

FUND MANAGEMENT SYSTEM

USER MANUAL

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TEAM MEMBERS

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Abstract

The portal developed automates the management of the allocated budget to various departments and schools .The admin is given the privileges to add/edit or view all the data. The portal facilitates other users to view their allocated as well as their remaining budgets as and when required.

Earlier the HOD's and HOS's had to go through various formalities to view their own budget details. The portal would now serve this purpose with ease. Also the user interface provided to the admin makes the data management much easier.

Also the portal would be hosted on the IIT INDORE servers, hence any unauthorized access is prohibited.

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1. Introduction

1.1 Audience

The intended audience of this User Manual would be the HOD's and HOS's of various departments and the Admin. The portal enables the HOD's and HOS's to be updated about the funds allocated to them and allows them to view their remaining balance. This helps to plan accordingly. Also the portal provides the admin an interface which would allow him to manage all these details with ease.

1.2 Applicability

The Software is applicable to the data provided by administrator through the website.

1.3 Purpose

The main purpose of this portal is storage, display, and management of the data entered.

1.4 User Manual Usage

This manual can be used as an installation guide. It will guide you through the flow of this software.

1.5 If You Have A Problem

In case of any queries regarding the product, please mail the Developer Team at:

- cse140001014@iiti.ac.in
- cse140001005@iiti.ac.in
- cse140001022@iiti.ac.in
- cse140001012@iiti.ac.in

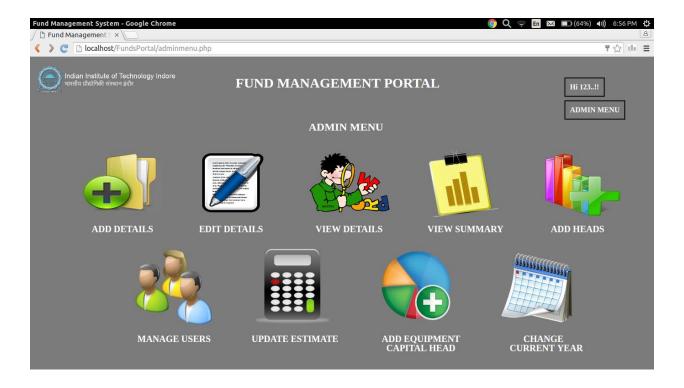
Our team will get back to you ASAP.

3. Using FUND MANAGEMENT PORTAL

3.1 LOGIN PAGE

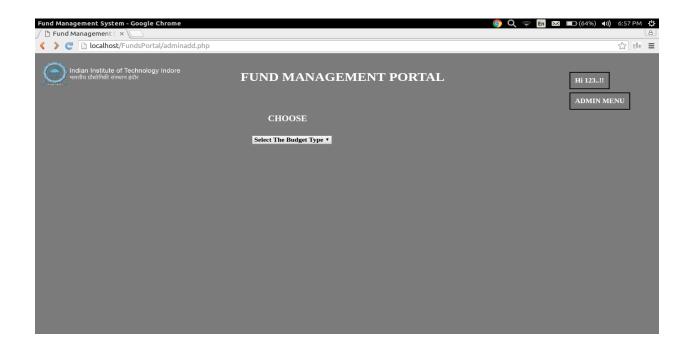
The login screen will be the homepage. The user needs to provide the username and the password that would be provided by the admin. The users except the admin would be unable to change their passwords. In case the password or username is lost, the user needs to contact the admin.

3.2 ADMIN MENU

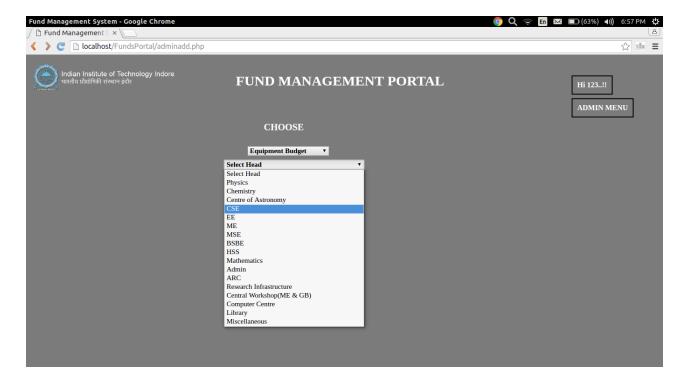


In case of a successful login by the admin, he will be directed to the admin menu. This page provides him with functionalities as shown in the above screenshot.

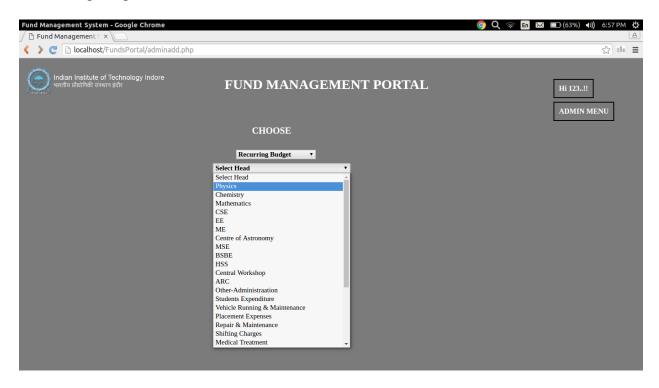
3.2.1 ADD DETAILS



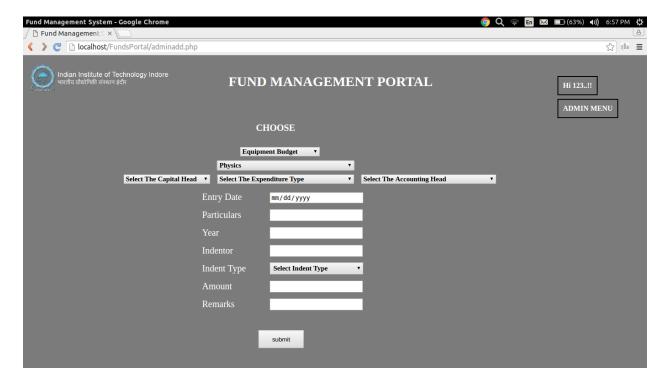
Clicking on the ADD-DETAILS icon redirects user to the add-details page. This page allows the user to select the budget type.

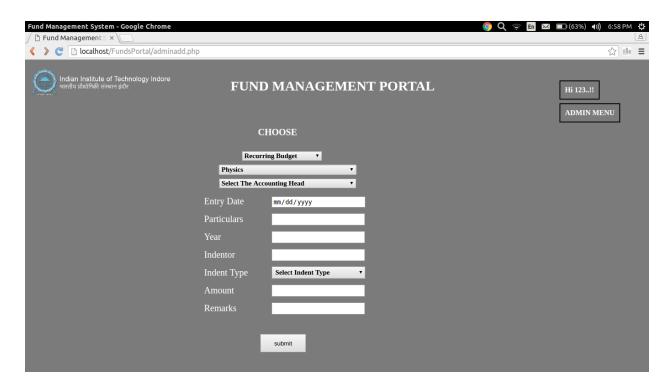


After selecting the budget type, another select box appears which asks the user to select the head. The above image shows the various heads corresponding to equipment budget and the below one to recurring budget.

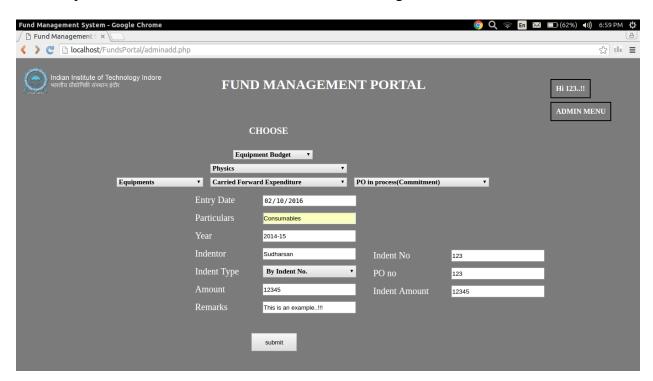


After both the values are selected, a table appears, which asks for various other details according to the budget type selected.

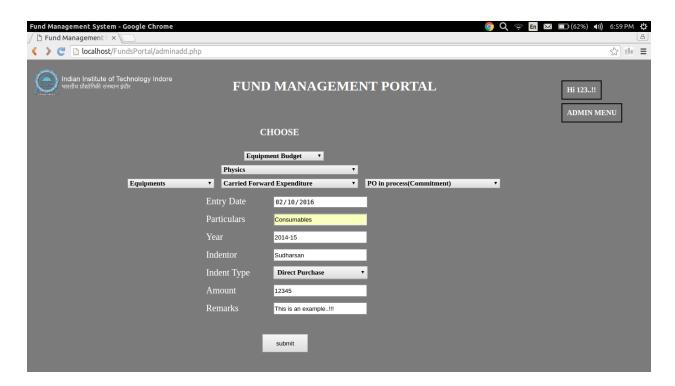




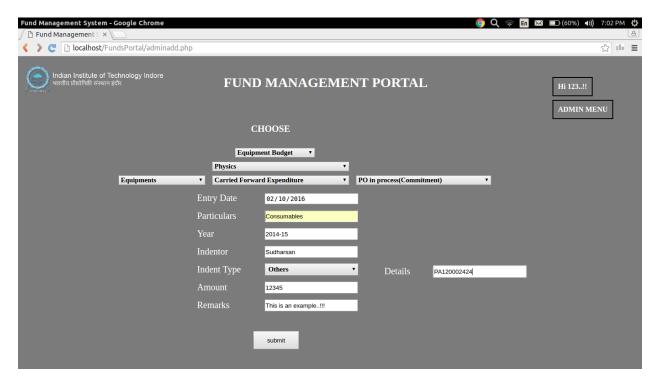
An example of the details to be entered is shown in the image below.



Here the indent type is: By indent no.



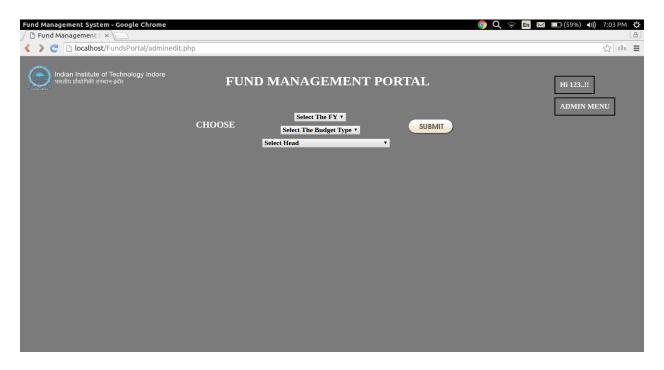
Here the indent type is: Direct Purchase.



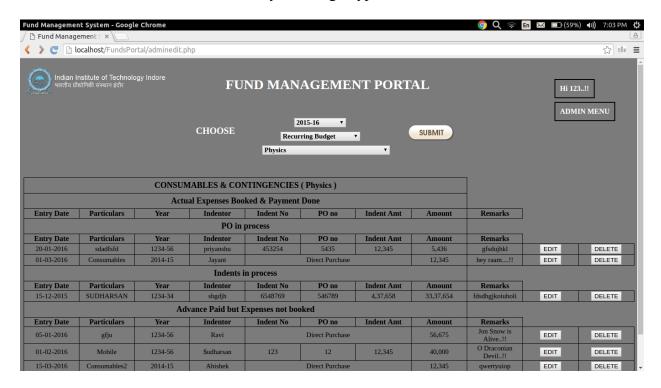
Here the indent type is: Others.

3.2.2 EDIT DETAILS

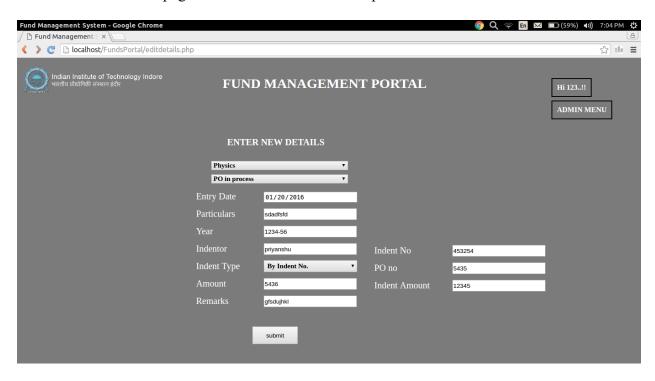
Clicking on the EDIT-DETAILS icon redirects user to the edit-details page. This page allows the user to edit the existing details.



The user needs to select the functional year, budget type and the head.

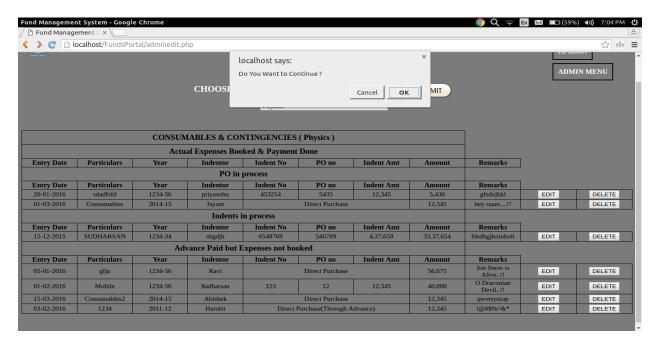


To edit any detail, the user should click on the edit button in the corresponding row. This would take him to a different page that allows him to edit this particular detail.



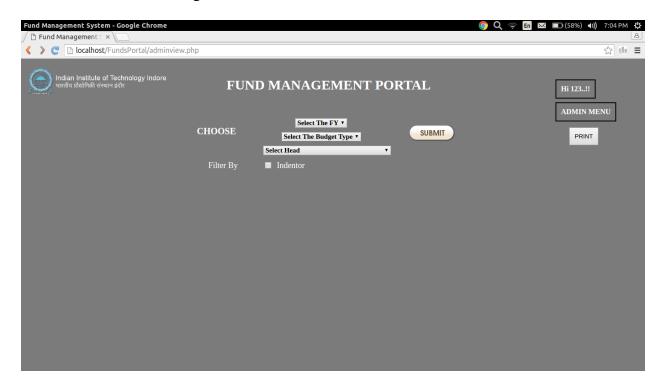
The image above show the page, when the user clicks on the edit button on first record of the previous image.

For deleting an existing record, the user needs to click the delete button beside the particular record. This would further ask for a confirmation as shown in the image below.

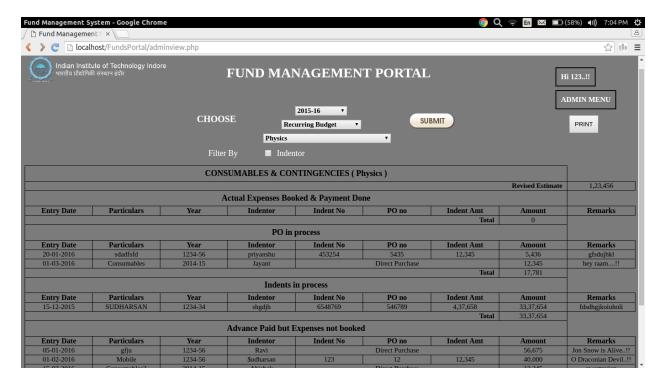


3.2.3 VIEW DETAILS

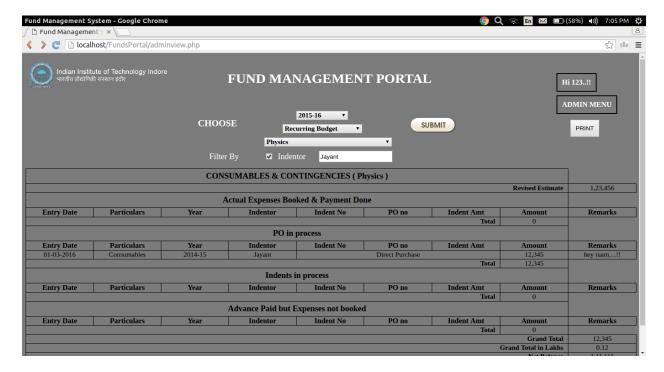
Clicking on the VIEW-DETAILS icon redirects user to the view-details page. This page allows the user to view the existing details.



The user needs to select the functional year, budget type and the head.

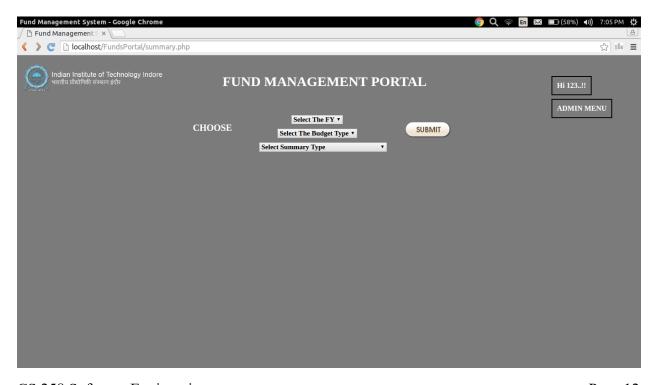


This page also allows the user to filter details by the indentor. An example is shown below.

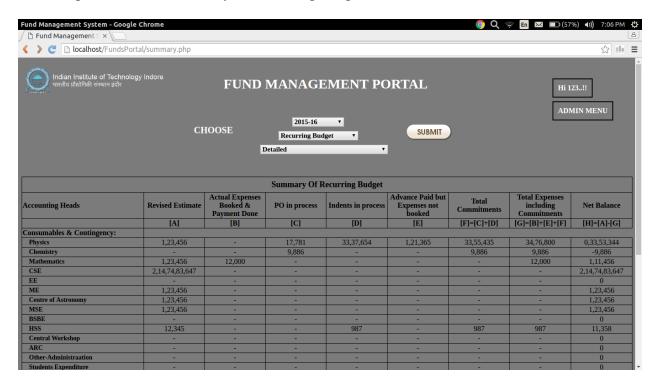


3.2.4 SUMMARY

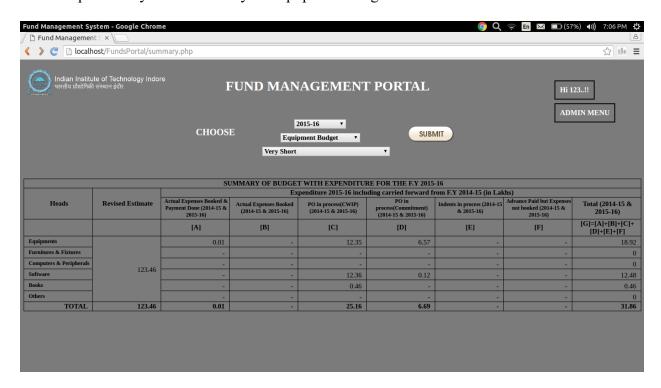
Clicking on the SUMMARY icon redirects user to the view-summary page. This page allows the user to view the summary of the existing details.



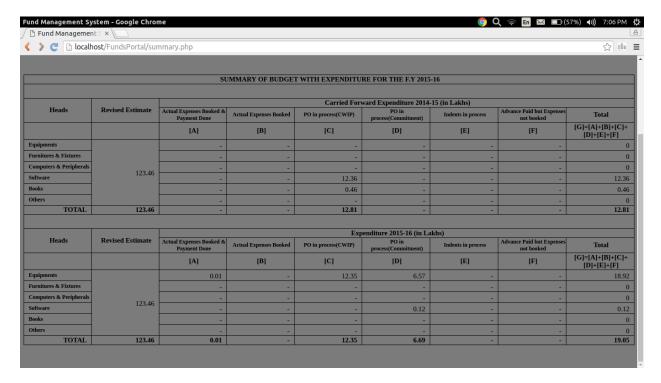
The user needs to select the functional year, budget type and the summary type. An example of detailed summary for recurring budget is shown below.



An example of very-short summary for equipment budget is shown below.

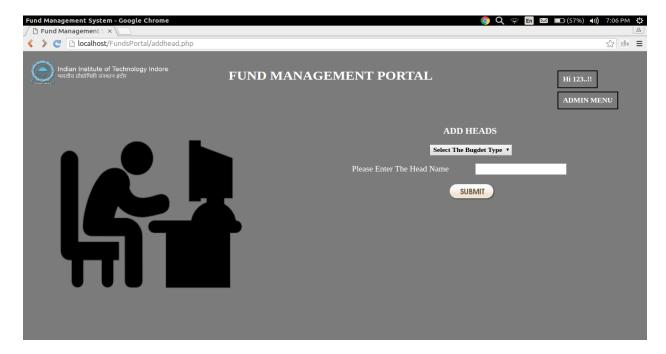


An example of short summary for equipment budget is shown below.

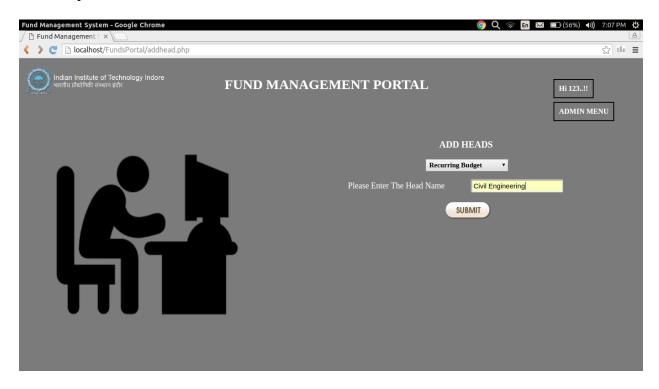


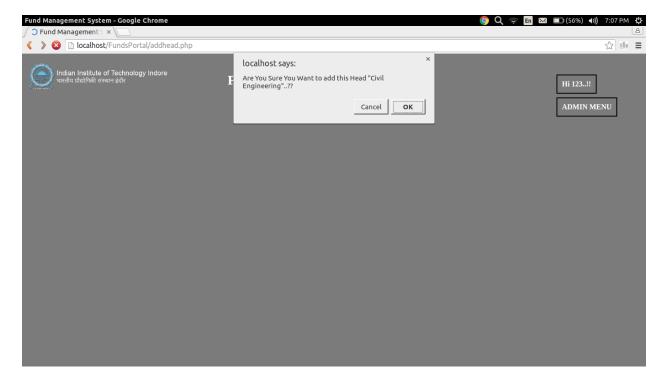
3.2.5 VIEW DETAILS

Clicking on the ADD-HEAD icon redirects user to the add-head page. This page allows the user to add a head to both the budget types.



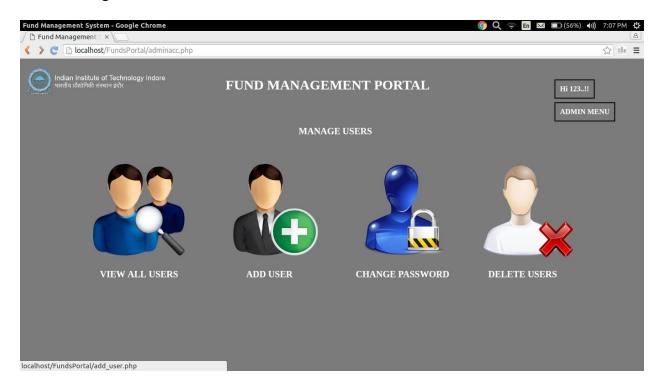
An example of this is shown below. This further asks the user for a confirmation.



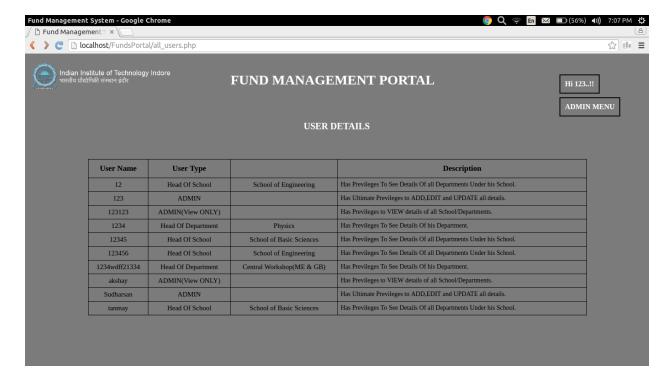


3.2.6 MANAGE USERS

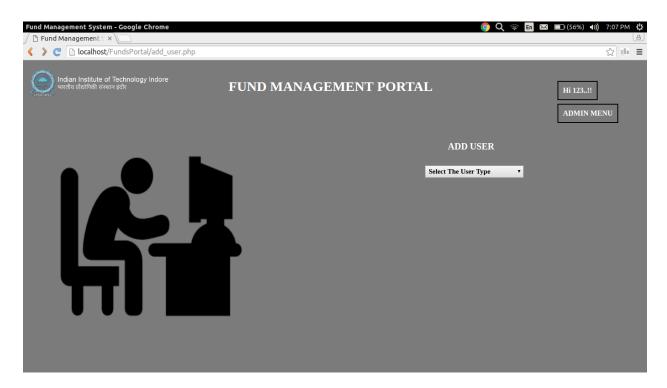
Clicking on the manage users icon redirects user to the manage users page. This page allows the user to manage the users and their details.

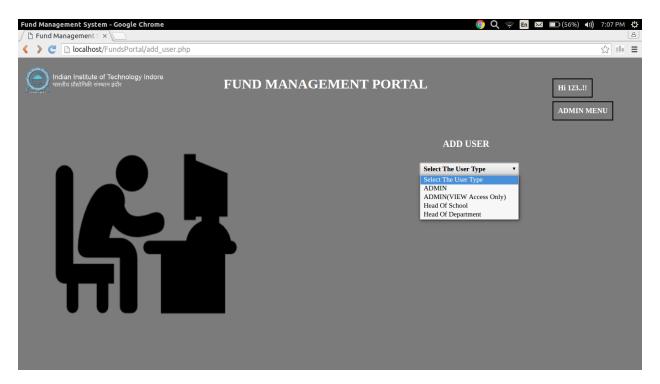


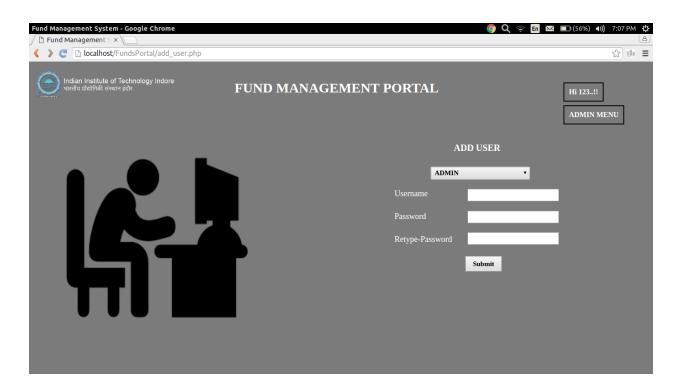
Clicking on the view all users icon redirects user to page that show all the users.

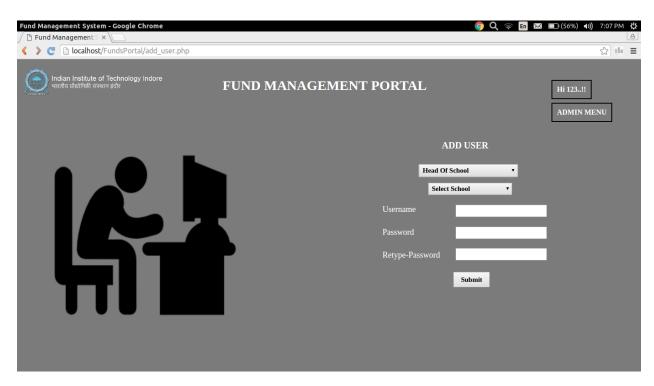


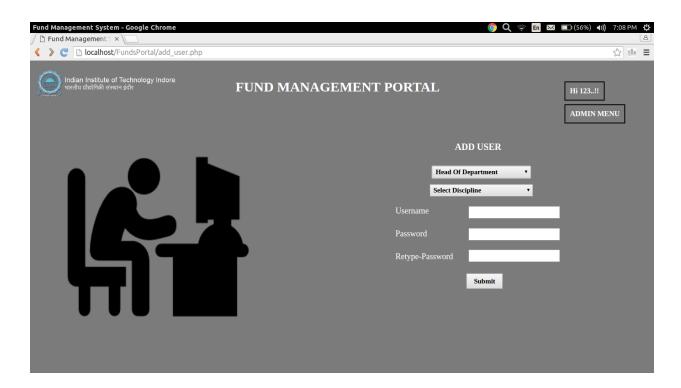
Clicking on the add user icon redirects admin to the add users page. This page allows the admin to add a new user.





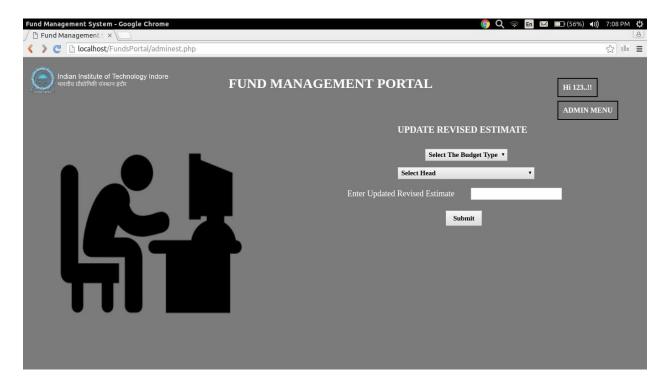




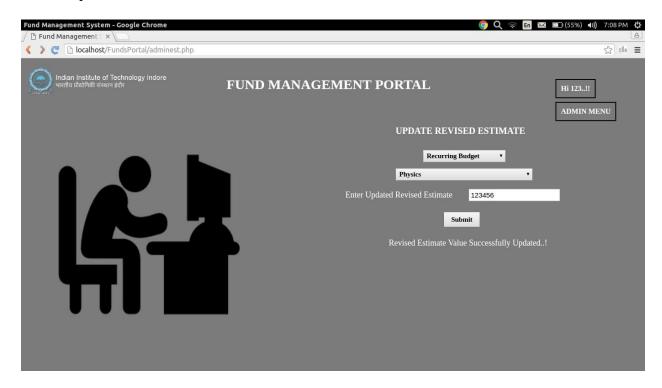


3.2.7 UPDATE ESTIMATE

Clicking on the update estimate icon redirects user to the update estimate page. This page allows the user to update/add the budget estimate for any head.

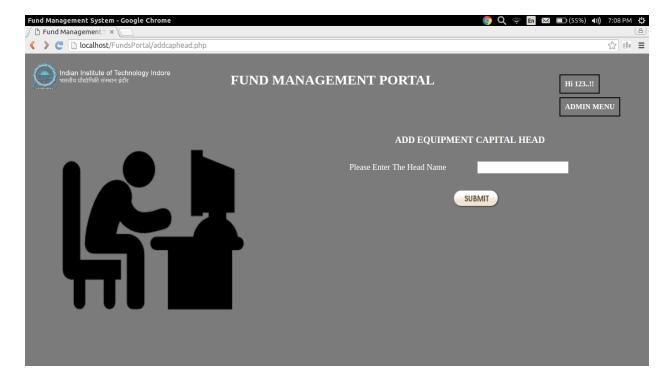


An example of this is shown below.



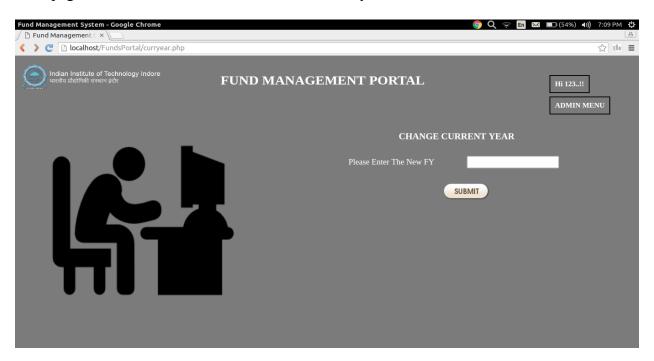
3.2.8 ADD EQUIPMENT CAPITAL HEAD

This page allows the user to add a equipment capital head.



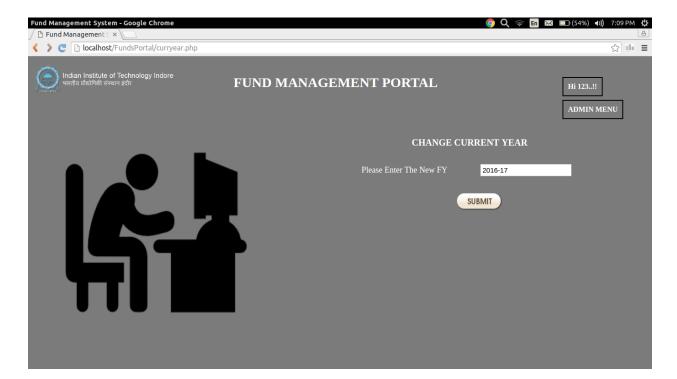
3.2.9 CHANGE CURRENT YEAR

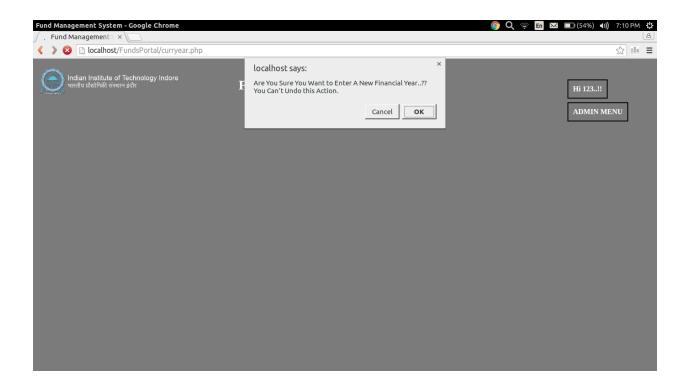
This page allows the user to move to a new financial year.



An example of this is shown below.

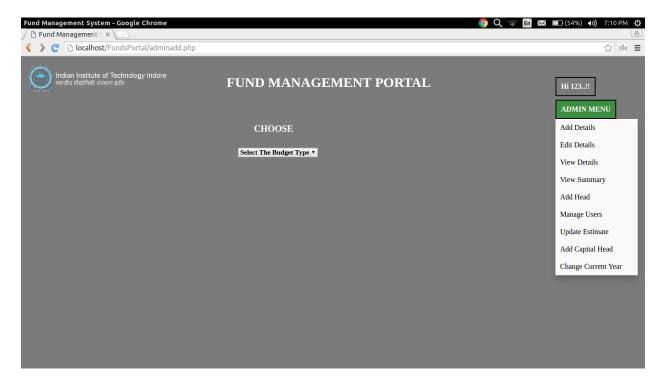
NOTE: The format for the year should be as shown. Also this action can't be undone.





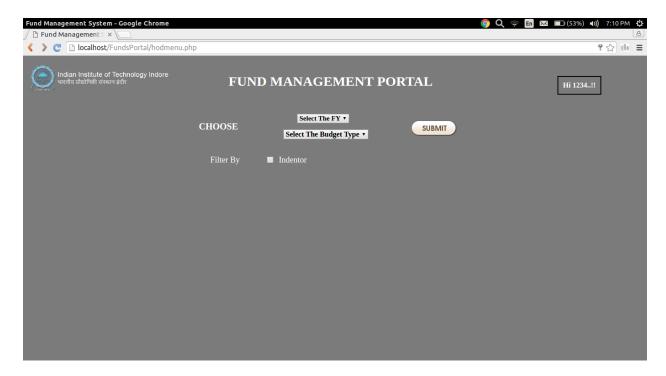
3.2.10 ADMIN MENU DROPDOWN

This admin menu dropdown enables the user to navigate to any page from anywhere in the portal.

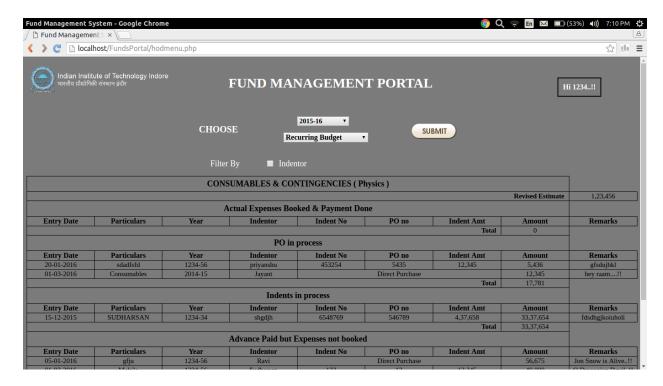


3.3 HOD HOMEPAGE

In case of a successful login by the HOD, he will be directed to the HOD homepage. This page allows him to view the details of his own department.

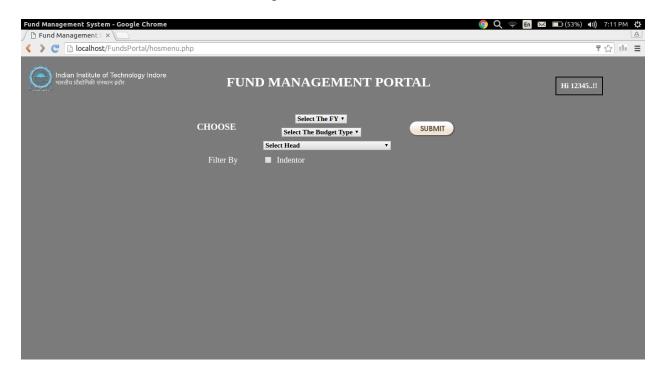


An example is shown below.

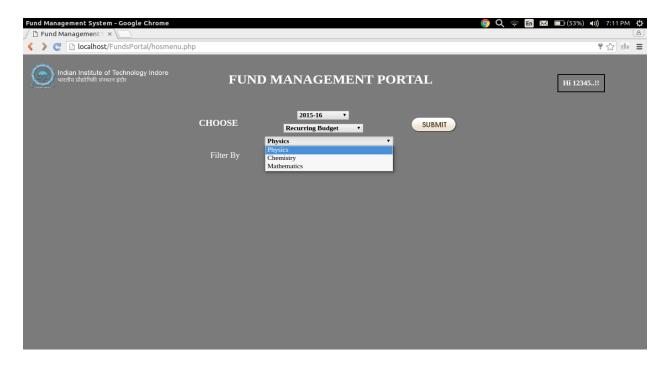


3.4 HOS HOMEPAGE

In case of a successful login by the HOS, he will be directed to the HOS homepage. This page allows him to view the details of the departments that are under his school.

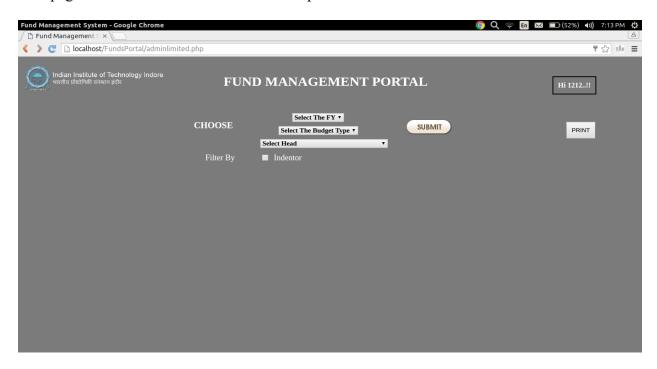


An example for a successful login by the Head of Basic Sciences would show the following heads.

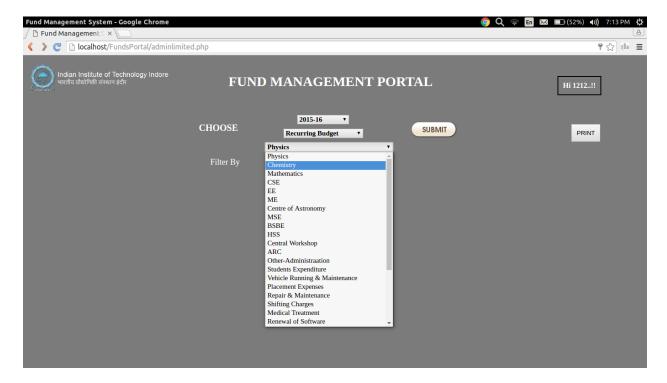


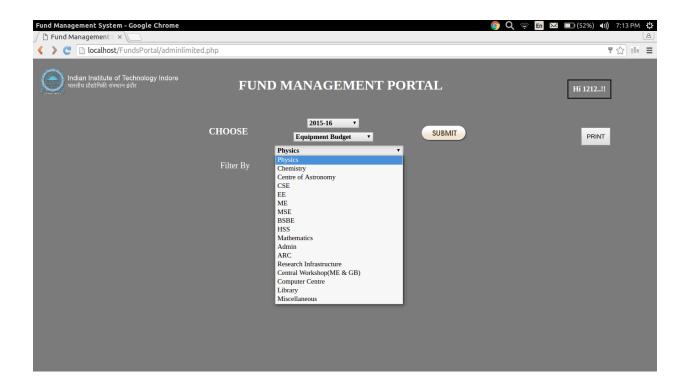
3.5 ADMIN (VIEW ACCESS ONLY) HOMEPAGE

In case of a successful login by the admin(view access only), he will be directed to this page. This page would allow him to view all the department's details.



An example of the various heads available to the this type of user is shown below.





3.6 LOGOUT

The greeting message dropdown enables the user to logout.

