

# **Odin Health**

## Business Manager

### User Documentation

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# User Documentation

## Introduction

This user guide is to be used in conjunction with the Odin Health Business Manager. It contains all necessary information for the user including: background to the problem, requirement specifications, installation procedures, user guide and troubleshooting. All other technical information has either been included in the technical guide or the project documentation.

## Identification of the Problem

Currently, Odin Health uses a huge number of spreadsheets for tracking its business expenses, tracking expenses, wages, etc. This creates a very inefficient system in which a lot of time is wasted formatting and creating the spreadsheets as well as locating and collating them.

The current spreadsheet solution is very unorganised and requires the manual input of data across forms. Applications for reimbursements and such must also be manually sent via email or approved through phone calls. For a business, time is money, and it is vitally important that a system is as efficient as possible.

Thus as shown, the current system is inefficient and unorganised and a new system is required to keep all the data together and allow for automatic calculation and tasks.

## Identification of Prospective Users

Almost all employees in Odin Health would be using this system, as most employees will at one point require reimbursement for travel or business expenses. The employees will also most probably apply for travel or business expenses. Therefore, all the employees would need to be able to access this system.

The jobs range from Accountants to Developers, and thus all the different users have varying levels of computer experience. Due to this, the system will have to be user-friendly and very precise so that little or no training is required for the employees on top of the information provided in the User Manual.

## Requirement Specifications

The following specifications are based upon the investigation and analysis of the previous system and multiple interviews with the client. The specifications describe all the information, logic and requirements of the new system.

The new system must be able to fulfil the needs and requirements of the clients. It is important that the client and I agree on the same requirements otherwise the new system would be inefficient and perhaps a waste of time. The requirements specification is based upon the decision to use Visual Basic .NET and Microsoft Access 2013.

## General Requirements

1. The system must be efficient and quick to use.
2. Data should be stored and organised quickly and practically.
3. The user interface must be unambiguous and easy to navigate and use.
4. Reports must be able to be printed.
5. Back-ups of the database must be easy to perform.

## Hardware and Software Requirements

The new system must be able to be used on any computer running Windows 7, 8 or 8.1. A computer with a mouse, keyboard and printer would be necessary to utilise the system to its full potential.

The main database must be stored on the network so all employees can access it. Furthermore, an option to store the database locally (i.e. save it to a different directory), so that data may be accessed when the network cannot be accessed, is essential.

The new system must also be able to print reports to any printer that the client wishes. The required information must be able to be easily viewed and sorted for this printing.

The new system will be built on Microsoft Visual Basic .NET while using Microsoft Office Access 2013 to manage the database. This would require all Users computers to have the .NET Framework installed and relevant Microsoft Access Drivers or Microsoft Access 2013 to enable OLE DB (Object Linking and Embedding, Database) database connections.

## Database Requirements

The new system must be to store, organise and sort all of the following fields. Additionally, the user must be able to easily edit fields and add new records. The system must be able to prepare reports and sort them and allow the user to print these. Furthermore, the system must allow for the searching of records by different field parameters and display results.

The record structures and a data dictionary may be found further on in this documentation.

## The Objectives of the Solution

The solution must be able to:

1. Produce printable reports with the relevant data.
2. Add, delete and update Usernames, Passwords and Full Names (Accounts).
3. Provide a security barrier to prevent unauthorised access to the system.
4. Limit access to some sections of the system to selected Users.
5. Change the location of the database and back-up the database.
6. Allow users to send direct emails to the developer for Technical Support.
7. Allow users to apply for Travel or Business Expenses by filling in the relevant fields and sending a direct email to the CEO asking for approval.
8. Allow the CEO to approve user applications through the new system and send relevant emails if the application is approved,
9. Add, delete and search these applications for expenses and automatically assign tracking numbers.
10. Allow users to add, modify and delete travel and business expenses.
11. Add, edit and delete revenues and wages and all their relevant fields.
12. Display all this data in a table-based view.
13. Allow the entry, addition and deletion of data through a form-based interface.
14. Sort data based on specific fields.
15. Query data based on specific fields.

## Installation Procedure

### Prerequisites

The files required for installation are located on several USB drives which have been provided to Odin Health. They have also been securely stored on a cloud storage facility which also allows for any new updates to be pushed.

Firstly, it is important that the .NET Framework 4.5 and Access Database Engine are installed or else the program will not work. Normally, the .NET Framework is already installed on Windows devices but the Access Database Engine is not.

Follow the following link to download the .NET Framework Setup:

<http://www.microsoft.com/en-nz/download/details.aspx?id=30653>

Follow the following link to download the Access Database Engine (also included on the USB drives):

<http://www.microsoft.com/en-us/download/details.aspx?id=23734>

### Odin Business Manager Installation

Follow the following steps below after the prerequisite steps have been satisfied.

1. Insert the USB drive into the computer
2. Navigate to the 'Install' Folder on the USB and click on setup.exe
3. Follow the instructions on the InstallShield Wizard. Select a different directory to install in if needed.
4. Click Install. If a prompt appears asking for your approval then select 'Yes'.
5. The program has been installed and a shortcut is available on the desktop.

Then perform the following steps to begin using the program:

1. Open the Odin Business Manager
2. If the program is blurry and pixelated then right click on it, go to 'Compatibility' and check 'Disable display scaling on high DPI settings' and finally click 'OK'.
3. Change the database location from the Settings so that your database can work. (Click File then Settings on the login form)
4. Change the email for applications in the Settings form.
5. Use the Account Manager (Click File then Account Manager) to add an account to the database so that you can login to the system.

Please note that unhandled errors may appear if the database location is not set correctly so it is beneficial to do so before using the program.

## Backup Routines

As with all computer systems, it is extremely important that all data is backed up so that if data is accidentally deleted it may be restored. Furthermore, backups allow for rollbacks to previous times. It is impossible to determine when data loss or corruption could occur and thus the database should be backed up frequently (preferably once a day).

The installation files and documentation have been uploaded into the cloud so that they may be accessed in all cases. Please contact your technical support for the link.

### Using the Backup Function

The Odin Health Business Manager contains a very useful feature by which you can back up the database through the program. To do this, one must first navigate to the 'Settings' form and then follow the instructions below:

1. Click on the 'Backup' button [Fig 1.1]
2. Select the folder or directory you want to back up the database to and then click 'OK'. [Fig 1.2]
3. The database has been backed up to the location you specified.

The 'Settings' form will indicate when you last backed up the database for recording purposes. Furthermore, it will output a success if the database is backed up successfully. Please ensure to keep multiple copies of the backup in different locations for good back up measures.

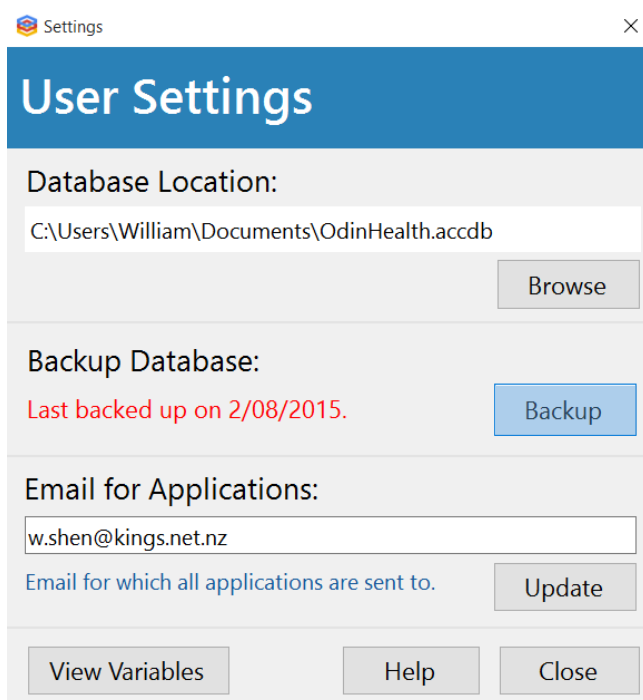


Fig 1.1

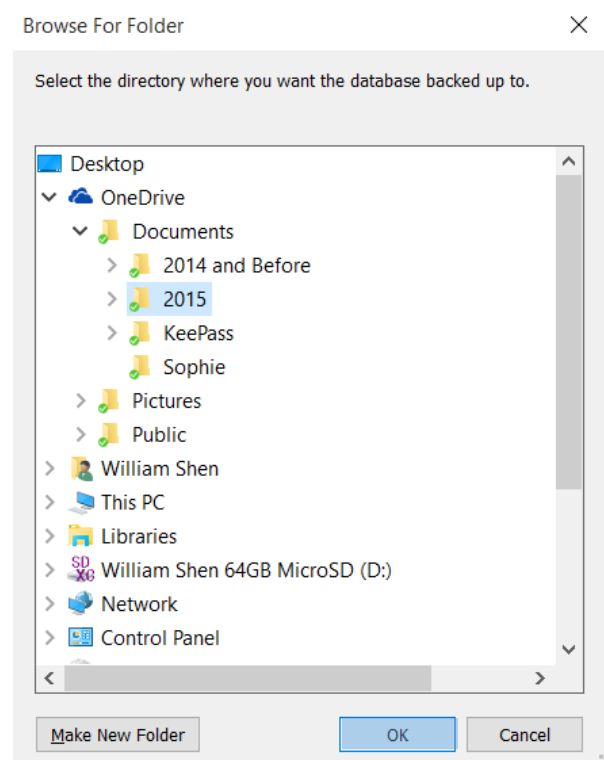


Fig 1.2



## Guide to Common Errors

Below is a table of common errors, their meanings and how to 'solve' them. Many errors are self-explanatory.

Error	Description	Solution
Please ensure all fields are filled out correctly	Some controls may have been left blank or are invalid (e.g. KiwiSaver > Gross Pay)	Ensure all fields have been filled in with valid data. Refer to the validation rules on the next page.
Please select a record from the table.	Occurs when clicking 'View or Edit' or 'Delete' without selecting an item on the ListView.	Select your desired item from the ListView (table) and then click the relevant button.
Application successfully added into database but email did not successfully send.	Your application was added to database but the email could not send to the recipient.	Ensure you are connected to the internet, delete the application then reapply or directly contact CEO.
The table 'Accounts' is empty.	Occurs when no accounts exist in the database.	Use the Account Manager to add an account to the database and use it to login.
The username or password you have entered is incorrect.	Either the username or password you entered and tried to login with were not correct.	Use the Account Manager to check add, delete or update accounts.
No data found.	No data could be found in the database for your specific search query.	Use different filters to find the data you require.
Something went wrong. The email could not be sent. Please try again later.	Your email to contact support could not be sent successfully.	Ensure you are connected to the internet then resend the data.

## Validation Rules

The following are the rules for validation on each relevant form. A large majority of 'validation' has already been carried out in the program by restricting user input and thus have not been included here (e.g. no letters in currency textboxes).

Form	Rule
Business Expense – New Business Expense – View and Edit	All controls contain text.
Business Expense Applications – New Business Expense Applications – View and Edit	All controls contain text.
Contact Support	All controls contain text, checkbox checked and email address is valid.
Investment	All controls contain text.
Revenues – New Revenues – View and Edit	All controls contain text.
Travel Applications – New Travel Applications – View and Edit	All controls contain text.
Travel Expense	All controls contain text and length of currency type is exactly 3 characters (e.g. RMB)
Wages – New Wages – View and Edit	All controls contain text, the net pay is greater than 0, and gross pay is bigger than PAYE and KiwiSaver.

## Performing Common Tasks

The following list of tasks has been produced based on application start order (i.e. when the program is first started what tasks should be carried out)

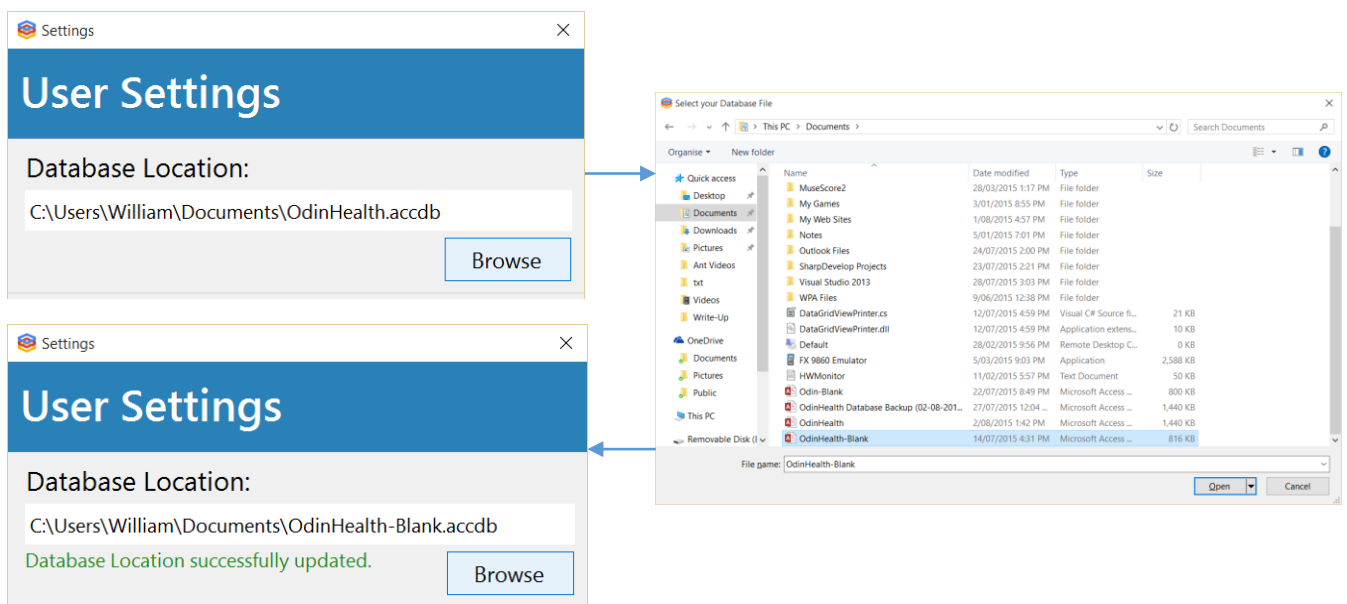
### Settings

#### Changing the Database Location

You must change the database location before using the program for the first time. First copy the database file from the setup USB drive into a directory of your choice.

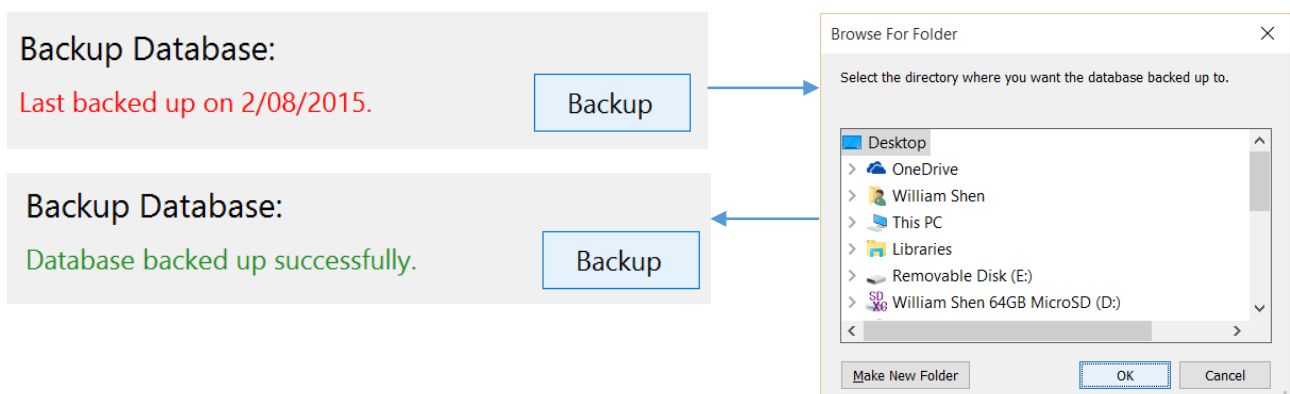
Next, go to the Settings form and click 'Browse' in the database location section then select your database file and click 'Open'. The database location should now update.

The program will ask you if you want to restart or not. It is recommended you select 'Yes' in most if not all situations.



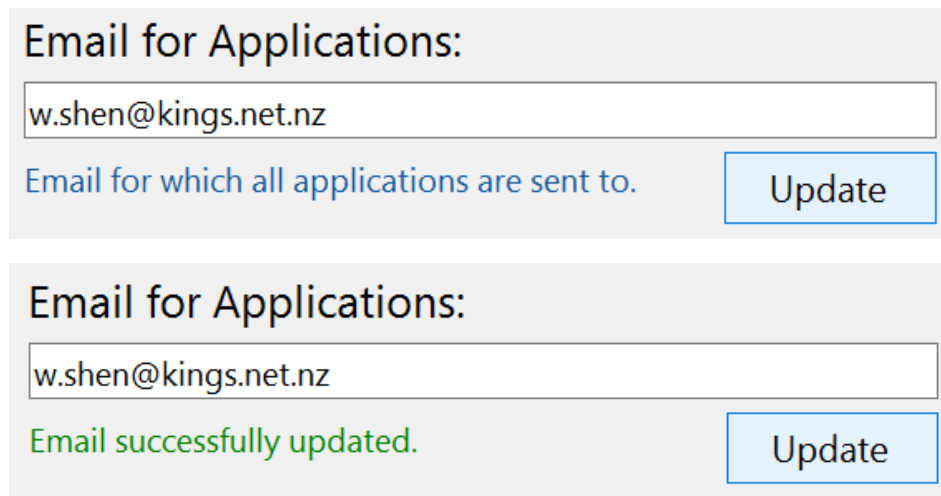
#### Making a Backup

It is important that the users maintain good backup routines. To back up the database, select 'Backup' and then choose the directory where you wish the database to be backed up to and then click 'OK'.



## Updating the Email to which Applications are sent to

To update the application email type in the new email into the textbox and then click 'Update'. Ensure that the email address is valid or else it will be rejected by the system.



**Email for Applications:**

w.shen@kings.net.nz

Email for which all applications are sent to.

**Email for Applications:**

w.shen@kings.net.nz

Email successfully updated.

## Viewing the Settings Variables

To view the Settings Variables click the 'View Variables' button on the bottom left of the form and then enter the password and enter. Here are the variables used by the system to determine many things.

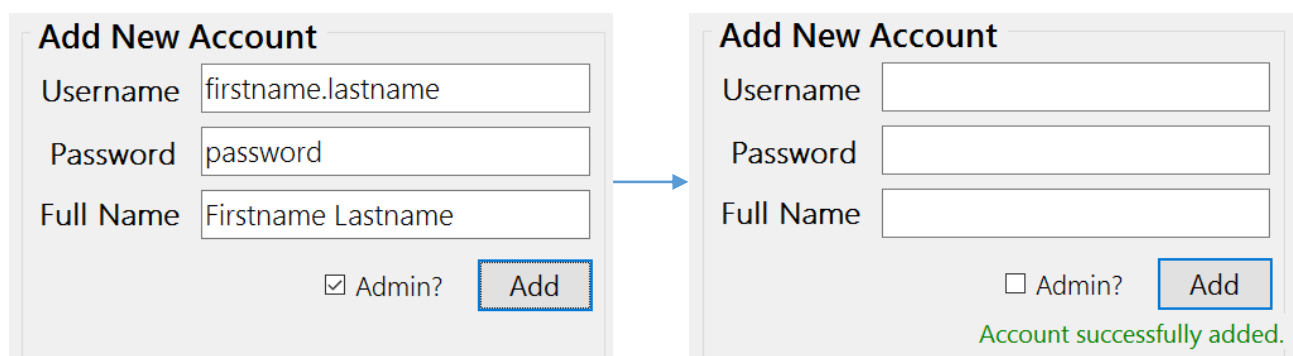
The variables are used to: check whether a user is an admin or not, automatically assigning travel and business expense tracking number and storing database locations, etc.

## Account Manager

Navigate to the Account Manager and then enter the password to enable the following functions.

### Adding an Account

To add an account first enter the account details into the 'Add New Account' controls and then click 'Add'. The account will add to the database unless the username already exists in the database (the system will give an error output).



**Add New Account**

Username

Password

Full Name

☒ Admin?

**Add New Account**

Username

Password

Full Name

☐ Admin?

Account successfully added.

## Deleting an Account

To delete an account, first select a username from the combination box in the 'Delete Account' group box and then check the 'Confirm' checkbox. Next, click the 'Delete' button and the account will be deleted from the database.

The first screenshot shows the 'Delete Account' form with 'firstname.lastname' selected in the Username dropdown, the 'Confirm' checkbox checked, and the 'Delete' button highlighted. An arrow points to the second screenshot, which shows the same form with 'daniel.dyer' selected, the 'Confirm' checkbox unchecked, and a green message 'Account has been deleted.' displayed below the form.

## Updating an Account

To update an account firstly select the username that you wish to update and then fill in the relevant fields in the controls. Next, click 'Update' and the account will be updated.

The first screenshot shows the 'Update Account' form with 'william.shen' selected in the Username dropdown, 'badpassword' in the Password field, 'William Shen' in the Full Name field, and the 'Admin?' checkbox checked. The 'Update' button is highlighted. An arrow points to the second screenshot, which shows the same form with 'daniel.dyer' selected, empty Password and Full Name fields, the 'Admin?' checkbox unchecked, and a green message 'Account has been updated.' displayed below the form.

## Viewing Accounts

Viewing the existing accounts in the database is an extremely simple task to carry out. Simply click 'View' and the data will appear. Use the clear button to clear the ListView so that others cannot see this private data.

The first screenshot shows the 'View Existing Accounts' form with an empty table and the 'View' button highlighted. An arrow points to the second screenshot, which shows the same form with the table populated with two rows of account data. The 'Clear' and 'View' buttons are visible at the bottom.

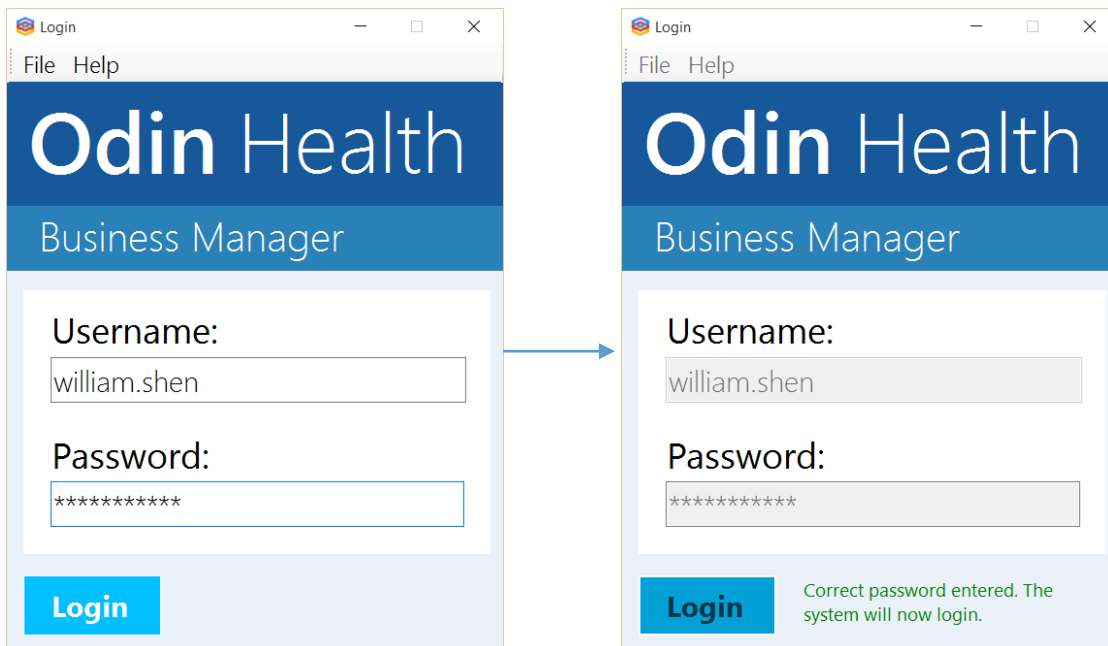
Username	Password	Full Name	Admin
daniel.dyer	penguins	Daniel Dyer	False
william.shen	badpassword	William Shen	True

## Login Form

### Logging In

To login to the program enter your username and password into the relevant textboxes and press 'Login'. If the account does not exist or one of the credentials are incorrect then the program will count it as an incorrect attempt. You are allowed a maximum of 5 attempts each time the program is opened.

If the login credentials are correct then the program will open the Main Menu form.



### Using the ToolStrip

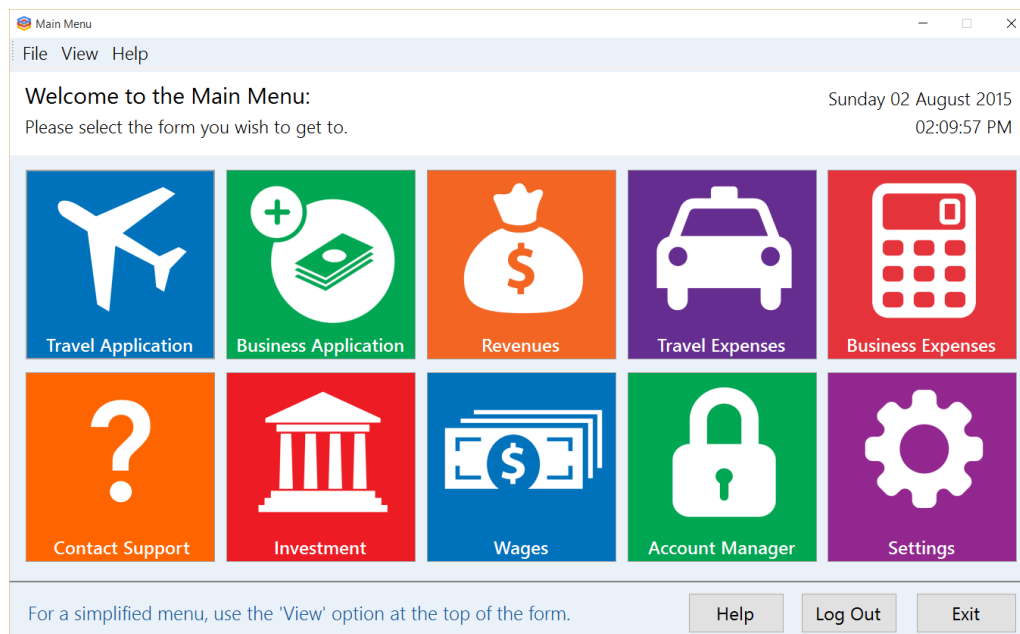
Use the tool strip located on the top of the login form to access important forms such as the Account Manager and the Settings Form.

The toolstrip is the 'File' and 'Help' included on the diagram below.



## Main Menu

The main menu may only be accessed after a correct username and password is entered by the user. This form contains all the controls required to open the other forms to perform their relevant functions.



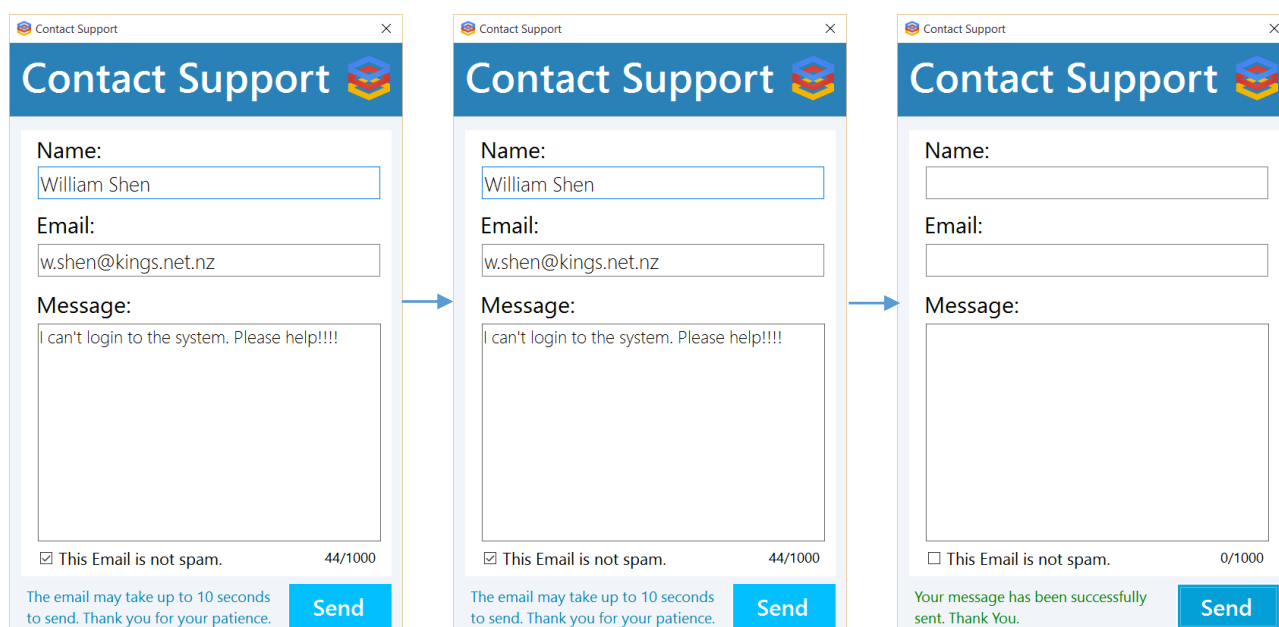
The screenshot shows the 'Main Menu' application window. It has a title bar with 'Main Menu' and standard window controls. Below the title bar is a menu bar with 'File', 'View', and 'Help'. The main content area displays a welcome message: 'Welcome to the Main Menu: Please select the form you wish to get to.' and the date/time: 'Sunday 02 August 2015 02:09:57 PM'. A grid of ten icons represents different functions: Travel Application (blue square with white airplane), Business Application (green square with white plus and money), Revenues (orange square with white money bag), Travel Expenses (purple square with white car), Business Expenses (red square with white calculator), Contact Support (orange square with white question mark), Investment (red square with white classical building), Wages (blue square with white money and dollar sign), Account Manager (green square with white padlock), and Settings (purple square with white gear). At the bottom, there is a footer with the text 'For a simplified menu, use the 'View' option at the top of the form.' and three buttons: 'Help', 'Log Out', and 'Exit'.

## Contact Support

### Sending an Email to the Developer

If the situation should arise that you need to send an email to the developer or have a problem or query, then use the contact support form to send this email.

Firstly, enter your name, email address, your message and check the 'This Email is not spam' checkbox. Next, click send and the system will validate your data and then send it if it is all valid. Ensure that all fields are filled in and the email address is valid.



The three screenshots illustrate the workflow of the 'Contact Support' form. The first screenshot shows the form with the following data: Name: 'William Shen', Email: 'w.shen@kings.net.nz', Message: 'I can't login to the system. Please help!!!!', and the checkbox 'This Email is not spam.' checked. The second screenshot is identical to the first, showing the form before the 'Send' button is clicked. The third screenshot shows the form after the 'Send' button has been clicked. The 'Message' field is now empty, the checkbox is unchecked, and a green status message at the bottom reads: 'Your message has been successfully sent. Thank You.'.

The following section includes how to search, add, view or edit, and delete data. Since many forms follow the same structure (Overview, New, View and Edit), only one of these will be used to show the user how to use the system in detail.

The example that will be used is travel expense applications.

## Travel Expense Applications

### Adding a new application or record into the database

To open the form to add a new record into the database, you must first navigate to the 'Overview' and then click 'New Application' or 'New Record' or similar. Next, fill in the form with all the relevant details, be sure that the data is all valid. After that, click the 'Add' button or similar to add the record into the database. If any data is invalid, the system will output a message to the user.

The form will then close in most cases (apart from Wages) and output a message indicating success on the 'Overview' form. In the case of a travel expense application, an email will be sent to the application email and thus there could be a slight 'lag'.

Travel Application - New

**Travel Application - New**

Employee Name: William Shen | Email Address: william.shen@odinhealth.co.nz | Tracking Number: TV0208150

Destinations (Countries and Cities): Shanghai China | Duration: 12 Days

Reason for Trip: Sell our products to new customers

Please estimate the following costs:

Domestic Travel Costs: 2300 NZD | Accomodation Costs: 2000 NZD

International Travel Costs: 3000 NZD | Total Costs: 7300 NZD

Your application will be reviewed before it is approved. An email will be sent to you once it has been approved.

Close Submit

Select a row from the tables above:

View or Edit Delete Record added and email sent. Search New Application

### Deleting a record from the database

Deleting a record from the database can usually be done in two ways using the program. Either by using the overview form or the view and edit form.

See the diagrams on the next page.



To delete data by using the overview form first select the record you wish to delete and then click 'Delete'. The program will ask you to confirm so select 'Yes' if you wish to proceed. The record will then be deleted and a success message shown.

**Travel Application - Overview**

**Pending Applications (Unapproved)**

Tracking No.	Full Name	Destinations	Duration	Total Cost
TV0208150	William Shen	Shanghai China	12	7300
TV0507150	Richard Hendrix	San Francisco, New York, Chicago, USA	21	1813
TV0706150	Marco Yu	Shanghai, Hangzhou, Shenzhen	14	12308
TV1607153	William Shen	Shanghai Shanghai Shanghai Shangh...	9999	29999999997

**Past Applications (Approved)**

Tracking No.	Full Name	Destinations	Duration	Total Cost
TV0706151	William Shen	Australia, USA, India	26	140000
TV1607150	William Shen	Sydney and Melbourne Australia	5	3250
TV2707150	William Orr-Stalker	Cairo Egypt	420	4046

Select a row from the tables above:

**Delete Travel Expense Application**

Are you sure you want to delete this Travel Expense Application?

**Travel Application - Overview**

**Pending Applications (Unapproved)**

Tracking No.	Full Name	Destinations	Duration	Total Cost
TV0208150	William Shen	Shanghai China	12	7300
TV0507150	Richard Hendrix	San Francisco, New York, Chicago, USA	21	1813
TV0706150	Marco Yu	Shanghai, Hangzhou, Shenzhen	14	12308

**Past Applications (Approved)**

Tracking No.	Full Name	Destinations	Duration	Total Cost
TV0706151	William Shen	Australia, USA, India	26	140000
TV1607150	William Shen	Sydney and Melbourne Australia	5	3250
TV2707150	William Orr-Stalker	Cairo Egypt	420	4046

Select a row from the tables above:

Record successfully deleted.

To delete data by using the view and edit form simply click the 'Delete' button and then confirm the deletion with 'Yes'. Next, the record will be deleted and a success message shown on the 'Overview' form.

Look at the diagram on the next page for reference.

Travel Application - View and Edit

Employee Name

William Shen

Email Address

william.shen@odinhealth.co.nz

Tracking Number

TV0208150

Destinations (Countries and Cities)

Shanghai China

Duration

12

Days

Reason for Trip

Sell our products to new customers

Please estimate the following costs:

Domestic Travel Costs

2300

NZD

Accommodation Costs

2000

NZD

International Travel Costs

3000

NZD

Total Costs

7300

NZD

Update the relevant data and press 'Update'.

Close

Delete

Update

Travel Application - Overview

Travel Application - Overview

Pending Applications (Unapproved)

Tracking No.	Full Name	Destinations	Duration	Total Cost
TV0507150	Richard Hendrix	San Francisco, New York, Chicago, USA	21	1813
TV0706150	Marco Yu	Shanghai, Hangzhou, Shenzhen	14	12308

Past Applications (Approved)

Tracking No.	Full Name	Destinations	Duration	Total Cost
TV0706151	William Shen	Australia, USA, India	26	140000
TV1607150	William Shen	Sydney and Melbourne Australia	5	3250
TV2707150	William Orr-Stalker	Cairo Egypt	420	4046

Select a row from the tables above:

View or Edit

Delete

Record successfully deleted.

Search

New Application

Delete Application

Are you sure you want to delete this Travel Expense Application?

Yes


No

## Updating a Record in the database

To update a record first select a record on the 'Overview' form then click 'View or Edit'. Next, update any of the relevant fields with valid data and then click 'Update'. Given that all the data is valid, the program will then go ahead and update the record in the database.

In the case that the data is not valid the program will reject it and display a message to the user. Please see the diagram on the next page as a reference.

Please note that for 'Pending' and 'Completed' ListViews the data will sort itself and update the ListViews automatically. This also applies to forms for one ListView only.



## Travel Application - View and Edit

Approved?

Employee Name
Richard Hendrix

Email Address
william.shen@odinhealth.co.nz

Tracking Number
TV0507150

Destinations (Countries and Cities)
San Francisco, New York, Chicago, USA

Duration
212 Days

Reason for Trip
TechCrunch Disrupt 1234567890. Visiting Pied Piper for fun.

Please estimate the following costs:

Domestic Travel Costs
NZD

Accommodation Costs
NZD

International Travel Costs
NZD

Total Costs
NZD

Update the relevant data and press 'Update'.

Close
Delete
Update

Travel Application - Overview

Travel Application - Overview

## Travel Application - Overview

Pending Applications (Unapproved)

Tracking No.	Full Name	Destinations	Duration	Total Cost
TV0507150	Richard Hendrix	San Francisco, New York, Chicago, USA	212	68160
TV0706150	Marco Yu	Shanghai, Hangzhou, Shenzhen	14	12308

Past Applications (Approved)

Tracking No.	Full Name	Destinations	Duration	Total Cost
TV0706151	William Shen	Australia, USA, India	26	140000
TV1607150	William Shen	Sydney and Melbourne Australia	5	3250
TV2707150	William Orr-Stalker	Cairo Egypt	420	4046

Select a row from the tables above:

View or Edit

Delete

Record successfully updated.

Search

New Application

## Approving an application

Approving an application follows the same routine as updating a record. To approve an application, you must select the approved checkbox on the top right of the view and edit forms. If you cannot do so then it means you do not have enough user rights to do so.

After you have checked the approved checkbox click update and an email will be sent to the applicant telling him or her that their application has been approved. Since this follows the same structure as updating a record, screenshots have not been included.

## Travel Expenses

The following section is a guide on how to add new travel expenses to the system and edit or view them accordingly.

### Adding a travel expense

To add a travel expense first navigate to the Travel Expense – Overview form and then click on 'New Expense'. Next enter the tracking number and once one from the TEA table is identified, the employee name is automatically locked in. Next, add expenses as you wish ensuring that all data is valid. Finally click the 'Save' button and the data will be added to the database and shown on the ListView below

The 'Travel Expense - New' form contains the following fields and options:

- Tracking Number:** TV2707150
- Employee Name:** William Orr-Walker
- Date Incurred:** 2/08/2015
- Expense Type:** Meals
- Payment Method:** Personal
- Item Description:** Dinner at Shangri-La Hotel
- Reimburse?:** ☒ (Bill Client? is unchecked)
- Foreign Amount:** 600 RMB
- Exchange Rate:** 0.24
- NZD Amount:** 144 NZD

Buttons: Clear, Save

Message: Travel Expense successfully saved. Buttons: Clear, Save

ID	Date	Description	Type	NZD	Reimbursed
60	2/08/2015	Dinner at Shangri-La H...	Meals	144	False

Buttons: View or Edit, Delete, Print, New Expense

### Modifying a travel expense

To view or edit a travel expense in depth you must first select the expense on the ListView and then click 'View or Edit' once you have done so, the data will be loaded above and you can update it accordingly. To return to adding new expenses click the 'New Expense' button located on the bottom right of the form.

The 'Travel Expense - View and Edit' form displays the following data:

- Tracking Number:** TV2707150
- Employee Name:** William Orr-Walker
- Date Incurred:** 2/08/2015
- Expense Type:** Meals
- Payment Method:** Personal
- Item Description:** Dinner at Shangri-La Hotel
- Reimburse?:** ☒ (Bill Client? is unchecked)
- Foreign Amount:** 600 RMB
- Exchange Rate:** 0.24
- NZD Amount:** 144 NZD

Buttons: Delete, Update

Message: Record successfully loaded. Please make any desired changes and click 'Update'.

ID	Date	Description	Type	NZD	Reimbursed
60	2/08/2015	Dinner at Shangri-La H...	Meals	144	False

Buttons: View or Edit, Delete, Print, New Expense

## Sorting Data in ListViews

Sorting the data in the ListViews by the columns is an extremely simple task to carry out. Simply click on the column headers the data will sort itself accordingly. The data will sort itself both ascending and descending depending on how many times the column has been clicked/

An example has been shown below:

Past Applications (Approved)				
Tracking No.	Full Name	Description	Quantity	Total Price
BS0607150	Daniel Dyer	Nexus 9 64GB	5	4250
BS1106151	William Shen	Dell Projector	1	1200
BS1607152	William Shen	Chicken Niblets	100	121
BS2305150	Marco Yu	Dell U2515H Monitors	12	6552

↓

Past Applications (Approved)				
Tracking No.	Full Name	> Description	Quantity	Total Price
BS1607152	William Shen	Chicken Niblets	100	121
BS1106151	William Shen	Dell Projector	1	1200
BS2305150	Marco Yu	Dell U2515H Monitors	12	6552
BS0607150	Daniel Dyer	Nexus 9 64GB	5	4250

## Filtering Data

On some forms filtering data is supported either for printing or viewing purposes. These forms are the business expense, revenues, and wages forms. To filter the data, check the filter checkboxes and then specify your query. Finally, click the 'Filter' button and the data will be filtered accordingly.

If you wish to clear the filters then simply click 'Clear Filter' and the ListView will return to its original state.

The example on the next page shows filtering on the Wages form.

[illegible]

## Printing Options

Printing is an important function of the program in order to allow for record keeping and checking purposes. The Odin Health Business Manager has been built with this in mind and therefore has three important printing functions. They are printing business expenses, travel expenses and wages.

The guide below shows how to make use of these functions:

## 1. Setup

Navigate to the relevant form and 'select' the data to be printed and click 'Print'. Below shows examples for each of the three functions.

## Business Expenses

**Print by:**

☐ Expenses Between  and  ☐ Completed Reimbursement

☒ Employee Name  ☐ Pending Reimbursement

☐ Print all data ☒ Find Total

## Wages

Filter by:

☐ Payments Between

2/08/2015

and

2/08/2015

☐ Employee Name

Daniel Dyer

Clear Filter

Filter

Printing Options:

☒ Print all Data

☐ Print Filtered Data

Print

## Travel Expense - Overview

Travel Expense - Overview				
Tracking No.	Name	Period	Amount (NZD)	Reimbursed
TV0507150	Richard Hendrix	16/07/2015 - 16/07/2015	222000000003...	True
TV0706150	John Shen	28/06/2015 - 16/07/2015	9214.99	False
TV0706151	William Shen	2/07/2015 - 5/07/2015	3049.92	True

View or Edit      Delete      Print      Search      New Expense

## Travel Expense – New and View and Edit

Travel Expense

×

Travel Expense - New

Tracking Number

Employee Name

TV0706151

William Shen

Date Incurred

Expense Type

Payment Method

2/08/2015

Item Description

☐ Reimburse?

☐ Bill Client?

Foreign Amount

Exchange Rate

NZD Amount

RMB

RMB to NZD

0

NZD

Please enter the Tracking Number.

Clear

Save

ID	Date	Description	Type	NZD	Reimbursed
35	2/07/2015	Sheraton in Shanghai f...	Accomm...	2880	True
41	5/07/2015	Cleaning suit	Dry Clea...	29.52	True
40	5/07/2015	Hotel internet	Internet	78	True
39	5/07/2015	High Speed rail to Han...	Public Tr...	56.4	True
37	5/07/2015	Movie Tickets to watch ...	Entertai...	6	True

View or Edit

Delete

Print

New Expense

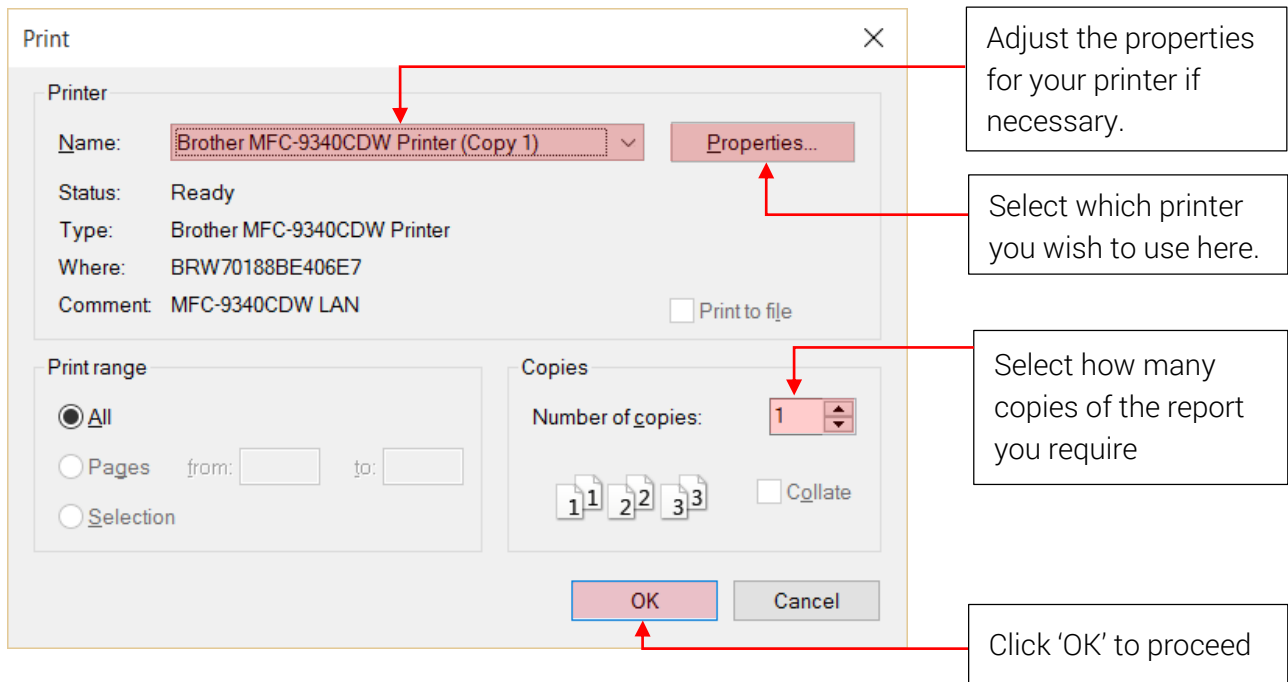
## 2. Print Dialog

After setting up the printing and clicking the 'Print' button a dialog will appear presenting the user with many print options. Here you can adjust the properties of the printer and how many copies you want before a preview is displayed on the next step.

You must ensure that the properties of your printer are correct or else irregular formatting or improper printing may occur on the documents.

After selecting all these options press the 'OK' button and proceed to the next step. Diagrams of this step have been included on the next page.





### 3. Preview and Print

After you have selected your printer and its settings you will be presented with a print preview dialog. Here you should review the report that has been produced and if you are satisfied with it then confirm to print it. After you have clicked the print button (the printer symbol on the top left) your report will be printed by your printer.

Travel Expenses

Page 1

**TV0706151 - William Shen**

Date	Description	BC	Type	Amount	XRT	NZD	Repaid
02/07/15	Sheraton in Shanghai for 12 nights		Accommodation	RMB \$12000	0.24	\$2880	Yes
05/07/15	Cleaning suit		Dry Cleaning	RMB \$123	0.24	\$29.52	Yes
05/07/15	Hotel internet		Internet	RMB \$325	0.24	\$78	Yes
05/07/15	High Speed rail to Hangzhou		Public Transport	RMB \$235	0.24	\$56.4	Yes
05/07/15	Movie Tickets to watch Jurassic World		Entertainment	RMB \$25	0.24	\$6	Yes
						\$3049.92	\$0

Click the button as highlighted above in the diagram with blue to print the document. You can use the other buttons to browse the report.

## Glossary of Terms

**Business Expense** – an expense incurred by the business that may be related to physical goods and services (not travel related)

**Business Expense Application** – an application that must be submitted and approved before purchasing any goods and services for the business unless approved otherwise.

**Investment** – any money that is not from sales but rather from other organisations for the purpose of research and development or donations.

**Revenue** – income made by the company such as sales or service maintenance.

**Travel Expense** – an expense incurred during a business trip or other trip that includes accommodation, food, internet, mobile phones, etc. Different to business expenses in the way that they may be considered 'costs of living'.

**Travel Expense Application** – an application that must be submitted and approved before embarking and purchasing tickets for a business trip.

**Wage** – a fixed regular payment for work or services that is paid to the employees or contractor.

