Professional Services Budget Holder Dashboard – User Guide

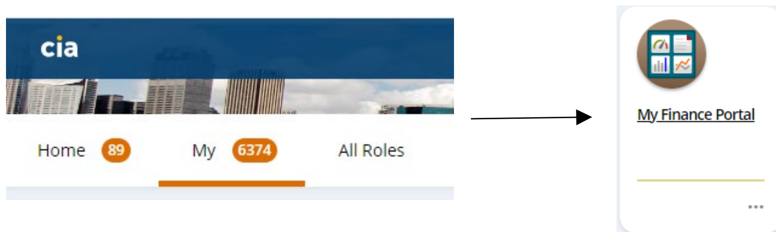
Please click the titles below to skip to the relevant section

Contents

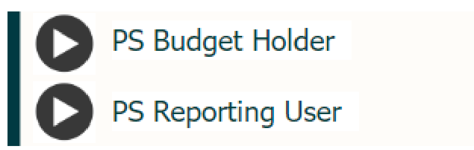
1. How do I use the dashboard?

1.1 Finding the dashboard

To load your dashboard, first log in to T1 using Chrome. Then click on My Finance Portal within the "My" page of T1.

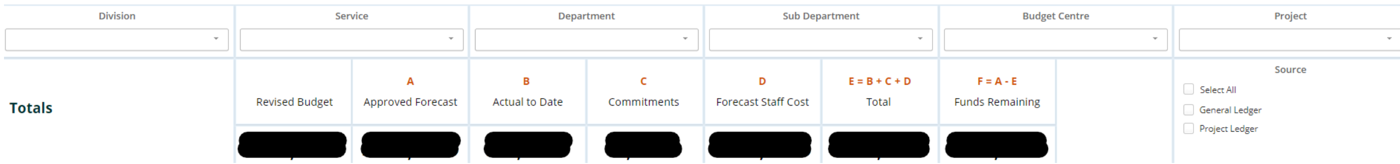


Once in the portal click on 'Professional Services Budget Holder' or 'Professional Services Reporting User' dependent on your role (see 'What if I am a reporting user?' for more information).



1.2 Dashboard filters

There are a range of filters on the Budget Holder Dashboard that you will see below the report outputs:



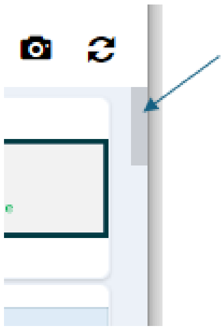
! Please note these filters apply to **<u>all</u>** dashboard data below the filters

Users can filter by the T1 reporting hierarchy (e.g. project/budget centre – see [glossary] for details). You can also choose to filter by source (general ledger or project ledger), which may be useful if you want to view a particular budget centre excluding any projects, i.e. just the general ledger.

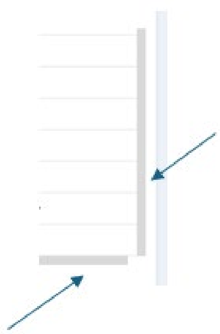
If you wish to remove all filters from the selection, please select the "clear all filters" button in the top-righthand corner as highlighted below:

1.3 Navigation

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 of the dashboard.



In addition to this, each section has its own scroll bar to the right-hand side and the bottom of the section. You will need these to scroll down the section and to the far right to see all the data available.



2. What is within the dashboard?

Each section of the Dashboard features a dynamic table of figures, introduced below. The data within the dashboard is refreshed daily, so should effectively be treated as **'live'** information.

Tables appear even when there is no associated data. For example, if you do not have any income within your budgets, then the income tables will still appear, but they will be blank.

Within each table, any text or figure in orange is clickable, enabling a further drill-down of data.

2.1 How do I see the financial position of all my budget centres / projects?

At the top of the dashboard, you will see a banner with totals on it. This will show the total figures for the area currently filtered on – if no filters are applied, it will show the totals for **all** budget centres and projects where you are the named budget holder. If a filter has been selected, these figures will automatically update to show the totals for that specific area. The definitions should help to explain what the figures for each box represent.

Remember that the financial year of the university is 1st August to 31st July. Any current year data labelled ‘to date’ means from 1 August to today’s date.

Within Professional Services we compare the actuals to date against the **latest forecast information** to represent what we think the respective budget area(s) have remaining. This is because some areas within Professional Services, for example commercial areas, need to be looking at the most up-to-date information possible to ensure that budgets are managed appropriately. The funds remaining will show what is predicted to be left at the end of the financial year based on the current data.

		A	B	C	D	E = B + C + D	F = A - E
Totals	Revised Budget	Approved Forecast	Actual to Date	Commitments	Forecast Staff Cost	Total	Funds Remaining
	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

2.2 ‘By Budget Centre’ and ‘By Project’

The dashboard is set-up to be able to report by either budget centres or by projects. The first 3 tables in the dashboard will show by budget centre, and the following 3 tables will show by project. The title of each table will detail which you are looking at, as below:

Pay Costs - Funds Remaining by Budget Centre

Pay Costs - Funds Remaining by Project

The tables ‘by Budget Centre’ will show you any budget centre for which you are the designated budget holder. This will **also include any projects** which report into that budget centre within the figures, unless a filter is selected for ‘General Ledger’ only. If you oversee budget centres that you are not budget holder for, but you oversee the department or service that they report into then you will only be able to see these via the Reporting Users dashboard.

The tables ‘by Project’ will show you any project that reports into a budget centre which you are the designated budget holder for, regardless of who the designated project manager in T1 is. If you are not the project manager, you will only see values that relate to the amounts in the project on your budget centre(s), and not the entirety of the project. If you are the project manager, you will see all values related to that project, regardless of who is responsible for the budget centre they report into.

The functionality of each table type, whether ‘By Budget Centre’ or ‘By Project’ are the same.

The figures shown within the tables follow the same format and calculations as the total banners, i.e. the below:

	Revised Budget	A Approved Forecast	B Actual to Date	C Commitments	D Forecast Staff Cost	E = B + C + D Total	F = A - E Funds Remaining
Totals	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

2.3 Pay Costs – Funds Remaining by Budget Centre / Project

To review a budget centre / project’s pay costs in detail, select the relevant figure in ‘Total to Date’. This will bring up a separate dashboard explicitly for pay costs.

Pay Costs - Funds Remaining by Budget Centre

Search

Budget_Centre	Revised Budget (Income) / Expense	Approved Forecast (Income) / Expense	Actual to Date (Income) / Expense	Commitments (Income) / Expense	Forecast Staff Cost (Income) / Expense	Total (Income) / Expense	Funds Remaining Favourable / (adverse)	Prior Year Actuals to Date (Income) / Expense	Current Year vs Prior Year Actuals Favourable / (Adverse)
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	240,532	[redacted]	[redacted]	[redacted]

2.3.1 How do I view the total pay costs and forecast for a budget centre / project?

At the top of the staffing dashboard, you will see a banner with totals on it. This will show the total pay costs for the area currently filtered on – if no filters are applied, it will show the totals for the entire budget centre / project. The definitions explain what the figures for each box represent. The totals will equal the total of the “Total Staff Cost by Position”, “Staff Cost by Nominal” and “General Journals not posted to Payroll” tables within the dashboard.

Totals	Actual to Date	Forecast Staff Cost	Total	☐ General Ledger ☐ Project Ledger
	[redacted]	[redacted]	[redacted]	

The forecast staff cost is unlikely to match the pay costs reported as part of your submitted forecast, as the dashboard will update each time a period’s payroll is loaded. For example, an official forecast may be submitted early November (including actuals to period 3, October) but if the dashboard was reviewed mid-December the figures would include actual pay costs for November, with forecasted costs for December-July.

If there are any employees that you don’t recognize within your staffing dashboard, please get in touch (Further Information and Contacts).

2.3.2 How do I view specific costs spent and forecast for each employee?

The first table "Total Staff Cost by Position" breaks down actual costs to date and forecast staff costs for each person with costs on that budget centre / project. Each month, the forecast for that month will be updated with the payroll actuals. This is managed within our T1 staff data. To review the detail of what's held within our T1 staff data, see the staffing report which will include the detail held in T1 e.g. FTE, start dates.

Position ID	Employee ID	Employee Name	Actual to Date	Forecast Staff Cost	Total	Period 1 Actual
[redacted]			4,756.21	54,075.89	58,832.10	4,756.21
[redacted]			2,607.78	31,134.29	33,742.07	2,607.78
[redacted]			2,828.41	32,241.22	35,069.63	2,828.41
[redacted]			3,252.38	36,989.81	40,242.19	3,252.38
[redacted]			0.00	9,470.90	9,470.90	0.00
[redacted]			2,814.44	30,636.10	33,450.54	2,814.44
[redacted]			2,414.19	17,421.86	19,836.05	2,414.19
[redacted]			0.00	14,553.88	14,553.88	0.00

2.3.3 How do I view any other pay-related costs spent or forecast?

The second table “Staff Cost by Nominal” breaks down actual costs to date and forecast for any pay costs that are held outside of the main T1 staffing data, e.g. temporary staff costs, above & beyond silver awards, overtime.

To review these costs in more detail, select the relevant figure in the ‘Actual to Date’ column and it will detail how this cost is made up e.g. what individuals’ costs are included with that figure. If you believe a payment has been made to an individual in error, please contact the payroll team, payandbenefits@exeter.ac.uk

Staff Cost by Nominal (for costs not posted by individual)

NOMINAL	Actual to Date	Forecast Staff Cost	Total to Date	Period 1 Actual	Period 2 Actual	Period 3 Actual	Period 4 Actual
21317 - PS Staff Overtime	24,264.73	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21320 - PS Staff SSP, SMP, SPP	-4,663.34	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21325 - PS Staff Redundancy	6,368.00	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21330 - PS Staff Reward And Recognition	0.00	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21340 - Temp Resourcing Unit Support	83,176.99	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21345 - Temp Resourcing Unit Pension	901.07	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21350 - Temp Resourcing Unit NI	6,504.92	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21352 - Temp Resourcing Unit Apprentice Levy	418.66	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
21355 - Vacancy Savings	0.00	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

The third table “General Journals not posted to payroll” breaks down actual costs to date and forecast for any pay costs that are held outside of the main T1 staffing data and are processed through the general ledger, rather than the payroll ledger. These should be minimal but actuals are typically above & beyond bronze awards. At the start of the financial year prior to a formal submitted forecast the forecast figures in the dashboard will be the same as the revised budget. During this period, any budget (and therefore, forecast) adjustments relating to staffing will also show in this table.

2.4 Non-Pay Costs & Income – Funds Remaining by Budget Centre / Project

2.4.1 How do I review non-pay or income by nominal?

To review a budget centre / project's non-pay costs or income at nominal level, select the relevant name in the left-hand side of the table. This will then bring up a supplementary dashboard for that budget centre / project where you will be able to drill down to review the area by nominal code.

Budget Centre	Revised Budget (Income) / Expense	Approved Forecast (Income) / Expense	Actual to Date (Income) / Expense	Commitments (Income) / Expense
1374 - PS - Northcott Theatre	[redacted]	[redacted]	[redacted]	[redacted]

Account Number	Nominal	Revised Budget (Income) / Expense	Approved Forecast (Income) / Expense	Actual to Date (Income) / Expense	Commitments (Income) / Expense	Total to Date (Income) / Expense	Funds Remaining Favourable / (Adverse)
25 - Other Operating Costs		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
23025 - Facilities/Equipment Hire (Estates Cost)		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
23041 - Construction - Main Contract		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
23045 - Waste Disposal		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
23115 - Maintenance - Services		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
25060 - Uniforms		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
25062 - Safety Equipment		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
25110 - Equipment - Purchases		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
25205 - Consumables		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
25305 - IT Software		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
25315 - Software Licences		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
		[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

2.4.2 How do I see transactions and invoices?

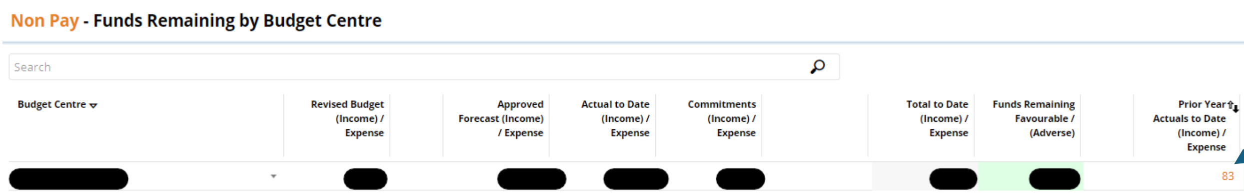
To see a detailed list of transactions on a given budget centre / project, select the relevant figure in 'Actual to Date'. This will bring up a dashboard of all transactions, which can be filtered. This dashboard will also show you any invoice documentation related to the transaction under the left-hand 'Attachment' column.

2.4.3 How do I see commitments?

To see a detailed list of commitments on a given budget centre / project, select the relevant figure in ‘Commitments’. This will bring up a dashboard of all commitments, which can be filtered.

2.4.4 How do I see transactions from last financial year?

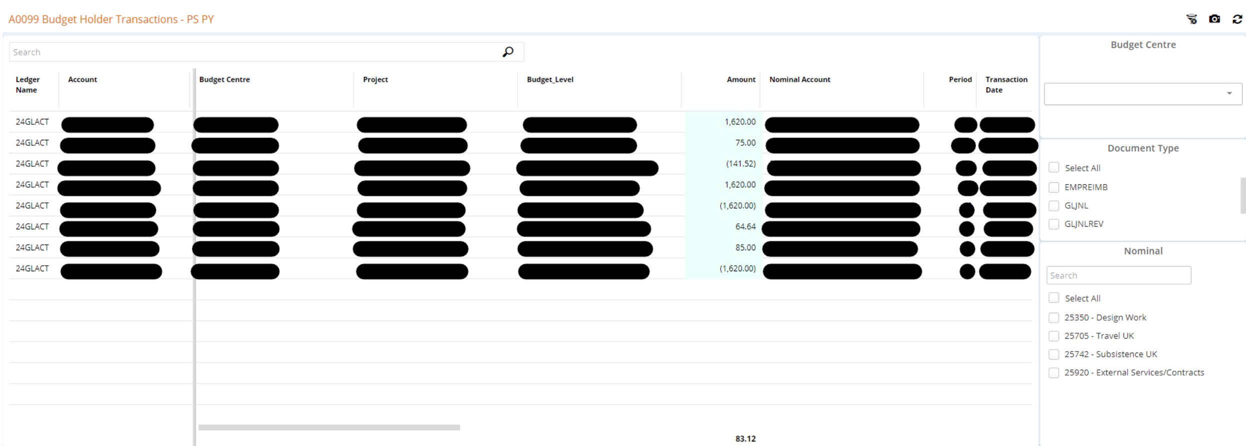
The tables show what the actual non-pay costs were to date at the same point in the previous financial year. To see a detailed list of transactions at this point last year on a given budget centre / project, select the relevant figure in ‘Prior Year Actuals to Date’. To see all transactions relating to the prior year (not just those to date), see [Prior Year Transactions report](#).



Non Pay - Funds Remaining by Budget Centre

Search

Budget Centre	Revised Budget (Income) / Expense	Approved Forecast (Income) / Expense	Actual to Date (Income) / Expense	Commitments (Income) / Expense	Total to Date (Income) / Expense	Funds Remaining Favourable / (Adverse)	Prior Year Actuals to Date (Income) / Expense
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	83



A0099 Budget Holder Transactions - PS PY

Search

Ledger Name	Account	Budget Centre	Project	Budget_Level	Amount	Nominal Account	Period	Transaction Date
24GLACT	[redacted]	[redacted]	[redacted]	[redacted]	1,620.00	[redacted]	[redacted]	[redacted]
24GLACT	[redacted]	[redacted]	[redacted]	[redacted]	75.00	[redacted]	[redacted]	[redacted]
24GLACT	[redacted]	[redacted]	[redacted]	[redacted]	(141.52)	[redacted]	[redacted]	[redacted]
24GLACT	[redacted]	[redacted]	[redacted]	[redacted]	1,620.00	[redacted]	[redacted]	[redacted]
24GLACT	[redacted]	[redacted]	[redacted]	[redacted]	(1,620.00)	[redacted]	[redacted]	[redacted]
24GLACT	[redacted]	[redacted]	[redacted]	[redacted]	64.64	[redacted]	[redacted]	[redacted]
24GLACT	[redacted]	[redacted]	[redacted]	[redacted]	85.00	[redacted]	[redacted]	[redacted]
24GLACT	[redacted]	[redacted]	[redacted]	[redacted]	(1,620.00)	[redacted]	[redacted]	[redacted]
					83.12			

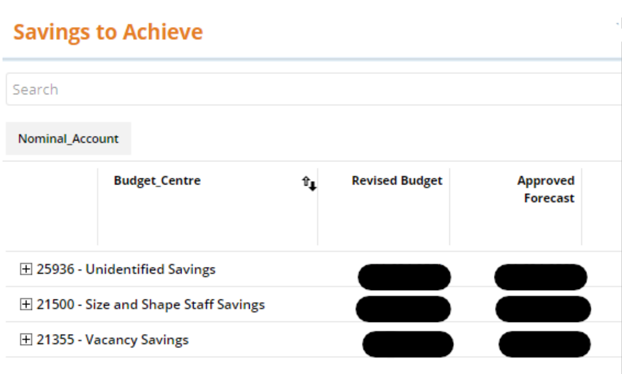
2.5 How do I know what savings I need to find?

The final table within the dashboard reports on savings remaining to achieve within your designated budgets. Unless they have already been designated to specific areas of spend, for example a non-pay saving may have been designated to a reduction in travel costs, then your savings targets should show here.

The savings nominals we use within Professional Services are:

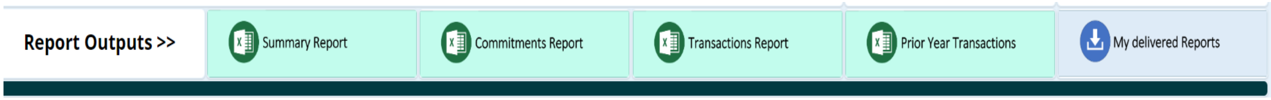
Nominal	Type	Explanation
21355 – Vacancy Savings	Pay	These are automatically calculated by T1 based on 3% of your pay budget. They are expected to be met by the division through staff turnover.
21500 – Size and Shape	Pay	These are centrally allocated savings assigned to the division, for example from PS Align. They will have been allocated out to budgets accordingly in conjunction with the Director/Business Manager.
21505 – Pay Divisional Pressures	Pay	These are allocated where a division takes a decision to recruit staff at risk above budgeted levels, to be met by additional savings.
25936 – Unidentified Savings	Non-Pay	These are centrally allocated savings assigned to the division, for example from PS Align. They will have been allocated out to budgets accordingly in conjunction with the Director/Business Manager.
25937 – Non-Pay Divisional Pressures	Non-Pay	These are allocated where a division may be over-spending on its non-pay but have agreed to meet this through additional savings as there is no additional budget for this.

The ‘revised budget’ will show what the savings you were set at the start of the financial year were. The ‘approved forecast’ will show you the remaining savings your budget is expected to meet before the end of the financial year, as at the last submitted forecast.



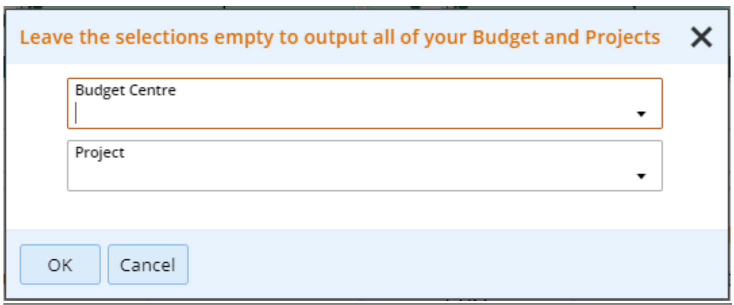
3. How can I view the information within Excel?

Along the top of the dashboard, you will find all available reports.

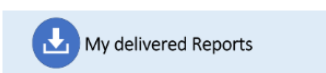


The summary report will automatically pull through all budget centres and projects within your remit once selected.

For all other reports, when you click on your chosen report, the below box will appear asking you to select parameters. If left empty, all your budget centres and projects will pull through.



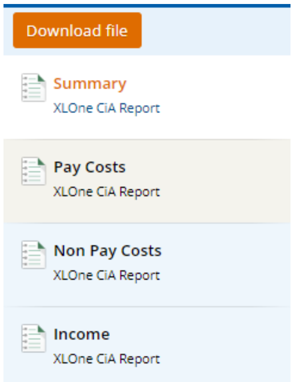
It may take a few minutes to generate the report but once available, click on "My delivered Reports" as below and you will be able to select your report. **This applies to all reports selected**.



! Please remember that all data should be treated with sensitivity, and any payroll information is covered by GDPR. Where information is being shared, please ensure that this is done in a secure way in line with the university's information governance policies.

3.1 How can I see the main dashboard information summarised in Excel?

The summary report provides a high-level view of your budget centres or projects, as seen in the dashboard.

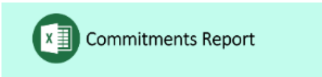


The summary tab provides a high-level visual view of pay costs, non-pay costs and income. This tab also splits the categories by general ledger and project ledger.

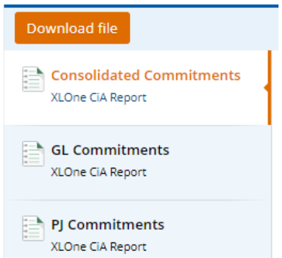
The remaining three tabs have the same headings but break down each type (pay / non-pay / income) into individual budget centres and projects.

Revised Budget (Income) / Expense	Approved Forecast (Income) / Expense	Actual to Date (Income) / Expense	Commitments (Income) / Expense	Forecast Staff Cost (Income) / Expense	Total (Income) / Expense	Funds Remaining Favourable / (Adverse)	Prior Year Actuals to Date (Income) / Expense	Current Year vs Prior Year Actuals Favourable / (Adverse)
For Info	A	B	C	D	E= B+C+D	F= A-E	G	H= G-B

3.2 How can I see a list of all commitments within Excel?



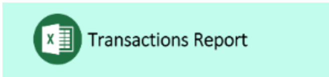
The commitment report returns a view of all outstanding commitments for the current financial year only.



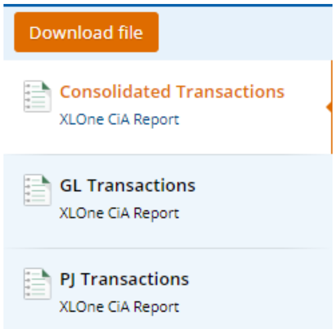
The consolidated tab groups all commitments by status e.g. order to receive, receipt awaiting invoicing.

This report provides useful information such as order number, date, description and supplier. The remaining two tabs split the commitments by general ledger and project ledger.

3.3 How can I see a list of all transactions within Excel?



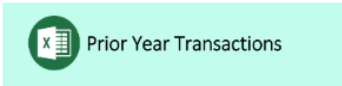
The Transaction Report returns a full transaction list for the current financial year.



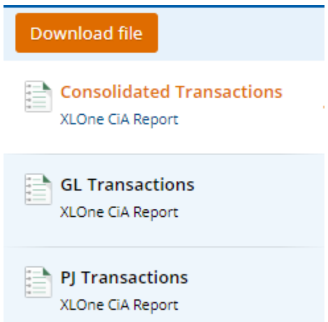
The consolidated transactions tab returns all transaction under both general ledger and project ledger. Under the project heading it will state either non-project or project code, as relevant.

The remaining two tabs split the transactions between general ledger and project ledger.

3.4 How can I see a list of prior year transactions within Excel?



The Prior Year Transaction report returns all transactions over the previous five years for the specified budget centre or project.

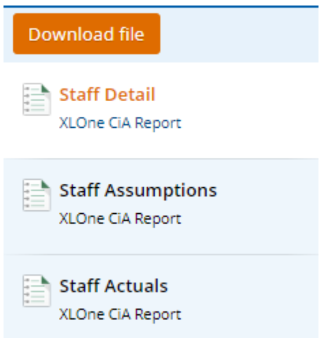


The consolidated tab runs all transactions under both general ledger and project ledger (depending on parameters selected).

3.5 How can I view staffing information within Excel?

The staffing report is accessed via the staffing dashboard.

Select 'Staffing Report' whilst on the dashboard, and the report will be downloaded in the same way as the other reports.



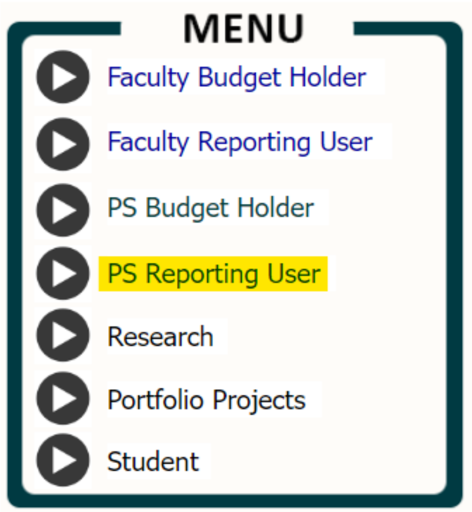
The staff detail tab shows the information within the staffing dashboard: a monthly breakdown of actual staff costs and expected forecast.

The staff assumptions tab shows detail held within the T1 staffing data, including start and end dates, fte, pay grades and any notes relevant to the post. This data is managed by the Professional Services finance team and will be kept as up to date as possible, particularly around forecast and budget submissions but they will also rely on budget holders for some of this information. The information within the staff assumptions should show all posts and vacancies within the given budget centre or project.

The staff actuals tab shows detailed payroll data against post references. Most budget holders should not require this information, but it is important data for some users, for example where staff costs are recharged outside of the university.

4. What if I am a Reporting User?

Only one person can ultimately be responsible for a budget (i.e. the Budget Holder), but T1 allows view-access for additional 'reporting users' who can support the Budget Holder in managing their funds. If you have been designated as a reporting user, click the PS Reporting User link in the My Finance Portal screen.



This takes you to a screen which gives you the option to select specific budget codes, or to select all. After making your selections, click the button at the top-right of the screen. This brings you to the Reporting Users Dashboard, which has identical functionality to the main Dashboard, meaning you can view data as if you were the Budget Holder.

This will also be the case if you are not the designated budget holder for a budget centre but oversee a department/service/division. To review the relevant area, you will need to access this via the reporting user dashboard. Any budget centres where you are specifically the budget holder will still need to be accessed via the Budget Holder dashboard.

Note that as a Reporting User you may or may not have access to payroll data: this is up to the budget holder's discretion. If you cannot view payroll data but believe that you should, please get in contact with the budget holder who can agree for finance to set-up this access for you.

5. Glossary

Here are the key terms used throughout the Dashboard:

Type	Term	Description
Report Headings	Revised Budget	The most recently approved total allocated budget for the current financial year.
	Approved Forecast	This is the most up-to-date prediction of how much income and expenditure will be received and spent in the financial year.
	Actuals to Date	The total value of completed transactions within your budget so far in the current financial year.
	Commitments	The total value of non-pay transactions that are due to occur (i.e. a purchase order has been raised) but have not yet been invoiced.
	Forecast Staff Cost	The total value of expected staff cost transactions to year end, which have not yet occurred.
	Total	The sum of the actuals to date, commitments and forecast staff costs.
	Funds Remaining	This is the approved forecast less the 'total'. It is the amount left to be spent or received in the current financial year based on the latest forecast.
	Prior Year Actuals to Date	The amount transacted between 1 August last financial year and today's equivalent date in that year.
	Prior Year vs Current Year Actuals	The variance between the prior year actuals to date and the current year actuals to date.
	(Income) / Expense	Total funds received into your budget (income) will show as a bracketed figure, and funds paid out of your budget (expenses) will show as a figure without brackets.
	Favourable / (Adverse)	Variances are either favourable (more income and/or less cost than the comparative) or adverse (less income and/or more cost). Adverse figures are bracketed.
	Period	Month within the financial year, starting with August as Period 1 and ending with July as Period 12.
Individuals	Budget Manager / Budget Holder	The individual responsible for managing the budget.
	Reporting User	A nominated individual(s) who the budget holder has agreed can view information about the relevant budget centre or project but is not the named budget holder and therefore not directly responsible for the budget. A

		reporting user may or may not also be given access to view payroll data, subject to the budget holder's discretion.
	Project Manager	The individual responsible for managing the budget of the project. A project may report across multiple divisions.
T1 Ledgers	General Ledger	The main accounting record for the university, built up of non-project related income and costs. The general ledger is divided into **budget centres** and **nominals**.
	Project Ledger	The accounting record for the university built up of project-specific income and costs. The project ledger is divided into **projects**.
T1 Code Structures	Budget Centre	A specific area of budget that reports into the wider service/division/university's budgets. Within T1, this is made-up of a four-digit code. Each budget centre will have a designated **budget manager**.
	Project	A specific area of budget for a project which may report into multiple services/divisions. Within T1, this is made-up of a six-digit code. Each project will have a designated **project manager**.
	Nominal code	A five-digit code used to denote a particular type of activity, e.g. 25110 for equipment purchases.
T1 Reporting Hierarchy	Sub-department	Each budget centre reports into a sub-department, assigned a four-digit code in T1.
	Department	Each sub-department reports into a department, assigned a four-digit code in T1. This should reflect a specific department of the university.
	Service	Each department reports into a service, assigned a four-digit code in T1. This should reflect a specific service of the university, e.g. Global Advancement or Doctoral College.
	Division	Each service reports into a division, assigned a four-digit code in T1. This will reflect one of the divisions within Professional Services, e.g. FICS or EAS.

6. Frequently Asked Questions

Why can't I see all the budgets within my remit on the dashboard?

There could be several reasons for this, the most likely being:

- A filter is currently selected on the dashboard, so not all data is shown (see filters for instructions on how to clear these)
- You may be both a budget holder and a reporting user for different budget centres or projects. The dashboard is set-up so any budget centres or projects where you are the named budget holder are visible within the Budget Holder dashboard, whilst any that you are reporting user only for will only be visible via the Reporting User dashboard. This should ensure that there is no confusion with accountability.

How up to date is the data?

- Actual to date and revised budget data in the main dashboard is refreshed daily, so you should always see a 'live' position.
- Approved forecast will only be updated after a formal submitted forecast (or at the start of the year, this will be the same as the revised budget) – the dashboard will tell you which figures the approved forecast is showing.
- Actual payroll data will update as payroll is loaded into T1, monthly.
- Staff assumptions included within the Staffing Report are based on information held within T1 and will typically be updated ahead of forecast and budget submissions.

Why can I see budget centres within the Budget Holder dashboard that I'm not the named Budget Manager or a reporting user against?

If you are a named Project Manager for a project, you will see all project-related items for the project so may see budget centres where you're not the named Budget Manager. However, you will only see the specific project-element of these budget centres and not the entire budget centre.

Why don't the figures shown match a report I've been sent by the Finance team?

The data in the dashboard is live, whereas any report shared will be at a point in time, typically at a period end-date.

The current year transaction data excludes reversing accruals done by the finance team to reduce the amount of transaction lines on display. This means that if looking at actuals for a specific period, e.g. period 3, the figures may not exactly match figures reported for that period, however the overall to-date position and position at the financial year-end will remain the same.

7. How do I find more information?

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 is the place to go for information and support with using the T1 finance system. It includes:

- Step-by-step guides to all the main T1 functions such as creating an expense claim, purchase order or sales invoice.
- Direct links into the main T1 functions
- Contacting the Finance Helpdesk to arrange a quick screenshare/phone call if you need any help with navigating or downloading the reports in 'My Finance Portal'

For specific budget queries, please contact your named Management Accountant / Assistant Management Accountant Professional Services Financial Planning and Reporting Team. If you're not sure who this is, please contact the team email address: psfinanceteam@exeter.ac.uk