Appendices

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Appendix 1: First interview with client

Interview with Athena Zuo, the founder of an engineering corporation.

Q – Question

A – Answer

January 12, 2023

Q: Thank you for taking the time to discuss your requirements for the financial management system. Let's begin by talking about the current reimbursement process. Can you describe how it works?

A: Certainly. Currently, our employees have to fill out paper forms for reimbursement and submit them to their respective managers for approval. It's quite cumbersome and inefficient.

Q: I see. So, the manual process of filling out forms and getting them approved is causing delays

and inefficiencies. Could you explain why you're looking for a reimbursement platform?

A: With the expansion of our business, the number of reimbursement requests has increased significantly. We need a more convenient and efficient way to manage and optimize the approval process. We want to digitize this process to save time and make it easier for employees to submit their reimbursement requests.

Q: That makes sense. In terms of the platform, what are the key characteristics or features that you would like it to have?

A: There are a few important characteristics we are looking for. Firstly, it should be easily accessible for both employees and managers. They should be able to use it anytime and anywhere without the need for any specific apps or installations. Secondly, the platform should offer complete functionality, replacing the old process entirely. It should allow employees to upload their reimbursement forms, provide feedback on the process, perform cost checksums, and manage the final results. Lastly, we are looking for an appropriate budget and timeline. We want a balance between quality and cost, and we prefer a development period that is not too long. Additionally, the deployment should be designed as a one-stop solution without requiring significant system rearrangement or extensive training.

Q: Thank you for sharing these requirements. We will consider all of these aspects while designing the reimbursement platform for you.

Appendix 2: Second interview with client

Interview with Athena Zuo, the founder of an engineering corporation.

Q – Question

A – Answer

January 27, 2023

Q: In our previous discussion, we talked about the characteristics and features you are looking for in the reimbursement platform. I'd like to dive deeper into some of those aspects. Firstly, could you elaborate on the accessibility requirements?

A: Sure. We want the platform to be easily accessible for our employees and managers. It should be available to them at any time and from anywhere, without the need for them to install any specific applications or environments. We want to make it as convenient as possible for them to access the platform and submit their reimbursement requests.

Q: That's clear. Now, regarding the functionality of the platform, you mentioned that it should completely replace the old process. Can you provide more details on what specific functions and features you would like to see?

A: Certainly. Along with the ability to upload reimbursement forms, we want the platform to provide process feedback. This means that employees should be able to track the progress of their reimbursement requests and receive updates on where their requests are in the approval process. Additionally, the platform should perform cost checksums to help employees identify and correct any errors in their reimbursement requests. Finally, it should enable efficient result management, allowing both employees and managers to view and track the final approval results.

Q: Thank you for clarifying those requirements. We will ensure that the platform encompasses all these functionalities to streamline the reimbursement process.

Appendix 3: Third interview with client

Interview with Athena Zuo, the founder of an engineering corporation.

Q – Question

A – Answer

February 4, 2023

Q: Welcome back. In our previous discussions, we covered the accessibility and functionality aspects of the reimbursement platform. Now, let's talk about the budget and timeline. Can you provide more details on your expectations in these areas?

A: Absolutely. We are looking for a balance between quality and cost. While we want a high-quality platform, we also need to ensure that the development period is not too long. We don't want the project to drag on indefinitely. Additionally, we would prefer a deployment process that doesn't require significant system rearrangement or extensive training. We want the platform to be implemented as a one-stop solution that can be easily integrated into our existing systems and workflows.

Q: Understood. Considering the scale of your company, what are your expectations in terms of the load and concurrent capacity of the platform?

A: Based on our analysis, the overall data volume wouldn't be enormous. We don't anticipate a large number of users accessing the platform within a short period of time either. So, we don't require an extremely high capacity in terms of handling concurrent users. However, it's important that the platform can efficiently handle the typical load and user activity expected in our organization.

Q: Thank you for providing these insights. We will take all of these factors into consideration while designing and developing the reimbursement platform to meet your requirements effectively.

Appendix 4: Final interview with client

Interview with Athena Zuo, the founder of an engineering corporation.

Q – Question

A – Answer

April 30, 2023

Q: Do you have any feedback on the first release of our financial management system?

A: Overall I think the functions are all very well implemented. I have checked some of the success criteria and found that they are all realized properly.

Q: Great, thank you for your appreciation. Are there any revisions I should make to improve the user experience?

A: First off, in the Roster section, it will be better if the manager can see some of the brief information about each employee, such as the email and the department, even if the manager does not click on the full information page. Secondly, you can add our company's logo to the login page.

Q: That's a good idea! I will do these two revisions and give you the final release before May 4th.

Appendix 5: User Manual

1. Install the dependencies in the file "requirements.txt"

   The list of dependencies:

   Flask
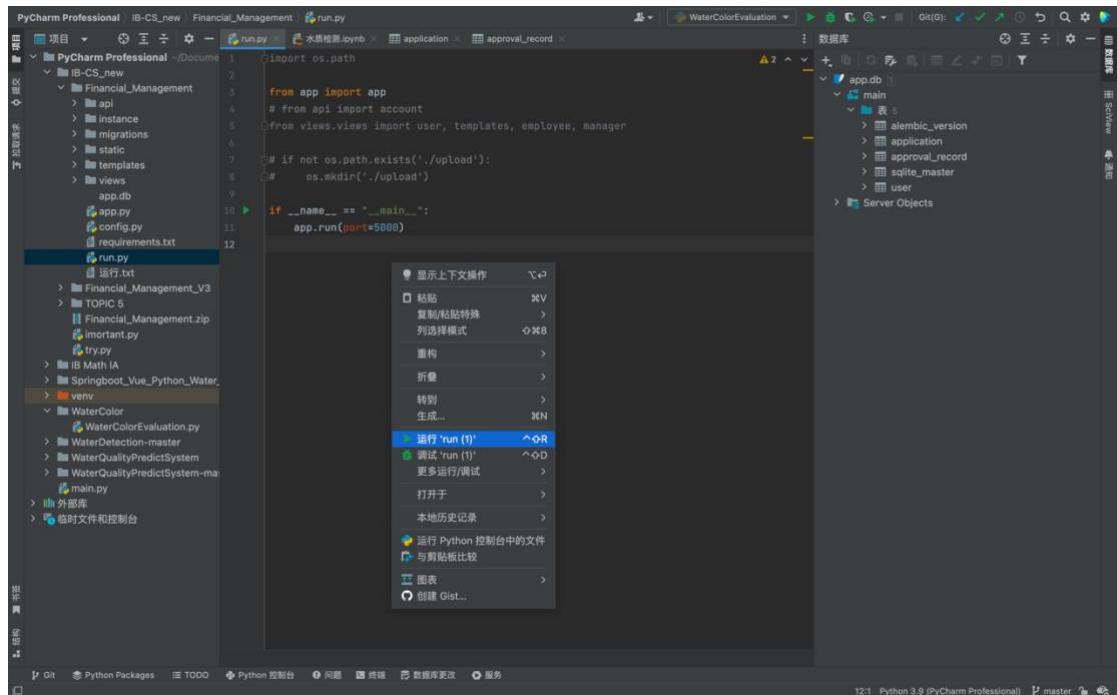
   Flask-Mail

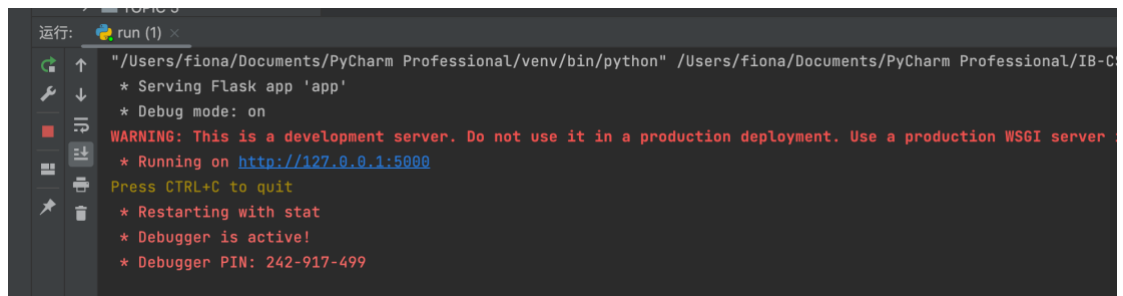**Flask-Migrate**

Flask-SQLAlchemy
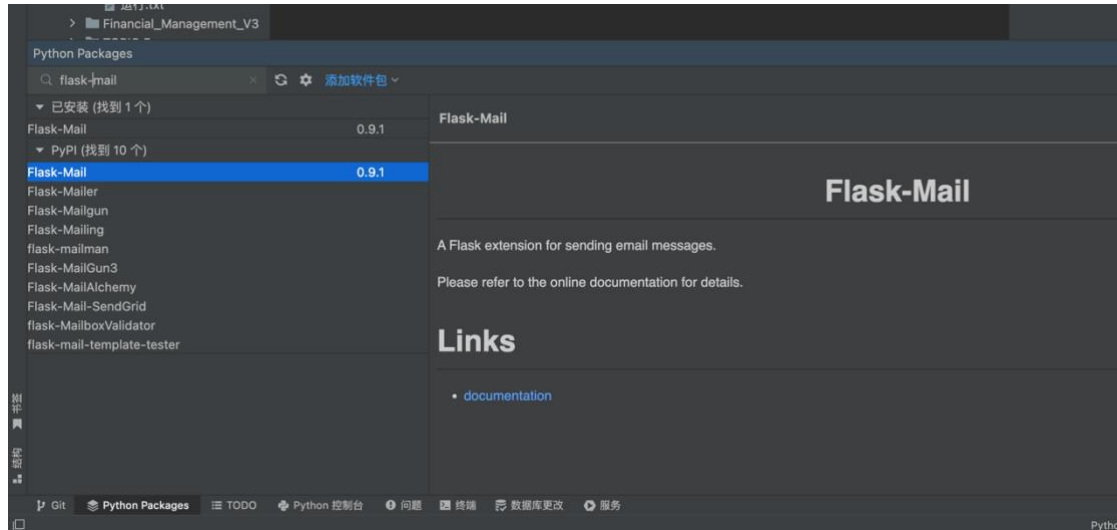
If you are using the Python IDE "PyCharm": Click the "Python Packages" button in the lower left corner, enter the dependency name, and follow PyCharm's prompts to install it.

2. Run the Python file "run.py"

3. A web page link (URL) will be popped up in the terminal. Copy the link and paste it into the

browser.


```
* default admin account:
email: admin@admin.com
password: 1234
```