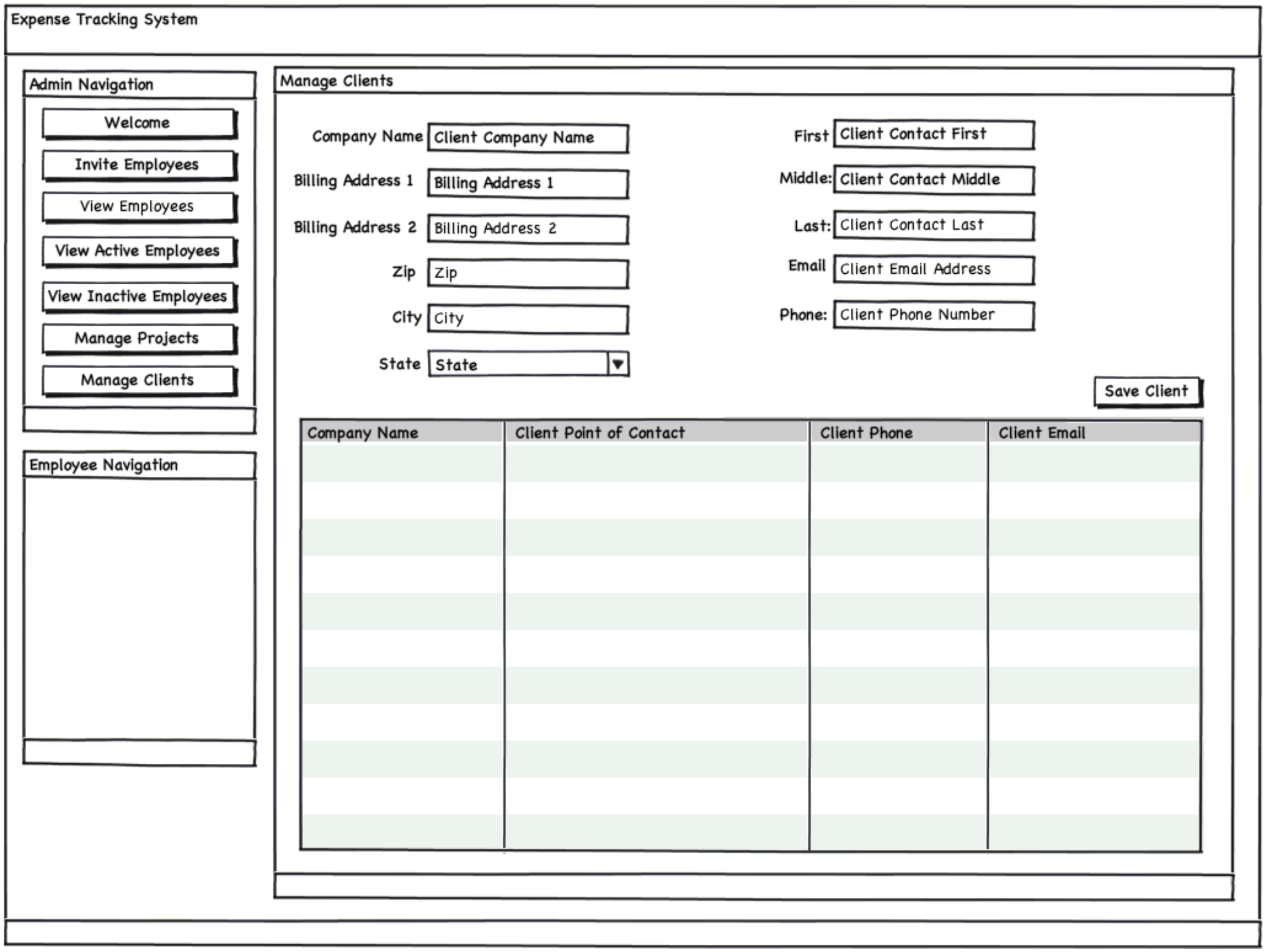

Manage Clients

1) For a person to be able to invoice their expenses to a client they need to establish the relationship with that client.
2) This can be done here on the manage clients screen

- All information is not displayed in the grid - only the high level pertinent information to a user.
- Clicking a row in the grid will populate the text inputs in case a change needs to be made to a record
- clicking save will update an existing record if it exists or create a new record

These records are used to associate many projects with one client.

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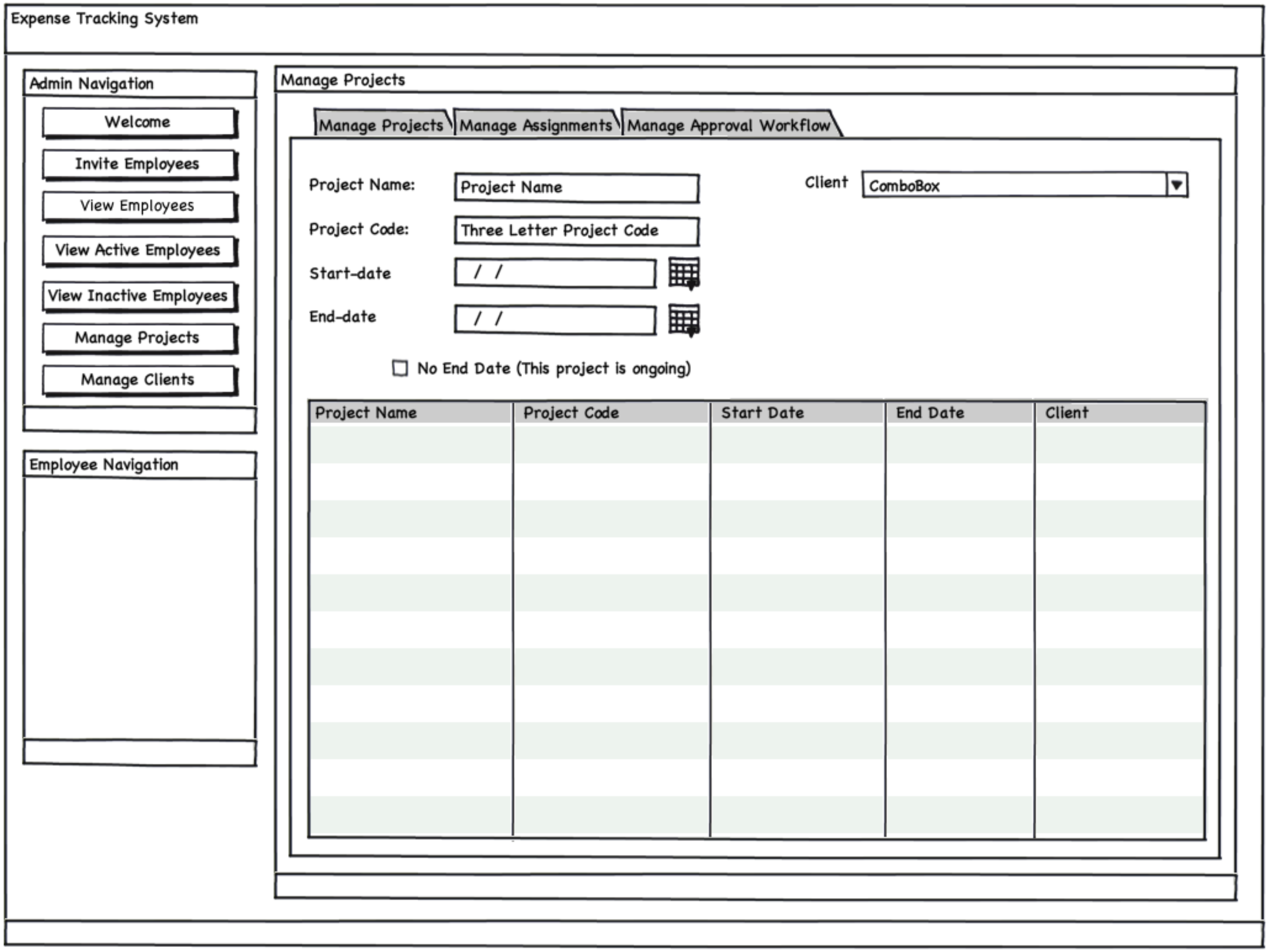

This screen will allow users to manage project metadata. Basic information about a project will need to be captured and also associated with a client company.
Later a screen can be built to show expenses accross all projects for a client in the reporting interface.

Selecting no end date will allow for notification systems to be built around closing out a project's expenses to remind users when they should have final expenses in.

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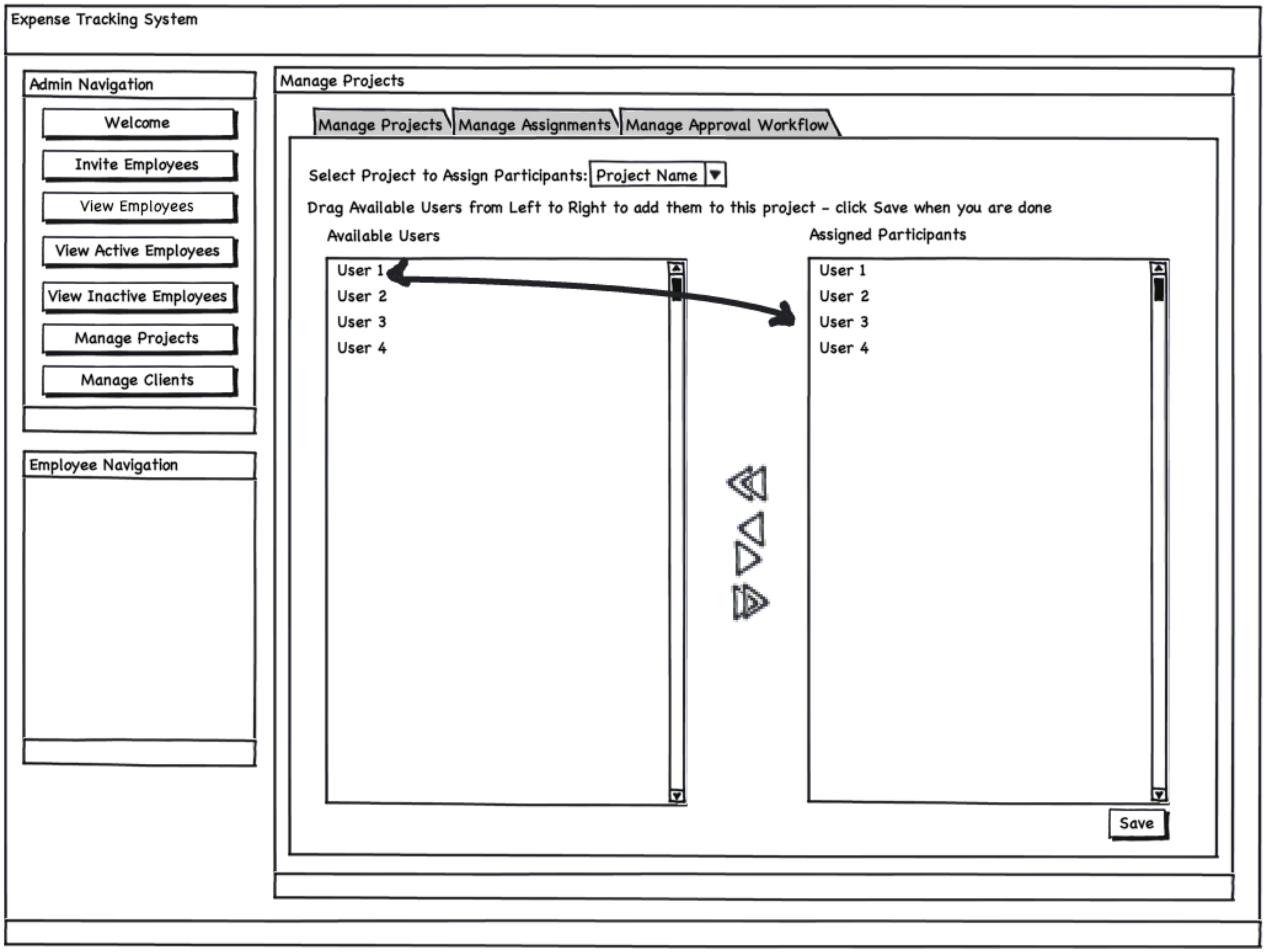

This screen will allow an administrative user to add participants to a project so that they can later be allowed to create expense reports for that project.

The flow would work such that a user is asked to select a project first.
Then they can drag users from left to right to add participants.
They can drag users from right to left to remove participants.
clicking save will cause the changes to be persistent.
Selecting a new project while changes have been made will prompt the user to save or discard their changes.
Clicking a new tab or navigation item will prompt a user to save their work before moving on if changes have been made.

The arrows between the two lists can be used to allow users not to use drag drop functionality to perform the same activities of adding/removing users.

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Expense Tracking System

Admin Navigation

- Welcome
- Invite Employees
- View Employees
- View Active Employees
- View Inactive Employees
- Manage Projects
- Manage Clients

Employee Navigation

Manage Projects

Manage Projects | Manage Assignments | Manage Approval Workflow

Select Project to Assign Participants: Project Name ▼

Create an approval workflow that submitted expense forms for this project will go through. It can be as simple as submitting to one user before being queued for client invoicing or it can go through multiple approvers.

⊕ Select User For Approval Work ▼

- Approver One ⊗
- Approver Two ⊗
- Approver Three ⊗

Dynamic Verbal Explanation of Workflow: Approver One will first approve expenses, Approver Two will approver expenses second, and finally Approver Three will finalize expenses for <CLIENTNAME>

Save

This will be a simple project specific workflow that will allow for one or more people to become the approvers for a submitted expense form.

A dynamic simple expression will be generated to explain in plain english what will happen when an expense is submitted.

The order of approvers can be drag/dropped reordered like a linked-list.

Removel of a user is as simple as dragging them out of the list and dropping or selecting the delete button beside their name.

Clicking save will persist all changes and navigation away from this screen will try to prompt a user to save their changes or discard them.

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