Admin Portal How-To Guide

Oxford House Expense Tracker

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Quick Start Guide

Get Started in 5 Minutes

This quick start guide will help you get up and running with the Admin Portal in just a few minutes.

Logging In

[SCREENSHOT: admin-portal-login]

1 **Navigate to the Portal**

Open your web browser and navigate to the Oxford House Expense Tracker web portal URL provided by your administrator.

2 **Enter Credentials**

Enter your email address and password on the login screen.

3 **Access Admin Portal**

After logging in, you'll be taken to your personalized Admin Portal (e.g., "John's Portal").

> **Tip: Bookmark the Portal**
>
> Bookmark the portal URL in your browser for quick access. You can also save your login credentials in your browser if your organization's security policy allows it.

Viewing system management

[SCREENSHOT: admin-portal-dashboard]

1 **Select Month and Year**

Use the month and year selectors at the top of the portal to choose which month's report you want to view.

2 **Navigate Tabs**

The portal has several tabs:

- **Daily Travel** - View and edit mileage entries
- **Receipts** - View and manage receipts
- **Hours Worked** - View and edit hours tracking
- **Daily Descriptions** - View and edit daily notes
- **Monthly Summary** - See totals and summary

3 **Review Your Data**

Click through each tab to review all your entries for the selected month.

Creating Your First Employee

[SCREENSHOT: admin-portal-submit]

1 **Review Completeness**

Before submitting, review your report to ensure all entries are complete and accurate. Check the "Check Completeness" button if available.

2 **Click Submit Report**

Once you've reviewed everything, click the "Submit Report" button in the header.

3 **Confirm Submission**

Confirm that you want to submit the report. Once submitted, you can no longer edit entries for that month (unless revisions are requested).

Important: Report Locking

Once a report is submitted, it is locked and cannot be edited unless your supervisor requests revisions. Make sure all entries are complete before submitting.

Comprehensive Reference

Portal Overview and Navigation

[SCREENSHOT: admin-portal-overview]

Portal Layout

The Admin Portal is designed to give you a comprehensive view of your expense data in a spreadsheet-like interface. The main components are:

Header Section

- **Month/Year Selector** - Choose which month's report to view
- **Employee Name** - Displays your name
- **Notification Bell** - Shows alerts and notifications
- **Action Buttons** - Submit Report, Check Completeness, Export PDF, etc.

Tab Navigation

The portal uses tabs to organize different types of data:

- **Daily Travel Tab** - Mileage entries organized by day
- **Receipts Tab** - All captured receipts
- **Hours Worked Tab** - Time tracking entries
- **Daily Descriptions Tab** - Daily notes and descriptions

- **Monthly Summary Tab** - Totals and summary information

Real-time Status Indicator

Look for the sync status indicator in the header. It shows:

- **Green** - Data is synced
- **Yellow** - Syncing in progress
- **Red** - Sync error (check your connection)

Viewing Mileage Entries

[SCREENSHOT: admin-portal-mileage-tab]

Daily Travel Tab

The Daily Travel tab shows all your mileage entries organized by day of the month. Each row represents a day, and you can see:

- Date
- Start location
- End location
- Miles traveled
- Mileage amount (calculated)
- Cost center
- Purpose/description

Editing Mileage Entries

1　　**Click on a Cell**

Click on any cell in the mileage table to edit it.

2　　**Make Changes**

Enter your changes in the edit field that appears.

3　　**Save Changes**

Press Enter or click outside the cell to save. Changes are saved automatically.

Adding New Mileage Entries

To add a new mileage entry:

1. Navigate to the Daily Travel tab

2. Click the "Add Entry" or "+" button

3. Fill in the required information (date, start location, end location, miles, cost center)

4. Save the entry

Tip: Bulk Editing

You can edit multiple cells in the same row. Just click on each cell you want to change, make your edits, and they'll all be saved together.

Viewing Receipts

[SCREENSHOT: admin-portal-receipts-tab]

Receipts Tab

The Receipts tab displays all receipts you've captured, either from the mobile app or uploaded through the web portal. For each receipt, you can see:

- Date
- Vendor/merchant name
- Amount
- Category
- Cost center
- Description
- Receipt image (thumbnail)

Viewing Receipt Details

1 **Click on a Receipt**

Click on any receipt in the list to view its details.

2 **View Full Image**

The receipt detail view shows the full receipt image and all associated information.

3 **Edit if Needed**

You can edit receipt details (amount, category, cost center, description) if the report hasn't been submitted yet.

Uploading Receipts via Web

If you need to upload a receipt through the web portal:

1. Go to the Receipts tab

2. Click "Add Receipt" or "Upload Receipt"

3. Select an image file from your computer

4. Fill in the receipt details (date, amount, category, cost center)

5. Save the receipt

Viewing Hours Worked

[SCREENSHOT: admin-portal-hours-tab]

Hours Worked Tab

The Hours Worked tab shows a grid view of your time tracking entries. The grid displays:

- Days of the month (columns)

- Cost centers (rows)

- Hours worked for each day/cost center combination

- Daily totals

- Monthly totals by cost center

Editing Hours

1 **Click on a Cell**

Click on any cell in the hours grid to edit hours for that day and cost center.

2 **Enter Hours**

Enter the number of hours worked. You can use decimal values (e.g., 7.5 for 7 hours 30 minutes).

3 **Save**

Press Enter or click outside the cell to save. The totals will update automatically.

Viewing Daily Descriptions

[SCREENSHOT: admin-portal-descriptions-tab]

Daily Descriptions Tab

The Daily Descriptions tab allows you to view and edit notes for each day of the month. This is useful for:

- Documenting work activities
- Providing context for expenses
- Meeting notes
- Important events or reminders

Adding or Editing Descriptions

1 **Select a Day**

Click on the day you want to add or edit a description for.

2 **Enter Description**

Type your description in the text field. There's no character limit.

3 **Save**

Click "Save" or press Enter to save the description.

Monthly Report Creation

[SCREENSHOT: admin-portal-monthly-summary]

Monthly Summary Tab

The Monthly Summary tab provides a comprehensive overview of your expense report for the selected month. It includes:

Summary Totals

- **Total Miles** - Sum of all mileage entries
- **Total Mileage Amount** - Calculated reimbursement amount
- **Total Receipts** - Number of receipts and total amount
- **Total Hours** - Hours worked for the month

Category Breakdowns

The summary shows totals by receipt category:

- Air/Rail/Bus

- Vehicle Rental/Fuel

- Parking/Tolls

- Ground Transportation

- Hotels/Airbnb

- Per Diem

- Phone/Internet/Fax

- Shipping/Postage

- Printing/Copying

- Office Supplies

- Other expenses

Cost Center Breakdown

You can see how expenses are allocated across different cost centers, helping you verify that everything is categorized correctly.

Report Submission Workflow

[SCREENSHOT: admin-portal-submission-workflow]

Before Submitting

Before submitting your report, it's important to:

1. **Review All Entries** - Go through each tab and verify all data is accurate

2. **Check Completeness** - Use the "Check Completeness" button to identify any missing information

3. **Verify Totals** - Check the Monthly Summary to ensure totals look correct

4. **Confirm Cost Centers** - Verify that expenses are allocated to the correct cost centers

Submitting Your Report

1   **Click "Submit Report"**

Click the "Submit Report" button in the header. This button is only available when viewing your own report for the current or past months.

2   **Confirm Submission**

A confirmation dialog will appear. Review the message and click "Confirm" to proceed.

3   **Report Locked**

Once submitted, the report is locked and cannot be edited. You'll see a status indicator showing "Submitted" or "Pending Approval".

4   **Notification Sent**

Your supervisor will receive a notification that your report is ready for review.

> **Important: Report Locking**
>
> Once a report is submitted, you cannot make changes unless your supervisor requests revisions. Double-check everything before submitting!

What Happens After Submission

After you submit your report:

1. Your supervisor receives a notification

2. The report status changes to "Pending Approval"

3. Your supervisor reviews the report

4. Your supervisor either approves the report or requests revisions

5. If revisions are requested, you'll receive a notification and can make the requested changes

6. Once approved by your supervisor, the report moves to finance for final approval

Viewing Report Status

[SCREENSHOT: admin-portal-report-status]

Status Indicators

The portal displays the current status of your report using color-coded chips or badges:

Status	Meaning	What You Can Do
Draft	Report is not yet submitted	Edit entries, add new entries, submit report
Submitted	Report is submitted and awaiting supervisor review	View only (cannot edit)
Needs Revision	Supervisor requested changes	Edit entries based on supervisor's comments
Approved by Supervisor	Supervisor approved, awaiting finance approval	View only
Approved	Fully approved by supervisor and finance	View only, export PDF

Approval Status Card

The portal includes an approval status card that shows:

- Current approval stage
- Who is reviewing the report
- Approval history with timestamps
- Any comments or revision requests

Notifications and Alerts

[SCREENSHOT: admin-portal-notifications]

Notification Bell

The notification bell in the header shows you important alerts and updates:

- **Report Approval** - When your supervisor or finance approves your report
- **Revision Requests** - When changes are needed
- **Report Status Changes** - Updates on your report's progress
- **System Messages** - Important announcements

Viewing Notifications

1 **Click the Bell Icon**

Click the notification bell in the header to open the notifications panel.

2 **Review Notifications**

You'll see a list of all your notifications, with the newest at the top.

3 **Click to View Details**

Click on any notification to view details or navigate to the relevant report.

4 **Mark as Read**

Notifications are automatically marked as read when you view them, or you can manually mark them as read.

Email Notifications

In addition to in-app notifications, you may receive email notifications for:

- Report submission confirmations
- Approval notifications
- Revision requests
- Weekly reminders (if enabled in preferences)

Profile Settings

[SCREENSHOT: admin-portal-settings]

Accessing Settings

To access your profile settings, look for a settings icon or your name in the header, then click to open the settings menu.

Available Settings

- **Profile Information** - View your name, email, position, and other details
- **Password Change** - Update your password (if allowed)
- **Preferences** - Configure portal preferences
- **Notification Preferences** - Control which notifications you receive

User Preferences

In the preferences section, you can configure:

- **Default Cost Center** - Set your most commonly used cost center
- **Email Notification Preferences** - Choose which email notifications to receive
- **Sunday Reminder** - Enable or disable weekly expense reminders
- **Portal Theme** - Light or dark mode (if available)

Tips & Best Practices

When to Submit Reports

Recommended Timeline

- **End of Each Month** - Submit your report within a few days of the month ending
- **Before Deadline** - Check with your supervisor for specific submission deadlines
- **After Completeness Check** - Always run the completeness check before submitting

> **Best Practice**
>
> Don't wait until the last minute to submit. Give yourself time to review and make any necessary corrections before the deadline.

How to Check Report Completeness

Using the Completeness Checker

1 **Click "Check Completeness"**

This button is available in the header when viewing your report.

2 **Review the Report**

The completeness checker will identify:

- Missing daily descriptions
- Days with mileage but no hours
- Days with hours but no mileage
- Missing cost center allocations
- Other potential issues

3 **Address Issues**

Fix any identified issues before submitting your report.

Manual Review Checklist

Before submitting, manually verify:

- All mileage entries have start and end locations
- All receipts have amounts and categories
- Hours are logged for all work days
- Daily descriptions are added for significant days
- Cost centers are correctly assigned
- Totals look reasonable

Understanding Approval Status

Approval Workflow

system management go through a multi-stage approval process:

1. **Draft** - You're still working on it
2. **Submitted** - You've submitted, awaiting supervisor

3. **Supervisor Review** - Your supervisor is reviewing

4. **Needs Revision** - Supervisor requested changes (you can edit again)

5. **Approved by Supervisor** - Supervisor approved, sent to finance

6. **Finance Review** - Finance team is reviewing

7. **Approved** - Fully approved and processed

What to Expect

- **Review Time** - Supervisors typically review within a few business days

- **Revision Requests** - Don't worry if revisions are requested - it's normal and helps ensure accuracy

- **Approval Notifications** - You'll be notified at each stage

- **Final Approval** - Once finance approves, your reimbursement will be processed

Tip: Be Proactive

If your report has been in "Submitted" status for more than a week, consider following up with your supervisor to ensure they received the notification.

Troubleshooting

Can't See My Data

No Data Showing

Problem: The portal shows no data for the selected month.

Solutions:

- Verify you've selected the correct month and year
- Check if you've created any entries for that month (via mobile app or web portal)
- Ensure your data has synced from the mobile app (if you use it)
- Try refreshing the page
- Check your internet connection
- Contact support if data should be there but isn't

Missing Entries

Problem: Some entries are missing from your report.

Solutions:

- Check if entries were created in a different month
- Verify entries were saved (not just started but not completed)
- If using mobile app, ensure sync completed successfully
- Check if entries were deleted accidentally
- Look in other months to see if entries were misdated

Report Won't Submit

Submit Button Disabled

Problem: The "Submit Report" button is grayed out or not clickable.

Solutions:

- Verify you're viewing your own report (not someone else's)
- Check that the report is in "Draft" status (not already submitted)
- Ensure you're viewing the current or past month (not future months)
- Try refreshing the page
- Check for any error messages in the browser console
- Contact support if the issue persists

Submission Error

Problem: You get an error message when trying to submit.

Solutions:

- Read the error message carefully - it may indicate what's wrong
- Run the completeness check to identify missing information
- Ensure all required fields are filled
- Check your internet connection
- Try submitting again after a few moments
- If the error persists, contact support with the error message

Missing Entries

Entries Not Appearing

Problem: Entries created in the mobile app don't appear in the web portal.

Solutions:

- Check the mobile app's sync status - ensure sync completed
- Verify the entries were created for the correct month
- Refresh the web portal page
- Check if entries were created but not saved
- Wait a few minutes and refresh - sync may be in progress
- If using offline mode on mobile, ensure you're back online and sync has completed

Entries Disappeared

Problem: Entries that were there before are now missing.

Solutions:

- Check if the report was submitted and locked (submitted reports may have different views)
- Verify you're viewing the correct month
- Check if entries were deleted (accidentally or by supervisor during revision)
- Look in the revision history if revisions were requested
- Contact support if entries should be there but aren't

General Issues

Portal is Slow

Problem: The portal loads slowly or is unresponsive.

Solutions:

- Check your internet connection speed
- Close other browser tabs to free up memory
- Clear your browser cache

- Try a different browser

- Disable browser extensions that might interfere

- Contact support if the issue persists

Can't Edit Entries

Problem: You can't edit entries that should be editable.

Solutions:

- Check if the report has been submitted (submitted reports are locked)

- Verify you're viewing your own report

- Check the report status - if it's "Approved", you can't edit

- If revisions were requested, ensure you're addressing the specific items marked for revision

- Try refreshing the page

- Contact support if you believe you should be able to edit

Sync Issues

Problem: Data isn't syncing between mobile app and web portal.

Solutions:

- Check the sync status indicator in the portal header

- Ensure you have an active internet connection

- Try manually refreshing the page

- In the mobile app, check sync status and try manual sync

- Wait a few minutes - sync may be in progress

- Contact support if sync consistently fails

Still Having Issues?

If you've tried the troubleshooting steps above and are still experiencing problems, contact your system administrator or technical support. Be prepared to provide:

- Description of the problem

- Steps you've already tried

- Browser type and version

- Screenshots of any error messages

- The month and year you're trying to view

This document is part of the Oxford House Expense Tracker documentation suite.

For technical support, please contact your system administrator.

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