

## myGateway Finance Page Quick Start Guide

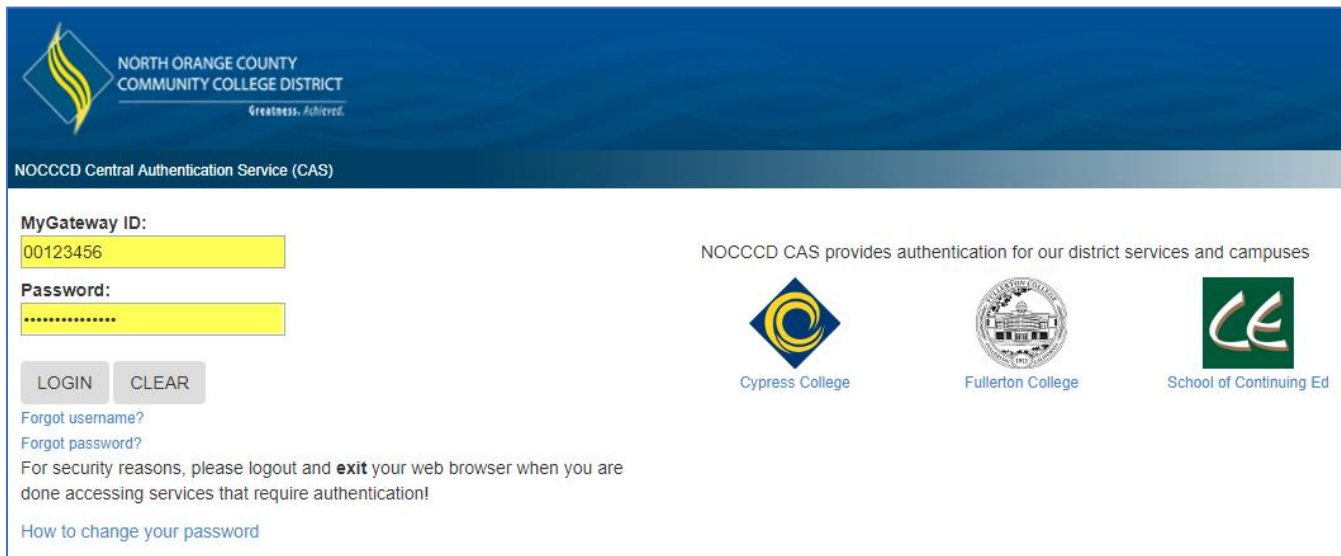
The new myGateway portal includes a menu link to the Finance page. This page is available to staff members who monitor and maintain budgets and financial transactions. The Finance features various channels that include the following:

- ✓ Financial Advisor – monitor budget vs activity/commitments
- ✓ Finance Channel – access requisition functions
- ✓ Approval Alerts – automatically display documents awaiting approval

This quick start guide will accompany you through the login process, access the Finance page, set up the Financial Advisor channel, and summarize other available channels.

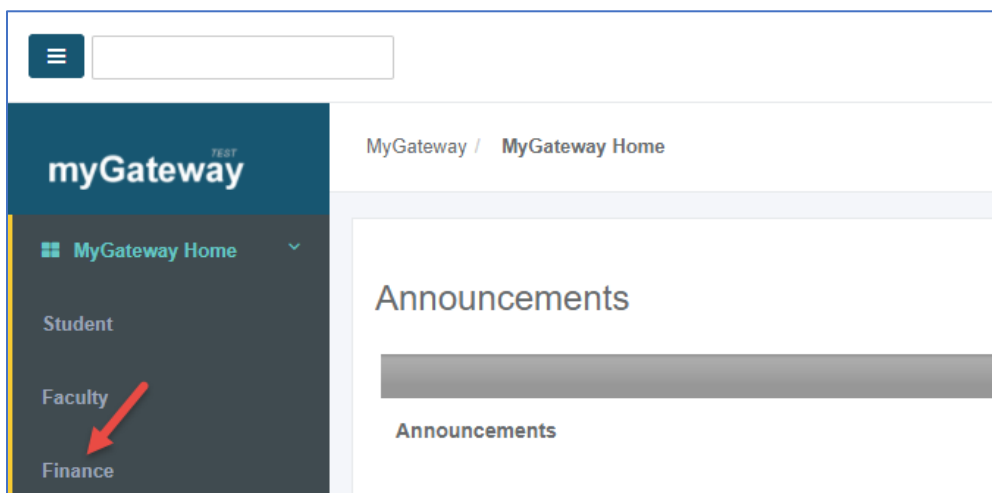
### Login and Access

Open your preferred web browser and access the myGateway login page (mg.nocccd.edu). Enter your myGateway ID (Banner ID#) and password in the fields provided. If you encounter problems logging into myGateway, refer to the myGateway Login Guide that is available on the [Information Services Training & Training Materials](#) page.



The screenshot shows the NOCCCD Central Authentication Service (CAS) login page. At the top left is the North Orange County Community College District logo with the tagline "Greatness. Achieved.". Below the logo is the text "NOCCCD Central Authentication Service (CAS)". The main login area contains two input fields: "MyGateway ID:" with the value "00123456" and "Password:" with a masked password. Below these fields are "LOGIN" and "CLEAR" buttons. To the right of the input fields, there is a text box stating "NOCCCD CAS provides authentication for our district services and campuses" and three logos: Cypress College, Fullerton College, and School of Continuing Ed. At the bottom left, there are links for "Forgot username?", "Forgot password?", "For security reasons, please logout and exit your web browser when you are done accessing services that require authentication!", and "How to change your password".

Once logged into myGateway, click on the **Finance** link located in the menu on the left side of your myGateway home page.



## Financial Page

The Finance page that appears is composed of several different areas as the below screenshot shows:

The screenshot displays the 'Financial Advisor' interface. At the top, there is a bar chart showing budget vs activity/commitments for five categories (1-5). Below the chart is a data table with columns: Legend, Fund, Orgn, Adjusted Budget, YTD Activity / Commitments, Available Balance, Percent Spent, and Percent Available. The table shows zero values for all categories. To the right of the table are three panels: 'Approval Alerts' (3) showing no pending documents, 'Reqs and POs' (2) with options to create a requisition, check available balance, and view documents, and 'Finance Alerts Grants' (4) showing no grants scheduled. At the bottom left is a news feed (5) with several items, including 'The Chronicle of Higher Education News' and 'For-Profit Colleges Find Few Reasons to Lobby a Friendlier Education Dept.'

| Channel | Description                                                                                                                                                                                         |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1       | Monitor budget vs activity/commitments with data table and bar graph                                                                                                                                |
| 2       | Create simple requisitions, new queries, retrieve saved queries, and view details/status of various documents.                                                                                      |
| 3       | This channel will show an approver the number of documents that are waiting for their approval. The approver can easily drill down to see document and accounting details to approve or disapprove. |
| 4       | Displays alerts of grants scheduled to end in a selected time period                                                                                                                                |
| 5       | This channel will show an updated feed of higher education news. To read a news item in the feed, click on the headline to open a new browser tab with the full story.                              |

Note: Additional training may be required to use features in certain channels.

## Financial Advisor

The Financial Advisor will need to be configured to show data and bar graph you wish to monitor based on Fund/Org combinations entered in the setup page. To access the setup page, click the **Preferences** link located at the top right of the Financial Advisor area.

### Financial Advisor

**Preferences**

**Adjusted Budget Color:**

Blue

**YTD Activity / Commitments Color:**

Yellow

**Set 1**

**COA:**

1

**Fund:**

11200

**Orgn:**

1700

**Set 2**

**COA:**

1

**Fund:**

11100

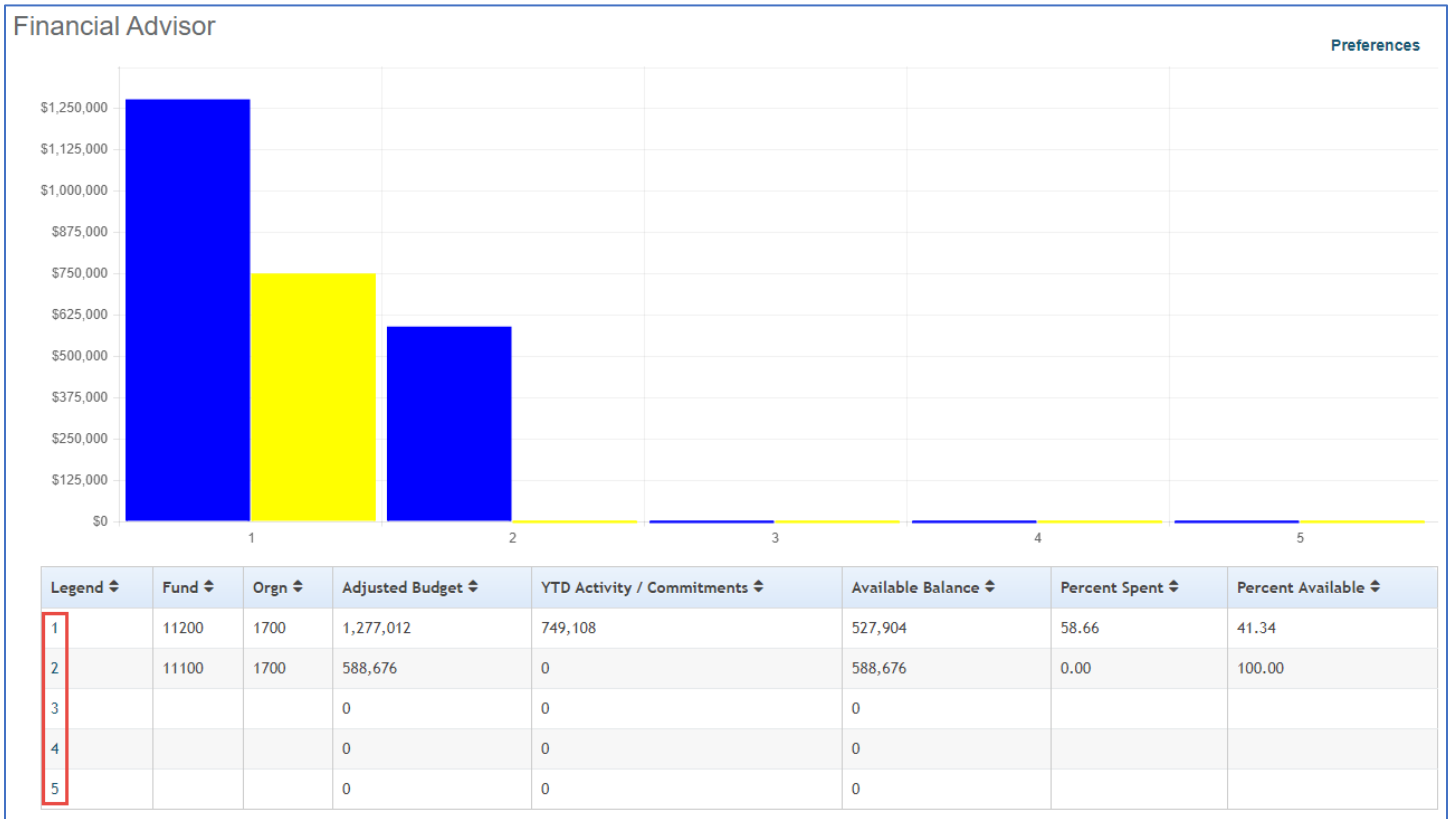
**Orgn:**

1700

Back Reset **Apply**

Enter the Chart of Accounts (COA), Fund, and Organization (Orgn) codes that you wish to monitor for each set in the space provided (maximum 5 sets). The bar colors can also be changed, if necessary. Click the **Apply** button to accept.

The bar graph and data chart for the for the entered fund/org codes will appear at the top of the Finance page.



If more information is needed than what is being shown, click the number in the Legend column corresponding to the budget account for a closer look (see outlined area above). Clicking the link will open another tab in your browser to the appropriate WebStar budget report query configuration page to complete and display.

|                                                          |                      |                                  |        |
|----------------------------------------------------------|----------------------|----------------------------------|--------|
| <b>Fiscal year:</b>                                      | 2017 ▼               | <b>Fiscal period:</b>            | 12 ▼   |
| <b>Comparison Fiscal year:</b>                           | None ▼               | <b>Comparison Fiscal period:</b> | None ▼ |
| <b>Commitment Type:</b>                                  | All ▼                |                                  |        |
| Chart of Accounts                                        | 1                    |                                  |        |
| Fund                                                     | 11200                | Activity                         |        |
| Organization                                             | 1700                 | Location                         |        |
|                                                          |                      | Fund Type                        |        |
| Account                                                  |                      | Account Type                     |        |
| Program                                                  |                      |                                  |        |
| <input type="checkbox"/> <b>Include Revenue Accounts</b> |                      |                                  |        |
| <b>Save Query as:</b>                                    | <input type="text"/> |                                  |        |
| <input type="checkbox"/> <b>Shared</b>                   |                      |                                  |        |
| <input type="button" value="Submit Query"/>              |                      |                                  |        |