

# Finance 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 Finance Portal in just a few minutes.

## Logging In

[SCREENSHOT: finance-portal-login]

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### 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 Finance Portal

After logging in, you'll be taken to your personalized Finance 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 expense reports

*[SCREENSHOT: finance-portal-dashboard]*

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### 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.

## Exporting Your First Report

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### 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. After submission, your report will be sent to your supervisor for review. You can continue to edit your report even after submission if needed.

#### Tip: Editing After Submission

You can continue to edit your expense report even after submitting it. Your supervisor will see the most current version when reviewing your report.

# Comprehensive Reference

## Portal Overview and Navigation

[SCREENSHOT: finance-portal-overview]

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## Portal Layout

The Finance 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

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## 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: finance-portal-receipts-tab]

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## 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: finance-portal-hours-tab]

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## 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: finance-portal-descriptions-tab]

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## 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: finance-portal-monthly-summary]

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## 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

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## 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 Submitted

After submission, your report will be sent to your supervisor for review. You'll see a status indicator showing "Submitted" or "Pending Approval". You can continue to edit your report if needed.

### 4 Notification Sent

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

## Report Submission Process

Understanding the report workflow:

1. Staff members submit their expense reports
2. Reports can still be edited by staff even after submission if needed
3. Reports go to supervisors for initial review and approval
4. Once supervisor-approved, reports reach the finance team
5. You review and can approve, reject, or request revisions
6. If revisions are requested, the report goes back through the workflow

## Viewing Report Status

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## Status Indicators

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

| Status                        | Meaning  | What You Can Do                                     |
|-------------------------------|--|---|
| <b>Draft</b>                  | Report is not yet submitted                        | Edit entries, add new entries, submit report        |
| <b>Submitted</b>              | Report is submitted and awaiting supervisor review | Can edit - report remains editable after submission |
| <b>Needs Revision</b>         | Supervisor requested changes                       | Edit entries based on supervisor's comments         |
| <b>Approved by Supervisor</b> | Supervisor approved, awaiting finance approval     | View only   |
| <b>Approved</b>               | 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

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## 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

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## 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

Expense reports 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 you're viewing the correct month and year
- 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:

- Refresh the page and try again
- 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

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

For technical support, please contact your system administrator.

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