

# BIMSA

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## **OA System User Guide**

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# 1. Homepage Display - Feature Overview

1. Work Center

2. Upcoming Meetings

3. BIMSA Approval Process Center

4. My Schedule

5. BIMSA Announcements & News

6. My Messages

7. My Favorites, My Documents

The screenshot displays the BIMSA homepage dashboard. At the top, there is a navigation bar with various menu items like 'Collaboration', 'Business Or...', 'Management', 'Report Center', 'Meeting', 'Knowledge...', 'Culture Work', 'Human Res...', 'Business &...', 'Service', and 'Personal Tools'. Below the navigation bar is a toolbar with icons for 'New Items', 'New Meeting', 'New Prog.', 'Address B.', 'My Tasks', 'Tracking E.', and 'Add Shortcut'. The main content area is divided into several sections:

- Work Center:** A section with a table showing '1' item, '55' matters issued, and '6' pending matters. A red star with the number '1' is overlaid on this section.
- My Schedule:** A calendar view for the week of 05-07 to 05-13. A red star with the number '4' is overlaid on this section.
- My Messages:** A list of messages with a red star and the number '6' overlaid on it.
- Pending Meeting[0]:** A section for pending meetings with a red star and the number '2' overlaid on it.
- BIMSA Announcement | BIMSA News:** A section for announcements and news with a red star and the number '5' overlaid on it.
- My Favorites | Commonly Used Documents:** A section for favorites and documents with a red star and the number '7' overlaid on it.
- Personnel Self-help:** A section with various links for personnel services, with a red star and the number '3' overlaid on it.



# 1. Homepage Display - Feature Overview

Click to return to the homepage

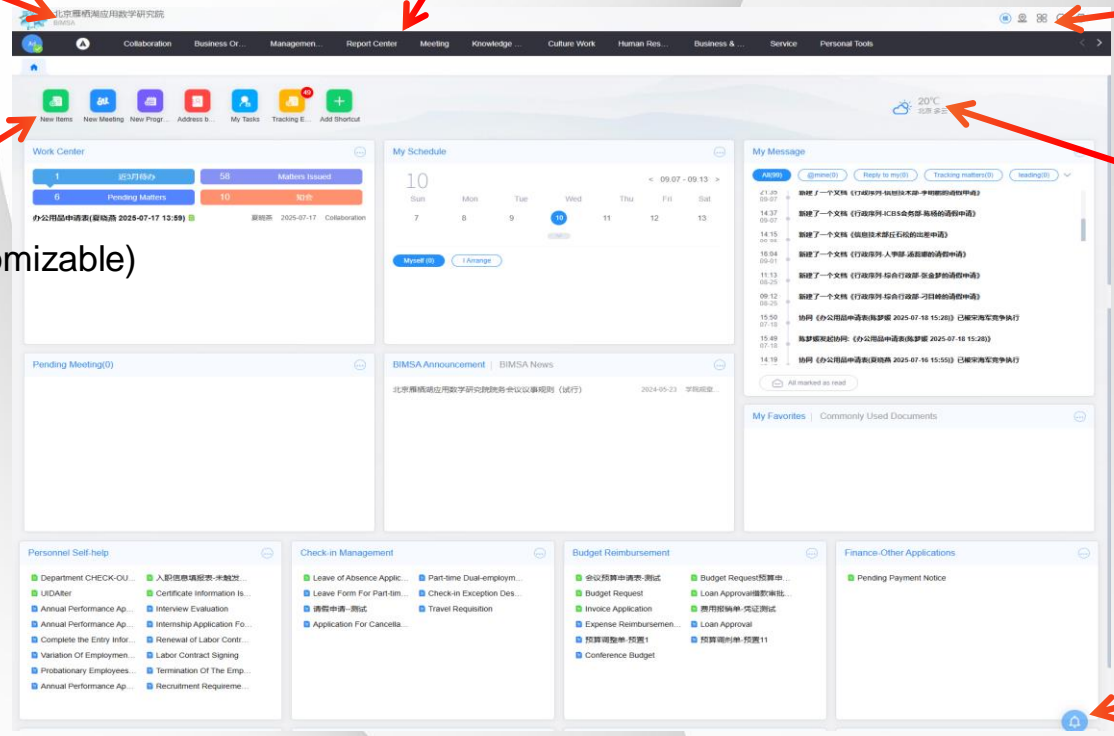
All main menu functions

Other Functions & Settings

Quick Access Bar (Customizable)

Weather Bar

Message Center





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# Approval Process Usage

BIMSA Approval Workflow Center - Click the workflow forms displayed within the red boxes to access their respective editing pages. This list of workflow forms is sorted by usage frequency.

The screenshot displays the BIMSA Approval Workflow Center interface. At the top, there is a navigation bar with various menu items like 'Collaboration', 'Business Or...', 'Management...', 'Report Center', 'Meeting', 'Knowledge...', 'Culture Work', 'Human Res.', 'Business &...', 'Service', and 'Personal Tools'. Below the navigation bar, there are several widgets: 'Work Center' showing task counts, 'My Schedule' with a calendar, 'My Message' with a list of messages, and 'Pending Meeting(0)'. At the bottom, there are four workflow form categories highlighted with red boxes and red arrows pointing to them: 'Personnel Self-help', 'Check-in Management', 'Budget Reimbursement', and 'Finance-Other Applications'. Each category contains a list of specific workflow forms.

- Personnel Self-help**
  - Department CHECK-OU...
  - UID/Alter
  - Annual Performance Ap...
  - Annual Performance Ap...
  - Complete the Entry Infor...
  - Variation Of Employees...
  - Probationary Employees...
  - Annual Performance Ap...
  - 入职信息维护系统-未办结
  - Certificate Information In...
  - Interview Evaluation
  - Internship Application Fo...
  - Renewal of Labor Contr...
  - Labor Contract Signing
  - Termination Of The Emp...
  - Recruitment Requireme...
- Check-in Management**
  - Leave of Absence Applic...
  - Leave Form For Part-tim...
  - 请假申请表-测试
  - Application For Cancell...
  - Part-time Dual-employ...
  - Check-in Exception Des...
  - Travel Requisition
- Budget Reimbursement**
  - 会议预算申请表-测试
  - Budget Request
  - Invoice Application
  - Expense Reimbursemen...
  - Conference Budget
  - Budget Request(预算申...
  - Loan Approval(借款审批)
  - 费用报销单-无证到试
  - Loan Approval
  - 预算审批单-预置1
  - 预算审批单-预置11
- Finance-Other Applications**
  - Pending Payment Notice

# Approval Process Usage

BIMSA Approval Process Center - Click the process forms displayed within the red boxes to access their respective editing pages. This list of process forms is sorted by usage frequency.

The screenshot shows the BIMSA Approval Process Center interface. At the top, there is a navigation bar with several menu items. A red box highlights the following items: Personnel ..., Labor Contr..., Foreign Affa..., Administration, Configuratio..., and Financial M... A red arrow points from the 'My Schedule' widget to the 'Administration' menu item.

The interface includes a header with the BIMSA logo and name, and a search bar. Below the navigation bar, there are several quick action buttons: New Items, New Meeting, New Progr..., Address b..., My Tasks, Tracking E..., and Add Shortcut. The main content area is divided into several widgets:

- Work Center:** Displays a summary of tasks, including '1 近3月待办' (3 months pending), '58 Matters Issued', '6 Pending Matters', and '10 知会' (10 notifications). It also shows a list of pending items, such as '办公用品申请表(夏晓燕 2025-07-17 13:59)'.
- My Schedule:** A calendar view for the week of 09.07 - 09.13. A red dot is placed on the '10' in the Wednesday column, with a red arrow pointing to the 'Administration' menu item in the navigation bar.
- My Message:** A list of messages, including '新建了一个文档《综合行政部刁目标的出差申请》' (Created a document 'Comprehensive Administration刁 Target Business Trip Application') and '回文提醒对A1-104的预订, 附言: 参会人员较多, A1-104容量不够' (Reminder for A1-104 booking, note: many participants, A1-104 capacity is not enough).
- Pending Meeting(0):** A section for pending meetings.
- BIMSA Announcement | BIMSA News:** A section for announcements, including '北京雁栖湖应用数字研究院常务会议事规则 (试行)' (Beijing Yanshi Lake Applied Digital Research Institute Board Meeting Rules (Trial)).
- My Favorites | Commonly Used Documents:** A section for favorite documents.

# Approval Process Usage - Viewing Approval Progress of Sent Process Forms

Collaboration Business Or... Managemen... Report Center Meeting Knowledge ...

New Items New Meeting New Progr... Address b... My Tasks Tracking E... Add Shortcut

Work Center

1 近3月待办 58 Matters Issued

6 Pending Matters 10 知会

办公用品申请表(夏晓燕 2025-07-17 13:59) 夏晓燕 2025-07-17 Collaboration

My Schedule

11

Sun Mon Tue

7 8 9

Myself (0) I Arrange

办公用品申请表(夏晓燕 2025-07-17 13:59)

夏晓燕 2025-07-17 14:11

Form **Flow**

夏晓燕 实际申请人 [Notify] Sender Manager of [Approve] Stocks Admin [Approve] END

办公用品申请表(夏晓燕 2025-07-17 13:59)

夏晓燕 2025-07-17 14:11

**Form** Flow

View the approval process status

Leadership approval opinions

北京雁栖湖应用数学研究院办公用品申请单						
常规办公用品申请						
申请部门	Department of Finance		申请日期	2025-07-17		
物品名称	物品分类	规格型号	计量单位	申请数量	备注	



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# Detailed Explanation of Process Forms - Purchase Request Form

Access the process form via the menu bar:

- ① Applicant, department, and date are automatically populated;
- ② Select whether to use procurement agency services. If "Yes" is chosen, the process defaults to the procurement specialist in the administrative department. If "No" is chosen, the actual procurement personnel must be selected;
- ③ Manual selection is required for: funding source, procurement category, procurement method, procurement channel, etc.;
- ④ The procurement purpose must be described in text form;
- ⑤ Fill in the procurement details: item name, quantity, purchase amount. The total amount will be automatically calculated;
- ⑥ If "Third-Party Price Comparison" is selected as the procurement method, a price comparison table must be completed;
- ⑦ The workflow will automatically assign relevant supervisors and require initiators to upload resolution approval documents based on the requested procurement amount.

北京雁栖湖应用数学研究院采购申请单  
BIMSA Purchase Application Form

采购单号			
申请人 Applicant	Administrator1	申请日期 Date of Application	2025-09-11
是否代采 是否代采 Purchased by the General Administration Department or not.		采购人 Purchaser	
归口部门 Department	Test	经费来源 Sources of funding	
采购类别 Purchasing Category		采购方式 purchasing mode	
采购渠道 purchasing channel		实际申请人 Actual applicants	Administrator1
采购目的 Purchasing purpose			

+ New   Replication   Delete   Delete all   Import data   Derived data

采购明细				
序号No	物品名称 (Items)	采购数量 Purchase quantity	采购金额 Purchase amount	备注
1				
合计		0	0.00	

+ New   Replication   Delete   Delete all   Import data   Derived data

产品询价表 (多方询价比价)  
采购总价1万元-3万元以下的采购规定自行采购填写此表

序号 No	供应商名称	联系方式/网址	规格型号	附件、零、配件及备件	最终报价	上传询价凭证附件	备注
1						需上传询价 凭证附件	

部门负责人/PI ( $< 1000$ RMB)	
分管副院长/Vice President in charge (1000-10000 RMB)	
常务副院长(EVP) (10000-30000 RMB)	
院长(President) (30000-100000 RMB)	
院长的办公会 (President's Office Meeting) (100000-2000000 RMB)	
专家论证 (Expert Argumentation) ( $\geq 2000000$ RMB)	编制证明 (专家论证决议)



# Detailed Explanation of Process Forms - Budget Request Form

Access the workflow form via the menu bar:

- ① The form number is automatically generated upon initiation, with the application time, department, and date populated automatically;
- ② Required fields include: **Expenditure Details, Estimated Support Amount, and Justification for Expenditure** (mandatory);
- ③ Select the **expense type** (Research Funds or Operating Funds). If **Research Funds** is selected, the **project name** is required.
- ④ The form automatically displays the applicant's **cumulative amount** applied for this year for the same type or project funding;
- ⑤ Depending on the amount and type, fixed approval stages in the workflow require the initiator to upload approval documents from the Dean and the Dean's Office Meeting.



预算申请表 Budget Request Form			
单据编号		申请期间	2025 年 9 月
申请部门 Department (Team)	Test	申请日期 Date	2025-09-11
支出内容 Expenditure Content		预计支出金额 Estimated Expenditure	
支出必要性 Necessity of Expenditure		实际申请人 Actual applicants	Administrator1
经费出处 (项目或科目) Funding Source (Project or Subject)	经费类型	项目名称	
项目负责人 Project Leader			
年初以来同类支出情况 Similar Expenditures since the Beginning of the year	累计次数 Accumulated Times	次	累计金额 Accumulated Amount
分管副院长意见 Vice President			
常务副院长意见 Executive Vice-President			
院长审批 President			
院长办公会			
备注 Remark			
部门主管或团队 (项目) 负责人 Department Director or Team (Project) Director	财务审核 Financial Reviewer:	申请人 Applicant	
费用完整 层级编码			
单位维度	北京雁栖湖应用数学研究院		



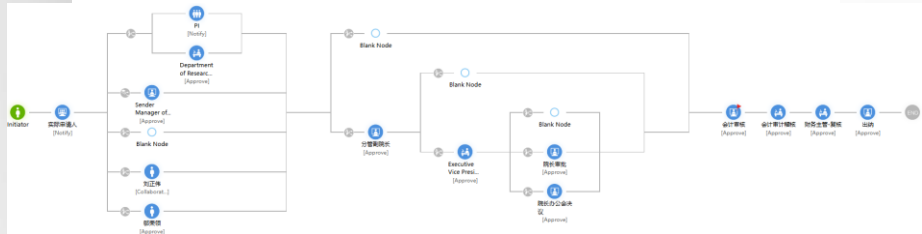


# Detailed Explanation of Process Forms - Loan Approval Form

Access the process form via the menu bar:

- ① The form number is automatically generated upon initiation. Application time, department, and date are automatically populated.
- ② Select the expense type (Research Funds or Operating Funds). If Research Funds is selected, the Project Name field is required.
- ③ Enter the expense amount (numeric value), which will automatically convert to the corresponding amount in words;
- ④ Click the icon to the right of the account name to select a personal bank account (personal personnel records must be entered in advance) or an external bank account (manually entered this time; can be selected directly for subsequent applications);
- ⑤ The necessity of this expenditure must be documented (required field), and supporting documentation (e.g., scanned file uploads) must be provided;
- ⑥ Depending on the amount, fixed approval stages in the workflow may require the initiator to upload approval documents from the Dean and the Dean's Office Meeting.

借款审批单 Loan Approval Form					
申请部门 Department (Team)	Test			申请人 Borrower	Administrator1
申请月份 Funding Source	2025	年	9	月	申请日期Date 2025-09-11
项目类型 Subject				项目名称 Funding Source Project	***
项目负责人				实际申请人 Actual applicants	Administrator1
费用金额 Amount	人民币			元	
	¥				
收款人银行账户信息 Payee Bank Account	账户名称 Payee Name	外部借款(仅对公付款)			
	开户银行 Bank Name				
	账号 Bank Account Number				
借款必要性证明	必要性说明				
	必要性证明文件				
分管副院长意见 Vice President in charge					
常务副院长意见 Executive Vice-President					
院长审批 Dean					
院长办公会决议					
备注 Remark					
部门主管或团队(项目)负责人 Department Director or Team (Project) Director	财务审核 Financial Reviewer		申请人 Borrower		





# Detailed Process Form - Invoice (Receipt) Issuance Request Form

Access the process form via the menu bar:

- ① The handler, requesting department, and request date are automatically populated;
- ② The invoice (receipt) type is a required field;
- ③ All fields in the billing information section must be completed;
- ④ Contract information must be linked as needed and based on actual circumstances (e.g., project-related invoices must be linked);
- ⑤ Add text descriptions manually as needed and based on actual circumstances;

发票 (收据) 开具申请单 Invoice (Receipt) Issuance Application Form					
申请人	Administrator1	部门	Test		
发票 (收据) 类型 Invoice (Receipt) Type	<input type="radio"/> 增值税普通发票 VAT general invoice <input type="radio"/> 增值税专用发票 Special VAT invoice <input type="radio"/> 捐赠票据 Donation Receipt <input type="radio"/> 三联收据 Triple receipt	申请日期 Date	2025-09-11		
实际申请人 Actual applicants	Administrator1				
开票信息 Invoice Information	单位名称 Unit Name				
	纳税人识别号 Taxpayer Identification Number				
	地址及电话 Address and Phone Number				
	开户行及账号 Bank Account				
	开票内容 Invoicing Content				
	金额 Amount	人民币 (大写) :		¥	
	是否免税 (Not)Tax-free				
合同信息	合同编号 Contract Number				
	合同名称 Contract Name				
说明 Remark					





# Detailed Explanation of Process Forms - Expense Reimbursement Form

Access the process form via the menu bar:

- The form automatically populates the handler, requesting department, request date, and request month. The currency unit defaults to RMB.
- Click to select the funding source. Choosing different expense types will display corresponding reimbursement policy explanations and supplementary forms for itemized details;
- Select whether to offset against loans. If this form involves loan offsetting, choose "Yes." If selected, you must associate an existing budget request and loan form under "Linked Application/Loan." After linking, the loan amount confirmation will display, indicating overpayments will be refunded and underpayments will be collected.
- If the reimbursement process was not initiated by the applicant, enter the actual reimburser's name in the "Reimburser" field. For self-reimbursement, enter your own name;
- Enter a textual description for the reimbursement reason; upload electronic scanned copies of invoices;
- If the reimbursement involves linked procurement, contracts, or other applications, select the relevant initiated documents under "Link Other Applications." Additional supporting materials may be uploaded as needed.
- Fill in the reimbursement amount module according to actual circumstances. If multiple projects are involved, select the corresponding projects (project selection is only required for research funds; operational funds do not require project selection).
- Confirm payment recipient information by selecting from the following options: 1. Internal payment recipient; 2. External domestic payment recipient; 3. External international payment recipient; 4. Corporate payment recipient. For internal payments, personal personnel records must be pre-registered. All other payment details entered manually this time can be directly selected for subsequent applications, avoiding duplicate entries.

**北京雁栖湖应用数学研究院 费用报销单 (BIMSA Reimbursement Form)**

报销单编号	2025-09-11		单据No.	
日期 (Date)			经费类型	
部门 (Department)	Test	是否冲借款	Funding source	申请人
Whether to use the loan		金额单位	Applicant	Administrator1
Amount unit	人民币 (CNY)	申请月份	Application month	2025 年 9 月
是否项目预算 Whether the project budget				

**证明材料上传**  
Upload supporting documents

发票上传 Invoice upload	注: 如已在系统中上传发票, 关联单据在再次开票或报销二次上传发票时请关联BIM
关联申请/借款 Related application/loan	请选择申请单
关联其他审批单 Associate with other approval forms	选择已有审批单
Other supporting materials 其他佐证材料	关联单据中的材料不可在此处上传
是否有未提交的纸质材料? Have you submitted paper materials?	

**报销金额**  
Reimbursement amount

报销事由 Reason for reimbursement	大写金额	金额 (Amount of Money)	币种	单位	千	百	十	元	角	分	经费项目 (项目) Funding Source (Project)	项目负责人 Project Leader	备注/说明 (Notes)
		00.00											
合计 Total	零元整	0.00											

**报销材料说明**  
Explanation for the reimbursement material  
只需在系统中上传发票, 其他材料随纸质发票一并提交至财务部  
Only the invoices have to be uploaded, the others should be submitted to the department of finance with the paper invoices

**收款信息确认**  
Confirmation of payment information

收款人/单位名称 Payee/Organization	内部收款人 Internal Payee	外部收款人 External Payee	Account Number/BAN (银行账号)	Swift Code/电汇/电汇编号 (电汇)	Bank Name (银行名称)	Bank Address (开户支行)	Holder Address (开户人地址)	币种 Currency	金额 Amount
**									0.00

**领导审批意见**  
Leadership approval opinion

部门主管 (Department Manager)	主管财务副部长 (Vice President of Finance)
常务副院级 (Executive Vice President)	
院长批示 (President)	
院务办公会议 (Resolution of the Dean's Office)	

财务主管 (Financial executive)	稽核 (Internal Audit)	财务审核 (reviewer)	出纳 (cashier)	经办人 (applicant)
出纳付款情况 Cashier payment status	付款总额 Total payment amount	本次付款金额 This payment amount	待付款总额 Pending payment amount	0.00



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**Form Workflow Approval**

# Form Workflow Approval - Form Approval Processing

## Pending Tasks:

- ① When a [System Message] alert appears in the bottom-right corner of the screen, it indicates a new task requiring your attention. Click the collaboration task title directly to access the processing page. Alternatively, navigate to the [To-Do Center] in your personal space, click the task title to enter the processing page, or click [Collaboration Tasks] under [To-Do Items] on the left side of the page. Select the task title from the list to access the processing page.
- ② Enter your processing opinion in the displayed text input field.
- ③ Click [Agree] or [Submit] to complete the task processing.

Message Set (0)

Ignore All See All

New Items New Meeting New Progr... Address b... My Tasks Tracking E... Add Shortcut

Work Center

1 近3月待办 58 Matters Issued

6 Pending Matters 10 知会

办公用品申请表(夏晓燕 2025-07-17 13:59)

Myself (0)

BIMS A Contract Approval Form 合同流程单 - 北京鼎泰康应用数字科技 BIMS A CONTRACT 2024080806

北京鼎泰康应用数字科技 合同流程单 (BIMS A Contract Approval Form)

合同名称 (Contract Name)	合同编号 (Contract No.)	合同日期 (Contract Date)	合同状态 (Contract Status)	合同类型 (Contract Type)
办公用品申请表	000000	2025-07-17	待审批	办公用品

意见回复填写区

事项处理区