Software User Manual

Version 1.0.0 6th April 2013

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Contents

3. **Manager**
   1. Vouchers submitted to you
4. **CEO Operations**
   1. Users List
   2. *exess* Reports
      1. New Report
      2. My Reports
5. **MD/System Administrator Operations**
   1. Add New User
   2. User Role Configuration
   3. Voucher Amount Configuration
   4. Company Policies
      1. Add New Policy
      2. View Policies
   5. Departments
      1. Add New Department
      2. View Departments
   6. Finance Manager Operations
      1. Check Vouchers to be Sanctioned
      2. Sanction the voucher
      3. Generate Ledger
5. **Error Messages and Recovery Procedures**
   1. Sending email failed due to network problem
   2. Claim limit exceeded while adding vouchers
   3. Acceptance limit exceeded while accepting vouchers
   4. Other errors

1.Introduction

1.1 Intended Readership

This document covers the use for the following users of the *Vowcher* system:

- Employee
- Manager
- Chief Executive Officer
- Managing Director
- Financial Manager
- System Administrator

1.2 Applicability

This Software User Manual (SUM) applies for *Vowcher* software v1.0.0

1.3 Purpose

The purpose of the SUM is to assist the user in installing and using the SPINGRID software.

1.4 How to use this document

- Chapter 2 gives an overview of the *Vowcher* software.
- Chapter 3 contains tutorials for installing and uninstalling the *Vowcher* software.
- Chapter 4 gives a detailed reference of how to use each and every feature.
- Chapter 5 gives a detailed explanation of the warnings and error messages.

1.5 Related Documents

Software Requirement Specification (SRS) documentation of *Vowcher* software.

1.6 Conventions

None

1.7 Problem Reporting

Errors or problems have to be reported to the System Administrator.

2. Overview

Vowcher provides a platform where the employee can submit his expense vouchers to his higher official to avail his claims. On the other side , managers and supervisors can track the expenses of his employees. In a nutshell , `Vowcher` is a single destination for a company's official expense management.

The product allows the reimbursement process in a company to be done in a very systematic and trackable manner whereby the employee has a clear idea of the status of his voucher and his manager/supervisor can be aware of the various types of expenses made by the employee. Both the employee and the executives can be benefited by the unique reporting feature that the user can generate, which provides comprehensive information about expense data , depicted graphically.

3.Tutorial

3.1 Installing the software

- Install WebSphere Application Server Community Edition after downloading the latest version for your OS.

- After installation is complete, start the server and log in to the Administrative Console.

- Install the given WAR file of the *Vowcher* software and run it.

- Install the back end DDL script given along with the package, to the DB2 console.

- Once the above step is complete, *Vowcher* with all its functionalities is ready to be used.

- Android SDK is required for the SMS notification feature to work. Install the latest Android SDK, along with ADB (Android Bridge).

- Send us your feedback by clicking the "Feedback" link on the footer.
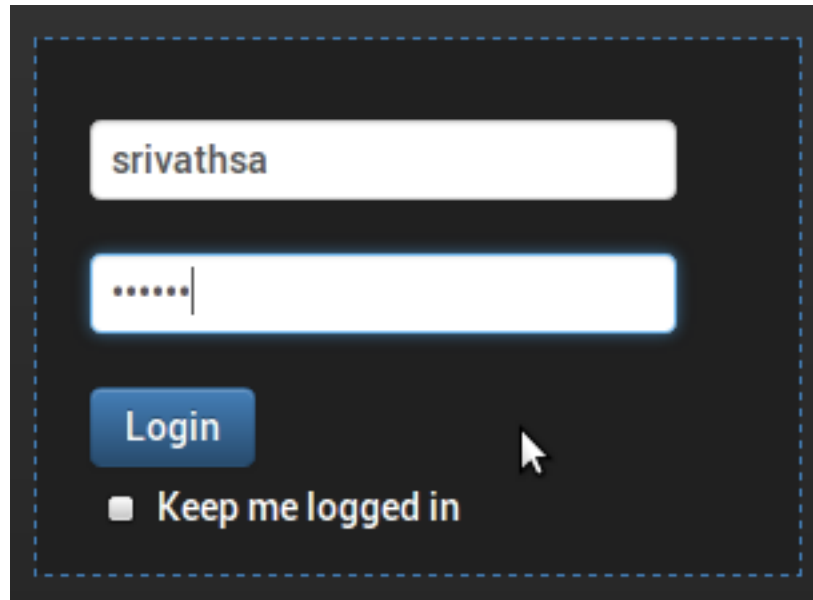
3.2 Uninstalling the software

- Uninstall the *Vowcher* software from the WebSphere Administrative Console.

- Remove the back end table from the DB2 console.

4.1 General Operations

4.1.1 Login

At the right top corner of the landing page, you will find the log in box. Enter your credentials and click the "Login" button. If you want the software to remember you every time you use the application click the check box "Keep me logged in"

4.1.2 Change Password
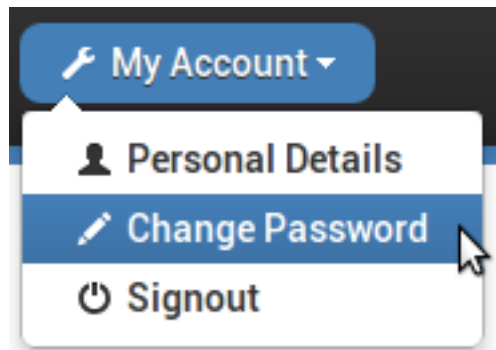
You can navigate to the "Change Password" page by clicking the "My Account" menu in the navigation bar.

Enter your old password, enter your new password twice and enter the security text as shown and change your password. You'll be notified through Email that your password has been changed.

4.1.3 Personal Details
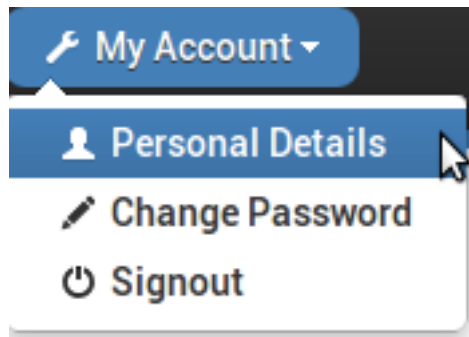
To view, edit or delete your personal details navigate to the "My Account" menu and click "Personal Details". You can view your personal details as shown below.

Srivathsa Venkatraman ✎ Edit   ✖ Delete

CEO - Records Department

🏠 Triplicane
👤 +24610463
★ +9176109911
✉ pv.srivathsa@gmail.com

☰ Recent Activity

• Added voucher hello	1 day ago
• Added voucher American Voucher	1 week ago
• Added voucher American Voucher	1 week ago
• Added voucher Limit Exceeds	2 weeks ago
• Added voucher date check	2 weeks ago
• Added voucher Status being set	2 weeks ago
• Added voucher Now Please	2 weeks ago
• Added voucher Fuel	3 weeks ago
• Added voucher My Voucher	1 month ago
• Accepted voucher - The last super submitted by Shruthi Shankaran	1 week ago
• Rejected voucher - The last super submitted by Shruthi Shankaran	1 week ago

ℍ User Hierarchy

Ranjith Ravichandran (Managing Director)

⬆

Srivathsa Venkatraman (CEO)

⬆

Venkat Raman (Chief Mgr-Records)

vowcher

4.1.4 Sign out

To sign out of *Vowcher* click "My Account" menu and click "Sign Out" and you will be logged out of the system.
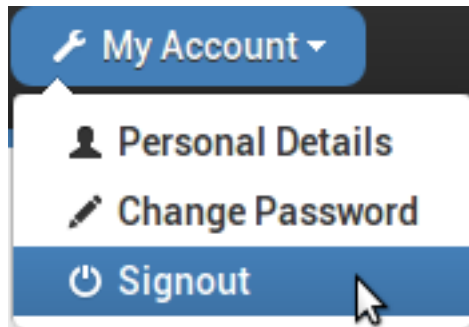
4.1.5 Switch GUI Language
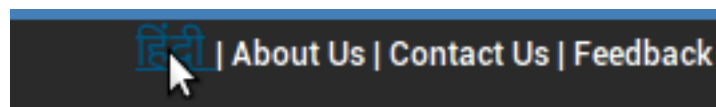
To switch your GUI language between English and Hindi, click the language link as shown above, which you can find in the footer.
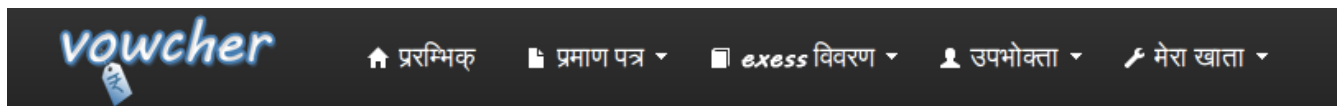
Once you've switched language to Hindi, you can see the change in menu and sidebar, as shown above.

4.1.6 Switch Currency
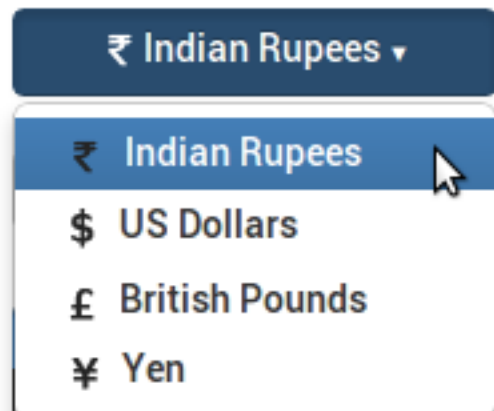
You can change the display of all currencies to any of the currencies shown above.

Once you've switched to American Dollar, you can see the change in the amount in the respective currency.

4.1.7 Bookmark Pages
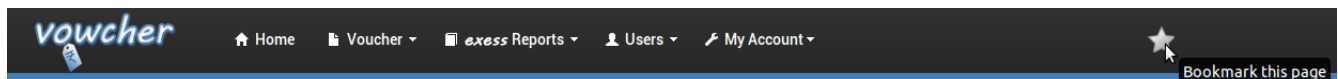
You can bookmark your favorite pages, by clicking on the star at the right top corner, present in the navigation bar, and giving a name for your bookmarks. Once you've done that, you can see the bookmarks at the sidebar as shown below.
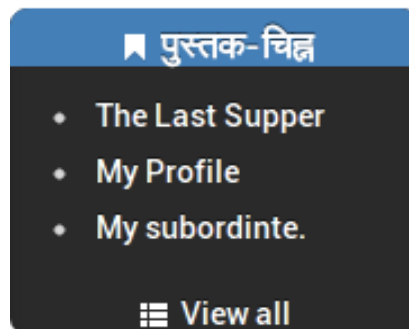
4.1.8 Search
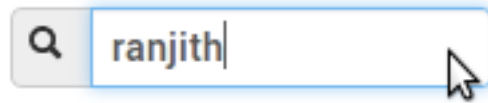
You can search for users and vouchers by typing your search query in the search box present in the left sidebar.

4.1.9 Money Management Tips

Vowcher provides you with money management tips for efficient planning and saving your expenses.

4.2 Employee

4.2.1 Add Voucher

Add new voucher

? Enter details about your voucher and submit to claim your expenses

📄 Create a new voucher

OR

↻ Create from an existing voucher

     You can create a new voucher by clicking Vouchers → New Voucher and you can see the above page. A voucher can be created freshly or from an existing voucher and you will be displayed a page as shown below where you can enter the related voucher details and add the voucher. You can even save the voucher as drafts and later complete it and submit it.

4.2.2 Edit Voucher

You can edit the voucher, before its status changes from "Pending" and change the essential details.

4.2.3 Check Status of a Submitted Voucher

Official trip to bangalore   ✖ Delete

Voucher Amount - ₹6185.0

Category - Conveyence

📅 Last update on 06 Jan 2013

☰ Description

> This is to inform you that i went to bangalore for an official trip

---

✉ Attachment

⚑ Status

Accepted by policy - overseas trips. Waiting for approval from higher authorities

Last update on 06 Apr 2013 at 02:13 PM by *Payal Singh*

Status History

Pending
Last update on 06 Apr 2013 at 02:12 PM by *Payal Singh*

    The current status of your voucher can be found out by checking out the voucher view page. The entire details about the status will be displayed.

4.2.4 View your vouchers

My Vouchers

Official trip to bangalore	✏ Edit	✖ Delete
The last super	✏ Edit	✖ Delete
Mail Voucher	✏ Edit	✖ Delete

+ Add New

You can check the list of your vouchers by click Vouchers → My Vouchers, where you can edit or delete the vouchers.

4.2.5 Notifications

moments ago

⚠ Your voucher **Computer & Accessoriesss** has been considered by **Ranjith Ravichandran**

moments ago

✔ Your voucher **Official trip to bangalore** has been accepted by **Payal Singh**

1 week ago

✖ Your voucher **The last super** has been rejected by **Srivathsa Venkatraman**

You will be able to view the status change of your voucher through Dashboard,Email and SMS notifications. The above images shows the various kinds of notifications that you might find in your dashboard

4.3 Manager

vowcher

4.3.1 Vouchers Submitted to you

As a manager you'll be able to view the vouchers submitted to you, through dashboard notifications.

4.4 CEO Operations

4.4.1 Users List
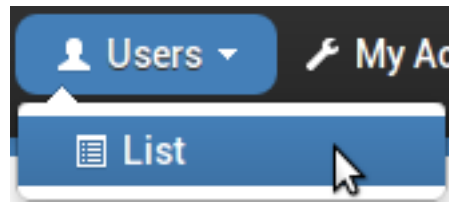
       As a CEO, you'll be able to view the list of users in your department and the list looks as shown below.

User List

Name	Department	Edit	Delete
Srivathsa Venkatraman	Records	✏ Edit	✖ Delete
Preethi Prabhakar	Records	✏ Edit	✖ Delete
Karthik Shivakumar	Records	✏ Edit	✖ Delete
Nivedha Raman	Records	✏ Edit	✖ Delete
Katrina Kaif	Records	✏ Edit	✖ Delete
Shwetha Tharoor	Records	✏ Edit	✖ Delete
Supriya Rajan	Records	✏ Edit	✖ Delete
Raghav Chandran	Records	✏ Edit	✖ Delete
Anand Kannan	Records	✏ Edit	✖ Delete
Prakash Choudhary	Records	✏ Edit	✖ Delete
Shruthi Shankaran	Records	✏ Edit	✖ Delete
Payal Singh	Records	✏ Edit	✖ Delete
Venkat Raman	Records	✏ Edit	✖ Delete

4.4.2 *exess* reports

4.4.2.1 New Report
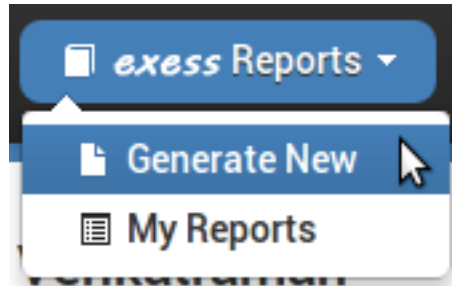
You can generate data reports related to your department by clicking *exess* Reports → Generate New and you'll be displayed a page as shown below. The types of reports and the explanation for it, will be found in the same page.

4.4.2.2 My Reports

My Reports

My new Report	✖ Delete
hey	✖ Delete
My chart	✖ Delete
abc	✖ Delete
graph!!	✖ Delete

You will be able to find a list of your reports by clicking *exess* Reports → My Reports where you can download a copy of the generated report and also you can delete the reports.

4.5 MD/System Administrator Operations

vowcher
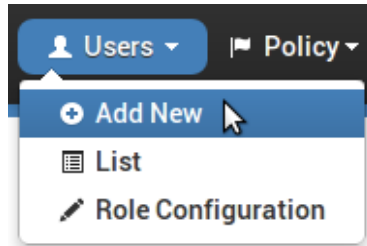
4.5.1 Add New User

As an MD or a System Administrator you'll be able to add new users to the system by clicking Users → Add New and enter the following details.
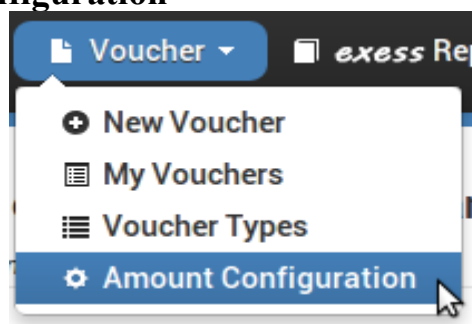

4.5.2 User Role Configuration
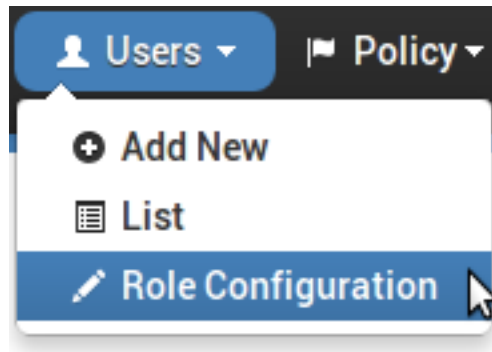
Users claim limit and acceptance limit can be set and edited as shown here.

Role Configuration

Role	Claim Limit	Acceptance Limit	Edit
employee	30000	0	✏ Edit
mgr	40000	150000	✏ Edit
ceo	150000	200000	✏ Edit
md	100000	1000000	✏ Edit

4.5.3 Voucher Amount Configuration

Vouchers' amount related configuration of flow limit is found in Voucher → Amount Configuration.

Amount Configuration

Lower Limit	Upper Limit	Max Count	Edit	Delete
100	5000	1	✏ Edit	✖ Delete
5001	10000	2	✏ Edit	✖ Delete
10001	25000	3	✏ Edit	✖ Delete
25001	100000	6	✏ Edit	✖ Delete

+ Add New

4.5.4 Company Policies

4.5.4.1 Add New Policy

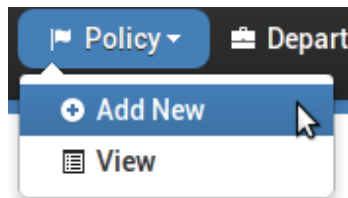| ⚑ Policy ▾	💼 Depart
⊕ Add New	
▤ View	

Company's policies can be added and configured by clicking Policy → Add New.

Add new policy

❷ Enter the details given below to create a new policy

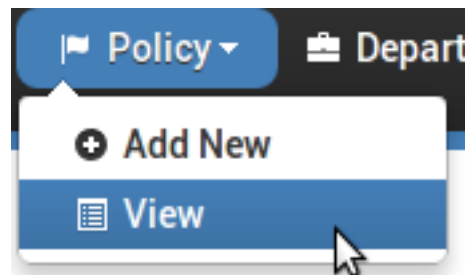| Policy Act 213 | | * |

| According to this policy | |

| 53 | % | * |

Available:
◉ Yes
○ No

+ Add Policy

vowcher

4.5.4.2 View Policies

Company policy details can be viewed by clicking Policy → View and following details will be displayed. Here you can Edit or Delete a company policy.

Policy list

| Policy Name	Description	Amount Percent	Available	Edit	Delete
allowable expenses	◆The reasonable costs of amounts necessarily expended on travelling in the performance of the duties of the employment for example to events external meetings training◆etc.	50.0	✔	Edit	Delete
hotel accommodation	Should be booked in advance at the best possible rates which should not exceed Rs.1300 per night (Rs.500 within the M25) including VAT but excluding breakfast costs.	74.0	✔	Edit	Delete
subsistence overnight absence	This will include hotel bills breakfast lunch evening meals and beverages of overall maximum of Rs.500 and parking at hotel	94.0	✔	Edit	Delete
overseas trips	Air travel should normally be by economy class or if outside India by business class.	91.0	✔	Edit	Delete
entertaining business	Employees should only entertain visitors and guests where it is likely to assist the corporate objectives. Wherever possible the cafe facilities should be used.	81.0	✔	Edit	Delete

4.5.5 Departments

4.5.5.1 Add New Department
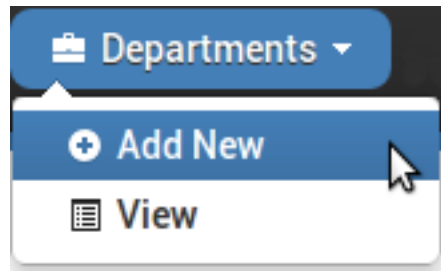
New departments can be added to the company by providing the following details.

4.5.5.2 View Departments

The list of all departments in the company, their users and the Edit and Delete options for the same, can be found in Departments → View.

4.6 Finance Manager Operations

4.6.1 Check Vouchers to be sanctioned

       As a finance manager of the company, once you log in you'll be able to find the vouchers which are awaiting to be sanctioned.

4.6.2 Sanction the voucher

       You can click the link shown in your dashboard notification, and you'll be able to find a "Sanction" button in the same page. Once you click it, the sanction process is complete.

4.6.3 Generate Ledger

       Monthly financial ledgers can be generated by clicking *exess* Reports → Generate New.

5. Error Messages and Recovery Procedures

5.1 Sending email failed due to network problem

This error usually occurs when you are not connected to the internet, while accepting,considering or rejecting a voucher that is awaiting your approval. Make sure that your internet connection is proper.

5.2 Claim limit exceeded while adding vouchers

Every user has a claim limit that is set by the System Administrator or your company Managing Director. This error occurs when you've crossed the claim limit for the particular month. Contact your System Administrator in this regard.

5.3 Acceptance limit exceeded while accepting vouchers

Every Manager or CEO has a limit on the total amount of vouchers that he/she accepts during a particular month. Contact your system administrator in this regard.

5.4 Other errors

For any other errors contact your System Administrator.