




Faculty Budget Holder Dashboard - Filter Guide

This guide aims to explain the specific issue of filtering and is an add-on to the main guide.

Guide links are at the top of your screen:

Faculty Budget Holder Dashboard	 Please click the link below for.... Dashboard User Guide	 Please click the link below for.... Dashboard Filters User Guide	 Please click the link below for.... Video Demonstration (Coming Soon)
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Key notes

- Data excludes externally funded research projects. For research project transactions please go to the Finance Reporting Menu and select 'Research'. To view Research Budgets, you will need to log into RIME (Research and Impact Management Environment).
- T1 differentiates between budget centre and project codes. Project codes are often time limited and attached to a budget centre (there can be many projects to one budget centre). Full details of Budget Centres Vs Projects within T1 can be found online [here](#).
- Budget Holder is the name given to the formal budget holder of a budget centre code. Project Manager is the name given to the formal budget holder of a project code.

Introduction to the Filters

There are a host of filters on the Budget Holder Dashboard, if you apply filters then only some of the data will show. If no filters are selected, ALL your budgets/projects show as the default. If you decide to filter, please ensure to take the filter back off to view all data again.


It is recommended to use the filters at the top of your screen (see first screenshot). These filters apply to **ALL** dashboard data below the filters e.g. filter to show one budget centre only. Once you have selected what you want at the top, the side filters become almost redundant. Nearly all users will only filter by budget centre (i.e. sub department and department can usually be ignored as these are higher level reporting structures).

Department	Sub Department	Budget Centre	Source
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Select All
			<input checked="" type="checkbox"/> General Ledger
			<input checked="" type="checkbox"/> Project Ledger

Note: A red arrow points from the Budget Centre dropdown menu to the table below.

Income = (With Brackets)	Variance to Budget = £(100) Adverse
Expenditure = No Brackets	Variance to Budget = £100 Favourable

If using side filters further down the screen, they apply only to their adjacent panel, e.g.:

General Projects					Project Manager	
					<input type="text"/>	
Total Committed (Income) / Expense	Variance to Budget Favourable / (Adverse)	Prior Year YTD (Income) / Expense	Prior Year Variance Favourable / (Adverse)	Manager	My Projects	
					<input type="text"/>	

Key Filter Information

1) View one budget centre only

If you hold multiple budgets, when you first open the Budget Holder Dashboard Report you will see all your budget centres.

Consolidated by Budget Centre

Budget Centre	Revised Budget (Income) / Expense	Actual to Date (Income) / Expense	Commitments (Income) / Expense	Total Committed (Income) / Expense	Variance to Budget Favourable / (Adverse)	Prior Year YTD (Income) / Expense	Prior Year Variance Favourable / (Adverse)	Manager
1000 1000 - HASS - HoD - 1000	1000	1000	0	1000	0	1000	0	1000
1000 1000 - HASS - HoD - 1000	1000	1000	0	1000	0	1000	0	1000
1000 1000 - HASS - HoD - 1000	1000	1000	0	1000	0	1000	0	1000
1000 1000 - HASS - HoD - 1000	1000	1000	0	1000	0	1000	0	1000

You can use the budget centre filter to see just one budget centre only. It is important to know that if you choose to filter by one budget centre it will also change ALL screens beneath this section as well to show all relevant financial information to that one budget centre only. (i.e. Projects, transactions, commitments, payroll etc).

Faculty: [] School: [] Department: [] Sub Department: [] Budget Centre: [- HASS - HoD - 1000 x]

If you just manage Projects, please scroll down to the next section - General Projects
 This dashboard queries our financial ledgers, therefore figures are displayed in accounting signage

Income = (With Brackets)	Total Budget Centre 1000 = £(100) Favourable
Expenditure = No Brackets	Total Budget Centre 1000 = £100 Adverse

Consolidated by Budget Centre

Budget Centre	Revised Budget (Income) / Expense	Actual to Date (Income) / Expense	Commitments (Income) / Expense	Total Committed (Income) / Expense	Variance to Budget Favourable / (Adverse)	Prior Year YTD (Income) / Expense	Prior Year Variance Favourable / (Adverse)	Manager
1000 1000 - HASS - HoD - 1000	1000	1000	0	1000	0	1000	0	1000

2) Filters for Source and Type

Source	Type
<input type="checkbox"/> Select All	<input type="checkbox"/> Select All
<input checked="" type="checkbox"/> General Ledger	<input checked="" type="checkbox"/> Income
<input checked="" type="checkbox"/> Project Ledger	<input checked="" type="checkbox"/> Expenses

Beware if you choose to untick the boxes above at the top right of the screen. If unticked, you are only viewing part of the full data. E.g. if you untick Income, you will only see Expenses, or if you untick Expenses, you will only see Income.

If you are a project manager, you will see the budget centre that your project is linked to. This will only be the value of your live projects – you will not see any other projects within the budget centre unless you are the project manager. To see the project information please scroll down to the project section (this is the next section below budget centres being the top section).

Note: There is no 'Source' filter for Research Projects as Research Projects are not shown on this report. Please note the first bullet point at the top of page 1 if you wish to see Research Projects (RIME will hold the budgeting information).

6) Payroll Postings (Confidential Info – no example screenshot)

If you are a Budget Holder or Project Manager, you may also see payroll information. (Please consider GDPR guidance around confidentiality). You can filter on the budget and project level where needed.

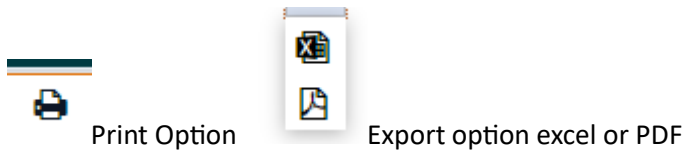
The screenshot shows a web interface with two main sections: 'Budget Centre' and 'Project'. Each section has a search box and a list of checkboxes for filtering. The 'Budget Centre' section includes a search box with the text 'Search', a 'Select All' checkbox, and two other checkboxes with text that is partially obscured. The 'Project' section includes a search box with the text 'Search', a 'Select All' checkbox, and one other checkbox with text that is partially obscured.

Reporting Users do not see staffing information (a request for them to view this is at the discretion of the budget holder)

Notes

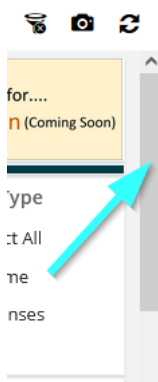
A) Exporting Data

Please remember if you wish to export the information then, in each section, left click on your mouse on the top right-hand side of the section. A print option will appear, you can then click on this to have the option to print in excel or PDF.



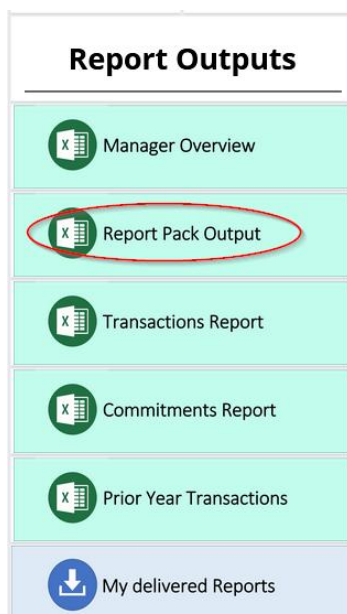
B) Scrolling Down

There is a scroll bar on the right-hand side of the page. You will need to drag this down to see the other sections available below.



C) Budget/Project Old Format.

There is still the option to run a budget centre report or project report as before in the previous portal version. This will have summary, transactions, commitments and staffing tabs as before. This is on the right-hand side of the reporting at the top.



Further Information and Contacts

More detailed information around the topics covered in this guide are on the [University Budgets](#) webpage. This includes the [University's Financial Regulations](#), which are mandatory for all staff.

The [PS Connect Portal](#) includes a wide selection of FAQs, how-to guides and training materials to support you. In addition, the [Finance Helpdesk](#) is available to assist with further T1 queries, and serves as the first point of contact for general finance-related questions.

For specific budget queries, please contact your [Faculty Financial Planning and Reporting Team](#). The teams' email addresses are:

Faculty of Environment, Science & Economy
Faculty of Humanities, Arts & Social Sciences
Faculty of Health & Life Sciences

ESE-Finance-Team@exeter.ac.uk
HASSFPR@exeter.ac.uk
HLSFPR@exeter.ac.uk