Expense report - User requirements doc

Objective

To create an expense report that

- spots departments that overspend
- track the movement of each department's expenses
- make smarter budget decisions

User details

→ Who's the user?

- The manager

→ What are they struggling with?

- They haven't got a clear view on who's spending what
- They only notice the problems once the money has been spent
- They want to catch issues early and stay within budget

→ What does success look like to them?

They want

- a table showing departments and their spendings

- a way to flag overspending automatically

- a visual that helps them understand where most of the money is going

→ What will we build?

Our table needs to include:

- the names of each department (department names)

- the category of each expense (category)

- what they're spending their budgets on (expense $)

- the budget amount (budget $)

- the flag to indicate when a department exceeds the budget or not (budget status)

Field names:

- department

- category

- expense ($)

- budget ($)

- budget status

Department	Category	Expense ($)	Budget ($)	Budget Status

We'll also include 2 visuals:

1. expenses vs budget for each department (clustered column chart)

2. how the expenses are distributed (tree map)