

# Advantage Financial 3.11- On Demand Training

**Class Title:** How to Navigate in Advantage Financial  
(FIN) 3.11

# Goal & Objectives

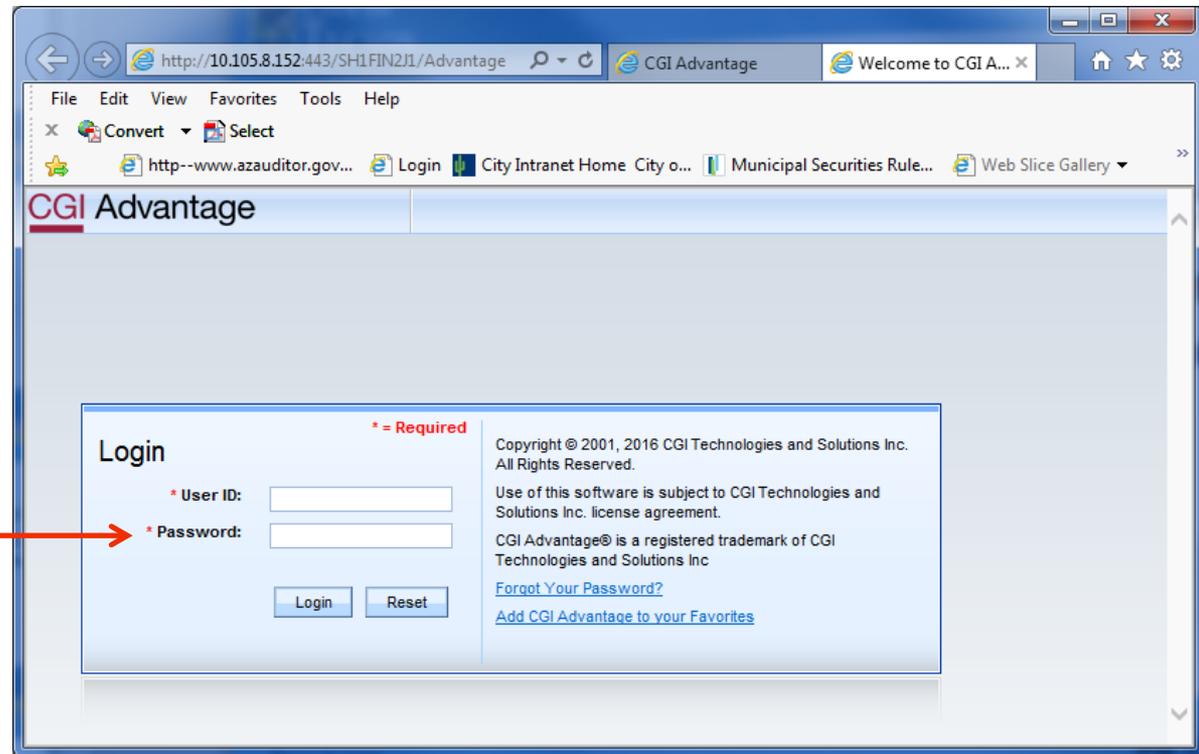
**Goal:** After taking this class, students will know how to navigate in Advantage FIN 3.11.

**Objectives:**

- Show students how to log into Advantage FIN 3.11
- Show students how to navigate in Advantage FIN 3.11
- Show students how to sign out of Advantage FIN 3.11

# How to log into Advantage FIN 3.11

1. Enter the web address for FIN in your internet browser.



CGI Advantage

**Login** \* = Required

\* User ID:

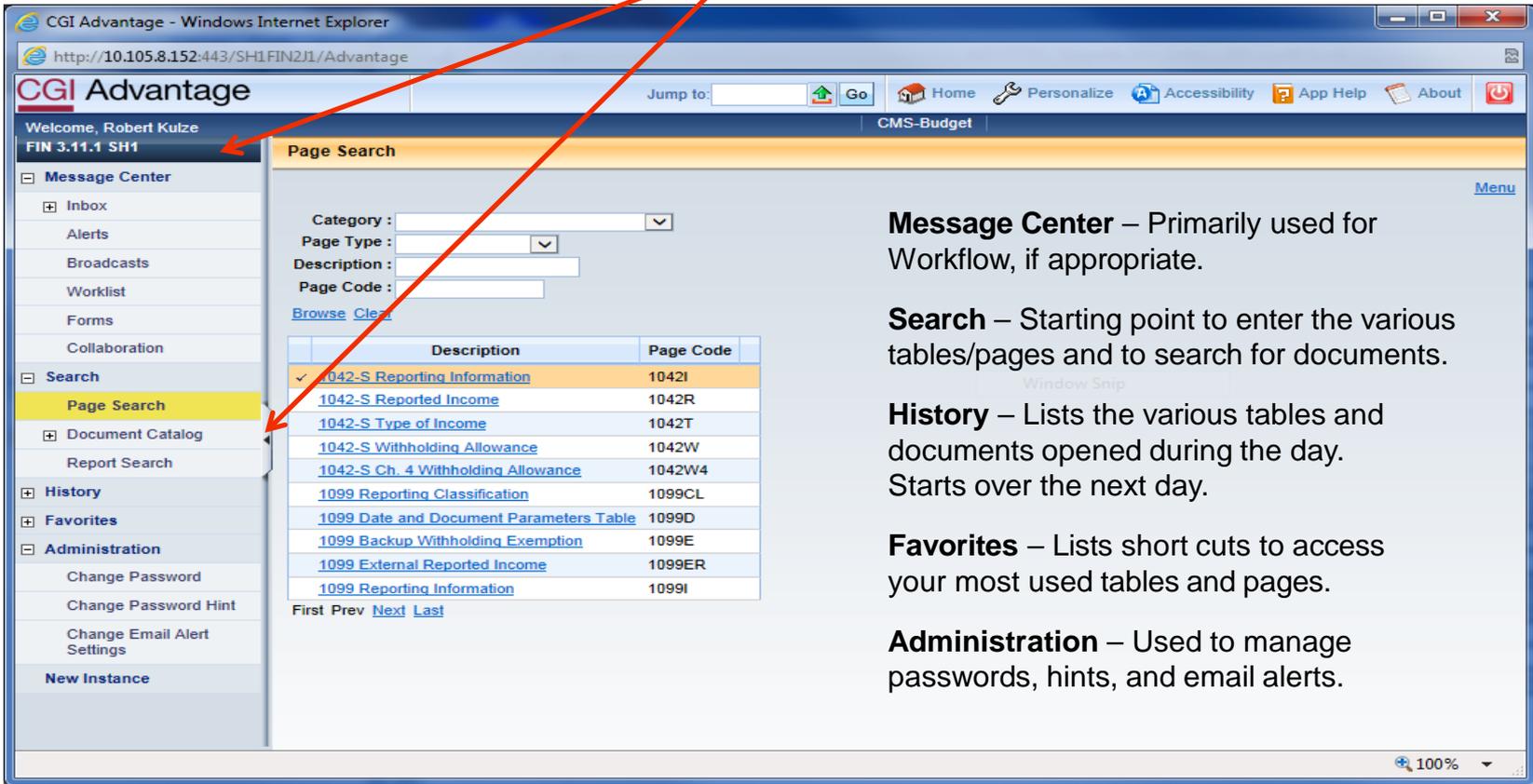
\* Password:

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[Forgot Your Password?](#)  
[Add CGI Advantage to your Favorites](#)

2. Enter your **User ID** and **Password** and select **Login** to begin your session.

# How to navigate in Advantage FIN 3.11

When you log into Advantage Financial, you will see the home screen. On the left-hand side, you will see a panel with several options. The panel can be opened and closed, depending on your preference.



CGI Advantage - Windows Internet Explorer  
http://10.105.8.152:443/SH1.FIN2J1/Advantage

CGI Advantage  
Welcome, Robert Kulze  
FIN 3.11.1 SH1

Page Search

Category :   
Page Type :   
Description :   
Page Code :   
[Browse](#) [Clear](#)

	Description	Page Code
✓	<a href="#">1042-S Reporting Information</a>	1042I
	<a href="#">1042-S Reported Income</a>	1042R
	<a href="#">1042-S Type of Income</a>	1042T
	<a href="#">1042-S Withholding Allowance</a>	1042W
	<a href="#">1042-S Ch. 4 Withholding Allowance</a>	1042W4
	<a href="#">1099 Reporting Classification</a>	1099CL
	<a href="#">1099 Date and Document Parameters Table</a>	1099D
	<a href="#">1099 Backup Withholding Exemption</a>	1099E
	<a href="#">1099 External Reported Income</a>	1099ER
	<a href="#">1099 Reporting Information</a>	1099I

First Prev [Next](#) [Last](#)

Message Center – Primarily used for Workflow, if appropriate.

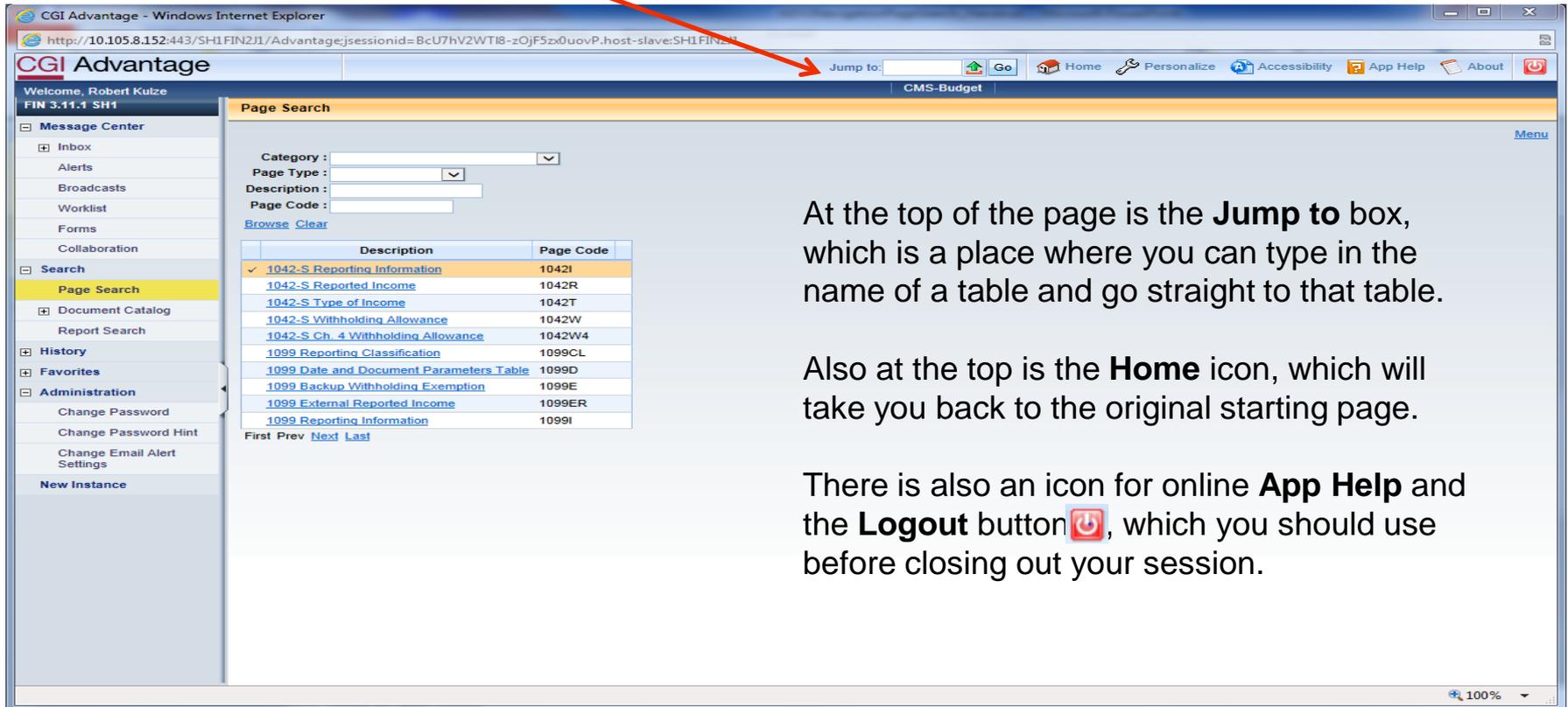
Search – Starting point to enter the various tables/pages and to search for documents.

History – Lists the various tables and documents opened during the day. Starts over the next day.

Favorites – Lists short cuts to access your most used tables and pages.

Administration – Used to manage passwords, hints, and email alerts.

# How to navigate in Advantage FIN 3.11

CGI Advantage - Windows Internet Explorer  
 http://10.105.8.152:443/SH1.FIN2J1/Advantage;jsessionid=BcU7hV2WT18-zOjF5z0uovP.host-slave:SH1.FIN2J1

CGI Advantage  
 Welcome, Robert Kulze  
 FIN 3.11.1 SH1  
 CMS-Budget

Message Center  
 Search  
 Page Search  
 History  
 Favorites  
 Administration  
 New Instance

Page Search

Category:   
 Page Type:   
 Description:   
 Page Code:   
[Browse](#) [Clear](#)

	Description	Page Code
✓	<a href="#">1042-S Reporting Information</a>	1042I
	<a href="#">1042-S Reported Income</a>	1042R
	<a href="#">1042-S Type of Income</a>	1042T
	<a href="#">1042-S Withholding Allowance</a>	1042W
	<a href="#">1042-S Ch. 4 Withholding Allowance</a>	1042W4
	<a href="#">1099 Reporting Classification</a>	1099CL
	<a href="#">1099 Date and Document Parameters Table</a>	1099D
	<a href="#">1099 Backup Withholding Exemption</a>	1099E
	<a href="#">1099 External Reported Income</a>	1099ER
	<a href="#">1099 Reporting Information</a>	1099I

First Prev Next Last

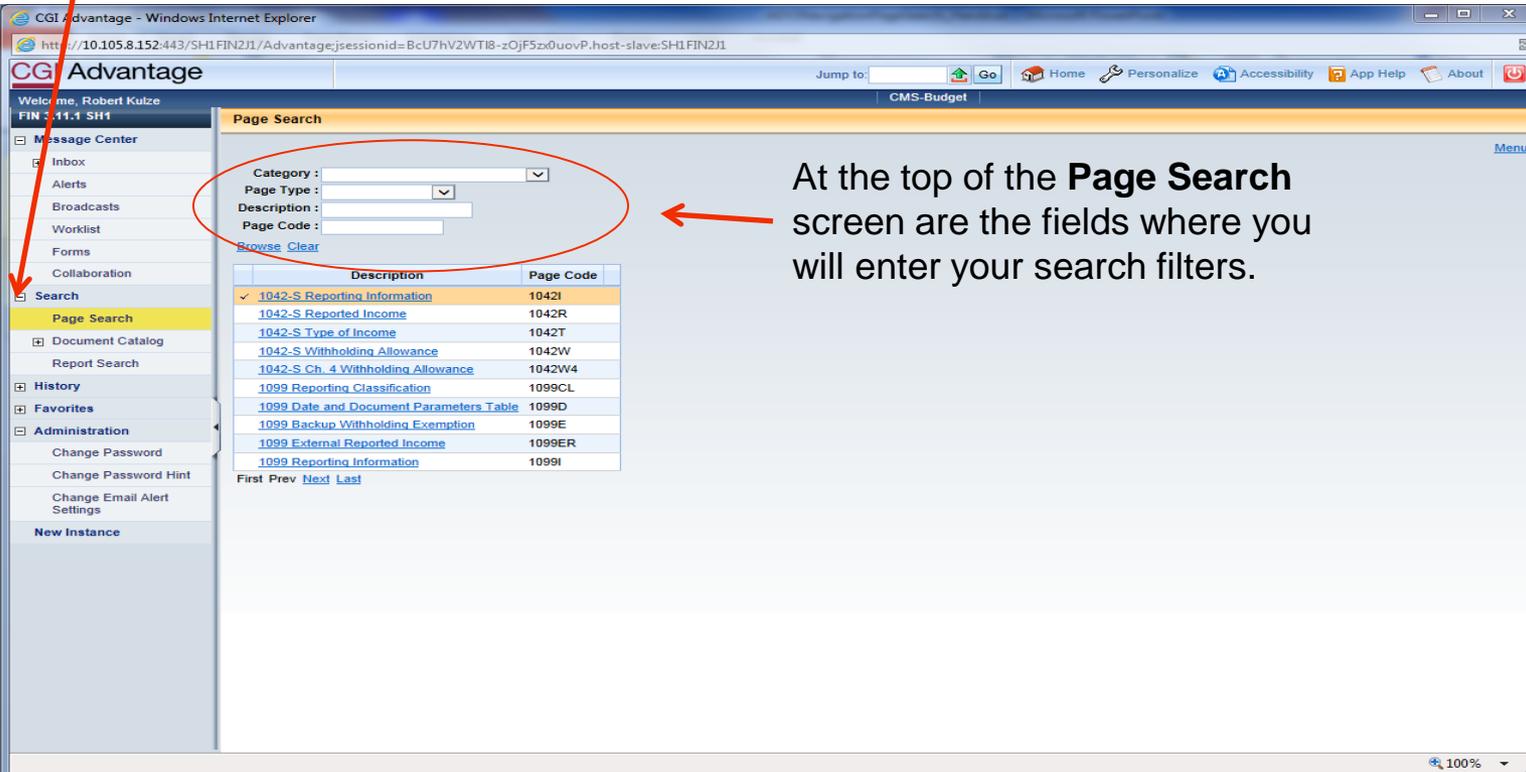
At the top of the page is the **Jump to** box, which is a place where you can type in the name of a table and go straight to that table.

Also at the top is the **Home** icon, which will take you back to the original starting page.

There is also an icon for online **App Help** and the **Logout** button , which you should use before closing out your session.

# How to navigate in Advantage FIN 3.11

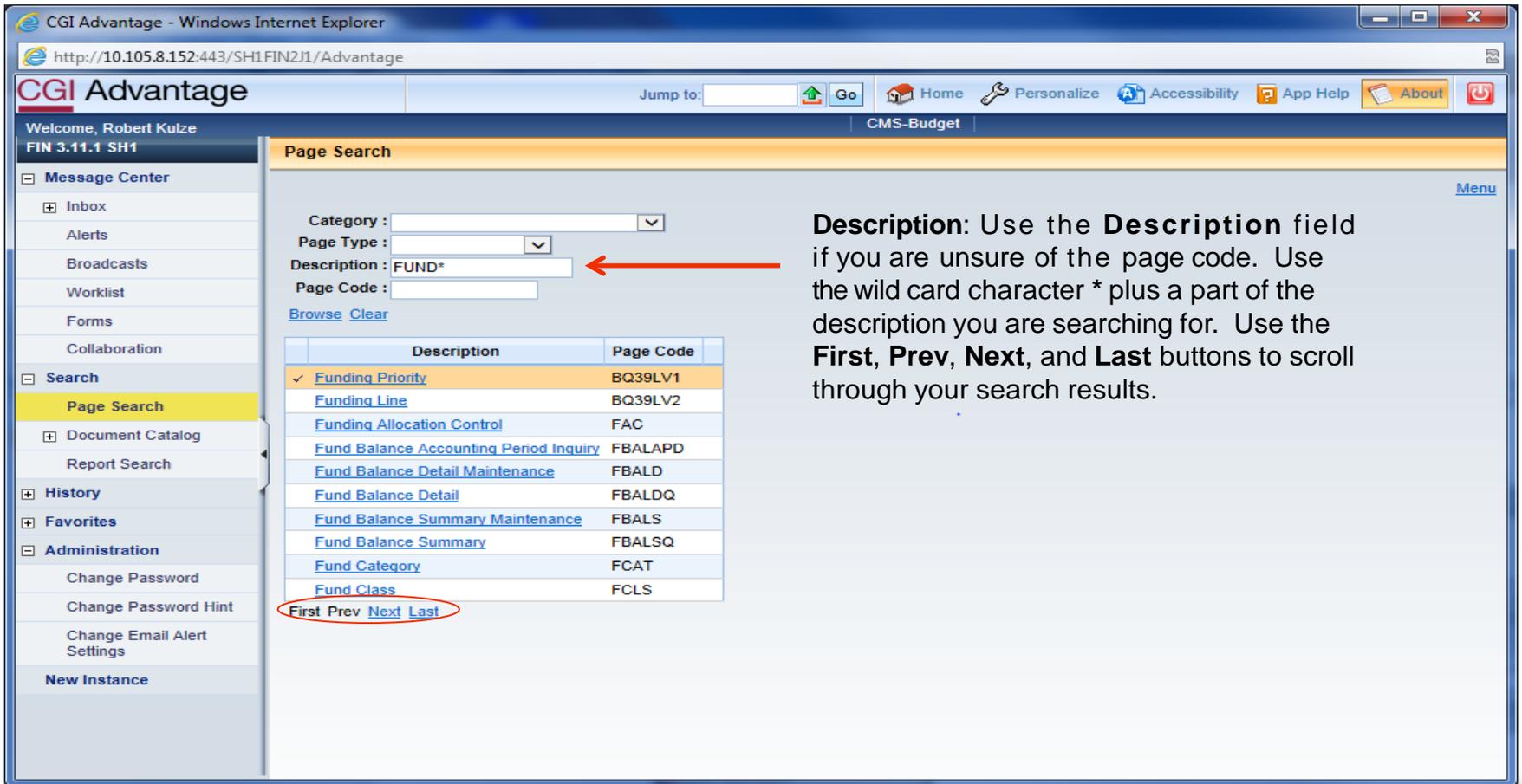
To perform a page search, select **Search** and then select **Page Search**.



At the top of the **Page Search** screen are the fields where you will enter your search filters.

Description	Page Code
1042-S Reporting Information	1042I
1042-S Reported Income	1042R
1042-S Type of Income	1042T
1042-S Withholding Allowance	1042W
1042-S Ch. 4 Withholding Allowance	1042W4
1099 Reporting Classification	1099CL
1099 Date and Document Parameters Table	1099D
1099 Backup Withholding Exemption	1099E
1099 External Reported Income	1099ER
1099 Reporting Information	1099I

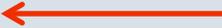
# How to navigate in Advantage FIN 3.11



CGI Advantage - Windows Internet Explorer  
 http://10.105.8.152:443/SH1FIN2J1/Advantage

CGI Advantage  
 Welcome, Robert Kulze  
 FIN 3.11.1 SH1  
 CMS-Budget

Page Search

Category :   
 Page Type :   
 Description : FUND\*   
 Page Code :

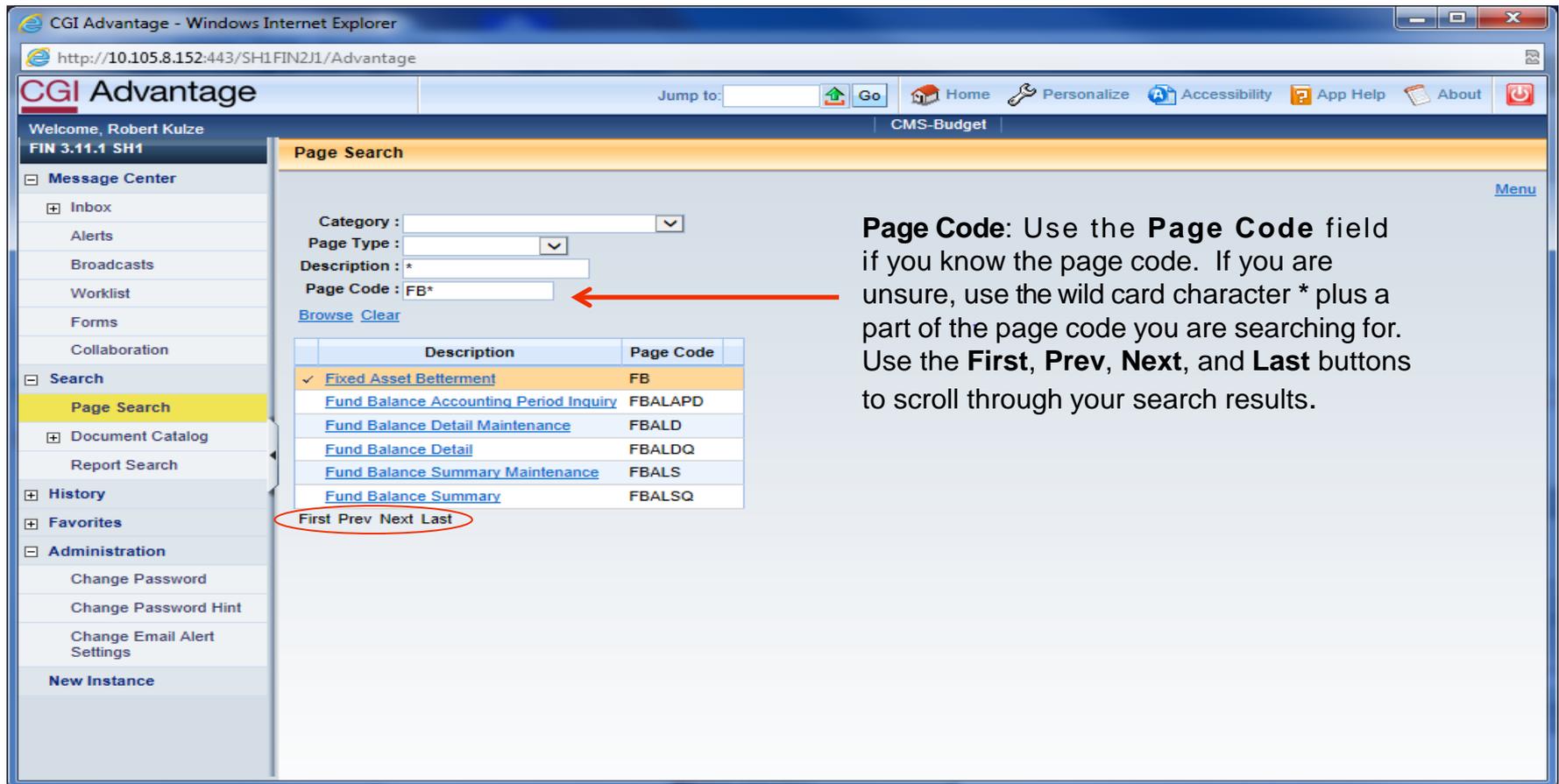
[Browse](#) [Clear](#)

Description	Page Code
✓ <a href="#">Funding Priority</a>	BQ39LV1
<a href="#">Funding Line</a>	BQ39LV2
<a href="#">Funding Allocation Control</a>	FAC
<a href="#">Fund Balance Accounting Period Inquiry</a>	FBALAPD
<a href="#">Fund Balance Detail Maintenance</a>	FBALD
<a href="#">Fund Balance Detail</a>	FBALDQ
<a href="#">Fund Balance Summary Maintenance</a>	FBALS
<a href="#">Fund Balance Summary</a>	FBALSQ
<a href="#">Fund Category</a>	FCAT
<a href="#">Fund Class</a>	FCLS

[First](#) [Prev](#) [Next](#) [Last](#)

**Description:** Use the **Description** field if you are unsure of the page code. Use the wild card character \* plus a part of the description you are searching for. Use the **First**, **Prev**, **Next**, and **Last** buttons to scroll through your search results.

# How to navigate in Advantage FIN 3.11



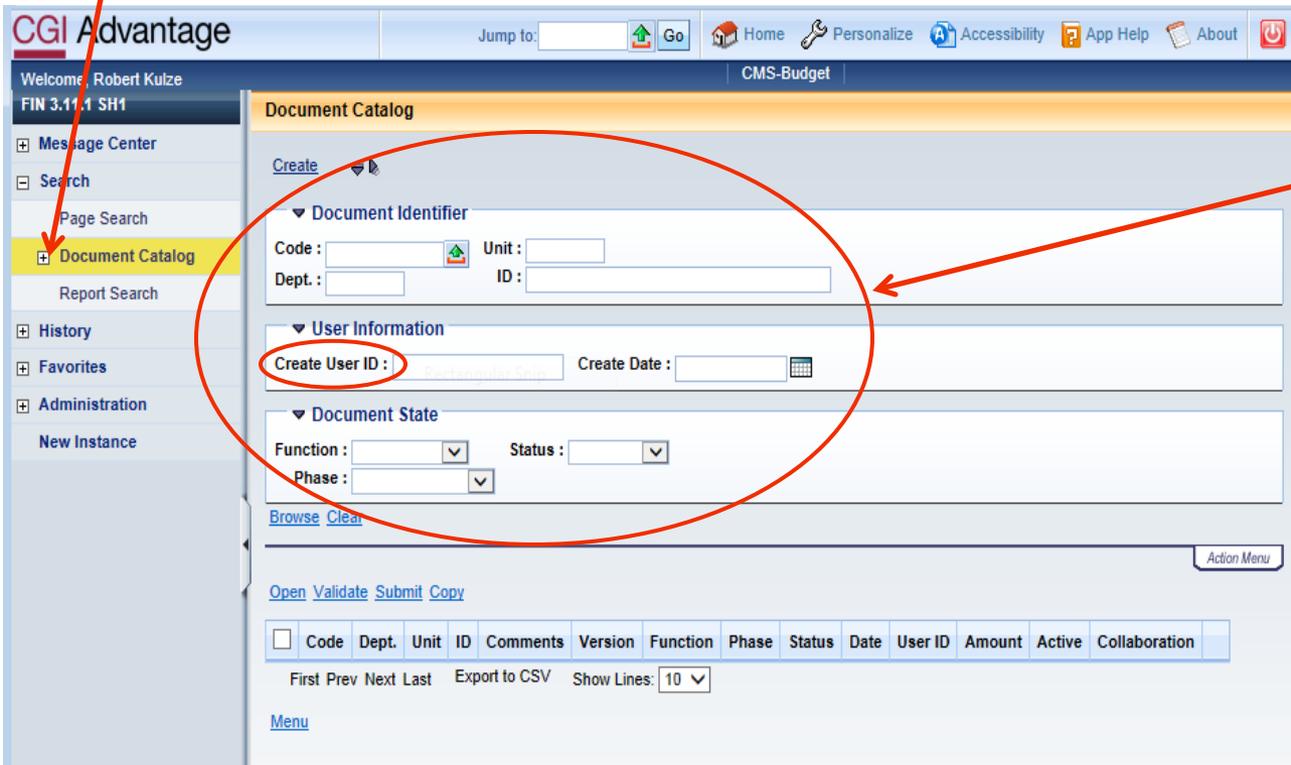
The screenshot shows the CGI Advantage web application interface. The browser window title is "CGI Advantage - Windows Internet Explorer" and the address bar shows "http://10.105.8.152:443/SH1FIN2J1/Advantage". The page header includes "CGI Advantage" and "Welcome, Robert Kulze". The main content area is titled "Page Search" and contains a search form with fields for "Category", "Page Type", "Description", and "Page Code". The "Page Code" field contains "FB\*" and is highlighted with a red arrow. Below the search form is a table of search results with columns "Description" and "Page Code". The first row is selected and highlighted in orange. At the bottom of the table, the navigation buttons "First Prev Next Last" are circled in red.

**Page Code:** Use the **Page Code** field if you know the page code. If you are unsure, use the wild card character \* plus a part of the page code you are searching for. Use the **First**, **Prev**, **Next**, and **Last** buttons to scroll through your search results.

Description	Page Code
Fixed Asset Betterment	FB
Fund Balance Accounting Period Inquiry	FBALAPD
Fund Balance Detail Maintenance	FBALD
Fund Balance Detail	FBALDQ
Fund Balance Summary Maintenance	FBALS
Fund Balance Summary	FBALSQ

# How to navigate in Advantage FIN 3.11

To search by document code, select **Search** and then select **Document Catalog**.



The screenshot shows the Advantage FIN 3.11 interface. The left sidebar contains a navigation menu with 'Document Catalog' highlighted. The main content area is titled 'Document Catalog' and includes a 'Create' dropdown menu. Below this are three sections: 'Document Identifier' with fields for Code, Unit, Dept., and ID; 'User Information' with fields for Create User ID (circled in red), Create Date, Function, and Status; and 'Document State' with fields for Phase and Status. At the bottom, there is a table header with columns: Code, Dept., Unit, ID, Comments, Version, Function, Phase, Status, Date, User ID, Amount, Active, and Collaboration. Below the table header are navigation links: First, Prev, Next, Last, Export to CSV, and Show Lines: 10.

In addition to searching by **Document Code**, the results can be narrowed by using additional search criteria.

**NOTE:** The **Create User ID** field allows you to narrow your search results by entering the User ID of the person who created the document.

## How to navigate in Advantage FIN 3.11

Here's a list of commonly used pages for general accounting.

FUND	FUND
DEPARTMENT	DEPT
DIVISION	DIV
SECTION	SEC
BUREAU	BURE
UNIT	UNIT
OBJECT	OBJ
ACTIVITY	ACTV
REVENUE	RSRC
SUB-REVENUE	SRSRC
BALANCE SHEET	BSA
SUB-BALANCE	SBSA

## How to navigate in Advantage FIN 3.11

Here's a list of commonly used pages for Accounts Payable and Accounts Receivable.

<b>Accounts Payable</b>	
<b>PAGE NAME</b>	<b>CODE</b>
VENDOR CUSTOMER	VCUST
DOCUMENT HISTORY	DHIST
DOCUMENT CATALOG	DOCATLG
DOCUMENT REFERENCE QUERY-FORWA	FWDRF
DOCUMENT REFERENCE QUERY-BACK	BWDRF
VENDOR INVOICE REGISTRY	VIR
DISBURSEMENT MANAGEMENT	DISBM
PCARD PAYMENT REQUEST	PRCC
<b>Accounts Receivable</b>	
<b>PAGE NAME</b>	<b>CODE</b>
DOCUMENT CATALOG	DOCATLG
RECEIVABLE HISTORY & REFERENCE	RDET
RECEIVABLE SEARCH	RESTA

## How to navigate in Advantage FIN 3.11

Here's a list of common account codes used for Journals and Queries.

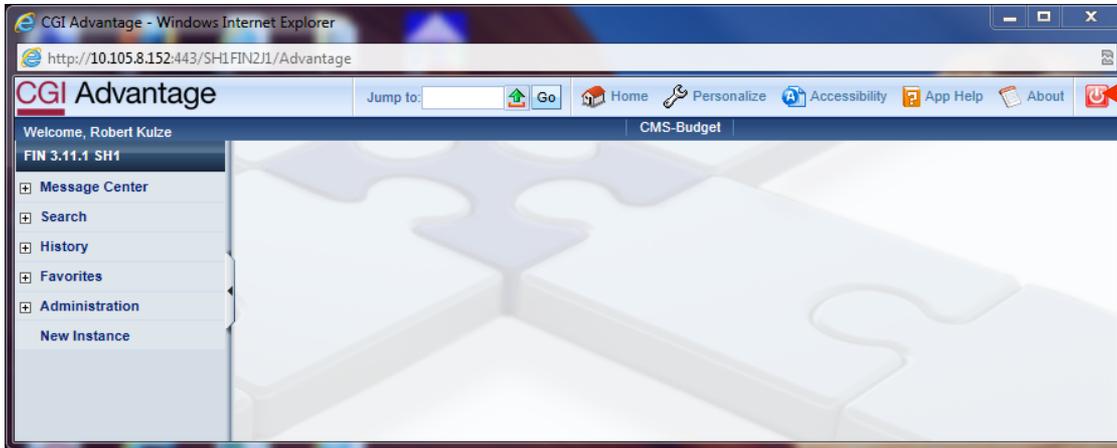
<b>Journals and Queries</b>	
<b>PAGE NAME</b>	<b>CODE</b>
ACCOUNTING JOURNAL	JACTG
COST ACCOUNTING JOURNAL	JCA
ACCOUNTING JOURNAL & LEDGER QUERY	JLACTGQY
EXPENSE BUDGET: LEVEL 1	BQ41LV1
EXPENSE BUDGET: LEVEL 2	BQ41LV2
BUDGET STRUCTURE 41 LEVEL 2 ESUM	ESUM412
REVENUE BUDGET 42: LEVEL 1	BQ42LV1
REVENUE BUDGET 42: LEVEL 2	BQ42LV2
BUDGET STRUCTURE 42 LEVEL 2 RSUM	RSUM422

## How to navigate in Advantage FIN 3.11

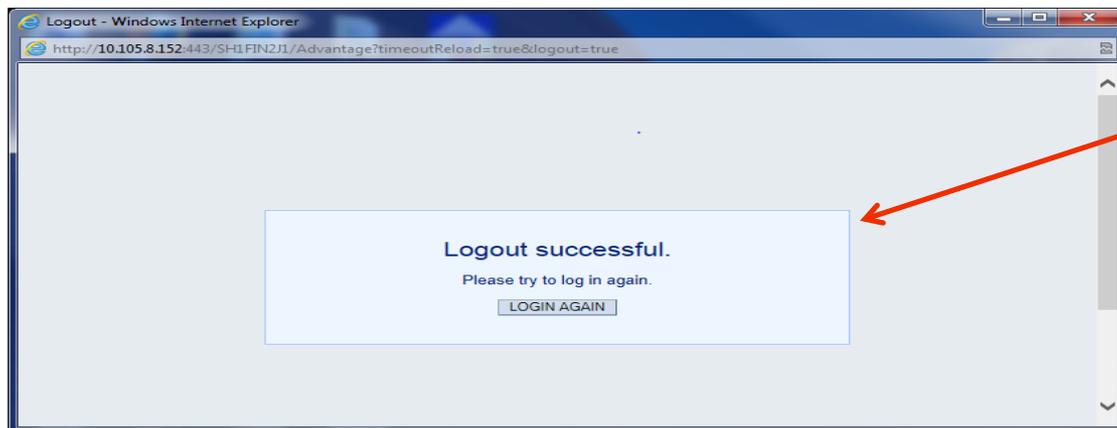
Here's a list of common account codes used for Cost Accounting.

<b>Cost Accounting</b>	
<b>Chart of Account Pages</b>	
<b>PAGE NAME</b>	<b>CODE</b>
MAJOR PROGRAM	MJPRG
MAJOR PROGRAM CATEGORY	MJPCAT
MAJOR PROGRAM CLASS	MLPCLS
MAJOR PROGRAM GROUP	MJPGRP
MAJOR PROGRAM TYPE	MJPTYP
PROGRAM	PROG
PROGRAM CATEGORY	PCAT
PROGRAM CLASS	PCLS
PROGRAM GROUP	PGRP
PROGRAM TYPE	PTYP
PROGAM PERIOD CODE	PPC
FUNDING PROFILE SELECT	FPRFLST

## How to sign out of Advantage FIN 3.11



To sign out of FIN, navigate to the **Home** page and select the **Logout** button.



This will take you to the **Logout successful** page.

Thank You!

This concludes the navigational  
training for Advantage Financial 3.11