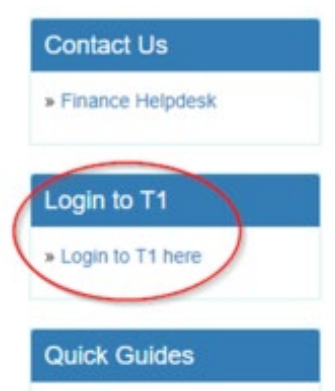


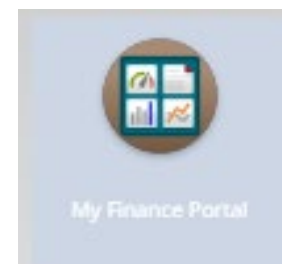
My Finance Portal Navigation Guide for College Reports

T1 is the University's finance system. [See here](#) for T1 Key Information.

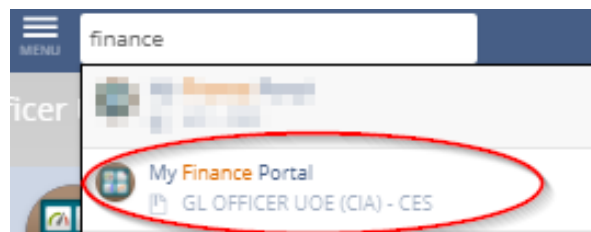
To access My Finance Portal, [use this link](#) to log into T1 using your normal IT username and password.



Your front page may already show the My Finance Portal tile which you can simply click on to access it.



If you can't see this tile, search for it using the Enterprise Search at the top of the screen.



Once you've selected the Portal it will take you to this first screen.

The screenshot shows the University of Exeter Finance Services Portal dashboard. At the top is the University of Exeter logo. The dashboard is divided into several sections:

- Admin Reports:** My Budgets & Projects, Find Project code string, Find Budget Centre code string, Budget Centre Hierarchy, Find a supplier.
- Useful Functions:** My Tasks, My Travel & Expenses, My Requisitions, My Purchase Orders, My Good Receipts.
- View Approval & Reporting Pools:** Budget Centre, Project.
- HELPDESK TELEPHONE:** 01392 726981, Monday - Friday (not Bank Holidays), Monday 09:00 - 17:00, Tuesday 09:00 - 17:00, Wednesday 10:00 - 17:00, Thursday 09:00 - 17:00, Friday 09:00 - 16:00.
- EMAIL:** FinanceHelpdesk@exeter.ac.uk
- ONLINE:** http://www.exeter.ac.uk/finance/financehelpdesk/
- IN PERSON:** Northcote House, Room 253, The Queen's Dr, Exeter, EX4 4QJ
- MENU:** Financial Reporting, College, Professional Services, Strategic Investment, Research.

Select College on the right of your screen.

This image is a close-up of the MENU section from the screenshot above. It shows the 'Financial Reporting' heading and a list of options: 'College' and 'Professional Services'. The 'College' option is circled in red, indicating it is the selected item.

This will take you to My Finance Portal:

The screenshot shows the My Finance Portal interface. It is divided into several sections:

- MENU:** Contains links for Home, Financial Reporting (with a sub-link for College), Professional Services, and Strategic Investment.
- College Reporting:** Contains links for Budget Holder Overview, Budget Centre Summary, Project Summary (marked with a red circle 1), and PDA/Third Party Report.
- My Completed Reports:** Features a 'Click to refresh' button and a table of reports. Below the table, it states: "After submitting a report please wait up to 2 minutes then press the refresh button, the report will appear below".
- Transaction Reports:** Contains links for Transactions (marked with a red circle 2) and Commitments.
- Other Links:** Contains links for My Reports (marked with a red circle 3), Original BH Dashboard (marked with a red circle 6), and UxI Feedback form.
- Help:** Contains a link for Report Drilldown (marked with a red circle 5) and a red circle 4.

Report	Report Name	Created Date
45955	2021 - 2022 Financials - Budget Holder Report	03/09/2021
45954	2021 - 2022 Financials - Budget Centre Summary	03/09/2021
45943	2021 - 2022 Financials - Budget Centre Summary	01/09/2021
45942	2021 - 2022 Financials - Budget Centre Summary	01/09/2021
45938	2021 - 2022 Financials - Budget Centre Summary	31/08/2021
45937	2021 - 2022 Financials - Budget Centre Summary	31/08/2021
45936	2021 - 2022 Financials - Budget Centre Summary	31/08/2021
45935	2021 - 2022 Financials - Budget Centre Summary	31/08/2021
45934	2021 - 2022 Financials - Budget Centre Summary	31/08/2021
45932	2021 - 2022 Financials - Budget Centre Summary	31/08/2021

From here you can access:

- 1 & 2** Six useful reports
- 3** My Reports, where you can access all reports you've run in the past
- 4** Glossary, explaining terminology used throughout the portal
- 5** Report Drilldown, providing guidance on how to drill down into more detail within reports
- 6** The original version of your previous Budget Holder Dashboard, which will only be available temporarily