SOP

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BUDGET-ONLINE

Training material

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Built on:	November 2008
Version:	1.0

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1 BUDGET-ONLINE – General information

Budget-Online is an internet-portal for handling all administrative tasks regarding the administration of funds. The implementation as a web-portal enables technical, temporal and spacious independence of the application.

This training material is designed to help users to get to know the basic functions of Budget-Online.

1.1 Login

Depending on the installation path the link to the login page could look like the following:

https://asp.sop.co.at/budget_europe/LoginServlet

If you have forgotten your password, you can request your password by clicking the button 'Forgot password' and entering your user name.

The password will be sent to the last email-address saved on your user-account.

1.2 Menu structure

After entering user name and password, the system checks the authorisation (LDAP or internal) and designs the user's individual menu as follows:

Users who do not use the Microsoft internet explorer (Firefox, Netscape, Opera, Apple Safari, Google Chrome) get a similar menu structure though without dynamic menus.

If this menu navigation is used the menu structure can only be single-levelled.

1.3 Handling

1.3.1 General Icons

For editing datasets different icons are available.

The following icons apply to the whole application.

	Create a new dataset
	Edit an already existing dataset
	Delete a dataset
	Copy the dataset showed (Only possible in display mode)
	Open the extended search
	Show all existing datasets in a single-line list
	Print the current page in HTML-format
	Print the current page in PDF-format
	Print the current page in MS-Word-format
	Leave the current program
	Show online-help
	Browse to the end of the page
	Browse to the top of the page
	Select all datasets
	Undo selection of all datasets
	Change sorting of datasets

Underlined entries point to the possibility of calling and/or displaying further information.

If there is too much information which cannot be displayed on one screen mask, the system will use so called 'tabs' for displaying of further information. This display form can be changed by the user into a different display form (all information of the tabs one below the other on one screen page).

The following icons describe further possibilities for displaying, inserting or modifying data.

If entries are missing in a select list, you can make a new entry next to the field in this select list by using the insert icon

Display of detailed information of a field (if the select list is deposited)

Change the display mode (with/ without tabs)

Display the revision history

In the course of reporting and evaluation, displayed data can either be printed or exported into different output formats.

Export the displayed data into CSV-format

Export the displayed data in MS-Excel-format

Export the displayed data in XML-format

1.3.2 Program calls

Desired programs can be started from the sub menu by clicking the program name. With most of the programs, existing data will be edited (insert, update, delete), analysed or processed in different ways. Thus, the system tries to display existing data first. This is done by using a tabular list.

Depending on the system settings either all datasets or a certain number of datasets (customizable by each user) will be displayed on the screen.

By using the navigation bar at the end of the screen, you can scroll either forward or backwards. Also, the display can be limited by using the initial letter. The summary by letters, numbers or data is executed depending on the column, which is currently being sorted.

For further limitation of the displayed data, further constraints can be entered via the 'search bar'.

If it is necessary to search in a more detailed way, the selection of displayed data can be constricted by using a detailed search mask (Icon in the left upper edge of the screen).

Data sets can be exactly constricted in the search masks. When searching, so called 'Wildcards' (<,>,*,<>) are possible. If for example A* is entered into the field 'city', the system will find all addresses, with a city that starts with an 'A' and shows them in a tabular display.

Individual seach fields can also be combined (for example all cities in Austria which a zip code beginning with '1…').

1.3.3 Processing data

Data shown in the tabular overview can be modified, displayed or deleted.

By using institutions data as an example, it is easy to see how data is displayed during data processing.

Due to the large amounts of available information, the information is divided into information groups. The groups are accessed by using tabs.

If all available information should be displayed on one screen mask, the view could be changed by using the icon 🖳.

The functionality and meaning of each data can be requested by clicking on the icon for the integrated Online-Help ⓦ .

1.3.4 General characteristics of fields

Basically, there are two different field-forms (mandatory fields, optional fields) and several different field-types (text field, number field, date field, selection field).

1.3.4.1   Forms of fields

When entering or editing data sets, two different forms of fields are possible:

1.3.4.1.1 Mandatory input fields

Mandatory input fields are white with a blue border. Mandatory field means that this field has to be filled out to complete the current activity (insert, update).

Erasmus code

1.3.4.1.2 Optional input fields

Optional input fields are light grey with a grey border. This field does not have to be filled out to complete the current activity. Usually, optional fields contain additional information which does not have an operating effect.

.

EUC Number

1.3.4.1.3 Types of fields

For both forms of fields (mandatory fields, optional fields) following types of fields are available:

1.3.4.1.4 Text field

In a text field any letter and number can be entered, depending on the length of the field.

Erasmus code

1.3.4.1.5 Textarea field

Textarea fields are used to enter text that needs more than one line. The permitted number of letters and the remaining number of letters are displayed during the input.

Name of the home institution

There are still **200** Characters available

1.3.4.1.6 Number field

In a number field only numbers (integers or decimal) can be entered.

Undergraduate 2,00

If a number entry is incorrect, this will be shown immediately.

Undergraduate a

Microsoft Internet Explorer

Only digits can be entered!

OK

1.3.4.1.7 Date field

These fields are designed for the input of date values. The following formats are permitted:

dd.mm.yy
dd.mm.yyy
ddmmyy
ddmmyyyy

Date of birth

By using the calendar-icon you can select the date from the integrated calendar.

Date of birth 20.04.1969							
?	**April, 1969**						×
«	<	Today			>	»	
wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
13			1	2	3	4	5
14	6	7	8	9	10	11	12
15	13	14	15	16	17	18	19
16	**20**	21	22	23	24	25	26
17	27	28	29	30			
Select date							

1.3.4.1.8 Radio-Button

By using radio.buttons one option out of several options can be selected.

Gender ○ Male ○ Female

1.3.4.1.9 Checkbox

By using a checkbox, several entries out of several options can be selected.

2. How did you find out about the EXCHANGE programme?
(choose more than one [STRG-Key])

☐ Home institution ☐ Host institution ☐ Other students ☐ Newspaper/TV ☐ Internet ☐ Socrates/Erasmus national agency
☐ Others

1.3.4.1.10   Combobox/Listbox

By using a combobox, one or multiple entries out of a list can be chosen. There are single-selections and multi-selections:

Single-selection

Communication language | English ▼
Additional comment | <-- No choice -->
Deutsch
English
Español

If there is a combobox with the entry <Please make a choice> this is a mandatory field, if the entry says <No choice> it is an optional field.

Multi-selection

Type of person | <-- No choice -->
Employees
Students
Teachers
Choose more than one [CTRL-Key]

If the combobox is a multi-selection, various entries will be selected by clicking on the favoured entry and holding the [ctrl-button] at the same time.

BUDGET-ONLINE
The standard software for the web-based administration of budget
and finance with capital and liquidity management

1.3.4.2 Extension of fields

If a field has the following extension an entry of an additional search mask can be pre-selected.

| Institution | |

If a field has the extension additional information of this field can be displayed.

| Address | <--Please choose selection --> |

If the extension exists, missing datasets can be created without leaving the current program.

| Address | <--Please choose selection --> |

Fields with the extension refer to an e-mail address. By clicking on the symbol, an e-mail can be sent to this address immediately.

| E-Mail address | gerald.mauberger@sop.co.at |

Fields with the extension refer to an existing entry in the online help.

| Mobile phone number | |

If a field has the extension (one flag per language)then the possibility of changing into the translation of the column label exists.

2 BUDGET-ONLINE – Reporting possibilities

2.1 *Reporting of all data managed by Budget-Online*

With Budget-Online it is possible to generate reports and print-outs of all data stored in the
database by means of the standard table administration programs.
After selecting the requested data you can print out or export this data in all common
formats (e.g. MS-Word, PDF, XML, XLS, ASCII)

After selecting the desired output format ![PDF] ![Word] ![XML] ![XLS] ![Excel] the system exports or prints the
displayed data.

PDF-Format

Adobe Reader - [admin[1].pdf]

Datei Bearbeiten Anzeige Dokument Werkzeuge Fenster Hilfe

Auswählen 79% Hilfe Suche im Web Neue Reader-Version jetzt herunterladen

Persons   Demo institution (European-Edition)

Last name, first name, title	Gender	Date of birth	ZIP	Place of birth
Basedow, Steffen,	Male	Nov 27, 1980	12345	Straslund
Baxter, Thomas,	Male	Mar 23, 1965		
Berkley, James, Dr.	Male	Mar 23, 1963	343224	London
Finn, Hackelberry, Dr.	Male	Jun 10, 1961	NE8 1NX	Tyne and Wear
Griffin, Carla, Dr.	Female	May 23, 1970	N8 8DG	London
Harris, Barney,	Male	Nov 21, 1980	2012	London
Mauberger, Gerald,	Male	Apr 20, 1969	5620	Schwarzach/St. Veit
Musterstudent, Max,	Male	Nov 26, 1979	2014	London
Slaughter, William, Prof. Dr.	Male	Mar 7, 1951	WC1A 1 DU	London
Spacy, Elma, Prof. Dr. habil.	Female	Mar 2, 1970	N8 8DG	London
Spice, Edward, Mr.	Male	Feb 2, 1966	20123	London
Teacher, Max, Prof. Dr.	Male	Jan 1, 1970	2017	London
Washington, Mike,	Male	Nov 23, 1980	188437	Stralsund
Weiher, Jan, Prof.	Male	Mar 22, 1959	18439	Stralsund

End of report (14 Records found!)

1 von 1

MS-Word-Format

admin[1].rtf - Microsoft Word

Datei Bearbeiten Ansicht Einfügen Format Extras Tabelle Fenster ?   Frage hier eingeben

100% Lesen Standard + Times N Times New Roman 12 F U

Bedingungsfeld einfügen

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End of report (14 Records found!)

Zeichnen AutoFormen

Seite 1 Ab 1 1/1 Bei 1,2 cm Ze 1 Sp 1 MAK AND ERW ÜB Deutsch (De

XML-Format

admin[1].xml (~\Lokale Einstell...Files\Content.IE5\C7Q3G5CV) - GVIM

Datei Editieren Werkzeuge Syntax Puffer Ansicht Hilfe

```xml
<?xml version="1.0" encoding="utf-8"?>
<personen xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <row>
    <P_NACHNAME>Basedow, Steffen,</P_NACHNAME>
    <P_GESCHLECHT>Male</P_GESCHLECHT>
    <P_GEB_DATUM>Nov 27, 1980</P_GEB_DATUM>
    <P_GEB_PLZ>12345</P_GEB_PLZ>
    <P_GEB_ORT>Straslund</P_GEB_ORT>
  </row>
  <row>
    <P_NACHNAME>Baxter, Thomas,</P_NACHNAME>
    <P_GESCHLECHT>Male</P_GESCHLECHT>
    <P_GEB_DATUM>Mar 23, 1965</P_GEB_DATUM>
    <P_GEB_PLZ xsi:nil="true" />
    <P_GEB_ORT xsi:nil="true" />
  </row>
```

1,1   Anfang

Excel-Format

2.2 Reporting of every field of any table stored in the database

By means of the included table reporting tool it is possible to select the desired fields of
any table stored in the database.

The selected data can be printed out or exported into common formats as already mentioned above.

2.3 Create own reports with the integrated report generator

The report generator was designed for joining two or more tables and/or defining own selection criteria.

Per column you can decide

- to build a sub total or a total sum for this column
- to use this column as a sort criteria
- the type of sorting (ascending, descending)
- to build any mathematic functions (min,max,avg,count) when selecting this column
- to define further selection criteria for this column
- to print out this column or use it as selection criteria

Per report you can define

- Preselection input fields (i.e. list boxes, data fields etc.)
- the type of output (screen, pdf, xls, csv)
- which roles and users are allowed to execute this report

2.4   Existing reports and statistic

Budget-Online offers a lot of prepared reports and statistics:

- List of student mobility/head count (sum per exchange program, incoming/outgoing, academic year, field of study, nationality, host institution)
- List of teacher mobility/head count (sum per exchange program, incoming/outgoing, academic year, field of study, nationality, host institution)
- List of application of funds (sum per account/cost centre, exchange program, contract, investor)
- List of payments of funds
- And so forth…

3 BUDGET-ONLINE – Administration of access- and user rights

3.1 Organisation administration of access- and user rights

The administration of access and user rights is based on three types of information:

- Application
- Organisation
- Role

3.1.1 Application

Based on the application it is possible to define

- which organisation has access rights to certain applications
- which role has access rights to certain applications
- which user has access rights to certain applications

Some additional information (display the data per page or display all data found when searching rows of a table) is also stored in the application.

3.1.2 Organisation

On the basis of the organisation it is possible to define

- which application has access rights to these organisations (see application)
- which programmes (software) are available within these organisations

In addition to these settings, information concerning name, address, language of the country, communication language is stored.

3.1.3 Role

Based on the role it is possible to define

- which programmes are available for a certain role
- for which organisations these roles have access rights (see organisation)
- for which applications these role have access rights (see application)

3.1.4 User permissions

Within the user administration you can define by means of the tab ‚Permissions'

- for which organisation
- for which application
- for which role

this user has access rights.

Based on the allocation of programmes to roles and the allocation of programmes to organisations it is exactly determined which software programmes are available for the user.

In addition to these settings, information concerning last name, first name, contact details (e-mail address, telephone number etc) is stored.

3.1.5 Role permissions

In addition to the allocation of roles to applications and organisations you can define per role and per application and organisation

- if this role is allowed to create new data sets
- if this role is allowed to update data sets
- if this role is allowed to delete data sets

If none of the above mentioned options is selected the role has only 'display' permissions.

3.1.6 Programme permissions

Per software programme it is possible to define if the role which executes the programme

- has permission to create a dataset
- has permission to update a dataset
- has permission to delete a dataset

If none of the options is chosen the role has only display permission for the data managed by the specific programme.

3.1.7 Table permissions

Due to the fact that some information is managed within several programmes by means of
tabs (e.g. allocation of roles to organisations) you can administrate the access rights of
these tabs by means of the table permissions.

Similar to the administration of programmes, roles and users it is possible to define

- Permission to create a dataset
- Permission to update a dataset
- Permission to delete a dataset

Without any selection the selected role has display permissons.

3.1.8 Exchange programme permissions

Because of the fact that different users have different access rights within several
exchange programmes, Budget-Online allows to determine

- for which software programme
- for which tab (optional)
- for which organisation unit
- for which user (optional)
- and for which exchange programme

permissions concerning

- display a dataset
- create a dataset
- update a dataset
- delete a dataset

should be granted.

Appendix A   BUDGET-ONLINE – check list for start-up

The following steps have to be examined during the course of start-up of Budget-Online by
the responsible administrator. Missing entries or allocations have to be completed.

Details of institutions

(Menu structure: Master Data → Institution data → Institutions (own))

- ☐ Master data of institution entered
- ☐ Addresses allocated (at least one address with type of address „main address")
- ☐ People allocated to correct functions
- ☐ Bank accounts allocated

Personal details

(Menu structure: Master Data → Institution data → Person)

- ☐ Personal details of the employees entered
- ☐ Workplace address of the employees entered
- ☐ Correct functions allocated to the people of the own institution

E-Mail patterns per exchange program

(Menu structure: Master Data → Program data → E-mail patterns per exchange program)

- ☐ Mail patterns per exchange program (or for all exchange programs) in the desired
  communication language created

Letter patterns per exchange program

(Menu structure: Master Data → Program data → Letter patterns per exchange program)

- ☐ Letter patterns per exchange program (or for all exchange programs) in the
  desired communication language created

General settings

(Menu structure: Administration → Settings → General settings)

- ☐ Current academic year allocated
- ☐ Current semester allocated
- ☐ Functions allocated
- ☐ Types of persons allocated
- ☐ Types of addresses allocated
- ☐ Exchange programs allocated

Settings per exchange program

(Menu structure: Administration → Settings → Settings per exchange program)

- ☐ Setting for all existing exchange programs entered
- ☐ Roles and types of persons allocated

Settings per academic year

(Menu structure: Administration → Settings → Settings per academic year)

- ☐ Deadlines for nominations per exchange program (or all) and academic year (semester optionally) fixed
- ☐ Deadlines for application for mobility and for accounting fixed

Budget management settings

(Menu structure: Administration → Settings → Budget management settings)

- ☐ Terms of payment (Annuity, number of rates etc.) fixed
- ☐ Bank information when creating projects fixed
- ☐ Information regarding generation of project number and project name fixed

Mobility grants settings

(Menu structure: Administration → Settings → Mobility grants settings)

- ☐ Amount of grants per exchange programme und host country fixed
- ☐ Type of calculation of the grant fixed (per month, per stay)