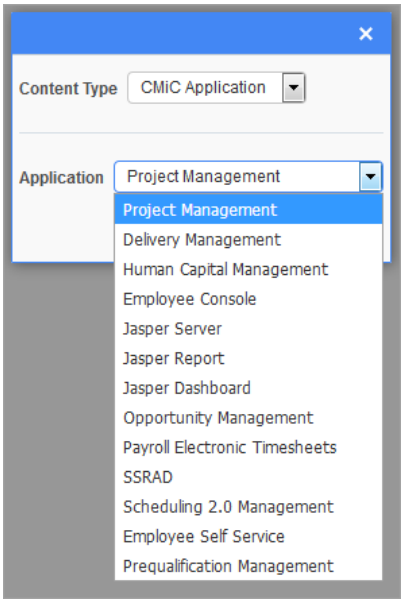
To delete a region, click the region's Edit Region drop-down menu, and select its Remove Region option.

Edit Region Content



A region's Region Content drop-down menu's options are used to edit and clear a region's content. Use option Edit Content to change the type of region.

CMIC Application – Content Type

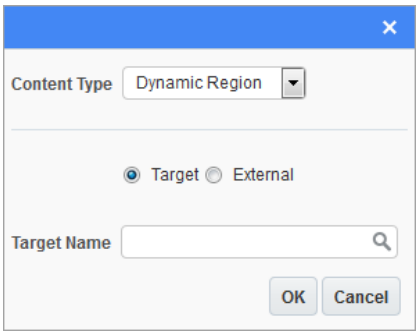


The CMiC Application content type is used to display a selection of CMiC modules. With "CMiC Application" selected for the Content Type field, use the Application field to select the module to be displayed by the region.

Dynamic Region – Content Type

The Dynamic Region content type is used to display an Enterprise module selected through a Treeview menu, which is contained by a region with the menu content type, and it is used to display targets like dashboards.

To set a region's content to the dynamic region type, click the region's Region Content drop-down menu and select Edit Content from the drop-down list. In the pop-up window, as shown below, select "Dynamic Region" from the Content Type field.



Display Enterprise Application Selected via Treeview

To have the dynamic region display the module selected via the Treeview in a menu region, simply leave the Target Name field blank. The system will automatically pair the menu region with the dynamic region.

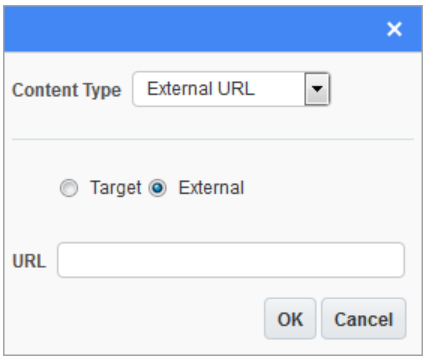
NOTE: Only one menu and dynamic region pair can be used per console tab.

Display Target

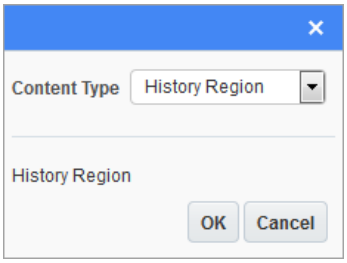
To have the dynamic region display a target, such as a dashboard, select the Target radio button, and using the Target Name field, select the desired target.

External URL – Content Type

The External URL content type is used to display an external website. The user may select the Target radio button and choose a target from the LOV. If the External radio button is selected, the user can enter a URL in the URL field, as shown below.



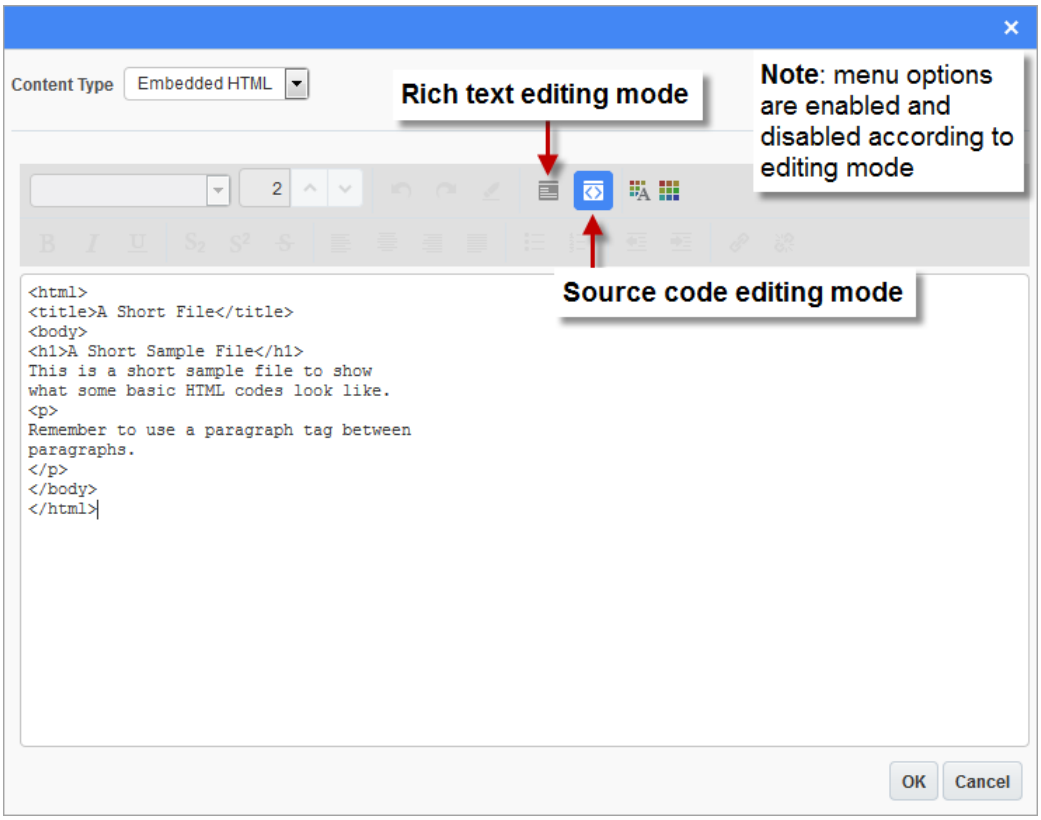
History Region – Content Type



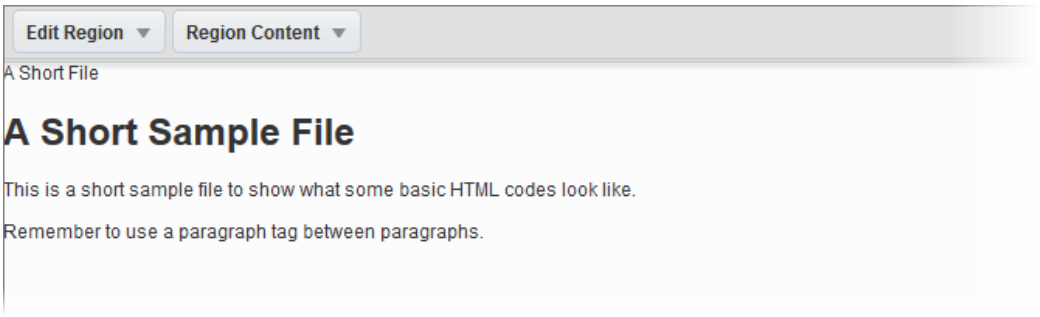
The History Region content type is used to list all the programs called from the Treeview, as hyperlinks, in order to quickly re-launch used applications. A History region only displays the applications launched by the Treeview that is on the same console tab that it is.

Embedded HTML – Content Type

The Embedded HTML content type is used to create a custom HTML region, using an HTML editor, as shown in the below screenshot.



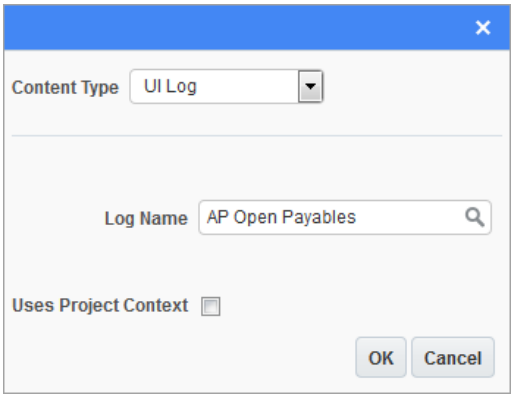
The result of the above HTML code is shown in the following screenshot:



User Privilege for Embedded HTML Content Type

To use the Embedded HTML content type, a user must have the privilege to do so. Please refer to this guide's *Grant Embedded HTML Privilege* section for further details.

UI Log Region – Content Type



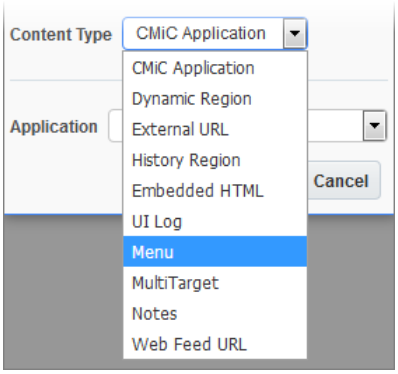
The UI Log content type is used to display a UI log created through the UI Log Builder module. Use the Log Name field to select the log to be displayed by the region.

Menu – Content Type

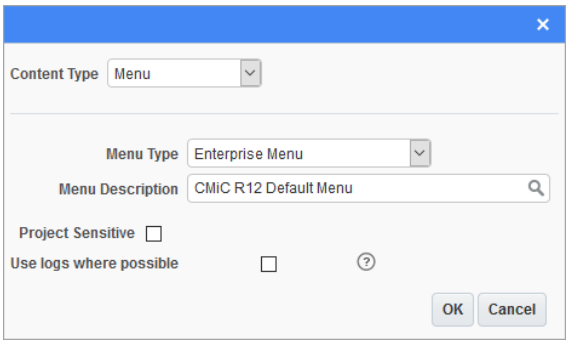
The Menu content type is used to display a selected Treeview menu, which is used to select an Enterprise module to run. Modules selected through a Treeview are displayed by the Dynamic Region content type, so a menu region is typically paired with a dynamic region. If a console's tab has a menu region, but no dynamic region, the applications selected through the menu region's Treeview will be displayed on a new tab of the web browser.

The Treeview menus used in menu regions can also be customized. For details about customizing Treeviews, please refer to the Treeview Builder user guide.

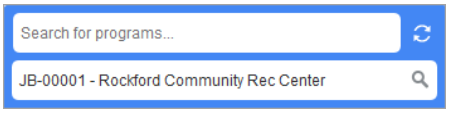
To set a region's content to the menu type, click the region's Region Content drop-down menu and select Edit Content from the drop-down list. In the pop-up window, as shown below, select "Menu" from the Content Type field.



Then, select the menu type for the menu from the pop-up window's Menu Type field, as shown below, and select the Treeview for the selected menu type using the Menu Description field.



Project Sensitive – Checkbox

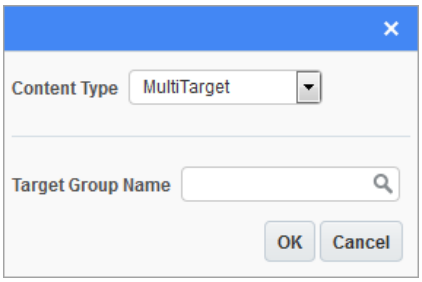


If this box is checked, the menu is set to be project sensitive and the Treeview menu region will display a Project LOV, as shown in the above screenshot. This lists all projects to which the user has access to based on PM security. When the user launches any of the modules that are project driven, the project selected from the LOV will be defaulted.

User Logs Where Possible – Checkbox

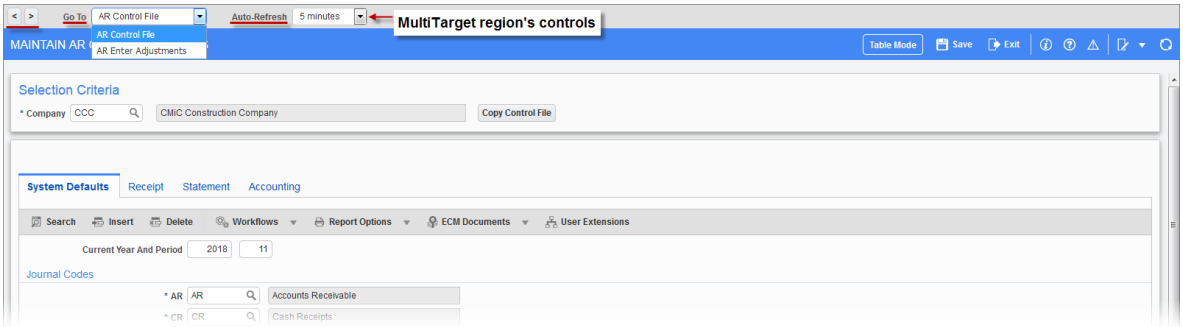
If this box is checked, certain program menu items will launch read-only logs, from which the user can access individual records in a new browser tab.

MultiTarget – Content Type

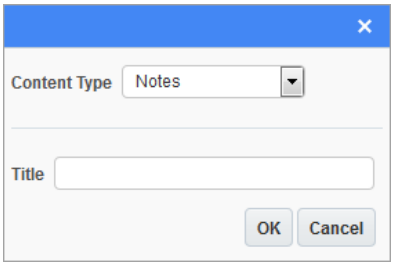


The MultiTarget content type is used to display a user-defined set of targets, such as dashboards and logs, and URLs in one region, without trying to fit them all in the region at the same time. The set of user-defined targets and URLs is referred to as a target group, and these sets are maintained by the Target Group Maintenance screen. For details about creating and editing target groups, please refer to the Target Group Maintenance section of this guide.

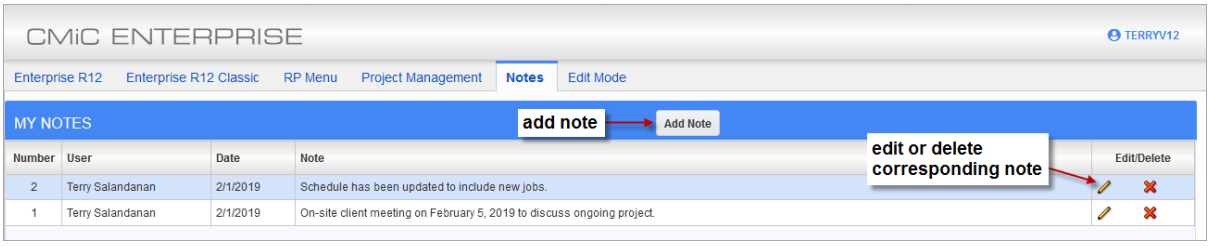
Along the top of a MultiTarget region, the blue [<] and [>] buttons are used to navigate from one target in the target group to the other. Alternatively, the Go To drop-down list can be used to select which target in the group to display. The Auto-Refresh drop-down list is used to select a refresh rate for the displayed target.



Notes – Content Type



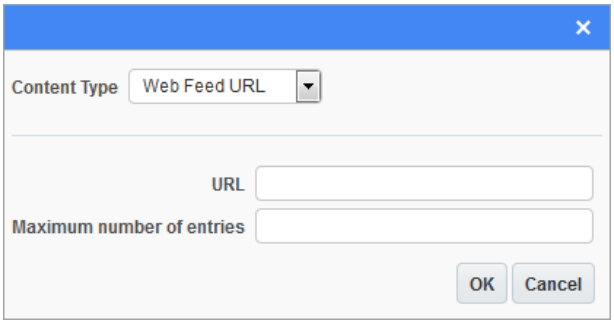
The notes content type is used to create a console region for notes, as shown in the following screenshot:



User Privilege for Notes Content Type

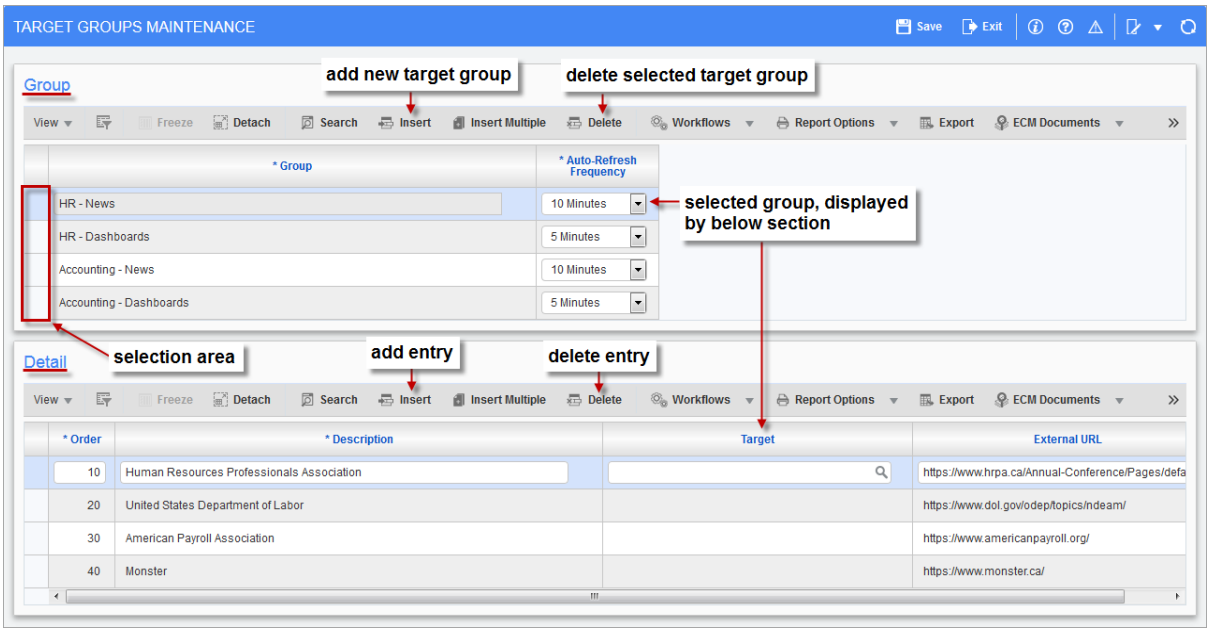
There are two user privileges related to the notes in a Notes region. For details, please refer to the *Grant Privileges for Notes Content Type* section of this guide.

Web Feed URL – Content Type



The Web Feed URL content type is used to display a web feed, such as an RSS feed. Specify the feeds URL using the URL field, and use the Maximum Number of Entries field to specify the number of entries to show in the region.

Target Group Maintenance



Pgm: STDTARGETGROUP; standard Treeview path: System > Setup > Target Group Maintenance

This section provides details about setting up the target groups used by the MultiTarget content type.

The MultiTarget content type is used to display a user defined set of targets, such as dashboards and logs, and URLs into one region, without fitting them into the region at the same time. The set of user defined targets and URLs is referred to as a target group, and these sets are maintained by the Target Group Maintenance screen.

Create New Target Group

To create a new target group, click the [**Insert**] button on the Group section's Block Toolbar. With the new row, give the target group a name, and use the Auto-Refresh Frequency column to select how often the target/URL should be refreshed.

Use the Detail section to add targets/URLs to the target group.

Delete Target Group

Select the target group using the selection area, framed by the red rectangle in the above screenshot, then click [**Delete**].

Add Target or URL to Target Group

Under the Group section, select the target group into which the target or URL will be inserted, using the selection area (framed by red rectangle). Click the [**Insert**] button on the Detail section's Block Toolbar. In the new row, enter the details for the target or URL, using the following table that provides details about its columns:

Column	Description
Order	Order in which items are displayed.
Description	Description about the target or URL.
Target	Either the Target field or External URL field is used; Select a created target, such as a dashboard or log, from the list.
External URL	Either the Target field or External URL field is used; Specify the desired URL.

Delete Target or URL from Target Group

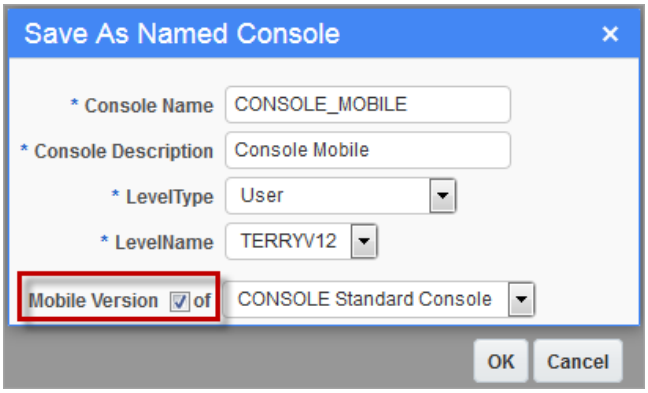
Select the entry to delete using the selection area, then click the [**Delete**] button.

Mobile Consoles

Using the UI Console tool, mobile versions of named consoles can be used instead when using Enterprise through a mobile device.

To create a mobile version of a named console, follow the instructions provided by the *Customizing & Editing Consoles* section, then follow these instructions when going to save the mobile version.

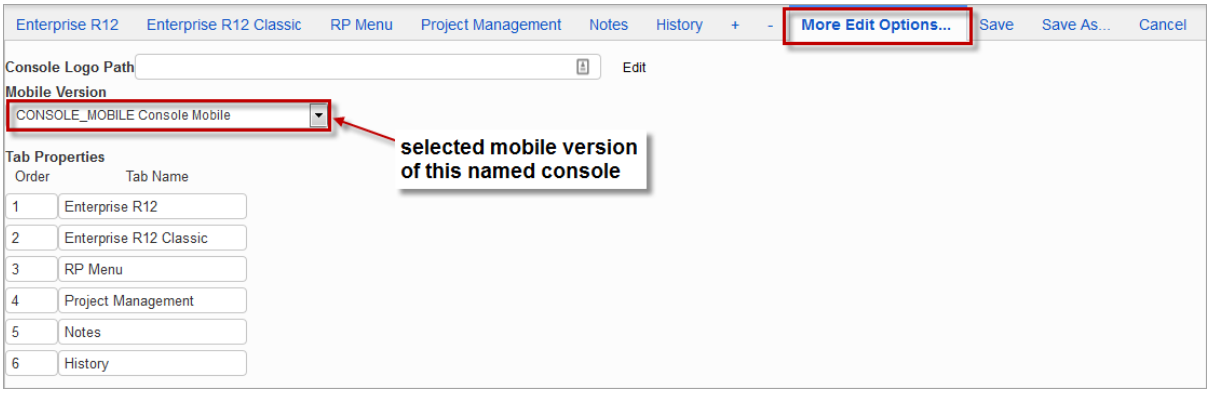
Create Mobile Console



To save the customized console as a mobile version of the named console, click [**Save As**]. In the Save As Named Console pop-up window, shown above, check the 'Mobile Version' checkbox. Once the 'Mobile Version' checkbox is checked, the corresponding field will default to the console used as the base for the customized version, and the Console Name and Console Description fields will default to a recommended name and description for the new named console.

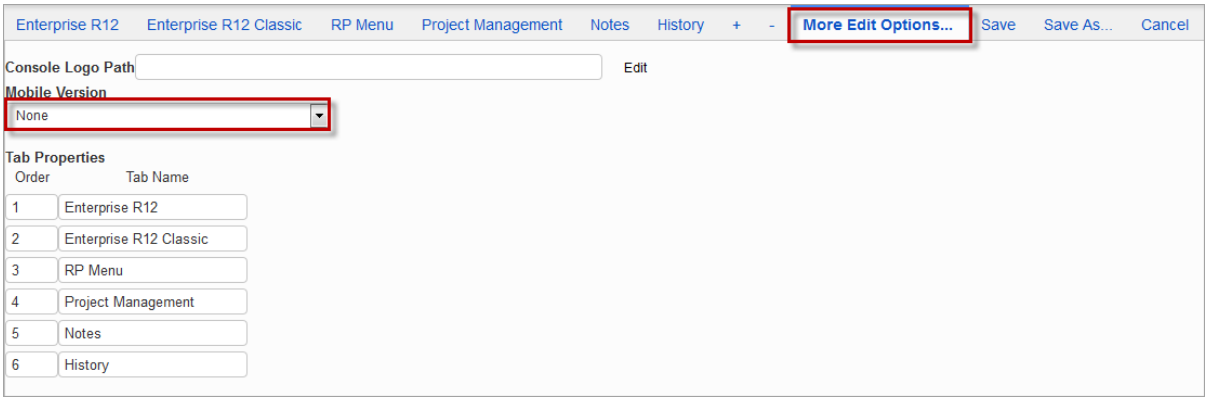
Since the 'Mobile Version' checkbox is checked, when a user on a mobile device logs into Enterprise with the console for which this mobile version was created, the system will detect that a mobile device is being used and that a mobile version of the Console exists, and it will load the mobile version instead.

Specify Mobile Version of Console



To specify a mobile version of a named console, so that the mobile version is loaded whenever the named console is selected through a mobile device, log into Enterprise with the named console for which its mobile version will be specified. Click the [**Edit Mode**] button, at the end of the console's tabs, and then click the [**More Edit Options**] button. As shown in the above screenshot, use the Mobile Version field to select the Console's mobile version, then click the [**Save**] button.

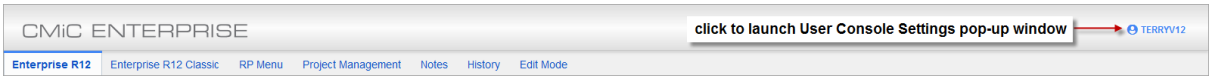
Remove Mobile Version Association from Named Console



To remove the mobile version specification from a named console, log into Enterprise with the named console for which its mobile version specification will be removed. Click the [**Edit Mode**] button, at the end of the console's tabs, and then click [**More Edit Options**]. As shown in the above screenshot, use the Mobile Version field to select "None", then click the [**Save**] button.

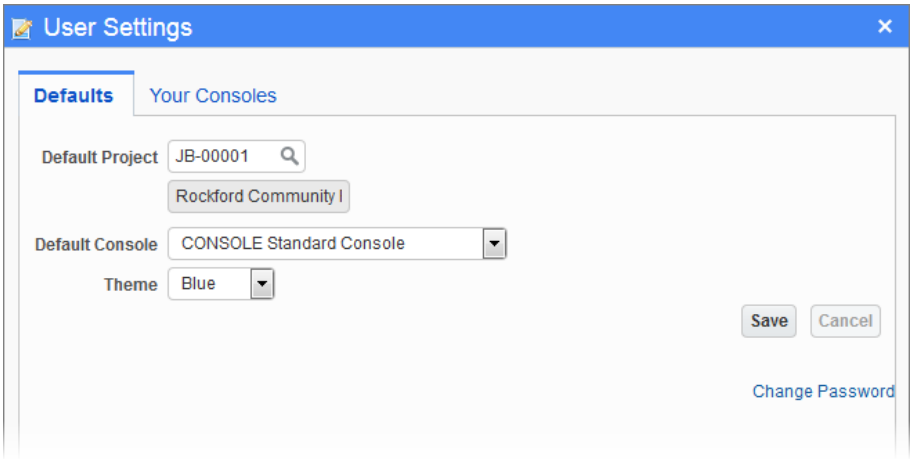
User Console Settings – Pop-up Window

Launching User Console Settings Pop-up Window



To launch the User Console Settings pop-up window, click the username along the top of the console (as shown in the above screenshot).

Defaults – Tab**:** Set User's Default Console & Project, & Change Password

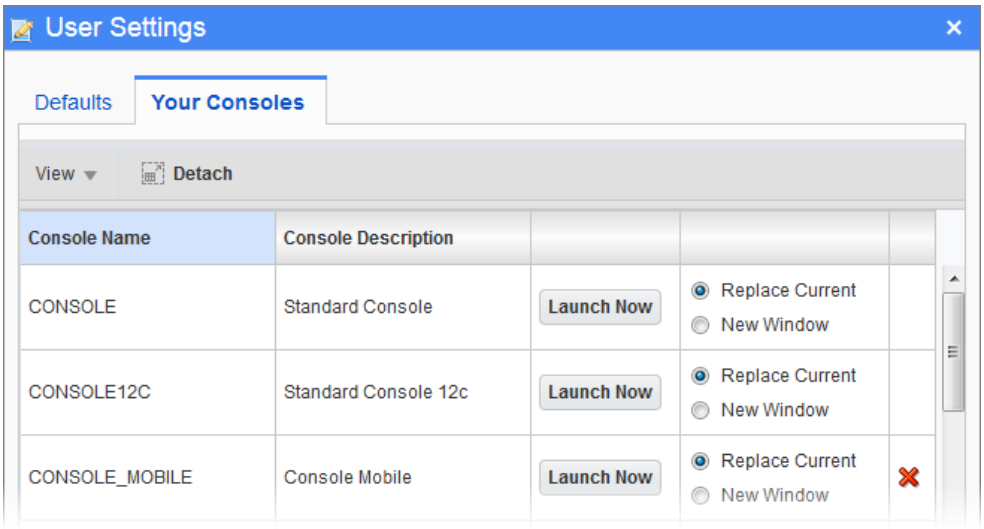


The Defaults tab, shown above, is used to set a user's default console so that when logging into Enterprise, the screen to select the console to load is skipped. This is done by selecting a default console via the Default Console field and clicking the [**Save**] button. The drop-down menu in the Default Console field in this pop-up window follows the same security rules as the Default Console field on the General tab of the User Maintenance screen. For more details, refer to *User Maintenance – Setting a Default Console* section.

This tab is also used to set a user's default project via the Default Project field and a user's default screen color using the Theme field.

A user's password can also be changed on this tab by click the Change Password link.

Your Consoles – Tab: Launch Other Consoles & Deleting Consoles



The Your Consoles tab lists the consoles available to the user. It is used to launch a different console or to delete a named console and all of its variants from the system.

Launch a Different Console

To launch a different console, select its corresponding 'Replace Current' or 'New Window' radio button and then its corresponding [**Launch Now**] button. The 'Replace Current' radio button launches the console using the current browser tab, and the 'New Window' radio button launches the console in a new browser tab.

Delete a Named Console & All Variants

For details about deleting a named console and all of its variants, please refer to the *Deleting Consoles & Removing Customizations* section found in this guide.

Appendix

Publishing Console Customizations

Script to Publish Console Customizations

When customizing a console, at any of the levels supported (site, group, user), that customization completely replaces the original definition. The latest means that any change applied by the level that originally created the console will no longer be seen by the customized levels. For example, if customer applies customizations to the standard console released by CMiC, and then in a later patch CMiC adds more tabs to the console, those tabs will not be seen in the customized version.

When publishing console customizations or consoles created by any of the customization levels, a script needs to be generated and then installed in the other environment or the same one if the idea is to use the script for copying customizations from one level to another.

NOTE: It is always recommended that environments be on the same patch level.

For generating the script to publish console customizations, CMiC provides two files:

1. **create_console_script.pl**
2. **create_console_script_ue.bat**

The batch file calls the PERL script (.pl) and passes the string to connect to the database where data needs to be extracted from.

NOTE: The batch file needs to be adjusted to use the actual user's environment and to pass the proper connection string (the connection for the database where data is read from).

File(s) with extension CONUE (which stands for CONsole of User Extension) will be generated.

Modify Script: create_console_script_ue.bat

Below is a list of variables that need to be set in the create_console_script_ue.bat:

Variable	Description	Example
ORACLE_HOME	Path to the Oracle Home	set ORACLE_HOME=C:\Oracle
TNS_ADMIN	Path to the tnsnames.ora location	set TNS_ADMIN=C:\Oracle\NET80\ADMIN
perl_bin	Path(s) to the Perl's BIN folder. Can be separated by ";".	set perl_bin=Z:\Util\perl\5.6.1\bin;Z:\Util\perl\5.6.1\bin\MSWin32-x86
uigSchemaName uigSchemaPass DatabaseName	Database Connection string: UIG Schema Name, password and Database	perl %~dp0\create_program_script.pl uigSchemaName/uigSchemaPass@DatabaseName N Y

When running the BAT file, it first prompts for the customization level, possible options are S (site) and G (group); by default it takes S (site):

```
C:\cm32\v10_x\15\15.04450>c:\cm32\od\V10_X\Internal\Infrastructure\SQLAPItools\create_console_script_ue_devv10_x.bat
Enter Customization Level: S(Site) or G (Configuration Group) or U (User). Press Enter for S(Site):
```

For any level selected, it will prompt for the client code, suggesting “DA” as a default value for the client code. Press Enter if that is the user’s client code.

NOTE: DA is always the code for all single-tenanted systems.

```
C:\cm32\v10_x\15\15.04450>c:\cm32\od\V10_X\Internal\Infrastructure\SQLAPItools\create_console_script_ue_devv10_x.bat
Enter Customization Level: S(Site) or G (Configuration Group) or U (User). Press Enter for S(Site):
Enter Client Code - Press Enter for CMiC Client(DA): _
```

If group level is selected, it will prompt for the group code:

```
C:\cm32\v10_x\15\15.04450>c:\cm32\od\V10_X\Internal\Infrastructure\SQLAPItools\create_console_script_ue_devv10_x.bat
Enter Customization Level: S(Site) or G (Configuration Group) or U (User). Press Enter for S(Site): G
Enter Client Code - Press Enter for CMiC Client(DA):
Enter Configuration Group Code: _
```

If user level is selected, then it will prompt for the user ID:

```
C:\cm32\v10_x\15\15.04450>c:\cm32\od\V10_X\Internal\Infrastructure\SQLAPItools\create_console_script_ue_devv10_x.bat
Enter Customization Level: S(Site) or G (Configuration Group) or U (User). Press Enter for S(Site): U
Enter Client Code - Press Enter for CMiC Client(DA):
Enter User ID: _
```

Once level data has been entered, it will prompt for the name of the console:

```
C:\cm32\v10_x\15\15.04450>c:\cm32\od\V10_X\Internal\Infrastructure\SQLAPItools\create_console_script_ue_devv10_x.bat
Enter Customization Level: S(Site) or G (Configuration Group) or U (User). Press Enter for S(Site):
Enter Client Code - Press Enter for CMiC Client(DA):
Enter Console Name: CONSOLE
```

Example 1 – Generating for site level:

```
C:\cm32\v10_x\15\15.04450>c:\cm32\od\V10_X\Internal\Infrastructure\SQLAPItools\create_console_script_ue_devv10_x.bat
Enter Customization Level: S(Site) or G (Configuration Group) or U (User). Press Enter for S(Site):
Enter Client Code - Press Enter for CMiC Client(DA):
Enter Console Name: CONSOLE
Generated - console_da.conue        Notice how the file name has suffix "DA" as this is the Client Code
```

Example 2 – Generating for group level:

```
C:\cm32\v10_x\15\15.04450>c:\cm32\od\V10_X\Internal\Infrastructure\SQLAPItools\create_console_script_ue_devv10_x.bat
Enter Customization Level: S(Site) or G (Configuration Group) or U (User). Press Enter for S(Site): G
Enter Client Code - Press Enter for CMiC Client(DA):
Enter Configuration Group Code: ADMIN
Enter Console Name: CONSOLE
Generated - console_admin.conue        Notice how the file name includes the Group Code as suffix
```

Installing files with extension CONUE

Files with extension CONUE could be manually run in any database by using the utility called CONUE_LOADER. The file for the utility is found in folder: \uig\sql (if using CMiC patch) or \External\Application\SQL\SYSTEM (if using SVN).

The utility CONUE_LOADER must be run via SQL*Plus, making sure the user sets the path in a way that it can find the following files:

- conue_loader.sql
- files with extension “conue” to be run

Steps to Run Loader

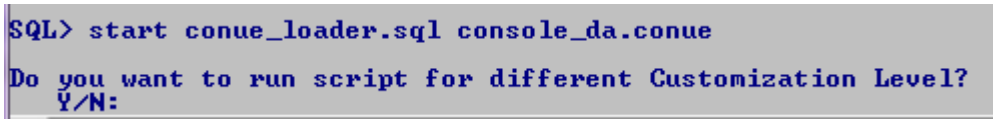
1. Run command window.

2. Set the path if required by executing “set sqlpath=”.

3. Connect to sql*plus to schema UIG.

4. Once in SQL*Plus, run CONUE_LOADER with the name of the CONUE file to be run passed as a parameter.

The user will be asked if they want to install the customization for a customization level different from which data was extracted.



For example, the file was prepared by reading data from group “ADMIN”;

If the user wants to install customizations for the same group, the user would answer “N”;

But if the user wants to install customizations to a different level, the user would answer “Y”.

If the user decided to install the customizations to a level different from where the data was extracted, the user will be prompted to answer questions about the customization level for installation.

Once the file installation is completed, spool files (*.lst) will be found in the same location where the command line was executed.

It is a good practice to open the spool file and review it, even if no errors were raised during the execution of conue_loader.

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