



Reimbursement Portal

By Gaurav Shrivastava

Introduction

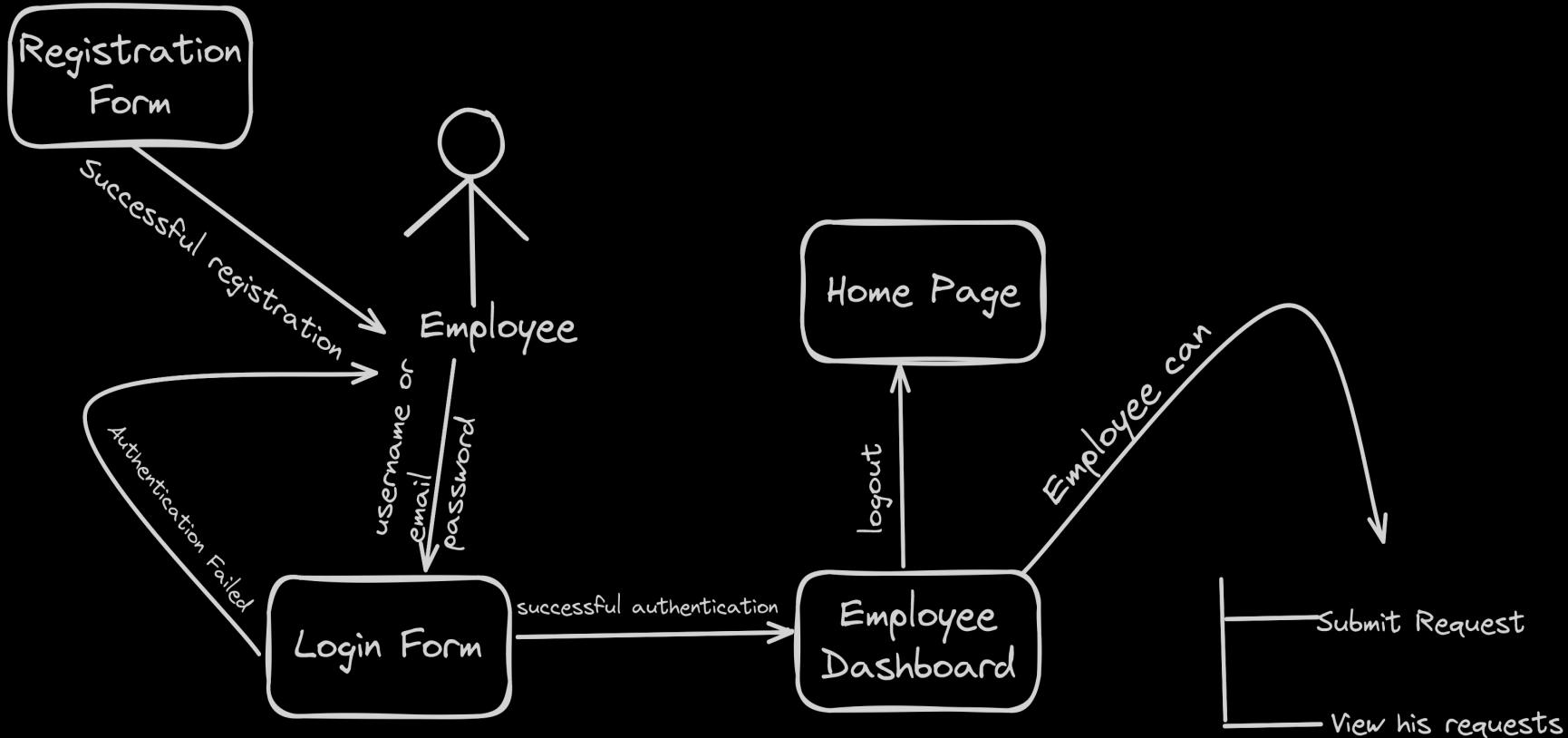
- Reimbursement Portal is an online portal where an employee can submit reimbursement claims related to relocation, travelling, and tech assets and the assigned manager can approve/reject the claims.
- If you're an employee, you can submit reimbursement requests and if you are Managers, log in to review and manage reimbursement requests of your team.

Functional Requirements

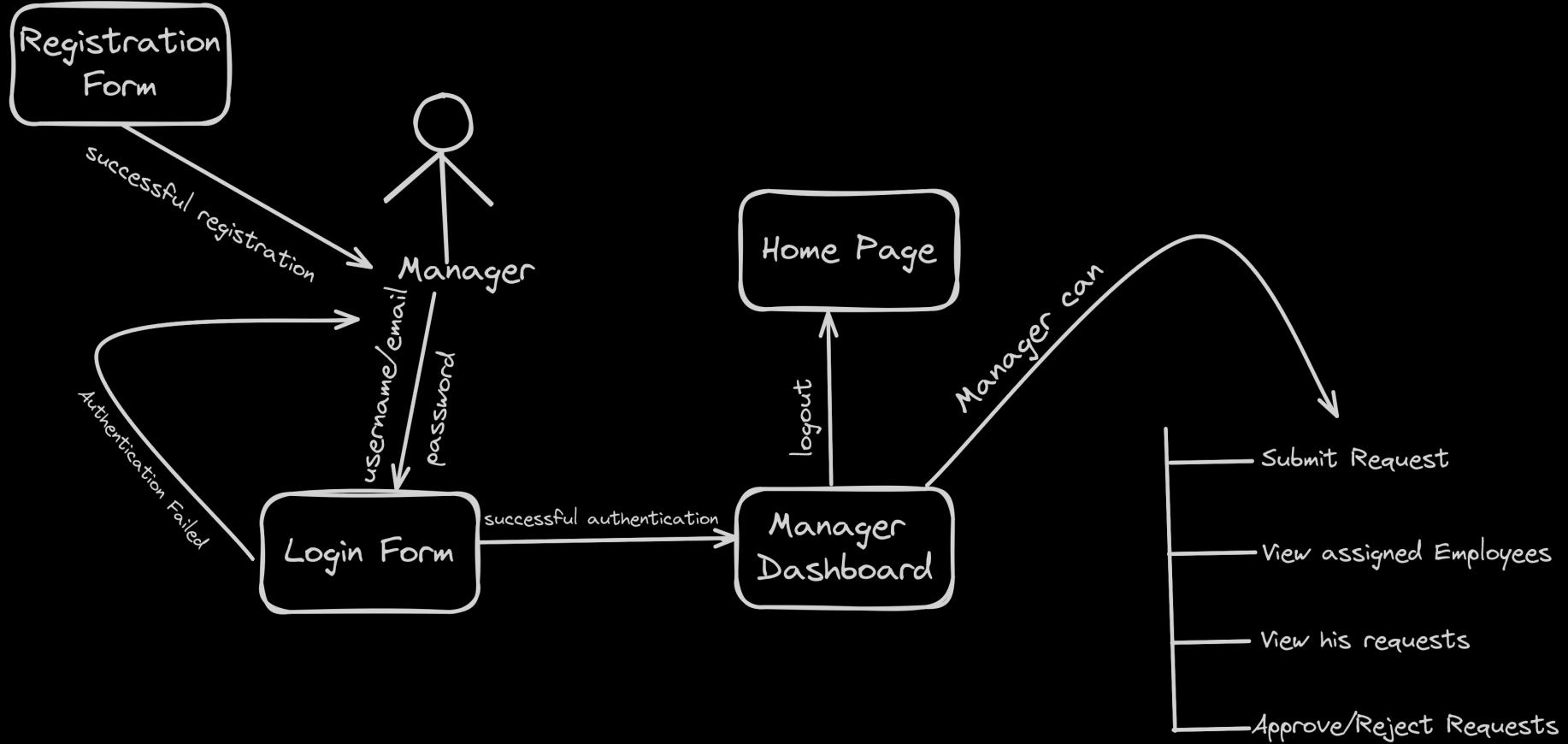
- Three user types: Admin, Manager, Employee.
- Managers and Employees register and login before any operations.
- Only company emails are valid for registration.
- Users must sign in before any operations.
- Employees submit reimbursement requests.
- Requests include expense type, amount, date, and image receipt.
- Managers approve/reject requests with comments.
- Policy categories: Traveling (15k), Relocation (20k), Tech assets (5k).
- Admin assigns managers to employees.

- Admin is the default manager until reassigned.
- Admin can delete employees and managers no longer in the organization.
- Admin can add or delete departments.
- New departments appear in the registration dropdown.
- One or more managers per department.
- Multiple employees under one manager.
- Requests directed to managers based on employee's department.
- Employees can view their requests, statuses, comments, and history.
- Comprehensive audit trail for each request.
- Users can upload jpg documents as supporting evidence.

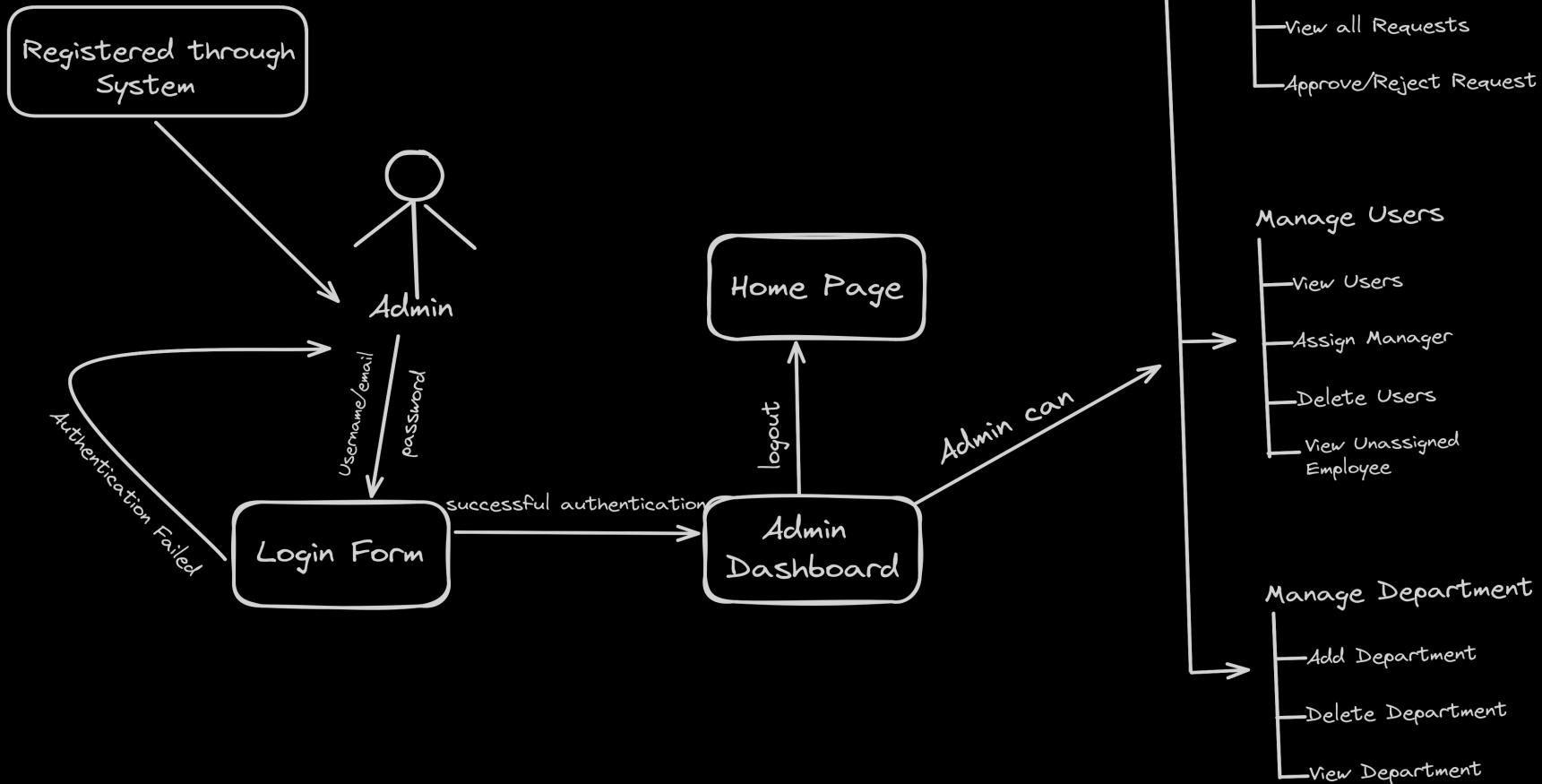
Employee Dashboard



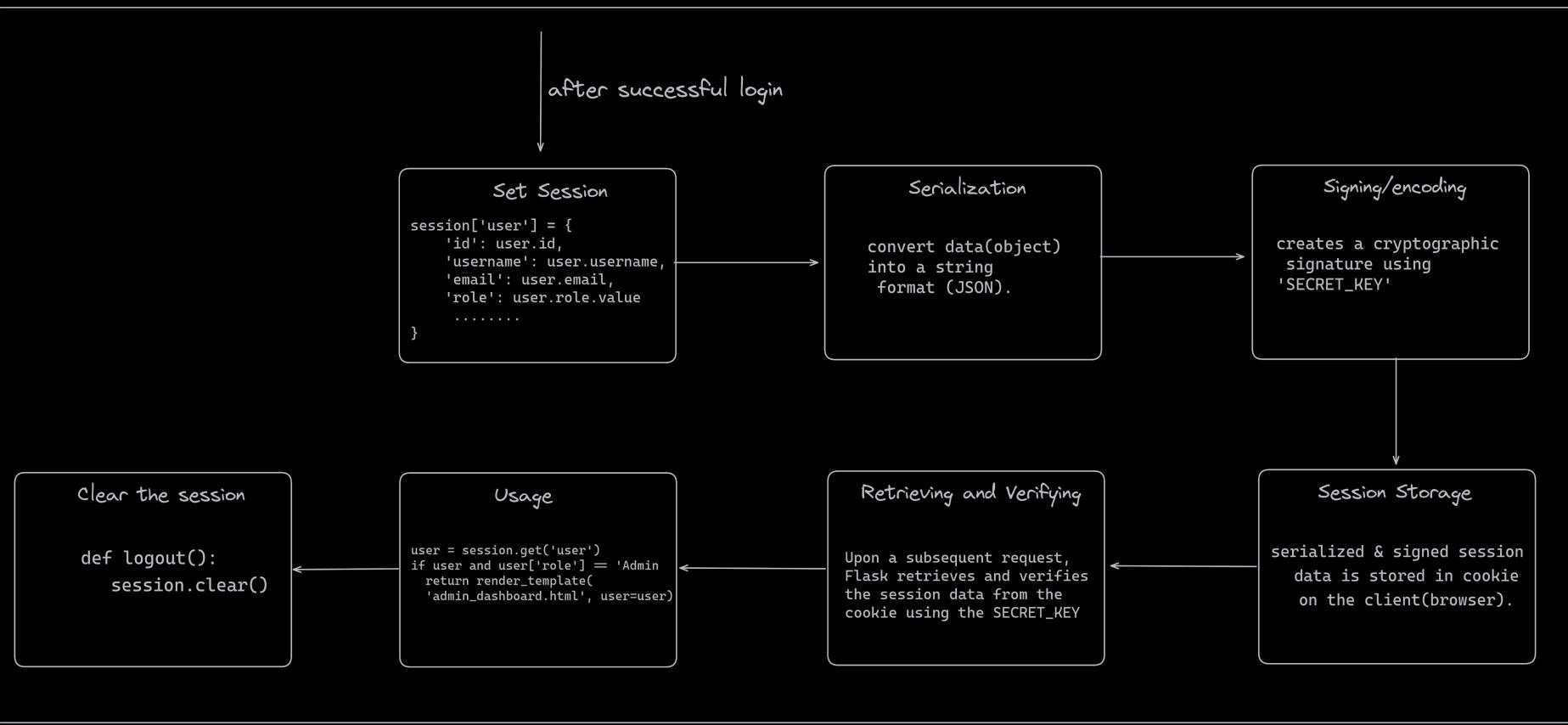
Manager Dashboard



Admin Dashboard



Session Management



User Model

Users		
Field	Type	Description
id	int	PK, auto_increment
username	string	unique
email	string	unique
role	enum	Admin, Employee, Manager
password_hash	string	
department_id	int	FK
manager_id	int	FK, self-referential
first_name	string	
last_name	string	
is_active	boolean	default = True
created_on	datetime	
deleted_on	datetime	

Reimbursement_request Model

ReimbursementRequest		
Field	Type	Description
id	int	PK
amount	float	notnull
date	datetime	notnull
description	string	
category	enum	Travelling, Relocation, TechAsset
status	enum	Pending, Approved, Rejected
employee_id	int	FK
manager_id	int	
manager_comment	string	
receipt_path	string	notnull
is_active	boolean	
created_on	datetime	
updated_on	datetime	

Department Model

Department		
Field	Type	Description
id	int	PK, auto_increment
name	string	unique

Relationships

- **User to Department:** One-to-Many
 - A department can have many users, but a user belongs to only one department.
- **User to User (Manager):** One-to-Many (Self-referential)
 - A user (Manager) can manage many users (Employees), but an employee has only one manager.
- **User to ReimbursementRequest:** One-to-Many
 - A user (Employee) can have many reimbursement requests, but a reimbursement request is linked to only one user.

ER MODEL

ER Diagram:

```

    classDiagram
        class User
        class ReimbursementRequest
        User "*" -- "1" ReimbursementRequest : canSubmit
    
```

ReimbursementRequest

Field	Type	Description
id	int	PK
amount	float	notnull
date	datetime	notnull
description	string	
category	enum	Travelling, Relocation, TechAsset
status	enum	Pending, Approved, Rejected
employee_id	int	FK
manager_id	int	
manager_comment	string	
receipt_path	string	notnull
is_active	boolean	
created_on	datetime	
updated_on	datetime	

Users

Field	Type	Description
id	int	PK, auto_increment
username	string	unique
email	string	unique
role	enum	Admin, Employee, Manager
password_hash	string	
departmenet_id	int	FK
manager_id	int	FK, self-referential
first_name	string	
last_name	string	
is_active	boolean	default = True
created_on	datetime	
deleted_on	datetime	

Department

Field	Type	Description
id	int	PK, auto_increment
name	string	unique

Technical Specification

Technologies Used:

- Backend: Flask, SQLAlchemy, MySQL
- Frontend: HTML, CSS, JavaScript
- Tools: VSCode, UnitTest for testing
- Logging module for generating application logs

Architecture:

- REST API developed in Flask
- Database: MySQL

Future Enhancements

- Store images in the cloud instead of the local file system.
- Deployment of the project.
- Make UI more attractive.

Snapshot of Home Page

Reimbursement Portal

[Home](#) [Login](#) [Register](#)

Welcome to Reimbursement Portal

Reimbursement Portal is an online platform where employees can submit reimbursement claims for various expenses such as relocation, medical, and office supplies. These claims are then reviewed and approved/rejected by their respective managers.

How It Works

Employees can easily submit reimbursement requests for various expenses such as travel, relocation, and tech assets.

Managers can review and approve/reject these requests, ensuring compliance with company policies.

Get Started

If you're an employee, submit your reimbursement requests now.

Managers, log in to review and manage reimbursement requests from your team.

Policy Details

Category	Maximum Amount
Traveling	\$15,000
Relocation	\$20,000
Tech Assets	\$5,000

Have Questions?

Check out our FAQ section for answers to common queries.

Snapshot of Registration Page

Reimbursement Portal

Home Login Register

Registration

Username:

Email:

Password: eye

Confirm Password: eye

Role:

First Name:

Last Name:

Department:

Register

Have an account? [Login](#)

© 2024 Reimbursement Portal

Snapshot of Login Page

Reimbursement Portal

[Home](#) [Login](#) [Register](#)

Login

Username or Email:

Password:

👁

Login

Don't have an account? [Register Here](#)

Snapshot of Employee Dashboard

Reimbursement Portal

Welcome to the Employee Dashboard

Username: pranjal

Full Name: pranjal Verma

Email: pranjal@nucleusteq.com

Role: Employee

Department ID: 27

Department Name: marketing

[Logout](#)

[Edit](#)

[Submit Reimbursement Request](#)

[Show my all requests](#)

Snapshot of Manager Dashboard

Reimbursement Portal

Welcome to the Manager Dashboard

Username: priya

Full Name: Priya Nanwani

Email: priya@nucleusteq.com

Role: Manager

Department ID: 27

Department Name: marketing

[Logout](#)

[Edit](#)

[Submit Reimbursement Request](#)

[See My Employees](#)

[Show my all requests](#)

[Show Requests for Updation](#)

Snapshot of Admin Dashboard

Reimbursement Portal

Welcome to the Admin Dashboard!

Username: gaurav

Full Name: Gaurav Shrivastava

Email: gaurav@nucleusteq.com

Role: Admin

[Logout](#)

[Edit](#)

[Add a New Department](#)

[See Department List](#)

[See User List](#)

[See Requests List](#)

[Show Requests for Updation](#)

[List of Unassigned Employees](#)

[Assign Manager](#)

Thank You