Expense Reimbursement System

User Guide

Introduction

Welcome to the Expense Reimbursement System! This system is designed to help employees easily submit and track their expenses for reimbursement. This guide will walk you through the process, from creating your account to receiving your reimbursement.

Creating an Account

If you don't have an account yet, you'll need to create one. Click the "Create Account" button on the login page. You'll be asked to enter your name, role, department, email address, and password.

User Roles

The system has three user roles: Employee, Manager, and Admin. Each role has different access and features. When you log in, you'll see a button for each role. Make sure to click the correct button for your role before entering your email and password.

Employee Guide

Submitting Expenses

To submit a new expense, click the "Submit New Expense" button on your dashboard. You'll need to fill out a form with the following information:

- **Title:** A brief description of the expense.
- **Category:** The type of expense (e.g., travel, meals, supplies).
- **Date:** The date the expense was incurred.
- **Amount:** The total cost of the expense.
- **Receipt:** A clear photo or scan of the receipt.

Once the form is complete, click the **"Submit"** button.

Managing Expenses

To view your submitted expenses, click the **"View Expenses"** button on your dashboard. You'll see a list of your expenses, including the title, category, amount, and status.

- **Editing Expenses:** If an expense is "Pending," you can still edit it. Click on the expense, make your changes
- **Approval Process:** Your manager will review the expense. If it's approved, the status will change to **"Approved."** If it's rejected, the status will change to **"Rejected."**

Manager's Guide

Viewing and Managing Employee Expenses

Log in as a manager to go to your dashboard, where you'll see a list of expense reports from the employees you supervise (e.g., Manager Jack will see reports from Max, Sarah, and Bob). You can click on any expense report to review the details.

- **Approving/Rejecting Expenses:** After reviewing an expense, you can approve or reject it.

Admin Guide

Accessing and Exporting All Records

Log in as an admin to access the dashboard, where you can view all employee expense reports.

- **Exporting Data:** To download all expense records, click the **"Export"** button. This will generate a CSV file containing all the data.