A360

Basic Navigation in Financial Management

Kent County Training Manual

April 2016

Table of Contents

1. Basic Navigation in A360 5

1.1. Instructions for first time login to Advantage 360 5

1.2. Login to A360 5

1.3. Navigate to Financial Management 6

1.4. Financial Management Home Page 7

1.5. Primary Navigation Panel 7

1.6. Secondary Navigation Panel 8

1.7. Navigation Tools 12

1.8. Application Help 13

1.9. Right-Click Commands 14

1.10. Personalize 16

1.11. I forgot my A360 password! 21

1.12. How to Change your A360 Password 23

1. Basic Navigation in A360

1.1. Instructions for first time login to Advantage 360

1. You will receive an email from noreply@adv360.com with the subject line: **ADVMAIL: Welcome to CGI Advantage360**

   This email will contain your user ID. You will soon receive an additional email containing instructions on how to activate your account.

   You user ID will be your *first initial + middle initial + first 6 letters of your last name* @kentcountymi.gov (If you do not have a middle name, use "*x*")

2. You will next receive an email from noreply@adv360.com with the subject line: **ADVMAIL: Your Advantage360 User Activation Email** to set up security questions and create a password.

   This email will contain a link to activate your account where you will be able to set up your password and security questions.

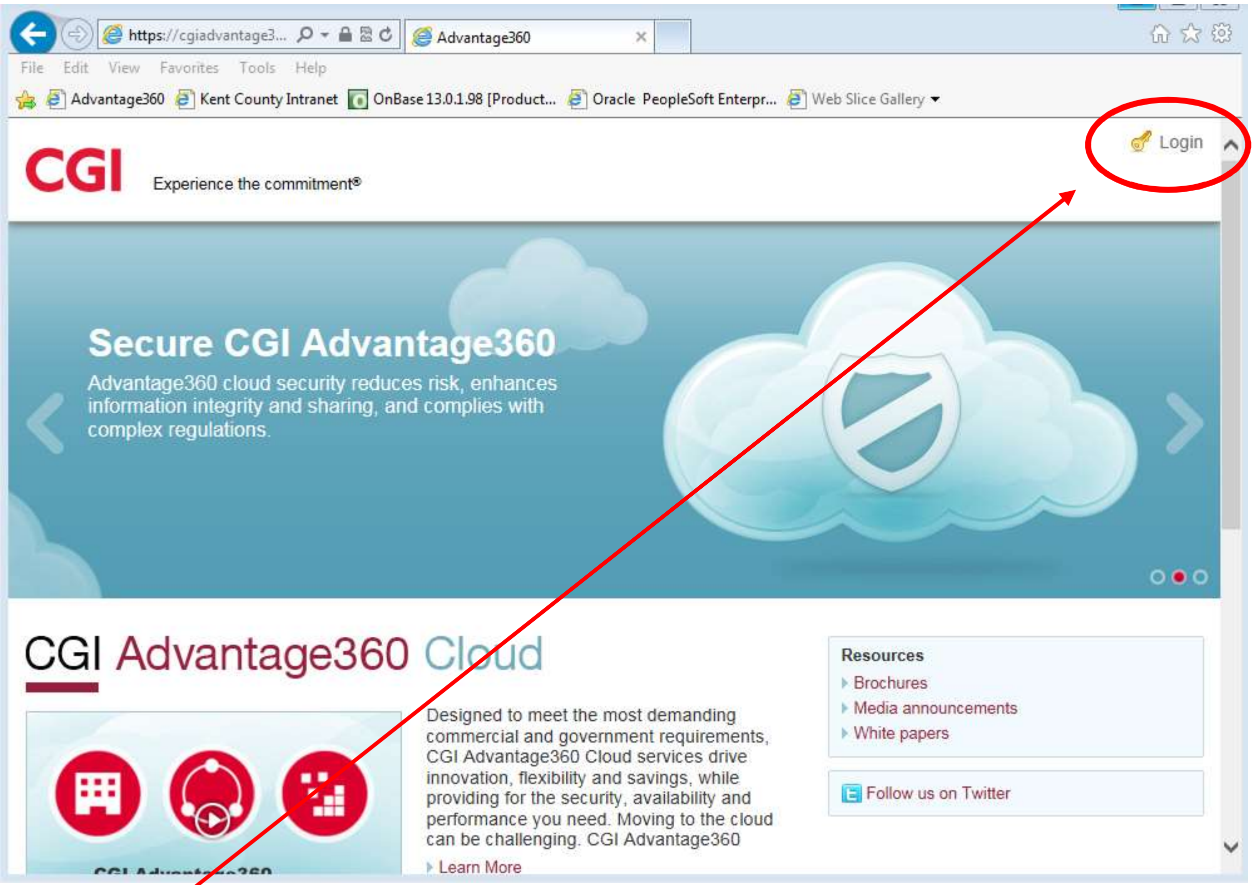
3. Your password must be a minimum of 10 characters and contain characters from **each** of the following categories:
   - English **uppercase** characters (A through Z)
   - English **lowercase** characters (a through z)
   - Base 10 **digits** (0 through 9)

4. To login, go to: hhttps://myadvantagecloud.cgi.com/PROD/portal/Advantage360Home

1.2. Login to A360

A360 is accessed through a web interface portal. This means it is accessible via the internet at work and at home.

hhttps://myadvantagecloud.cgi.com/PROD/portal/Advantage360Home


https://cgiadvantage3...
Advantage360
File
Edit
View
Favorites
Tools
Help
Advantage360
Kent County Intranet
OnBase 13.0.1.98 [Product...
Oracle PeopleSoft Enterpr...
Web Slice Gallery
Login
CGI
Experience the commitment®

Secure CGI Advantage360

Advantage360 cloud security reduces risk, enhances information integrity and sharing, and complies with complex regulations.

CGI Advantage360 Cloud

Designed to meet the most demanding commercial and government requirements, CGI Advantage360 Cloud services drive innovation, flexibility and savings, while providing for the security, availability and performance you need. Moving to the cloud can be challenging. CGI Advantage360

Learn More

Resources
- Brochures
- Media announcements
- White papers

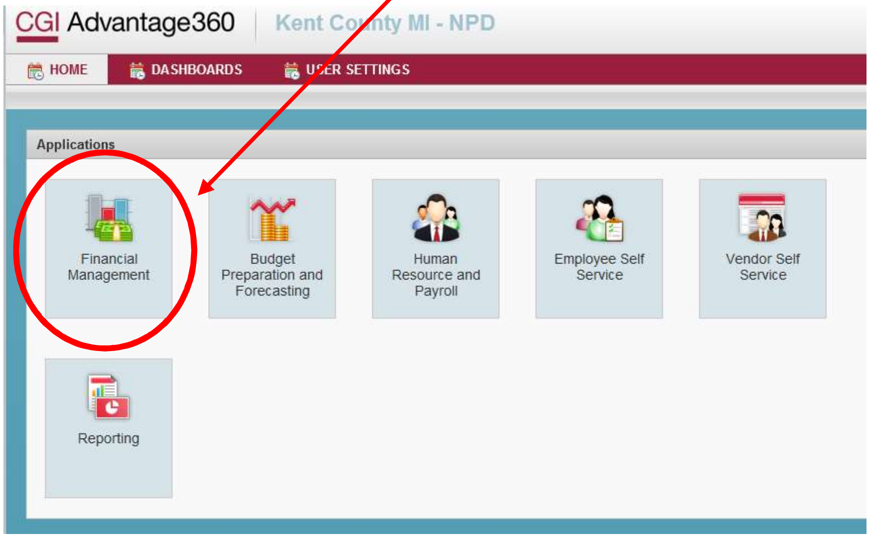
Follow us on Twitter

Click **Login**

1.3. Navigate to Financial Management

The applications that are visible to each user are dependent upon user roles.

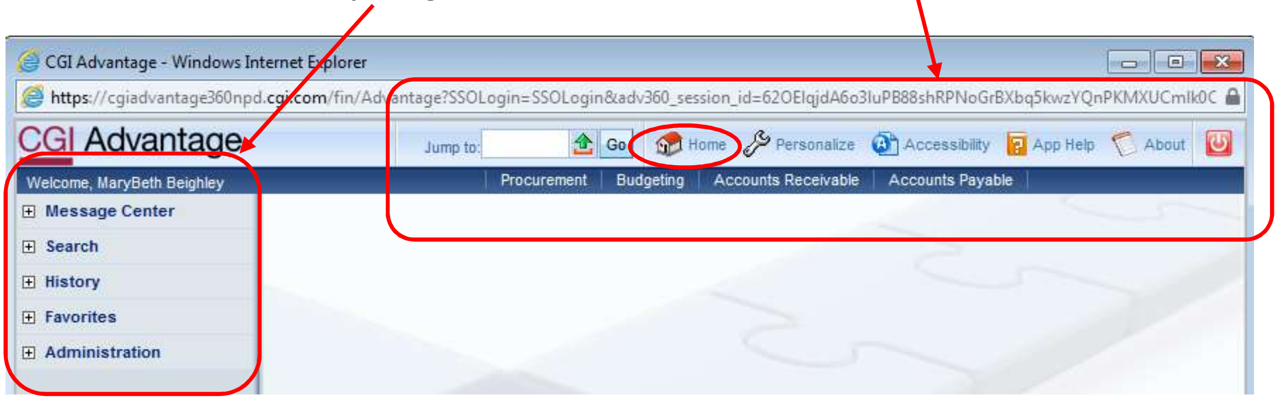
Select Financial Management.


CGI Advantage360
Kent County MI - NPD
HOME
DASHBOARDS
USER SETTINGS
Applications
Financial Management
Budget Preparation and Forecasting
Human Resource and Payroll
Employee Self Service
Vendor Self Service
Reporting

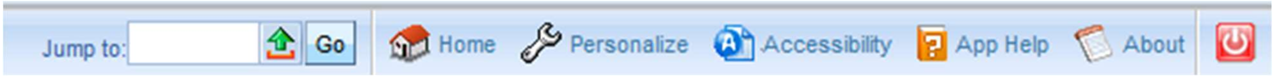
1.4. Financial Management Home Page

The A360 Home Page is the first page displayed after selecting the Financial Management application. You can return to this page from any other page in the system by clicking the **Home** icon at the top of the page.

The Home page illustrates the two major navigation panels: the **Primary Navigation Panel** at the top of the screen and the **Secondary Navigation Panel** on the left.

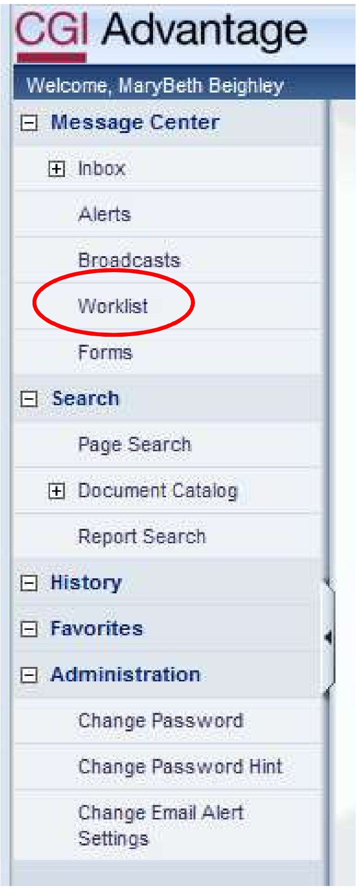

CGI Advantage - Windows Internet Explorer
https://cgiadvantage360npd.cgi.com/fin/Advantage?SSOLogin=SSOLogin&adv360_session_id=62OElqjdA6o3luPB88shRPNoGrBXbq5kwzYQnPKMXUCmIk0C
CGI Advantage
Jump to:
Go
Home
Personalize
Accessibility
App Help
About
Welcome, MaryBeth Beighley
Procurement
Budgeting
Accounts Receivable
Accounts Payable
Message Center
Search
History
Favorites
Administration

1.5. Primary Navigation Panel


Jump to:
Go
Home
Personalize
Accessibility
App Help
About

Jump to: Go	Use this field to quickly navigate to most pages by entering the Page Code and clicking Go. If you enter the Page Code for a table or inquiry, you are taken directly to that table or inquiry. If you enter the Page Code for a document, you are taken to the Document Catalog.
Home	Return to the Home page.
Personalize	Modify your Workspaces, Home page, or Favorites.
Accessibility	Opens the online help system in a format that is 508 and w3c Compliant.
App Help	Opens the online help system.
About	View version information about the software.
⏻	Log out of A360. IMPORTANT: Always log out when you are done with your session.

1.6. Secondary Navigation Panel


CGI Advantage
Welcome, MaryBeth Beighley
Message Center
Inbox
Alerts
Broadcasts
Worklist
Forms
Search
Page Search
Document Catalog
Report Search
History
Favorites
Administration
Change Password
Change Password Hint
Change Email Alert Settings

Message Center

Allows you to check your inbox, view system messages, access your Worklist, and view Forms.

Inbox

This function is not in use at Kent County.

Alerts and Broadcasts

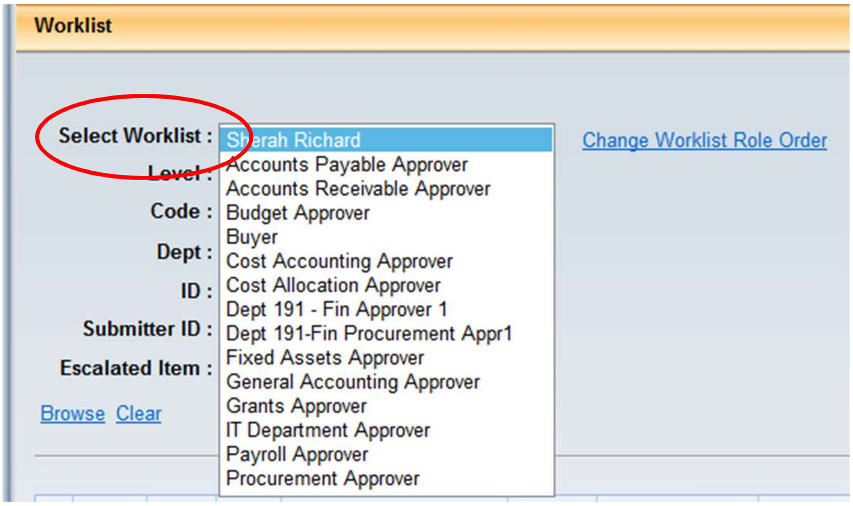
Alerts are messages targeted *directly to you* or your user groups. Broadcast messages notify *all users* of system broadcast messages. A pop-up window notifies you of new Alerts and Broadcasts.

Worklist

A Worklist is a listing of all documents **assigned to you** for action **or to any of the Approval Roles** to which you are assigned. There are two reasons documents display in your personal Worklist:

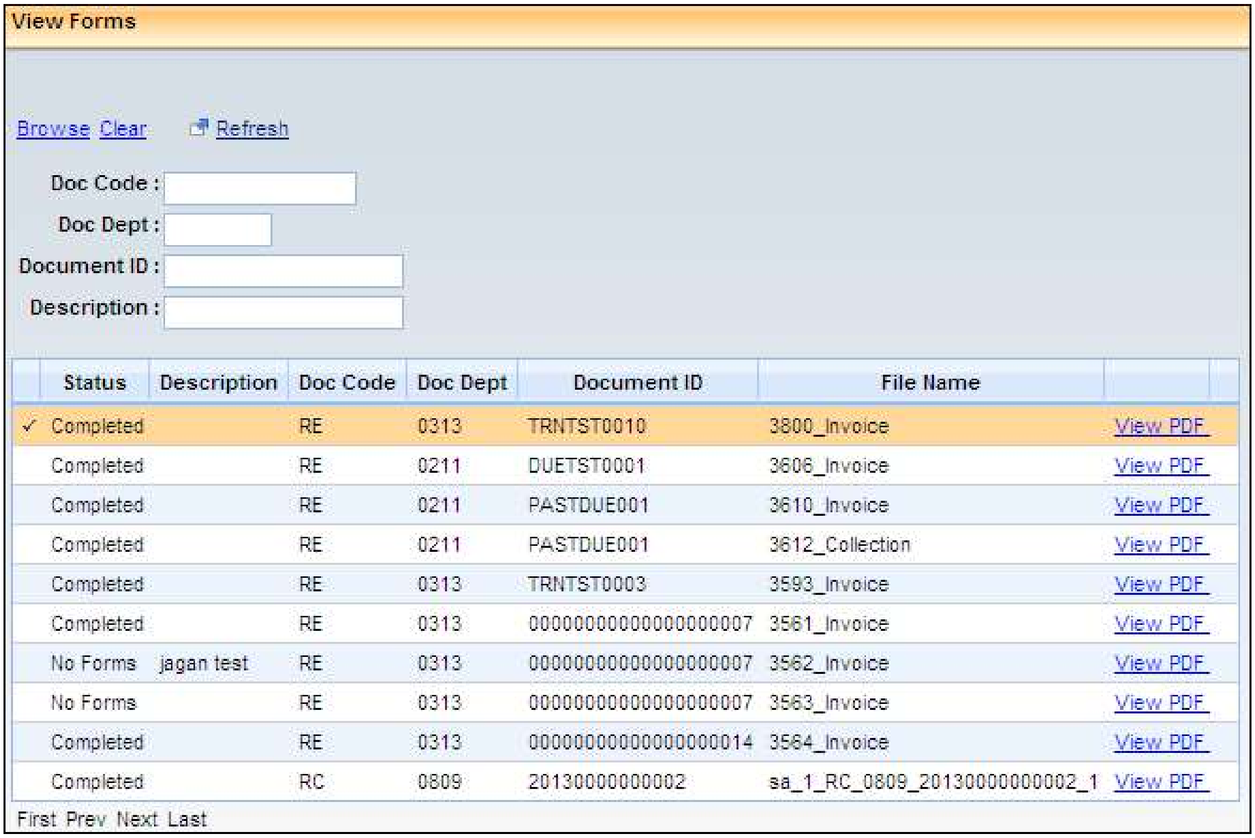
- **You are responsible** for approving the document
- **You submitted the document** for someone else's approval and it has been routed back to you by the system because it has been rejected by the approver.

Your full name is displayed in the **Select Worklist** field. If you are a member of any Approval Roles, they are displayed in the Select Worklist drop-down field values. Selecting an Approval Role in the Select Worklist field displays all of the work units that have been assigned to the role.


Worklist
Select Worklist :
Level :
Code :
Dept :
ID :
Submitter ID :
Escalated Item :
Browse Clear
Change Worklist Role Order
Sherah Richard
Accounts Payable Approver
Accounts Receivable Approver
Budget Approver
Buyer
Cost Accounting Approver
Cost Allocation Approver
Dept 191 - Fin Approver 1
Dept 191-Fin Procurement Appr1
Fixed Assets Approver
General Accounting Approver
Grants Approver
IT Department Approver
Payroll Approver
Procurement Approver

Forms

The View Forms page allows you to easily access system-generated PDF forms from within A360, to preview or print. Forms may be printed online or by a batch process.



View Forms

Doc Code :
Doc Dept :
Document ID :
Description :

Status	Description	Doc Code	Doc Dept	Document ID	File Name	
✓ Completed		RE	0313	TRNTST0010	3800_Invoice	View PDF
Completed		RE	0211	DUETST0001	3606_Invoice	View PDF
Completed		RE	0211	PASTDUE001	3610_Invoice	View PDF
Completed		RE	0211	PASTDUE001	3612_Collection	View PDF
Completed		RE	0313	TRNTST0003	3593_Invoice	View PDF
Completed		RE	0313	00000000000000000007	3561_Invoice	View PDF
No Forms	jagan test	RE	0313	00000000000000000007	3562_Invoice	View PDF
No Forms		RE	0313	00000000000000000007	3563_Invoice	View PDF
Completed		RE	0313	00000000000000000014	3564_Invoice	View PDF
Completed		RC	0809	20130000000002	sa_1_RC_0809_20130000000002_1	View PDF

Search

When entering search criteria, text can be typed in upper or lower case (all text is automatically converted to upper case for the search parameter). Entering an exact value (name, date, description, etc.) in a field limits the search results.

Commas can be used to provide multiple search criteria.

A wildcard is a character that can be used to represent one or many characters when completing a search. Range characters can be used to narrow search results. Users may enter wildcards (*) for partial values. The wildcard character (*) can be placed before, after, or anywhere in between a word or code to expand information returned in your search.

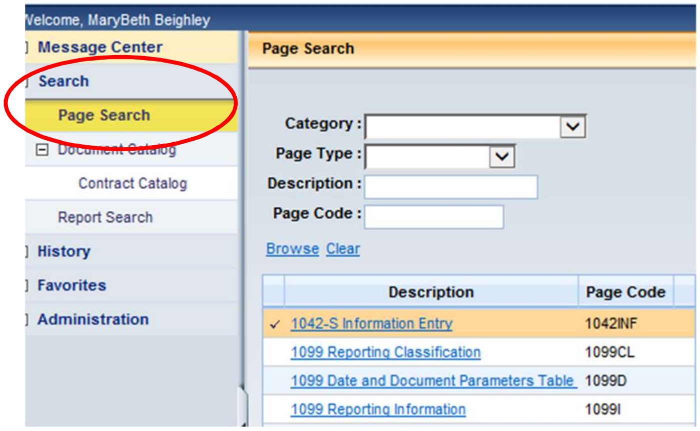
Wildcard and Range Characters

Wildcard/Range Characters	Example
Asterisk (*)	If 01* is entered, the system returns records 0100 to 0199 and any records that have letters or symbols after 01. The asterisk

	can be entered at the beginning, middle, or end of the search criteria.
Colon (:)	If 1/1/2015:2/15/2015 is entered in the Create Date field on the Document Catalog, all documents created on or after 1/1/2015 and on or before 2/15/2015 are returned in the search.
Greater Than (>)	If >10/15/2014 is entered in the Create Date field on the Document Catalog, all documents created after October 15, 2014 are returned in the search.
Greater Than or Equal To (>=)	If >=10/15/2014 is entered in the Create Date field on the Document Catalog, all documents created on or after October 15, 2014 are returned in the search.
Less Than Sign (<)	If <1/15/2015 is entered in the Create Date field on the Document Catalog, all documents created before January 15, 2015 are returned in the search.
Less Than or Equal To (<=)	If <=10/15/2014 is entered in the Create Date field on the Document Catalog, all documents created on or before October 15, 2014 are returned in the search.

Page Search

Click **Search > Page Search** to search for documents, tables, and inquiries, either by Category, Page Type, Description, or Page Code. Enter the search criteria, and then click **Browse**.


Velcome, MaryBeth Beighley
Message Center
Search
Page Search
Document Catalog
Contract Catalog
Report Search
History
Favorites
Administration
Page Search
Category :
Page Type :
Description :
Page Code :
Browse
Clear

	Description	Page Code
✓	1042-S Information Entry	1042INF
	1099 Reporting Classification	1099CL
	1099 Date and Document Parameters Table	1099D
	1099 Reporting Information	1099I

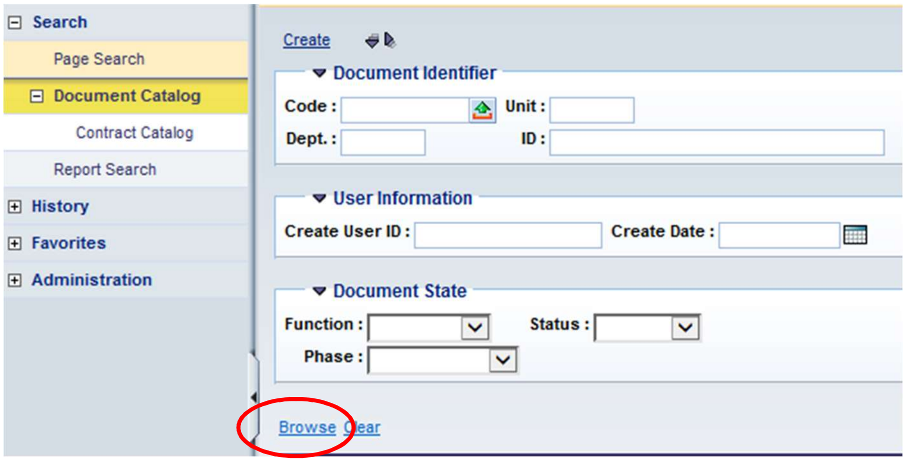
Document Catalog

The Document Catalog provides access to all documents in the system and allows you to create new documents.

A. Search for Document:

Click Search > Document Catalog, and then enter information in any of the following areas:

- **Document Identifier** - enter the specific document Code, Dept, Unit or ID
- **User Information** - enter the Create User ID or Create Date
- **Document State** - enter the Function, Phase, or Status of the document

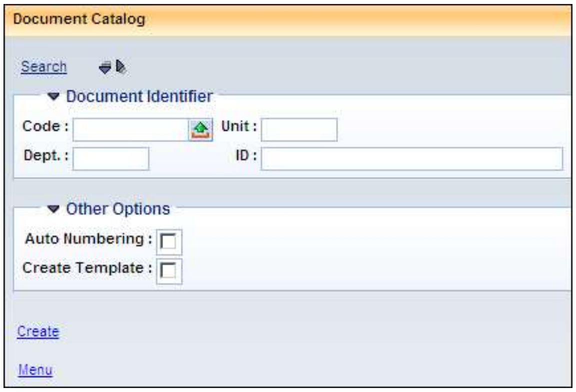

Search
Page Search
Document Catalog
Contract Catalog
Report Search
History
Favorites
Administration
Create
Document Identifier
Code :
Unit :
Dept. :
ID :
User Information
Create User ID :
Create Date :
Document State
Function :
Status :
Phase :
Browse
Clear

Click Browse and all of the documents that match the search criteria entered display at the bottom of the page.

B. Create New Document:

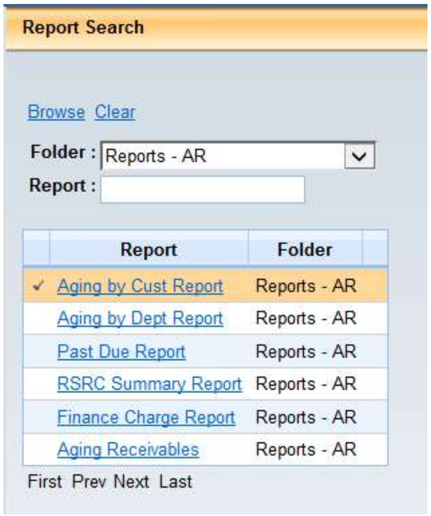
Click Search > Document Catalog > Create

- **Document Identifier** - enter the specific document **Code**, **Dept**, **Unit**, and **ID** (not required if using Auto Numbering)
- **Other Options** - select Auto Numbering (if the document allows the system to assign the document ID number) or Create Template (if the document is a template for other users)
- **Click Create** to open the new document in Draft phase.


Document Catalog
Search
Document Identifier
Code :
Unit :
Dept. :
ID :
Other Options
Auto Numbering : ☐
Create Template : ☐
Create
Menu

Contract Catalog -

Kent County is not using the Contract Catalog.


Report Search
Browse
Clear
Report :
First Prev Next Last

Folder : Reports - AR

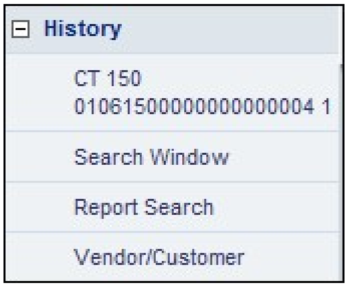
Report	Folder
✓ Aging by Cust Report	Reports - AR
Aging by Dept Report	Reports - AR
Past Due Report	Reports - AR
RSRC Summary Report	Reports - AR
Finance Charge Report	Reports - AR
Aging Receivables	Reports - AR

Report Search

Click Search > Report Search, to search for and open any Report. **Select the Folder** or enter the **Report name**, then click **Browse**.

History

A360 keeps track of the pages you have accessed in the course of your session. To return to a previous page, select **History**, and then the page name. To refresh the listing of pages in the History folder, click the Expand/Collapse icon twice.

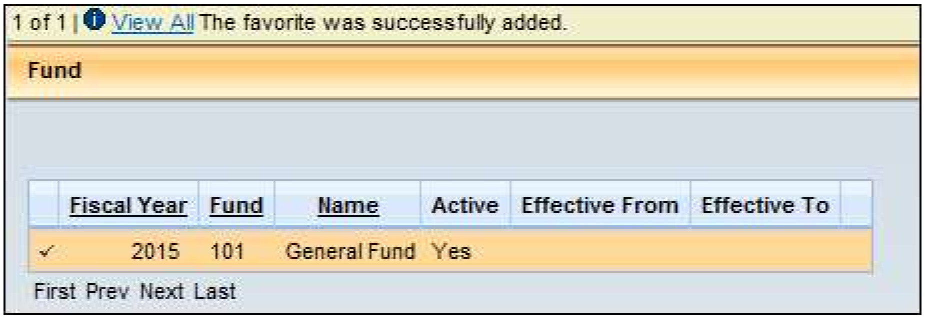

History
CT 150 01061500000000000004 1
Search Window
Report Search
Vendor/Customer

Favorites

The Favorites list enables you to navigate to specific pages that you have added to favorites.

1. To add a document to your Favorites, **open the document, and click Add to Favorites**, **in the document Menu at the top right of the document screen.**
2. To add a reference table or inquiry page to your Favorites, **open the table or page, right-click on the page, and click Add to Favorites.**

After clicking Add to Favorites, a pop-up window displays allowing you to enter the name for the page that you are adding to your Favorites list. After selecting OK, an information message is displayed indicating that the page has been added to your Favorites list.



1 of 1 | View All The favorite was successfully added.

Fund

	Fiscal Year	Fund	Name	Active	Effective From	Effective To
✓	2015	101	General Fund	Yes		

First Prev Next Last

You can modify your Favorites list on the **Personalization page**. On the Personalization page, select Favorites from the Secondary Navigation Panel. You can remove or modify Favorites by right-clicking on the name of a Favorite.

Administration Application

Users with appropriate security can access the A360 Administration application to administrate certain aspects of the Advantage360 environment. This function **should not** be used to change password.

1.7. Navigation Tools

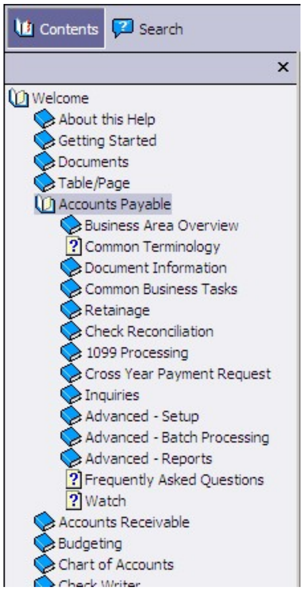
Navigation Tool	Behavior
Action Menu Action Menu	Provides users with a menu of available actions that can be performed on that page.
Auto Complete	Automatically predicts the remaining characters in a word or phrase based on what has been entered.
📅	Available for selecting a date from an interactive calendar.
☐	Check box: Used to indicate whether the condition is on (checked) or off (unchecked).
☒	Located at the top right corner and closes the window

Navigation Tool	Behavior
Document Menu ▾	Provides a menu of available commands that can be performed on the document or using the document. Located in the title bar of the document next to the Phase.
⌄	Drop-down List
Expand All/Collapse All ▼ ▶	Selecting the downward arrow expands all collapsed sections. Selecting the sideways arrow collapses all expanded sections.
🗖 🗗	Maximize/Restore Toggle
–	Minimize This button is located at the top right corner of a window. When selected, the window closes and an icon is placed in the Task Bar on the Desktop. To re-open the minimized window, select the icon in the Task Bar.
First Prev Next Last First Previous Next Last	Navigation Links/Buttons: Used when a document or table has more lines than the maximum that can display at once.
⇧	Pick List: Opens a page to provide a list of items to search and select.
▼	Quick Switch: This button is located in the summary bar of documents with more than one commodity line. When the button is selected, the Quick Select Row page opens, allowing the user to select another row in the document.

1.8. Application Help

App Help

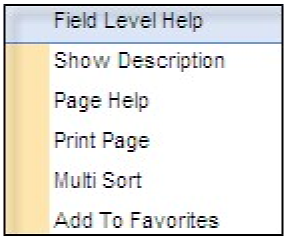
The **App Help button** opens the online support documentation in a separate window.


Contents
Search
×
Welcome
About this Help
Getting Started
Documents
Table/Page
Accounts Payable
Business Area Overview
Common Terminology
Document Information
Common Business Tasks
Retainage
Check Reconciliation
1099 Processing
Cross Year Payment Request
Inquiries
Advanced - Setup
Advanced - Batch Processing
Advanced - Reports
Frequently Asked Questions
Watch
Accounts Receivable
Budgeting
Chart of Accounts
Check Writer

Click the **Contents button**, and then the **Welcome** link in the left column, to display a list of help topics.

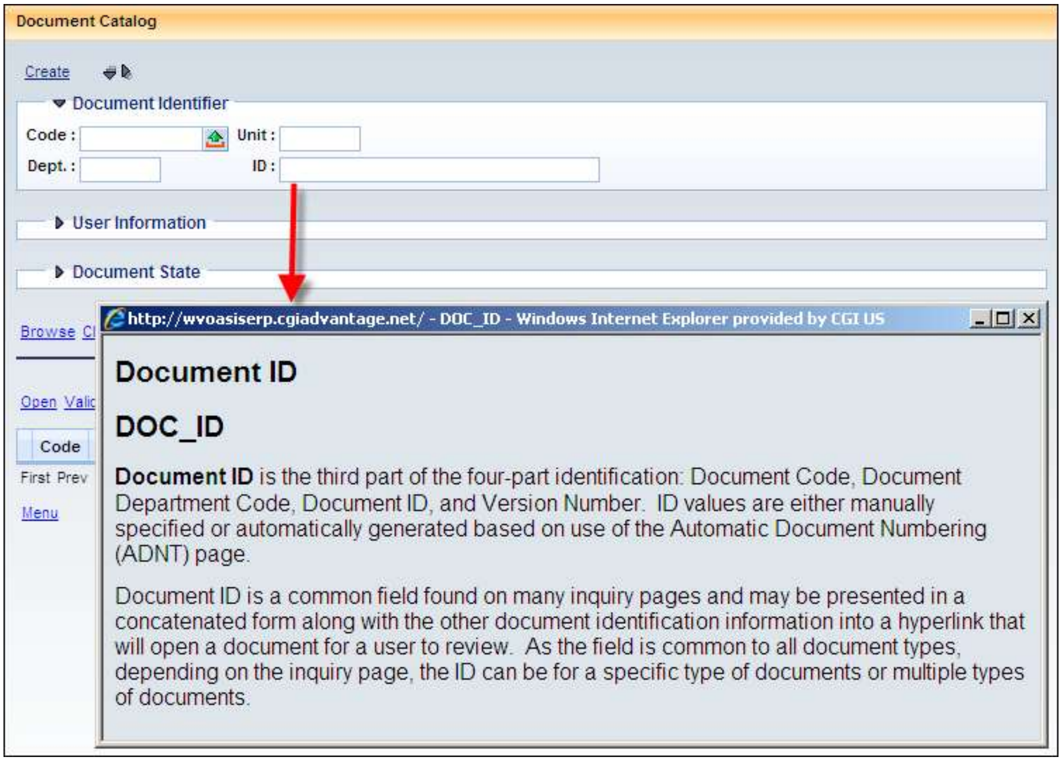
1.9. Right-Click Commands

Additional features and functionality are accessed by right-clicking the mouse. A drop-down list is displayed with these commands.


Field Level Help
Show Description
Page Help
Print Page
Multi Sort
Add To Favorites

Field Level Help

This feature provides an explanation about the selected field. Position the cursor directly over the field and **right-click. Select Field Level Help**; the field definition displays in a new pop-up window or to the right of the window. To close the field help, click the ☒ icon.


Document Catalog
Create
Document Identifier
Code :
Unit :
Dept. :
ID :
User Information
Document State
Browse Cl
Open Valic
Code
First Prev
Menu
http://wvoasiserp.cgiadvantage.net/ - DOC_ID - Windows Internet Explorer provided by CGI US

Document ID

DOC_ID

Document ID is the third part of the four-part identification: Document Code, Document Department Code, Document ID, and Version Number. ID values are either manually specified or automatically generated based on use of the Automatic Document Numbering (ADNT) page.

Document ID is a common field found on many inquiry pages and may be presented in a concatenated form along with the other document identification information into a hyperlink that will open a document for a user to review. As the field is common to all document types, depending on the inquiry page, the ID can be for a specific type of documents or multiple types of documents.

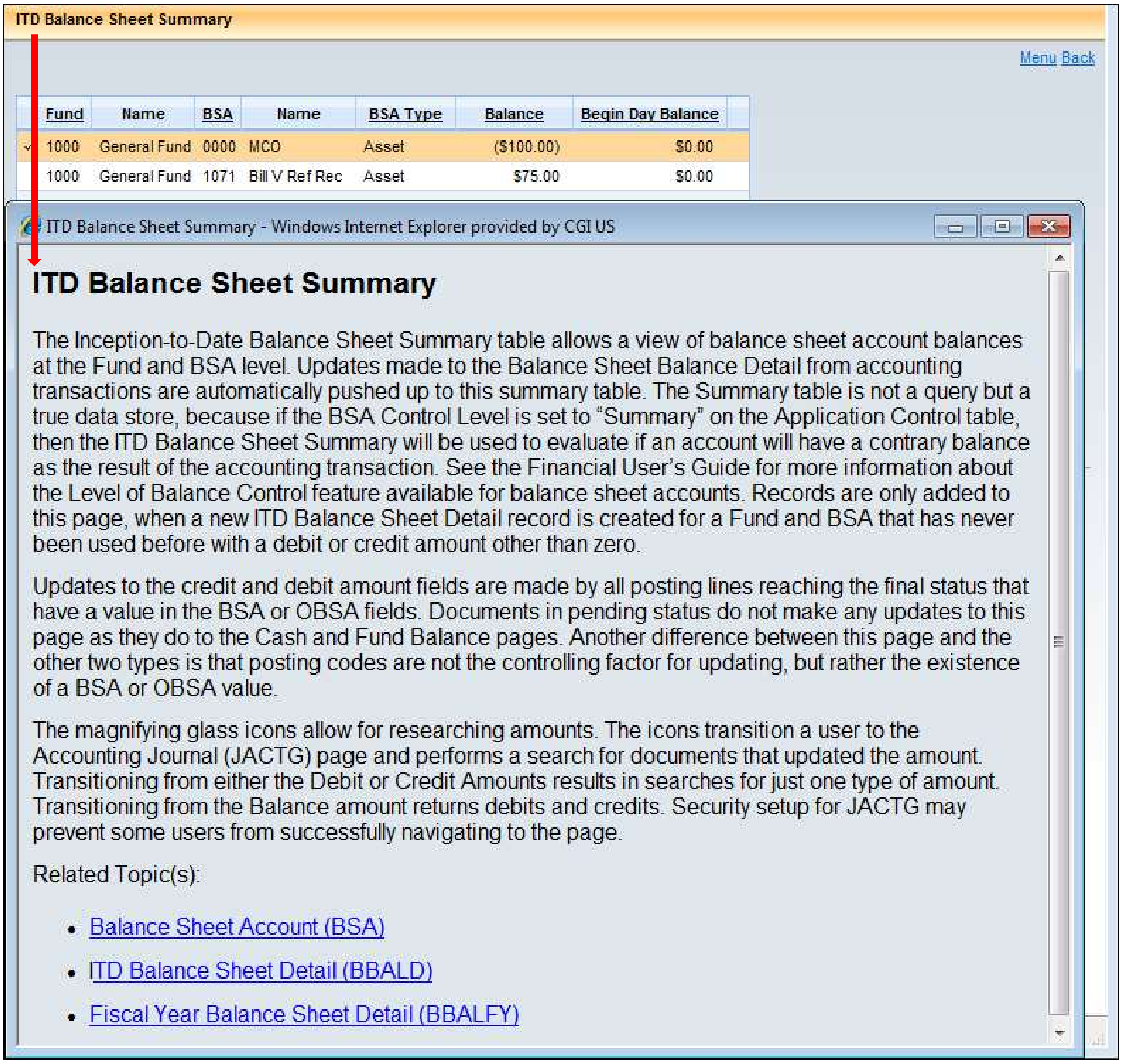
Show Description

Show Description offers additional detailed information about **certain fields**. Position your cursor in the field for which you want to get information, **right-click**. The Show Description page displays information, based on the associated Context Sensitive Search entry.

NOTE: Not all fields have this capability; therefore, you may receive the message that Show Description is not available for this attribute.

Page Help

In a blank portion of the page, **right-click**. Select **Page Help**, a description of the page displays in a new pop up window. To close the page help, click the ☒ icon.


ITD Balance Sheet Summary
Menu Back
ITD Balance Sheet Summary - Windows Internet Explorer provided by CGI US

Fund	Name	BSA	Name	BSA Type	Balance	Begin Day Balance
1000	General Fund	0000	MCO	Asset	($100.00)	$0.00
1000	General Fund	1071	Bill V Ref Rec	Asset	$75.00	$0.00

ITD Balance Sheet Summary

The Inception-to-Date Balance Sheet Summary table allows a view of balance sheet account balances at the Fund and BSA level. Updates made to the Balance Sheet Balance Detail from accounting transactions are automatically pushed up to this summary table. The Summary table is not a query but a true data store, because if the BSA Control Level is set to "Summary" on the Application Control table, then the ITD Balance Sheet Summary will be used to evaluate if an account will have a contrary balance as the result of the accounting transaction. See the Financial User's Guide for more information about the Level of Balance Control feature available for balance sheet accounts. Records are only added to this page, when a new ITD Balance Sheet Detail record is created for a Fund and BSA that has never been used before with a debit or credit amount other than zero.

Updates to the credit and debit amount fields are made by all posting lines reaching the final status that have a value in the BSA or OBSA fields. Documents in pending status do not make any updates to this page as they do to the Cash and Fund Balance pages. Another difference between this page and the other two types is that posting codes are not the controlling factor for updating, but rather the existence of a BSA or OBSA value.

The magnifying glass icons allow for researching amounts. The icons transition a user to the Accounting Journal (JACTG) page and performs a search for documents that updated the amount. Transitioning from either the Debit or Credit Amounts results in searches for just one type of amount. Transitioning from the Balance amount returns debits and credits. Security setup for JACTG may prevent some users from successfully navigating to the page.

Related Topic(s):

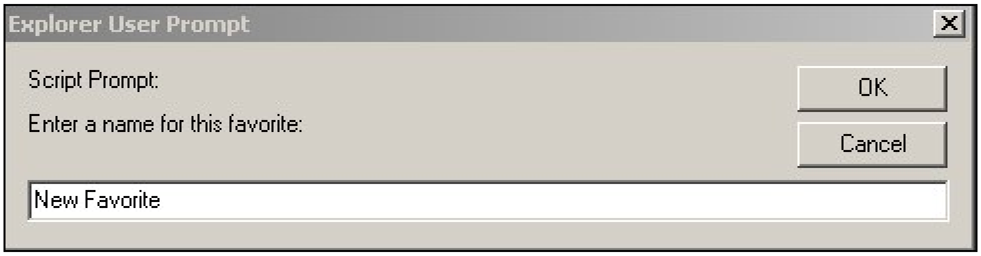
- Balance Sheet Account (BSA)
- ITD Balance Sheet Detail (BBALD)
- Fiscal Year Balance Sheet Detail (BBALFY)

Print Page

This function is not used by Kent County.

Add to Favorites

Allows you to name the page being saved as a Favorite.


Explorer User Prompt
Script Prompt:
OK
Cancel

Enter a name for this favorite:

New Favorite

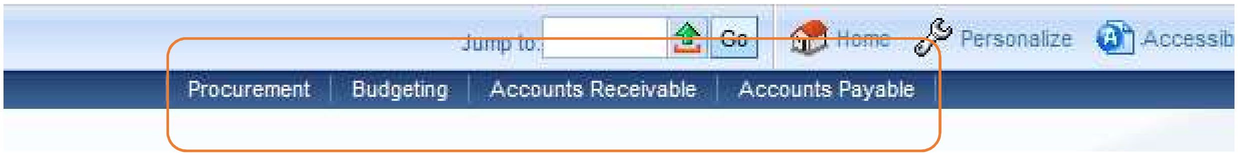
1.10. Personalize

Personalizing allows you to quickly access pages in the system you use most often. The Personalization page allows you to modify:

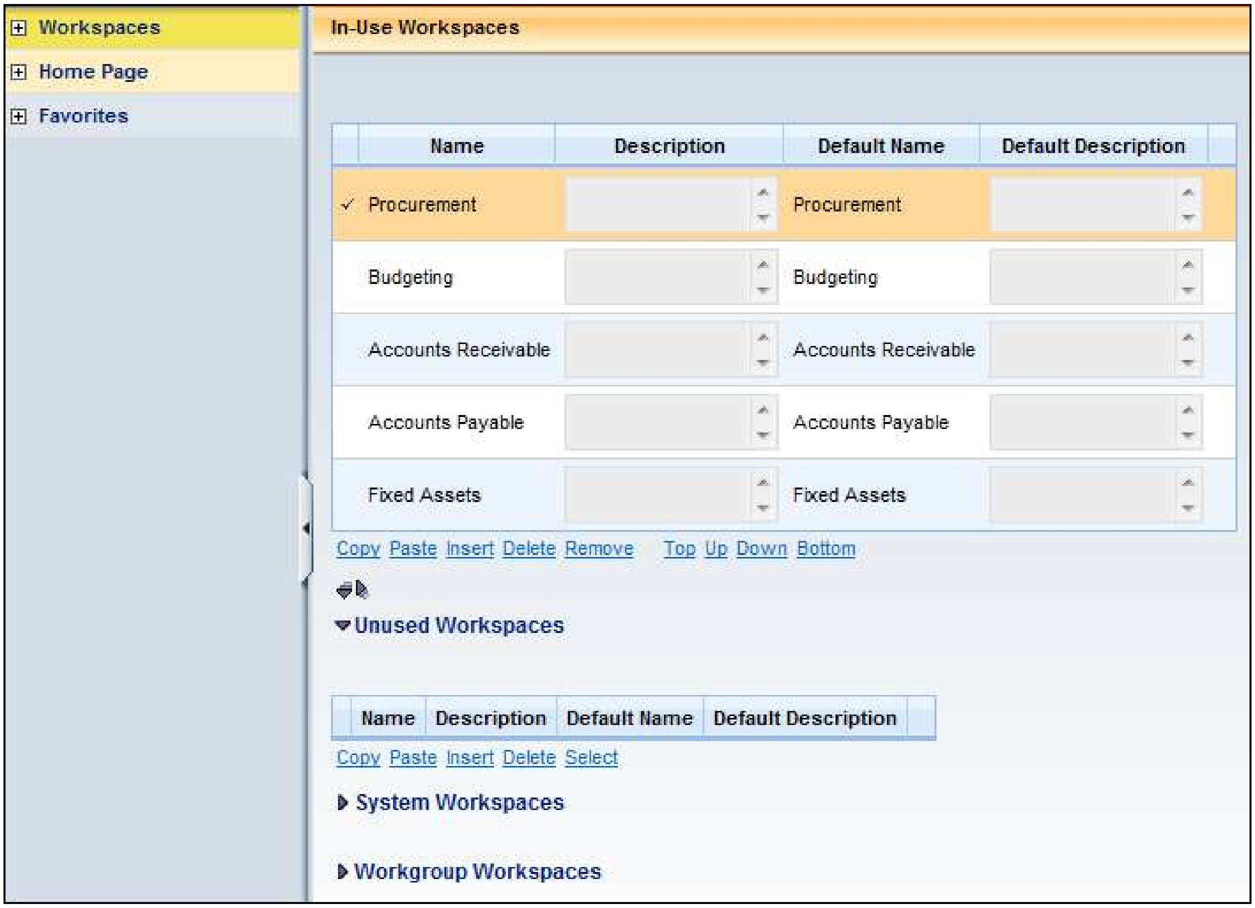
- Workspaces
- Home Page
- Favorites

Workspaces

Workspaces are a location that allows you to easily access a series of pages related to your work. Workspaces display at the top of the Home page, under the Primary Navigation Panel. The series of pages may be **pre-defined or personalized**.


Jump to:
Go
Home
Personalize
Accessib
Procurement
Budgeting
Accounts Receivable
Accounts Payable

To personalize your workspaces, click **Personalize**. A new window opens with the personalization options in the Secondary Navigation Panel. **Click Workspaces** in the Secondary Navigation Panel to open the In-Use Workspaces page.


Workspaces
Home Page
Favorites

In-Use Workspaces

	Name	Description	Default Name	Default Description
✓	Procurement		Procurement	
	Budgeting		Budgeting	
	Accounts Receivable		Accounts Receivable	
	Accounts Payable		Accounts Payable	
	Fixed Assets		Fixed Assets	

Copy Paste Insert Delete Remove Top Up Down Bottom

Unused Workspaces

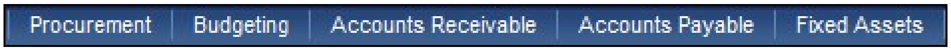
Name	Description	Default Name	Default Description

Copy Paste Insert Delete Select
System Workspaces
Workgroup Workspaces

This page includes expanding sections for Unused Workspaces, System Workspaces, and Workgroup Workspaces. **Use this page to rearrange, remove, and insert workspaces you use. Any changes you make to your workspaces do not take effect until you have logged out of the system, and then logged back on.** Use Online Help for detailed instructions on how to manage workspaces or add an existing or custom workspace.

Use Defined Workspaces to Access a Page

Once your workspaces are defined, you can use those workspaces to access frequently used pages. Click the link under the Primary Navigation Panel to open the appropriate workspace. The workspace page opens with the workspace sections displaying in the Secondary Navigation Panel. Select the desired section, and then click the link to access the desired page. Using the Secondary Navigation Panel, you can navigate to other pages in that workspace, save all changes or close the workspace.

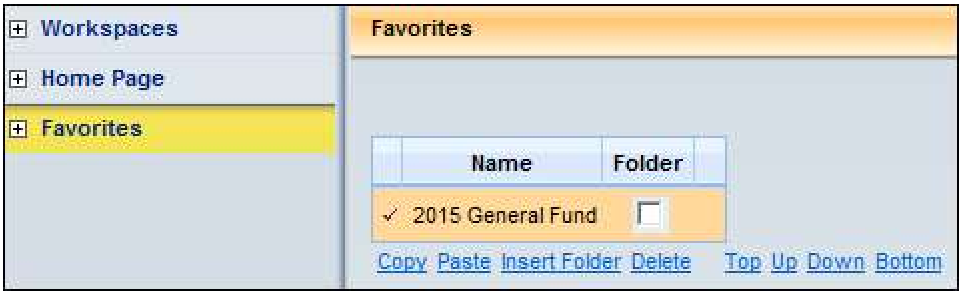

Procurement
Budgeting
Accounts Receivable
Accounts Payable
Fixed Assets

Home Page

Use the Home Page Windows page to create or modify the listing of pages that you want to display on your Home Page. We are not currently using this function.

Favorites

The Favorites List enables you to navigate to specific pages that you have previously marked as a favorite. The list of Favorites displays in the Secondary Navigation Panel. Adding pages to Favorites was covered in the Secondary Navigation Panel topic.

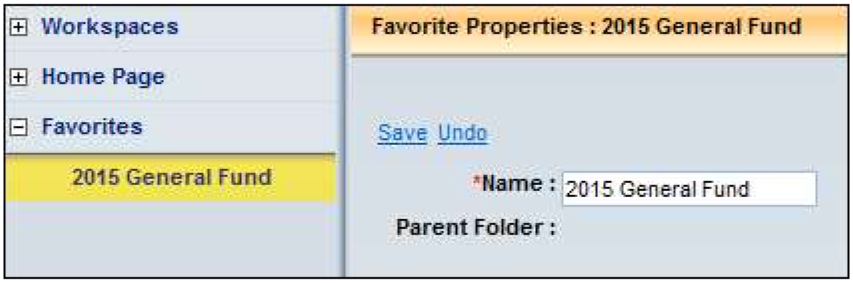

Workspaces
Home Page
Favorites
Favorites
Copy Paste Insert Folder Delete Top Up Down Bottom

Name	Folder
✓ 2015 General Fund	☐

Modify the Name of a Favorite

To modify the name for one of your Favorites, perform the following steps.

1. Click **Personalize** in the Primary Navigation Panel. A new window opens with the personalization options in the Secondary Navigation Panel.
2. Click Favorites in the Secondary Navigation Panel.
3. In the Secondary Navigation Panel, click on the plus (**+**) sign next to Favorites to display the Favorites listing.
4. In the Secondary Navigation Panel, select the Favorites listing that you want to modify.


Workspaces
Home Page
Favorites
2015 General Fund
Favorite Properties : 2015 General Fund
Save Undo

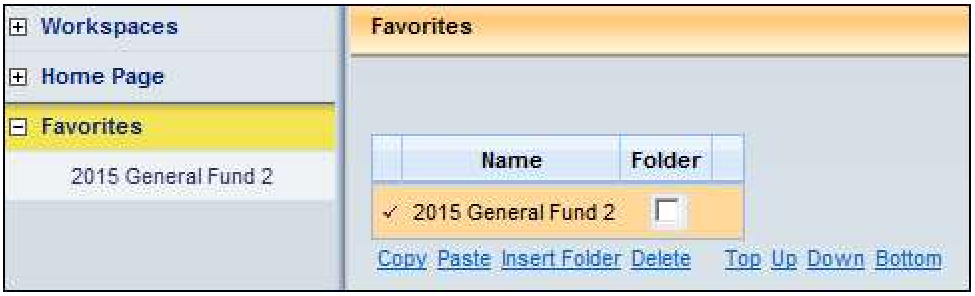
*Name : 2015 General Fund
Parent Folder :

5. In the Name field, enter the new name for the Favorites listing.
6. Click Save.
7. Close the Personalize window.
8. In the Secondary Navigation Panel, click the plus (**+**) sign next to Favorites. The new name you entered displays in your Favorites listing that you modified. If the Favorites listing was already expanded, then you must click the minus (**-**) sign to collapse the Favorites listing and then click the plus (**+**) sign. This refreshes the listing.

Delete a Favorite

To delete a page from your Favorites listing, perform these steps:

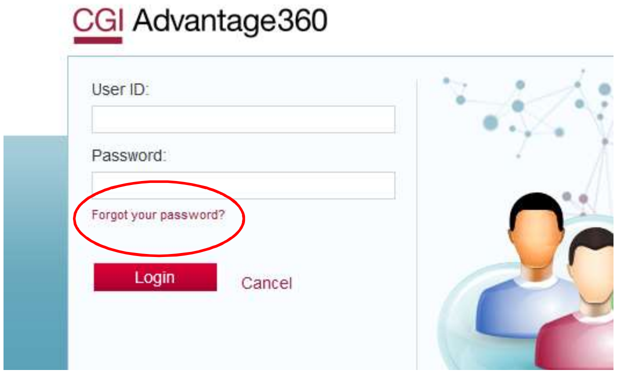
1. Click **Personalize** in the Primary Navigation Panel. A new window opens with the personalization options in the Secondary Navigation Panel.
2. Click Favorites in the Secondary Navigation Panel.
3. Select the row in the grid that contains the page that you want removed from your Favorites listing.


Workspaces
Home Page
Favorites
2015 General Fund 2
Favorites
Name
Folder
✓ 2015 General Fund 2 ☐
Copy Paste Insert Folder Delete Top Up Down Bottom

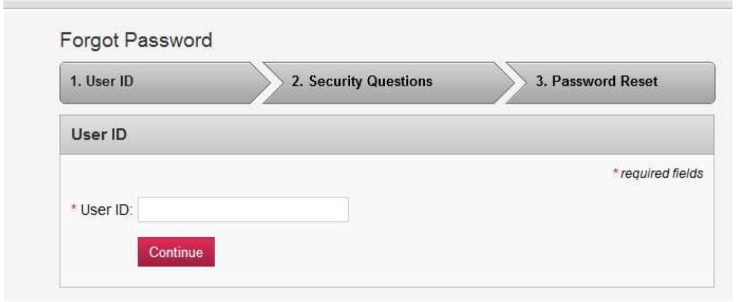
4. Click **Delete**.
5. Close the Personalize window.

1.11. I forgot my A360 password!

1. On the Login page, click "Forgot your password?"


CGI Advantage360
User ID:
Password:
Forgot your password?
Login
Cancel

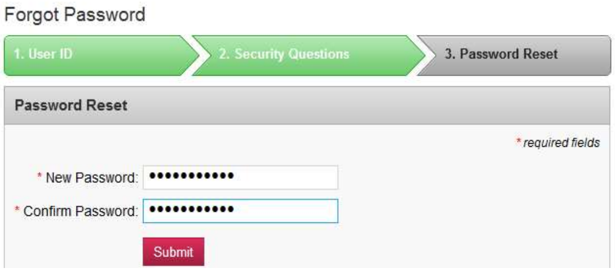
2. On the following page, enter your User ID. Your user ID is your *first initial + middle initial (or x if you do not have a middle initial) + first 6 letters of your last name* **@kentcountymi.gov** Click **Continue**


Forgot Password
1. User ID
2. Security Questions
3. Password Reset
User ID
* required fields
* User ID:
Continue

3. You must answer all three security questions correctly. Click **Continue**. *Answers to security questions are case sensitive.*

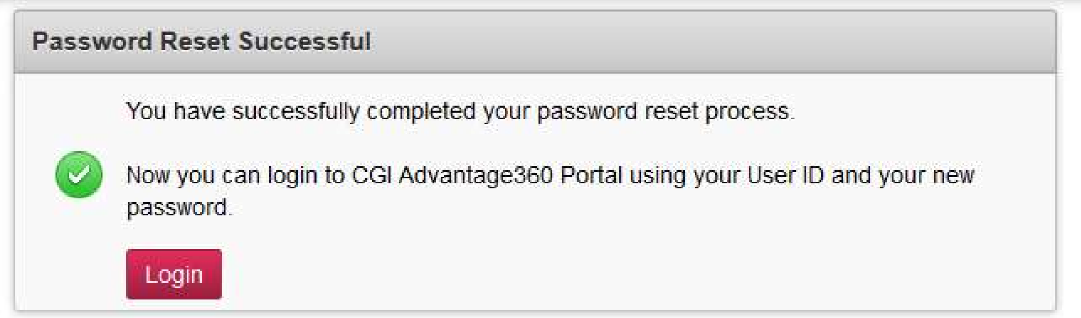
4. Create a new password. Your password must be a minimum of 10 characters and contain characters from **each** of the following categories:
   - English **uppercase** characters (A through Z)
   - English **lowercase** characters (a through z)
   - Base 10 **digits** (0 through 9)

   Note: You cannot use a password that you have used within the last 18 months.


Forgot Password
1. User ID
2. Security Questions
3. Password Reset
Password Reset
* required fields
* New Password:
* Confirm Password:
Submit

* New Password: •••••••••••
* Confirm Password: •••••••••••

5. Upon successful password change you will receive the following message:



Password Reset Successful

You have successfully completed your password reset process.

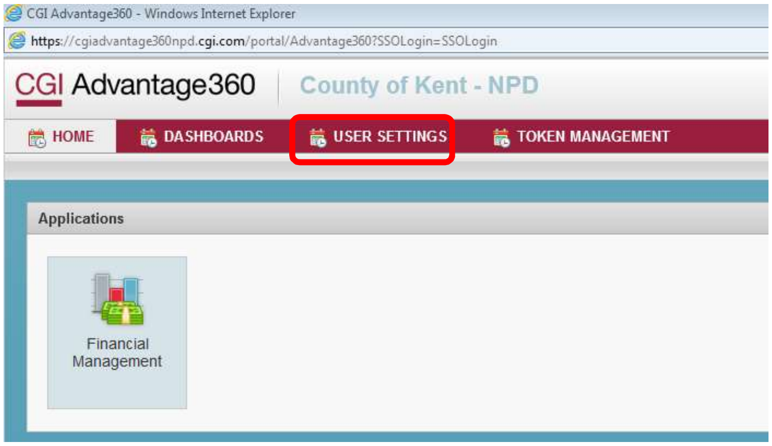
Now you can login to CGI Advantage360 Portal using your User ID and your new password.

6. You should now be able to log in to A360. Click the Login button, your bookmarked page or https://myadvantagecloud.cgi.com/PROD/portal/Advantage360Home to get back to the login page.

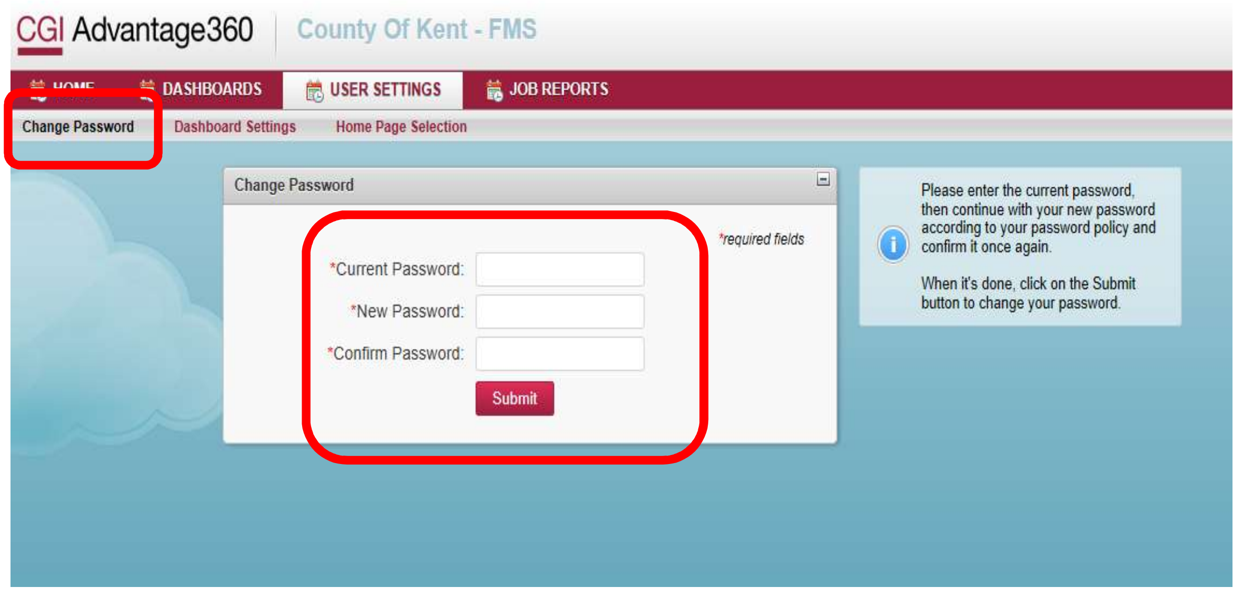
‼ If you have problems logging in after successfully changing your password, please close all your internet browser windows and wait 5 minutes, then try again. If you continue to have issues, please contact the Kent County IT Service desk at 632-6600.

1.12. How to Change your A360 Password

1. Log in to A360
2. Click on **User Settings**


CGI Advantage360 - Windows Internet Explorer
https://cgiadvantage360npd.cgi.com/portal/Advantage360?SSOLogin=SSOLogin
CGI Advantage360
County of Kent - NPD
HOME
DASHBOARDS
USER SETTINGS
TOKEN MANAGEMENT
Applications
Financial Management

3. Click on Change Password. Enter **Current Password**, **New Password**, **Confirm Password**. Click **Submit**.


CGI Advantage360
County Of Kent - FMS
HOME
DASHBOARDS
USER SETTINGS
JOB REPORTS
Change Password
Dashboard Settings
Home Page Selection
Change Password
*required fields
*Current Password:
*New Password:
*Confirm Password:
Submit

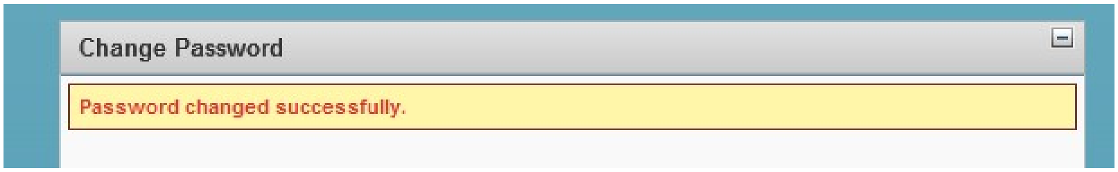
Please enter the current password, then continue with your new password according to your password policy and confirm it once again.

When it's done, click on the Submit button to change your password.

Your password must be a minimum of 10 characters and contain characters from **each** of the following categories:

- English **uppercase** characters (A through Z)
- English **lowercase** characters (a through z)
- Base 10 **digits** (0 through 9)

4. You should receive a “Password changed successfully” message.



Change Password

Password changed successfully.

!! If you have problems opening any of the a360 applications after successfully changing your password, please close all your internet browser windows and wait 5 minutes, then try again. If you continue to have issues, please contact the County IT Service desk at 632-6600.