Financial Services
Date: 09/01/2011

Users with any Finance Security will have the Finance Tab defaulted as a tab when they log into the MyUNM portal.

This job aid will provide information on the Financial Advisor Channel.

1. On the Finance tab.

2. Go to the Finance Advisor channel.
   - This channel uses a bar graph to show budget versus committed and actual expenses for up to five preferred fund/org combinations.

3. To enter your preferred fund/org combinations:
   A. Select the Edit button from within the channel.
   B. Enter the fund and org information
   C. Enter U for COA
   D. Select Apply
   E. Select Back

4. Select to expand the channel to fill the page.

5. Select to maximize for minimize to present less or more information.

6. Select to remove the Financial Advisor from your layout.

For information on adding a channel see job aid FSJA-014 Adding a Channel on the FSR website (www.unm.edu/~fssc).

**End**