

Dear Researcher,

Here at Trent, our Financial Management tool for researchers is "**eFIN**". **eFIN** is a view only Research Accounting project information tool, through which users will have the ability to view not only their total revenue and expenses, but will also be able to drilldown and access detailed information for invoices, expense reimbursements and encumbrances. In addition, historic information will be available and specific time periods can be selected to view.

It is our hope that this tool will assist Researchers with the financial management of their projects. Please follow the instructions below.

In order to access **eFIN**:-

1. Login to **MyTrent** using your usual Username and Password <https://www.trentu.ca/mytrent/>
2. Go to **Services**, and click on "**efin Research Portal**" under the **Learning & Research** header.

You are now in eFIN!

The first screen you will see is our **News** page through which we will advise of any changes you may need to know, so please take a moment to read this page.

To view your accounts:-

- Click **Continue** at the top right of the **News** screen
- You will now see your **Project List** which should show all of the Active Accounts you have access to and their current balances. (Please note new accounts may not appear until either Revenue or Expenses are allocated to the account)
- Click on the account number [555XXXX](#) you wish to view.

- You will be taken to the "**Project Header - Financial Information**" screen which shows a summary of the account:- **Balance forward, Revenue, Expenditures** and **Project Total**.

- **Project Total** is the balance on your account at the selected end date.

To view detailed account information:-

- click on any of these items (**Balance forward, Revenue, Expenditures** and **Project Total**) to drilldown to a more detailed **Project Summary** by object code.

- Once in the **Project Summary** click on an object code (eg, [58153](#) - Science Supplies) to obtain details of items within that object code, if there is a voucher number (eg, [V03XXXXX](#)) you can again drilldown on the Voucher number to see the details of that voucher.

To return to the Project Summary page, the Project Header page, or the Project List page

- Click on "Project Summary", "Project Header" or "Project List" at the top of the page, next to the University Logo.

To view account information for particular dates

- Change start and end dates using the drop down menus on the top right of the screen and click the magnifying glass to the right to refresh the account information.

For First Time Users - Change your Password

- The first time you log in please click on Change Password on the top right of the screen, and change your password to one of your choice. Currently your **password is "0000"**.

You could then try logging out and back in using your new password and your **username**. Your **username** will be your email address before the @ sign (for example, email address = joesmith@trentu.ca, eFIN username = "joesmith").

Please note that you will not need this separate username and password when accessing eFIN through MyTrent, however you may be timed out and will then need them to log back in.

Please go to eFIN and try it out, once you have had a look around please contact your Research Finance Administrator or Research Accountant at researchfinance@trentu.ca.

Thank You,

Your Research Finance Team