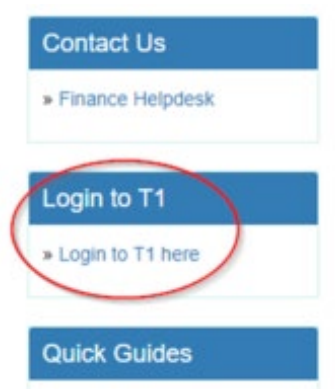


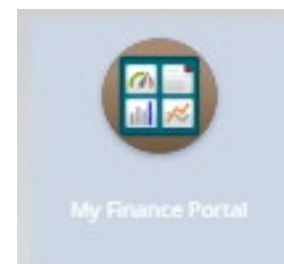
My Finance Portal Navigation Guide – PS Reports

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

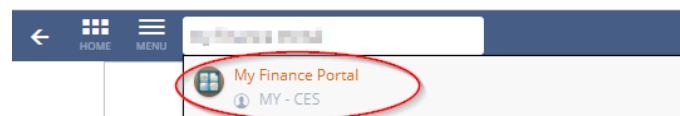
To access My Finance Portal, [use this link](#) to log into T1 using your normal IT username and password.



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. Below it are several sections: 'Admin Reports' with links to 'My Budgets & Projects', 'Find Project code string', 'Find Budget Centre code string', and 'Budget Centre Hierarchy'; 'View Approval & Reporting Pools' with links to 'Budget Centre' and 'Project'; 'My Useful Functions' with icons for 'Tasks', 'Supplier Dashboard', 'Travel & Expenses', 'Requisitions', 'Purchase Orders', and 'Good Receipts'; a 'HELPDESK TELEPHONE' section with the number 01392 726981 and a list of hours; an 'EMAIL' section with the address FinanceHelpdesk@exeter.ac.uk; an 'ONLINE' section with the URL http://www.exeter.ac.uk/finance/financehelpdesk/; and an 'IN PERSON' section with the address Northcote House, Room 253, The Queen's Dr, Exeter, EX4 4QJ. On the right side, there is a 'MENU' box containing 'Financial Reporting', 'College', and 'Professional Services'.

Select Professional Services on the right of your screen.

This image is a close-up of the 'MENU' box from the dashboard. It contains the text 'Financial Reporting' at the top. Below it are two items: 'College' and 'Professional Services'. The 'Professional Services' item is circled in red, indicating it is the selected option.

This will take you to My Finance Portal:

UNIVERSITY OF EXETER Professional Services Finance Portal

MENU

- Home
- Financial Reporting
 - College
 - Professional Services
 - Strategic Investment
- Help Section
 - Report Drilldown
 - User Feedback Form
- Other Reports
 - Transactions
 - Commitments

Monthly Reporting (Period position) **1**

- Monthly Management Accounts Pack

Forecast Remaining Reporting (Live) **2**

- Hierarchy Report (Includes Projects)
- Budget Holder (Excludes Projects)
- Project Holder

Forecast Pack Outputs **3**

- T1 Forecast pack output
- Projects by Service
- Projects
- Forecast Nominal Report

My Completed Reports **7** **Click to refresh**

After submitting a request please wait up to 4 minutes then press the refresh button, the report will appear below

Report	Report Name	Created Date
52406	Financial Reporting - T1 - Green College	23/09/2021
52405	Financial Reporting - T1 - Devon College	23/09/2021
52404	Financial Reporting - T1 - Exeter College	23/09/2021
52402	Financial Reporting - T1 - Exeter College	23/09/2021
52401	Financial Reporting - T1 - Exeter College	23/09/2021
52400	Financial Reporting - T1 - Exeter College	23/09/2021
52399	Financial Reporting - T1 - Exeter College	23/09/2021
52398	Financial Reporting - T1 - Exeter College	23/09/2021
52394	Financial Reporting - T1 - Exeter College	23/09/2021
52385	Financial Reporting - T1 - Exeter College	23/09/2021

Budget/Plan Pack Outputs **4**

- T1 Budget/Plan pack output
- Projects by Service
- Projects
- Plan Nominal Report

From here you can access:

- 1 - 4** Useful reports (explained in detail in the Guide).
- 5** Transactions and Commitments reports that can be run separately into excel.
- 6** Help Section which provides guidance on how to drill down into more detail within reports and includes a User Feedback Form where you can submit any feedback.
- 7** My Completed Reports, where you can access the last 10 reports ran, plus a link to 'My Reports' which will list all reports.