# Documentation Conventions

This manual follows these documentation conventions:

<table>
<thead>
<tr>
<th>UPPERCASE</th>
<th>Keyboard keys are presented in uppercase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue</td>
<td>BMS-specific buttons are presented in blue</td>
</tr>
<tr>
<td>Green</td>
<td>Internet Explorer web browser commands are presented in green</td>
</tr>
<tr>
<td>Red</td>
<td>Error messages, messages or remarks are presented in red</td>
</tr>
<tr>
<td>Violet</td>
<td>Examples are presented in violet</td>
</tr>
</tbody>
</table>
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About the BPS

The BPS is a comprehensive, intranet Budget Preparation System that automates the annual budget cycle, the budget manual, and the budget guidelines. Basically it mimics the routine manual annual budget cycle currently carried out at AUC, but in an automated manner. The BPS also enables its users quick and online access to the budget manual and guidelines at any point of its operation.

The BPS is used by all those involved in the annual budget cycle, starting from the staff and administrators responsible for preparing and approving the budgets of the departments, all the way to members of the Budget Office itself. Thus, it has a very broad spectrum of users, each with differing requirements and authorizations. The BPS enables this broad spectrum of users’ regulated access to the system based upon their predefined authorization levels.
Underlying Data Sources

The BPS is integrated with CUFS – the university financial system. All budget additions or modifications are downloaded automatically to CUFS, thus, the data is entered only once at the source. This eliminates the need for tedious data entry of financial data and dramatically reduces the probability of errors.
General Features

The BPS provides powerful features as listed below:

- Enables secure regulated access to budget information by all levels of the organization based upon their authorization
- Provides high levels of security by automatically logging users out based upon predefined time-out periods
- Automated integration with the university financial system CUFS
- Enables the generation, saving and printing of departmental budget reports
- Provides continuous access to the Budget Manual and Guidelines
- Is accompanied with a complete on-line documentation feature
- Enables the user to select the required fund, area, organization, or object required and move flexibly between them
- Enables users to continuously compare the planned budgets with previous years’ approved budgets
- Enables dual currency budget preparation
Installation and Training Requirements

It is assumed that all users who have access to the BPS have sufficient knowledge of the annual budget cycle and the role they play in it. However, some technical and training requirements are also needed:

- A reliable internet link
- Web browser software, preferably Internet Explorer (version 5.0 or higher)
- BPS username and password
- Basic training on how to use the system
CHAPTER TWO: BASIC REQUIREMENTS

Granting BPS Authorizations

Security is one of the main requirements of a sound and reliable budgeting system. The BPS has been designed with an extensive security management module supporting it. This security management module is based on unique usernames and passwords assigned to each user indicating his specific authorization profile and security level. This authorization identifies the user’s department, as well as the allowed functions of updating, approving, etc.

Without a BPS username and password the user will be unable to access the system. The Budget Office is the sole department with the right to grant usernames and passwords, after consultation with the departmental administrators.
The BPS is an intranet application and thus must be activated from within an Internet Web browser. The browser preferred for BPS usage is Internet Explorer version 5.0 or higher. Internet Explorer enables the user to access BPS as well as to view any web page. Basic knowledge of this browser is a necessity for efficient use of the system. This section presents the required navigating tools of the Internet Explorer.
Learning how to browse the web faster and easier

If the user learns just a few basic things about browsing the web, such as how to use the buttons on the Internet Explorer toolbar, browsing the web is easier and faster.

To start browsing the web, click any link on the home page, which is the page that appears when the user starts Internet Explorer. The user can see whether an item on a page is a link by moving the mouse pointer over the item. If the pointer changes to a hand, the item is a link. A link can be a picture, a 3-D image, or colored text (usually underlined). Now the user is ready to find a Web site.
To open Internet Explorer

☞ Select the Internet Explorer icon from the PC desktop and click twice to activate.

Fig (2.1): The Internet Explorer Icon

☞ If the Internet Explorer icon is not on the desktop, select the Start Menu, then Programs, and look for Internet Explorer.
To open a web page or folder, or to run a program

», To go to a web page, type the Internet address - in our case, http://budget.aucegypt.edu - in the address bar, and then click the Go button

Fig (2.2): The Address Field in Internet Explorer

», To run a program from the address bar, type the program name, and then click the Go button
To return to recently visited web pages

- To return to the last page viewed, click the Back button
- To return to a page viewed before clicking the Back button, click the Forward button
- To see a list of the last few pages visited, click the small down arrow beside the Back or Forward button
To open a specific web page

- To return to the page that appears each time Internet Explorer is started, click the **Home** button.
- To select a Web page from the user’s list of favorites, click the **Favorites** button.
- To select a Web page from the list of those recently visited, click the **History** button. The **History** list also displays previously viewed files and folders on the computer.
What to do if a web page isn't working

- If a page requested is taking too long to open, click the Stop button
- If a message appears indicating that a web page cannot be displayed, or the user needs to make sure he has the latest version of the page, click the Refresh button
Finding the information required

巨型 Click the Search button on the toolbar to gain access to a number of search providers. Type a word or phrase in the Search box.
巨型 Type go, find, or ? followed by a word or phrase in the Address bar. Internet Explorer starts a search using its predetermined search provider.
巨型 After a web page is displayed, the user can search for specific text on that page by clicking the Edit menu and then clicking Find (on this page).
Different types of menus

The BPS uses different types of menus. A menu is a window that allows users to select an option from a list. These options are called menu items. Several types of menus exist, but the pop-up menu is the most frequently used menu in BPS. A pop-up menu is a menu that is not attached to a menu bar but that floats somewhere. This section illustrates how a pop-up menu is used to select an option:

- A user can select an item by moving the mouse to the down arrow present at the right of the menu and clicking the left button
- As the user moves the mouse down the menu options, a highlighted bar moves down the list until the desired item is reached
- If the desired item is not on the first few options listed, the user should use the scroll bar to move to the desired option
- Finally, when the desired option is located, the user has to click on it to select it
University Financial Keys

The BPS is based on data coming from CUFS, the university’s main financial system. Thus, basic knowledge of CUFS is required for BPS users.

Fiscal year

The fiscal year refers to the financial year. At the AUC, the financial year is from September 1 to August 31, divided for CUFS reporting purposes into twelve accounting periods, with a thirteenth period reserved for fiscal year closing adjustments.

Budget line

Any object or revenue code in CUFS is represented by a code composed of Fund, Area, Organization, and Object/Revenue.

Fund

The fund is composed of four digits – 1100 represent US Dollars and 2100 represents Egyptian Pounds.

Area

The area is composed of three digits. For accounting purposes the university is divided into a number of areas. Each area represents a group of organizations (departments) all of which report to one senior administrator with overall budget and managerial responsibility.

Organization

The organization is composed of four digits each representing a budget center under the responsibility of a manager.

Object

The object is composed of four digits which represent the type of expenditure or revenue. There are four classes of objects as follows:

- The 5000 class contains all salaries and benefits. This class is not changed or modified by the department members
- The 6000 class contains operating expenditures such as office supplies
- The 7000 class contains all capitalized equipment
- The 4000 class usually covers all revenue and income
Activating the BPS

To activate the BPS the user should take the following steps:

- In Internet Explorer and type the following Internet address: http://budget.aucegypt.edu in the Address bar and click Go
- Click on the BPS link on the budget office home page

![Fig (3.1): Accessing the BPS](image)

Note: If you have “Pop Ups Blocked” you will need to hold the control key down while clicking on the BPS link.

- Type in your username and password and press the Submit button

![Budget Preparation System](image)

![Fig (3.2): BPS Username and Password Authorization Page](image)

- BPS checks the username and password entered. If they are a correct match the user is granted access to BPS. Otherwise, the following error message appears indicating incorrect username or password:

**Invalid UserName or Password**

![Fig (3.3): The BPS Username and Password Validation Page](image)

The user is then requested to enter the username and password again, and press the Submit button.
Touring the BPS

Now the user has logged on to the BPS. The following points take the user into a guided tour of the different functions of the system. It is important to note that not all users have access to all the coming pages. In the case of the Area List page, this does not appear to users outside the Budget Office. All non-budget staff users, upon activating the BPS, receive direct access to their Organization or Object Lists pages. Thus, depending on the user’s security profile, certain pages are enabled whereas others are skipped.

Selecting a specific area (Budget Office users only)

The first page that appears lists the different university areas sorted in ascending order. Only the areas which the user is authorized to access are listed.

To select a specific area, move the mouse to the required area and click the left button. This takes the user to the Organization List page containing all the related and authorized departments.

**Home Areas**

**Please Select Area**

- PRESIDENT’S AREA
- FINANCE & ADMINISTRATION
- STUDENT SERVICES
- ACADEMIC
- PLANNING & ADMINISTRATION
- INSTITUTIONAL DEVELOPMENT
- CENTER CONT. & ADULT EDUC

*Fig (3.4): Selecting a Specific Area from the Area List Page*
Selecting a specific organization

The second page that appears contains the different university organizations (departments) sorted in ascending order of organization ID. Only the organizations which the user is authorized to access are listed.

![Selecting a Specific Organization from the Organization List Page](image)

To select a specific organization, move the mouse to the required organization and click the left button.

If the required organization is not on the current screen, use the scroll bar to scroll down to the required organization and then select. This takes the user to the Object List page containing all the related and previously used objects.
Selecting a specific object

The third page that appears contains the different departmental objects sorted in ascending order. Only the objects previously selected by the user are displayed. This feature was created to simplify the search and minimize user confusion since the university has over 300 different objects not all of which are used by all departments.

To select a specific object, move the mouse to the required object and click the left button.

Please Select Object

4113 Thesis Fees
4114 Incidental Fees
4116 Non degree Tuition-Adult Ed
4121 Laboratory Fees
4122 Computer SC Lab Fees
5121 Admin Salaries & Allowances
5131 Staff Salaries & Allowances
5132 Staff Overtime
5211 Social Security
5215 Retirement Exp [TIAA & CREF]
5217 Staff Scholarships [Academic]
5218 Staff Scholarships [CACE]
5224 Medical Insurance
5230 Dependants Scholarships AUC
5311 AUC Clinic Services
5322 Visas/ Passports/ Permits
5339 Awards for Staff & Custodians

Other: Select Object To Add

Fig (3.6): Selecting a Specific Object from the Object List Page

If the required object is not on the current screen, use the scroll bar to scroll down to the required object and then select. This takes the user to the Object Form page selected.
Completing a specific object form

Each object has a unique form that must be filled out. Each object form is composed of a few areas:
- common items area – occurs in all object forms such as Area, Organization, Object, the Fund Field, the Previous Year Budget, the Previous Year Expense, the Current Year Budget, and the Requested Budget.
- unique items area – fields specific to that object form
- screen buttons
- navigation bar

To fill out the form the user should follow these steps:
- Select the appropriate fund by using the pop-up menu

Fig (3.10): The Fund Field Pull-Down Menu in the Object Form

- Using the mouse, select each field and fill it out with the correct data. Some of the fields are required fields (red in color), whereas the others are optional (black in color). Fields proceeded with an (*) mark are optional only in specific cases, depending on the data entered in the previous required fields.

Fig (3.11): Some Required Fields (Red in Color) and a Pull-Down Menu in the Object Form

Note: In filling out the Amount field, the user should never use decimal values

After filling out all the required fields, click on the Save button at the bottom of the page. If the information entered has any format errors or any of the required fields were left blank, an error message will appear. Otherwise the form will be saved and the Requested Budget field will be incremented with the amounts entered

The BPS will save the object form and the following message indicating this will appear:

Data Saved Press Back to return
Updating a specific object form

To update a previously filled out form the user should follow these steps:

☞ Go to the required Object Form page. A new Object Form page will appear on the screen.
☞ Ignore the empty fields and move the mouse to the View button at the bottom of the page. If there are forms previously filled out for this selected object the View button will be activated. In this case, click on the View button. If the View button was not active this means that no forms were previously filled out for this object.

Fig (3.12): The View Button at the Bottom of the Object Form

☞ The BPS will display all the previously filled -out forms for this particular object in sequence. It will start by displaying the first, as indicated by the Current Form No. field at the bottom of the page.

Fig (3.13): The Object Form Update Page

<table>
<thead>
<tr>
<th>Medical Insurance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area: 050</td>
</tr>
<tr>
<td>Org.: 6250</td>
</tr>
<tr>
<td>Object: 5224</td>
</tr>
<tr>
<td>Created By: budget</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>1100. USD FUND</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prev Yr Bud</th>
<th>5,881</th>
<th>Prev Yr Act</th>
<th>5,878</th>
<th>Curr Yr Bud</th>
<th>6,172</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Bud</td>
<td>6,480</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Emp-Name | ell |
| Category | Admin |
| Course-Type | VanBerdia |
| Est-Cost | 6480 |

[Prev, Next, Update, Delete, New]

Select Object

| 5224 Medical Insurance |

Home Areas

PLANNING & ADMINISTRATION  Admin Computing Services

Created By: budget  

Press Here for Help

Fig (3.13): The Object Form Update Page
If this is the required form, then the user can make the required changes and click the Update button. The BPS will save the modifications made and the following message indicating this will appear:

Data Saved Press Back to return.

Press the Back button to return to the previous page, where BPS will have updated the Requested Budget. If this is not the required form, then the user can use the Prev and Next buttons at the bottom of the page to navigate to the required form and perform the update.

Fig (3.14): The Object Form Update Page Navigation Buttons
Deleting a specific object form

To delete a previously filled out form the user should follow these steps:

✔️ Go to the required Object Form page. A new Object Form page will appear on the screen.

✔️ Ignore the empty fields and move the mouse to the View button at the bottom of the page. If there are forms previously filled out for this selected object the View button will be activated. In this case, click on the View button. If the View button was not active this means that no forms were previously filled out for this object.

Fig (3.15): The View Button at the Bottom of the Object Form

✔️ The BPS will display all the previously filled-out forms for this particular object in sequence. It will start by displaying the first, as indicated by the Current Form No. field present at the bottom of the page.

Medical Insurance
Area: 050  Org.: 6250  Object: 5224  Created By: budget

<table>
<thead>
<tr>
<th>Fund</th>
<th>1100. USD FUND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prev Yr Bud</td>
<td>5,881</td>
</tr>
<tr>
<td>Prev Yr Act</td>
<td>5,878</td>
</tr>
<tr>
<td>Cur Yr Bud</td>
<td>6,172</td>
</tr>
<tr>
<td>Requested Bud</td>
<td>6,481</td>
</tr>
<tr>
<td>Emp-Name</td>
<td>all</td>
</tr>
<tr>
<td>Category</td>
<td>Admin</td>
</tr>
<tr>
<td>Covrg-Type</td>
<td>VarBerda</td>
</tr>
<tr>
<td>Est-Cost</td>
<td>6480</td>
</tr>
<tr>
<td>Current Form No.: 1/2 Accepted</td>
<td>✓</td>
</tr>
</tbody>
</table>

Fig (3.16): The Object Form Delete Page

✔️ If this is the required form, then the user can delete it by clicking the Delete button present at the bottom of the page. A message indicating the change will then appear:

Data Saved Press Pack to return
Press the **Back** button to return to the previous page, where BPS will have updated the **Requested Budget** and decremented the deleted amount.

If this is not the required form, then the user can use the **Prev** and **Next** buttons at the bottom of the page to navigate to the required form and perform the update.

![Fig (3.17): The Object Form Update Page Navigation Buttons](image)

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Additional BPS Functions

The following sections cover other functions and features offered by BPS and not necessarily used every time the system is used.

Adding a new object

The object-listing screen only presents any previously used object. Using the pop-up menu at the bottom of the screen, select the required new object.

Fig (3.18): The New Object Addition Pull-Down Menu on the Object List Page

The screen is automatically regenerated and the required object is placed in the list based upon its code sequence
Generating a revenue and expense report

The revenue and expense report is a listing of all objects within an organization and their allotted total budgets. The report is composed of two tables each having six columns. A separate table is created to separate the budgets of each fund. The six columns contain: Object ID, Object Name, Previous Year Budget, Previous Year Expense, Current Year Budget and Requested Budget. The report has subtotals at the end of each table.

**Budget 2006 Report**

**Fund=1100  Organization ID = 6250  Organization Name = Admin Computing Services  Group = Revenue**

<table>
<thead>
<tr>
<th>ObjectID</th>
<th>Object Name</th>
<th>Prev Yr Budg</th>
<th>Prev Yr Act</th>
<th>Cur Yr Budg</th>
<th>Requested-1 Budg</th>
<th>Requested-2 Budg</th>
<th>Requested Budg</th>
</tr>
</thead>
<tbody>
<tr>
<td>4113</td>
<td>Thru Fees</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>SUM</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

**Fund=1100  Organization ID = 6250  Organization Name = Admin Computing Services  Group = Salaries & Fringes**

<table>
<thead>
<tr>
<th>ObjectID</th>
<th>Object Name</th>
<th>Prev Yr Budg</th>
<th>Prev Yr Act</th>
<th>Cur Yr Budg</th>
<th>Requested-1 Budg</th>
<th>Requested-2 Budg</th>
<th>Requested Budg</th>
</tr>
</thead>
<tbody>
<tr>
<td>5121</td>
<td>Admin Salaries &amp; Allowances</td>
<td>87,421</td>
<td>79,126</td>
<td>90,653</td>
<td>0</td>
<td>0</td>
<td>82,194</td>
</tr>
<tr>
<td>5211</td>
<td>Social Security</td>
<td>2,445</td>
<td>2,441</td>
<td>2,801</td>
<td>0</td>
<td>0</td>
<td>2,768</td>
</tr>
<tr>
<td>5215</td>
<td>Retirement Plan (TIAA &amp; CREF)</td>
<td>16,551</td>
<td>14,485</td>
<td>19,413</td>
<td>0</td>
<td>0</td>
<td>17,096</td>
</tr>
<tr>
<td>5224</td>
<td>Medical Insurance</td>
<td>5,881</td>
<td>5,878</td>
<td>6,172</td>
<td>0</td>
<td>0</td>
<td>6,480</td>
</tr>
<tr>
<td>5311</td>
<td>AUC Clinic Services</td>
<td>522</td>
<td>522</td>
<td>423</td>
<td>0</td>
<td>0</td>
<td>452</td>
</tr>
<tr>
<td>SUM</td>
<td></td>
<td>112,820</td>
<td>103,452</td>
<td>119,472</td>
<td>0</td>
<td>0</td>
<td>108,990</td>
</tr>
</tbody>
</table>

**Fund=1100  Organization ID = 6250  Organization Name = Admin Computing Services  Group = Supplies & Services**

<table>
<thead>
<tr>
<th>ObjectID</th>
<th>Object Name</th>
<th>Prev Yr Budg</th>
<th>Prev Yr Act</th>
<th>Cur Yr Budg</th>
<th>Requested-1 Budg</th>
<th>Requested-2 Budg</th>
<th>Requested Budg</th>
</tr>
</thead>
<tbody>
<tr>
<td>6130</td>
<td>Operational Supplies</td>
<td>98</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6160</td>
<td>Radio/Television LT $2000/$600</td>
<td>2,418</td>
<td>0</td>
<td>4,125</td>
<td>0</td>
<td>4,208</td>
<td>4,208</td>
</tr>
<tr>
<td>6210</td>
<td>Communication &amp; Information</td>
<td>1,220</td>
<td>71</td>
<td>1,220</td>
<td>0</td>
<td>1,244</td>
<td>1,244</td>
</tr>
<tr>
<td>6220</td>
<td>Travel &amp; Moving Expenses</td>
<td>9,065</td>
<td>7,640</td>
<td>11,070</td>
<td>0</td>
<td>11,291</td>
<td>11,291</td>
</tr>
<tr>
<td>6240</td>
<td>Computing &amp; Data Processing</td>
<td>187,151</td>
<td>185,115</td>
<td>188,179</td>
<td>0</td>
<td>344,297</td>
<td>344,297</td>
</tr>
<tr>
<td>6250</td>
<td>Consulting &amp; Professional Serv</td>
<td>35,978</td>
<td>29,866</td>
<td>35,978</td>
<td>0</td>
<td>36,698</td>
<td>36,698</td>
</tr>
<tr>
<td>6400</td>
<td>Depreciation Expense</td>
<td>57,116</td>
<td>28,558</td>
<td>115,958</td>
<td>0</td>
<td>0</td>
<td>80,733</td>
</tr>
<tr>
<td>6495</td>
<td>Building Depreciation</td>
<td>4,978</td>
<td>5,109</td>
<td>5,234</td>
<td>0</td>
<td>0</td>
<td>5,234</td>
</tr>
<tr>
<td>SUM</td>
<td></td>
<td>298,845</td>
<td>256,359</td>
<td>361,764</td>
<td>0</td>
<td>397,738</td>
<td>483,785</td>
</tr>
</tbody>
</table>

**Fund=1100  Organization ID = 6250  Organization Name = Admin Computing Services  Group = Capital Expenses**

<table>
<thead>
<tr>
<th>ObjectID</th>
<th>Object Name</th>
<th>Prev Yr Budg</th>
<th>Prev Yr Act</th>
<th>Cur Yr Budg</th>
<th>Requested-1 Budg</th>
<th>Requested-2 Budg</th>
<th>Requested Budg</th>
</tr>
</thead>
<tbody>
<tr>
<td>7120</td>
<td>Computing Equipment</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>91,289</td>
<td>41,564</td>
</tr>
<tr>
<td>SUM</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>91,289</td>
<td>41,564</td>
</tr>
</tbody>
</table>

Fig (3.19): An Example of a Revenue and Expenses Report
To generate this report follow these steps:

- Select the required organization either from the area-listing screen or by jumping to it from any object screen
- Click on the Revenue & Expense Report button next to each organization on the screen

### Please Select Organization

<table>
<thead>
<tr>
<th>Organization</th>
<th>Revenue &amp; Expense Report</th>
<th>Report in Excel format</th>
</tr>
</thead>
<tbody>
<tr>
<td>0601 Replacement Of Major Equipment</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>0606 ERP (SAP) Software Project</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>0806 Summer Renovations</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>1191 Testing &amp; Evaluation Services</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>4310 University Network Services</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>4315 Telecommunications</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6002 Vice President Plan &amp; Admin</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6045 Office Plan &amp; Int Research</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6050 Assoc VP Computing</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6220 Human Resources Office</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6221 Employee Training Progarm</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6222 Physically Challenged Employee</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6250 Admin Computing Services</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6410 Faculty For Administration</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
</tbody>
</table>

### Fig (3.20): Viewing the Revenue & Expenses Report

- The report is displayed on the screen
- To view the rest of the report, use the scroll down arrow
Saving a revenue and expenses report to your PC

- Click on the **Report in Excel format** button next to each organization on the screen.

<table>
<thead>
<tr>
<th>Organization ID</th>
<th>Organization Name</th>
<th>Revenue &amp; Expense Report</th>
<th>Report in Excel format</th>
</tr>
</thead>
<tbody>
<tr>
<td>6221</td>
<td>Employee Training Program</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6222</td>
<td>Physically Challenged Employee</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6250</td>
<td>Admin Computing Services</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
<tr>
<td>6410</td>
<td>Faculty Else Administration</td>
<td>Revenue &amp; Expense Report</td>
<td>Report in Excel format</td>
</tr>
</tbody>
</table>

**Fig (3.21): Viewing the Revenue & Expenses Report**

- A pop up screen will open requesting whether you would like to Open or Save this report, click **Save** and choose where you would like to save your file to on your PC.
- Once the file has downloaded you may choose to open it straight away or open directly from the directory on your PC.

**Fig (3.22): Example of Revenue & Expenses Report saved to Excel file**
Using the navigation bar to go to the home page or to move around the BPS

The navigation bar is the shaded line present at the bottom of all the BPS application pages. It enables the user to navigate through the application with minimal effort and delay. Links are added to the bar as the user moves further into the program. For example, if the user is only at the area listing page, the navigation bar only contains two links; one links back home and the other links back to the area listing page.

![Fig (3.23): The Navigation Bar at the Top of the Area List Page](image)

By the time the user moves to the object form page, the navigation bar has accumulated more links; a link back to the organization list page, and another to the object list page.

![Fig (3.24): The Navigation Bar at the Bottom of the Object Form Page](image)

It enables the user to jump at any point during his operation to the home page, the area selection page, the organization selection page or the object selection page.

To jump to the home page, or to any of the above-mentioned pages, the user should click on any one of the underlined links presented in the navigation bar. The BPS automatically takes the user to the appropriate page.