



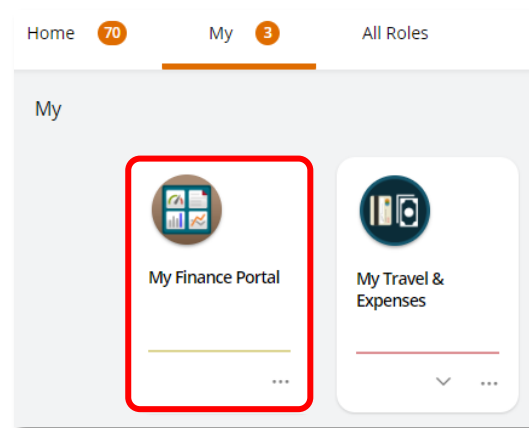
# MY FINANCE PORTAL PS Navigation Guide

## ACCESS

My Finance Portal is accessed by [logging in to T1](#) using your normal IT username and password then clicking the 'My Finance Portal' tile on the 'My page'.

A link to T1 is also published on every [Finance Services web page](#)

Or you can log in using this direct link – [My Finance Portal](#)



## PORTAL NAVIGATION

The portal's home screen looks like this:

**Quick links to other parts of T1**

**List of all your budgets and projects**

**Code string checker**

**List of who is in the T1 approval hierarchy**

**Check the membership of your approval pools here**

**Select 'Professional Services' to open the PS-specific set of budget reports**

**Helpdesk and Finance contact details for support with using T1 and navigating the portal**

**Admin Reports**

- My Budgets & Projects
- Find Project code string
- Find Budget Centre code string
- Budget Centre Hierarchy

**'My' Useful Functions**

- Tasks
- Supplier Dashboard
- Travel & Expenses
- Requisitions
- Purchase Orders
- Good Receipts

**MENU**

- Financial Reporting
- Faculty
- Professional Services**
- Research
- Info Projects
- t

**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 09:00 - 17:00  
Thursday 09:00 - 17:00  
Friday 09:00 - 16:00

<http://www.exeter.ac.uk/financehelpdesk/>

**PHONE**  
01392 726981



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## REPORT NAVIGATION

The screenshot shows the Professional Service Finance Portal interface. It features a dark blue header with the University of Exeter logo and the title 'Professional Service Finance Portal'. On the left is a 'MENU' section with options: Home, Financial Reporting, Faculty, Professional Services (highlighted), and Research. Below the menu is a 'Help Section' with 'FinancePortal Guide', 'Report Drilldown', and 'User Feedback Form'. The main content area is divided into three columns. The first column has 'Monthly Reporting (Period position)' with a sub-section 'Monthly Management Accounts Pack'. The second column has 'Forecast Remaining Reporting' with sub-sections: 'Hierarchy Report (Includes Projects)', 'Budget Holder (Excludes Projects)', and 'Project Holder'. The third column has 'My Completed Reports' with a 'Click to refresh' button and a table of reports. A red arrow points from the refresh button to the table. Red circles with numbers 1-7 are overlaid on the interface to indicate key navigation points.

Rep...	Report Name	Created
<a href="#">89988</a>	CL04 - 1C	20/10/2022
<a href="#">89987</a>	CL04 - 11	20/10/2022
<a href="#">89238</a>	CL03 - 11	14/10/2022
<a href="#">89228</a>	CL03 - 1C	14/10/2022
<a href="#">89167</a>	CL04 - 1C	13/10/2022
<a href="#">89141</a>	PS03 - Pr	13/10/2022
<a href="#">89099</a>	CL04 - 1C	13/10/2022
<a href="#">88601</a>	CL04 - 1C	10/10/2022
<a href="#">88600</a>	CL01 - EE	10/10/2022
<a href="#">88120</a>	CL03 - 11	06/10/2022

- 1 **Monthly Reporting** – summary of the actuals compared to a selected forecast or revised budget
- 2 **Forecast Remaining Reporting** - overview of the remaining forecast by comparing the YTD actuals plus commitments to the latest submitted forecast
- 3 **T1 Forecast Pack Output** - Staffing, Income and Expenditure that make up the work in progress Forecast
- 4 **Transactions/Commitments** - select to see current year or previous year transactions/commitments for all your budgets or a just a specific budget
- 5 **Reports List** - once a report has been requested, a link to it will be available here after approx 2-4 minutes. Click the refresh button to update the list with this new report link. Click the blue report number to open and view the report. Your last 10 reports remain listed here indefinitely.
- 6 **Finance Portal Guide** - link to [Budgets web page](#) with report explanations and budgeting guidance
- 7 **Report Drilldown** - how to download and drill down through your report