

User Guide MES-ERP

Team #26, Ethical Pals

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Table 1: Revision History

Date	Author(s)	Change
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Contents

1	Introduction	3
1.1	Purpose of MES-ERP	3
1.2	Purpose of this Guide	3
1.3	User Roles Overview	3
2	Getting Started	4
2.1	Accessing the Platform	4
2.2	Logging In	4
2.3	Registering a New Account	4
2.4	Dashboard Overview (/dashboard/home)	5
2.5	Navigating the Platform (Header & Sidebar)	6
2.6	Theme Selection (Light/Dark)	6
3	Guide for Regular Users	7
3.1	Viewing Your Dashboard (/dashboard/home)	7
3.2	Submitting Payment/Reimbursement Requests (/forms)	7
3.3	Tracking Your Request Status (/dashboard/requests)	8
3.4	Managing Your Account Information (/dashboard/accountInfo)	9
4	Guide for Club/Group Admins	10
4.1	Dashboard Overview (Club-Specific)	10
4.2	Viewing Club Requests (Payment & Budget) (/dashboard/requests)	10
4.3	Managing Club Requests (Approving/Rejecting)	10
4.4	Submitting Payment Requests for Your Club (/forms)	10
4.5	Submitting Annual Budget Forms (/dashboard/annual_form)	10
4.6	(Optional) Managing Club Members (/dashboard/users)	11
4.7	(Optional) Managing Club Roles (/dashboard/roles)	13
4.8	Managing Groups (/dashboard/groups)	13
4.9	Managing the Operating Budget (/dashboard/operating_budget)	14
4.10	Viewing System Analytics (/dashboard/analytics)	14
5	Key Features Overview	16
6	Troubleshooting & FAQ	17
7	Contact Information	18

1 Introduction

1.1 Purpose of MES-ERP

The MES-ERP (McMaster Engineering Society - Expense Reporting Platform) is a web-based application designed to streamline financial operations for the MES and its associated student groups. It provides a centralized platform for submitting, tracking, and managing reimbursement requests, payment requests, and budgets efficiently and transparently.

1.2 Purpose of this Guide

This guide provides instructions on how to effectively use the MES-ERP platform based on your assigned role(s). It covers common tasks, navigation, and key features to help you manage your financial activities.

1.3 User Roles Overview

The platform uses a Role-Based Access Control (RBAC) system. Your capabilities within the application depend on the role(s) assigned to you. Common roles include:

- **Regular User:** Can submit personal requests and view their status.
- **Club/Group Admin:** Can manage requests, budgets, and potentially users/roles for specific groups they oversee.
- **System Admin (MES Staff/Exec):** Has broad access to manage users, roles, groups, requests, budgets, and system-wide settings.

2 Getting Started

2.1 Accessing the Platform

The MES-ERP platform is accessible via a web browser on desktops and laptops (Windows, macOS, Linux). It is also accessible on mobile devices (iOS, Android). Ensure you are using a modern browser like Chrome, Firefox, or Edge. The main URL is <https://macengsociety.ca/erp>.

2.2 Logging In

1. Navigate to the login page (typically the application's root URL or `/login`).
2. Enter your registered email address and password.
3. Click the **Login** button.
4. Upon successful login, you will be redirected to your dashboard (`/dashboard/home`).

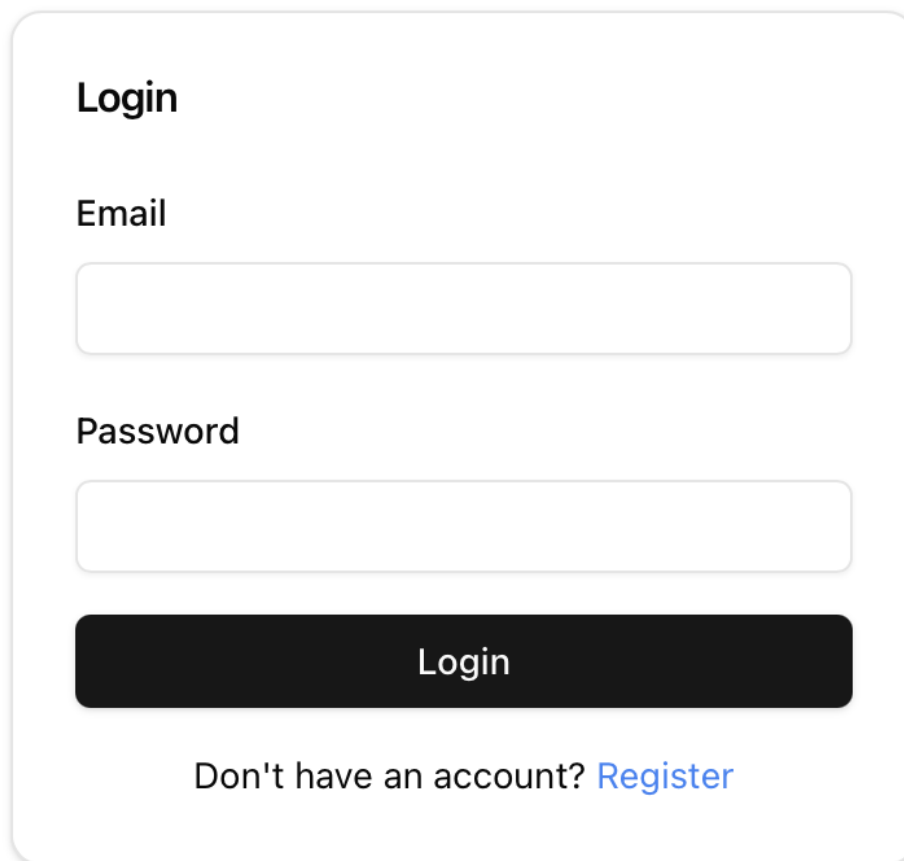
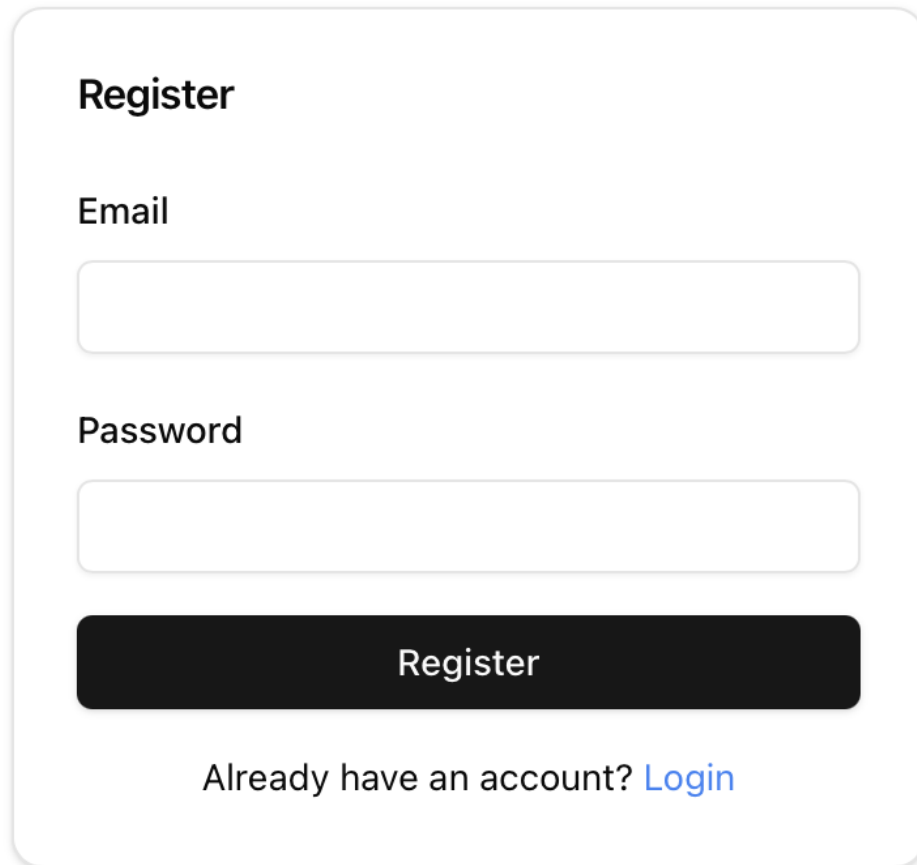
The image shows a login form within a light gray rounded rectangle. At the top, the word "Login" is displayed in a bold, black, sans-serif font. Below this, the label "Email" is followed by a white rectangular input field with a thin gray border. Further down, the label "Password" is followed by another identical white rectangular input field. Below the password field is a solid black rectangular button with the word "Login" in white, centered text. At the bottom of the form, the text "Don't have an account? Register" is shown, where "Register" is a blue hyperlink.

Figure 1: Login Page

2.3 Registering a New Account

1. From the login page, click the **Register** link.
2. Enter your email address and choose a secure password.
3. Click the **Register** button.
4. You may need to check your email to confirm your registration before you can log in.
5. Upon first login after registration, a user profile will be created for you with a default "user" role.

A registration form with a light gray background and rounded corners. At the top, the word "Register" is written in bold black text. Below it, the label "Email" is followed by a white rectangular input field with a thin gray border. Further down, the label "Password" is followed by another identical white rectangular input field. Below the password field is a solid dark gray button with the word "Register" in white text. At the bottom, the text "Already have an account?" is followed by a blue hyperlink labeled "Login".

Register

Email

Password

Register

Already have an account? [Login](#)

Figure 2: Registration Page

2.4 Dashboard Overview (/dashboard/home)

This is your main landing page after logging in. It provides a quick overview of relevant statistics based on your role:

- **Regular Users:** See stats for *your* submitted requests (count, total amount).
- **Club Admins:** May see stats for *your club's* requests (total count, amount, pending count) in addition to your personal stats, depending on permissions.
- **System Admins:** See system-wide stats (total requests, total amount, pending count, total users).

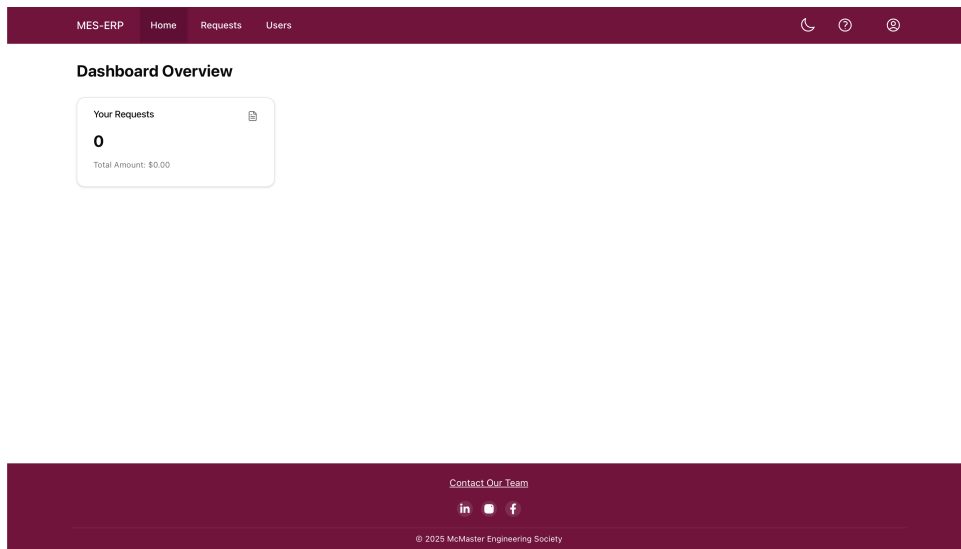


Figure 3: User Dashboard Home Page

2.5 Navigating the Platform (Header & Sidebar)

- **Header:** The header (maroon/dark blue bar at the top) contains the main navigation links (Home, Requests, Users, etc.). The links visible depend on your permissions. It also includes theme toggles, a link to this guide (</dashboard/guide>), and the user menu (profile icon).
- **User Menu:** Clicking the profile icon in the header opens a dropdown to access your "Account" page (</dashboard/accountInfo>) or "Sign Out".



Figure 4: Header with Navigation Links and User Menu

2.6 Theme Selection (Light/Dark)

Click the Sun/Moon icon in the header to toggle between light and dark themes. Your preference is saved locally in your browser.

3 Guide for Regular Users

3.1 Viewing Your Dashboard (/dashboard/home)

See section 2.4 for details. Your dashboard shows stats specific to *your* activity.

3.2 Submitting Payment/Reimbursement Requests (/forms)

1. Navigate to the **Requests Page** via the header link (/dashboard/requests).
2. Ensure the **Payment Requests** tab is selected.
3. Click the **Create New Payment Request** button. This redirects you to /forms.
4. **Fill out the form:**
 - **Group Selection:** Select the Club/Group this request is for from the dropdown. This is crucial.
 - **Basic Info:** Verify or fill in your name, email, phone. Select "Who Are You?" (e.g., MES Position, Club Member).
 - **Receipt Upload:** Upload an image (PDF, JPG, PNG) of your receipt OR provide a direct link to the receipt image. The system may attempt OCR to extract the total amount automatically.
 - **Role & Budget:** Select your role and the relevant budget line for this expense.
 - **Approval Info:** Enter the name of the individual or project approved for this expense.
 - **Team Info (If applicable):** Select sport/team name, conference details if relevant.
 - **Payment Details:** Specify if it's a Reimbursement or Payment, the currency, the amount requested (verify if OCR filled it), payment timeframe (date), and preferred payment method (E-Transfer, Direct Deposit, Cheque).
 - **Payment Method Details:** Provide necessary details based on your chosen method (e.g., email for E-transfer, bank info for Direct Deposit, address for Cheque).
5. Review all information carefully.
6. Click the **Submit** button. You should see a confirmation message.

MES Payment and Reimbursement Form

Group: Formula Electric

Basic Information

Submit Request For Group: Formula Electric

Who Are You?: Select Option

Email Address: motalas@mcmaster.ca

Full Name: Sufyan Motala

Contact Phone Number: 2267919714

Receipt Upload

Please insert an image of your receipt (PDF, JPG, JPEG, PNG accepted):

Choose File: no file selected

Link an image to your receipt

Enter image URL

Role & Budget Information

Role: Select role

Relevant Budget Line: Select budget line

Approval Information

Approved Individual / Project Name

Team Information

Sport and Team Name: Select Sport and Team Name

Conference/Competition Name (if applicable)

Conference/Competition Type (if applicable): Select Type

Figure 5: Reimbursement Form

3.3 Tracking Your Request Status (/dashboard/requests)

1. Navigate to the **Requests Page**.
2. The **Payment Requests** tab will display a table listing *only* the requests you have submitted.
3. The table shows the request details and the current **Status** (e.g., Submitted, In Progress, Approved, Rejected, Reimbursed).
4. You will receive email (and potentially SMS if configured) notifications when the status of your request is updated by an admin.

MES-ERP Home Requests

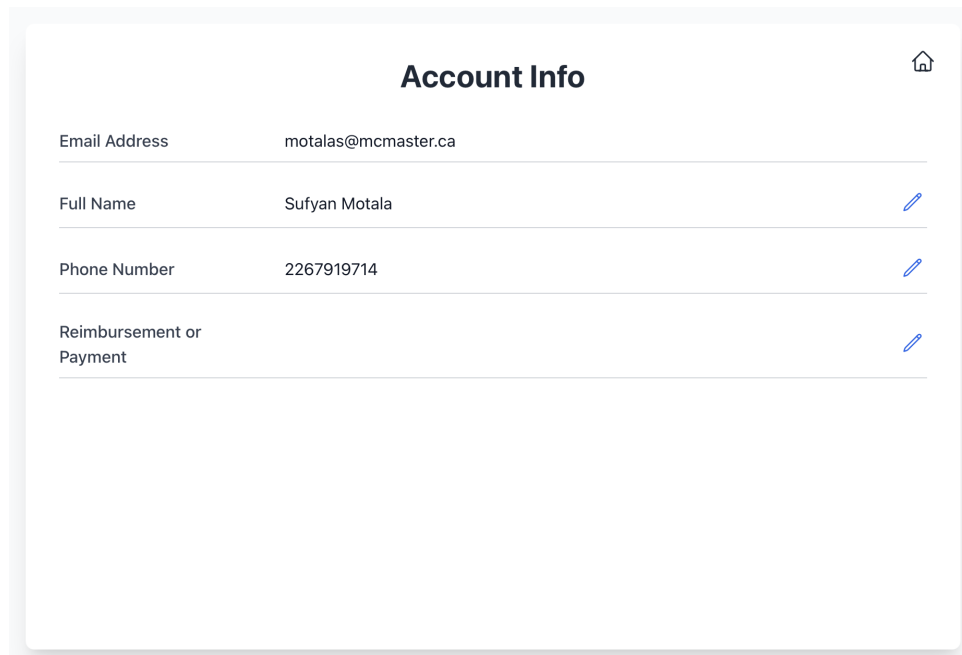
Payment Requests Budget Requests Create New Payment Request

Name	Role	Amount	Group	Timeframe	Type	Date	Status
Sufyan Motala	Student Projects and New Club Seed Funding	200	Formula Electric	2025-04-04	Reimbursement	2025-04-04, 8:29:32 PM	Pending View

Figure 6: Requests Page showing User's Requests

3.4 Managing Your Account Information (/dashboard/accountInfo)

1. Access this page from the user menu in the header.
2. View your profile details (email, name, phone number, default payment preference).
3. Click the pencil icon next to editable fields (like phone number, payment preference) to make changes.
4. Enter the new value and click the checkmark icon (✓) to save, or the X icon (X) to cancel.
5. **Note:** Your email address and assigned roles are usually not editable here and must be changed by an administrator.



The screenshot shows a web interface titled "Account Info" with a home icon in the top right corner. Below the title is a table with four rows of account information. Each row has a label, a value, and an edit icon (pencil) on the right. The rows are: Email Address (motalas@mcmaster.ca), Full Name (Sufyan Motala), Phone Number (2267919714), and Reimbursement or Payment. The edit icon is present for the last three rows.




Account Info		
Email Address	motalas@mcmaster.ca	
Full Name	Sufyan Motala	
Phone Number	2267919714	
Reimbursement or Payment		

Figure 7: Account Info Page

4 Guide for Club/Group Admins

(Requires specific permissions like `view_club_requests`, `manage_club_requests`, etc.)

4.1 Dashboard Overview (Club-Specific)

Your dashboard (`/dashboard/home`) may show aggregated statistics for the specific club(s) you manage, such as total requests, total amount spent, and pending requests within those clubs, in addition to your personal stats.

4.2 Viewing Club Requests (Payment & Budget) (`/dashboard/requests`)

1. Navigate to the **Requests Page**.
2. The tables here will display requests associated with the group(s) you have permission to view.
3. Use the tabs (**Payment Requests**, **Budget Requests**) to switch between request types for your group(s).

4.3 Managing Club Requests (Approving/Rejecting)

(Requires `manage_club_requests` permission)

1. On the **Requests Page**, you will see controls (e.g., a dropdown menu) in the "Status" column for requests belonging to your group(s).
2. Select a new status (e.g., "Approved", "Rejected") from the dropdown to update the request.
3. Updating a *payment request* status triggers an email/SMS notification to the submitter.

4.4 Submitting Payment Requests for Your Club (`/forms`)

Follow the same process as Regular Users (Section 3.2), ensuring you select the correct Club/Group in the form.

4.5 Submitting Annual Budget Forms (`/dashboard/annual_form`)

(Requires relevant budget permissions)

1. Navigate to the **Annual Budget Form** page (via sidebar or the "Budget Requests" tab on the Requests page).
2. Fill out the detailed form with projected income and expenses for the specified budget year for your club.
3. Submit the form for review by MES Finance/Execs.

MES-ERP
Home
Requests
Users
Groups
Analytics
Roles
Operating Budget

Back to Dashboard

Budget Form

Club / Team / Group:

Select a Club

Requested MES Funding:

Enter amount

Budget Year:

Select a Year

Income:

Source	Projected	Comments
Enter source	\$	Comments
Enter source	\$	Comments
Enter source	\$	Comments
Enter source	\$	Comments
Enter source	\$	Comments

Expenses:

Event	Source	Projected	Term	Comments
Enter event	Source	\$	Select Term	Comments
Enter event	Source	\$	Select Term	Comments
Enter event	Source	\$	Select Term	Comments
Enter event	Source	\$	Select Term	Comments
Enter event	Source	\$	Select Term	Comments

Total Income: \$0.00

Fall ____ Expenses: \$0.00

Winter ____ Expenses: \$0.00

Total Expenses: \$0.00

Surplus / Deficit: \$0.00

Submit Budget

Figure 8: Annual Budget Form

4.6 (Optional) Managing Club Members (/dashboard/users)

(Requires `manage_club_users` permission)

1. Navigate to the **Users** page.
2. You will see a list of users *only within the group(s) you manage*.
3. You may be able to assign group-specific roles (see below) to these users or potentially remove users *from your group*. You cannot manage users outside your assigned groups.

MES-ERPHomeRequestsUsersGroupsAnalyticsRolesOperating Budget

User Management

Email	Assigned Roles	Add Role
admin@mcmaster.ca	admin (Global)	No group (Global) Select role + Add
bennetts@mcmaster.ca	No roles assigned	No group (Global) Select role + Add
thompsol@mcmaster.ca	No roles assigned	No group (Global) Select role + Add
richarda@mcmaster.ca	Lead in EcoCar	
	Reimbursement Coordinator in Mars Rover Team	No group (Global) Select role + Add
	Club Admin in McMaster	
patelIn@mcmaster.ca	Budget & Reimbursements Officer in Mars Rover Team	No group (Global) Select role + Add
frasere@mcmaster.ca	Treasurer in Formula Electric	No group (Global) Select role + Add
clarkee@mcmaster.ca	Reimbursement Coordinator in Mars Rover Team	No group (Global) Select role + Add
atift@mcmaster.ca	admin (Global)	No group (Global) Select role + Add
housam4508@gmail.com	admin (Global)	No group (Global) Select role + Add
motalas@mcmaster.ca	User in Mars Rover Team	No group (Global) Select role + Add

Contact Our Team

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Figure 9: Users Management Page

4.7 (Optional) Managing Club Roles (/dashboard/roles)

(Requires `manage_club_roles` permission)

1. Navigate to the **Roles** page.
2. You can view, create, or modify roles *that are specifically assigned to your group(s)*.
3. You typically cannot create roles with high-level administrative permissions. Assign only the permissions needed for club operations.

Role Name	Scope	Groups	Actions
admin	Global	All groups	
Reimbursement Coordinator	Group Specific	Mars Rover Team	
Budget & Reimbursements Officer	Group Specific	Mars Rover Team	
Lead	Group Specific	EcoCar	
Treasurer	Group Specific	Formula Electric	
Club Admin	Group Specific	McMaster	
User	Group Specific	Mars Rover Team	

Figure 10: Roles Management Page

4.8 Managing Groups (/dashboard/groups)

1. Navigate to the **Groups** page.
2. Click **Create New Group** to add a new club/organization.
3. Edit group names directly in the table (if enabled) or via an edit action.
4. Delete groups using the Delete (trash) icon (typically only if no users or roles are assigned to them).

Group Name	Members	Actions
Mars Rover Team	4	
EcoCar	1	
Formula Electric	1	
McMaster	1	

Figure 11: Groups Management Page

4.9 Managing the Operating Budget (/dashboard/operating_budget)

1. Navigate to the **Operating Budget** page.
2. This interface allows detailed management of group budgets.
3. Add/remove groups using the buttons.
4. Add/remove budget line items within groups using the "+ Add Row" and "Remove" buttons.
5. Edit allocated amounts for different budget years (e.g., col_2024_2025) and line item labels directly in the table cells. The Change column (col_change) is usually calculated automatically.
6. Reorder rows within a group by dragging and dropping.
7. Use the **Save All** button to persist changes made on the page.

The screenshot shows the 'Operating Budget' page with a dark red header. The main content area is divided into two sections: 'Mars Rover Team' and 'EcoCar'. Each section has a 'Total: 0.00' label. Below each label is a table with four columns: 'Label', 'Amount', 'Type', and 'Actions'. The 'Mars Rover Team' table has 6 rows of budget line items, and the 'EcoCar' table has 6 rows. Each row has a 'Remove' button in the 'Actions' column. At the bottom of each table is a '+ Add Line' button.

Label	Amount	Type	Actions
Clubs, Teams, and Program Societies Funding	5000	Income	Remove
MES Funding	11000	Income	Remove
Chassis Materials	5000	Expense	Remove
Electrical Components	6500	Expense	Remove
Sensors	2500	Expense	Remove
Travel Expenses	2000	Expense	Remove
+ Add Line			

Label	Amount	Type	Actions
Clubs, Teams, and Program Societies Funding	10000	Income	Remove
MES Funding	2500	Income	Remove
Fundraising	3000	Income	Remove
Materials	5000	Expense	Remove
Car	10000	Expense	Remove
Print Materials	500	Expense	Remove
+ Add Line			

Figure 12: Operating Budget Page

4.10 Viewing System Analytics (/dashboard/analytics)

1. Navigate to the **Analytics** page.
2. View dashboards and charts summarizing financial activity across the *entire system*.
3. Analyze spending trends, status distributions, group spending, budget utilization, etc. Use the tabs ("Overview", "Detailed Analysis") for different views.

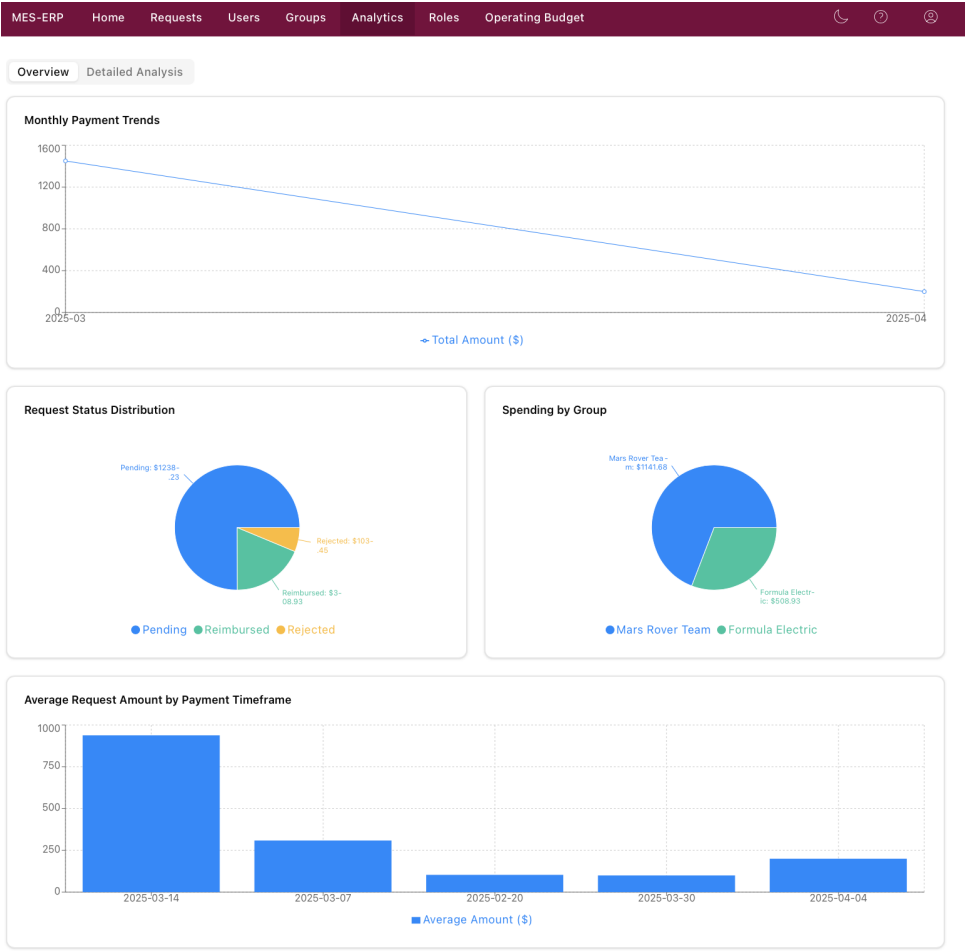


Figure 13: Analytics Page

5 Key Features Overview

- **Reimbursement Form & OCR:** The `/forms` page allows detailed submission of requests. It includes an OCR feature to automatically read the total amount from uploaded receipt images (PDF, JPG, PNG).
- **Budget Management:** The `/dashboard/operating-budget` page provides a powerful interface for admins to manage detailed budget lines for all groups. The `/dashboard/annual_form` allows clubs to submit their yearly budget requests.
- **Role-Based Access Control (RBAC):** The system uses a flexible RBAC model where permissions are tied to roles, and roles can be global or specific to certain groups. Users can hold multiple roles across different groups.
- **Notifications (Email/SMS):** Users are automatically notified via email (and potentially SMS if phone numbers are configured and Twilio is set up) when the status of their payment requests changes.
- **Analytics Dashboard:** The `/dashboard/analytics` page offers various charts and tables to visualize financial data, helping with oversight and decision-making.

6 Troubleshooting & FAQ

- **I can't log in.**
 - Ensure you are using the correct email and password.
 - Try resetting your password via the link on the login page (if available).
 - If you registered recently, check your email for a confirmation link.
 - Contact MES support if problems persist.
- **Why can't I see requests from other clubs?**
 - Access is based on your assigned roles and permissions. Regular users typically only see their own requests. Club Admins see requests for their specific club(s). Only System Admins can see all requests.
- **My request status hasn't changed.**
 - Processing times can vary. Please allow a few business days for review. You will receive a notification when the status is updated. If it takes unusually long, contact your club admin or MES Finance.
- **The OCR didn't read my receipt amount correctly.**
 - OCR accuracy can depend on image quality and layout. Please manually verify and correct the "Amount Requested" field in the form if the OCR result is inaccurate.

7 Contact Information

For technical issues or questions about using the MES-ERP platform, please contact:

- MES ERP Support: *[motalas@mcmaster.ca]*
- MES Finance: *[schuurml@mcmaster.ca]*