

Back to all reimbursement requests

New Reimbursement

Basic Information

Company: Innovation Labs Asset class: ICC

This is for a pre-approved travel

Expenses (1)

All expenses must be accompanied by receipt/invoice or supporting documentation. Failure to provide such will result in reimbursement. See a list of **Non-Reimbursable Expenses**. For more information, download our **Business Expense Policy**.

Expense Category: Meals & Entertainment Purchase Date: 2016/02/12

Travel meal has a limit of total \$50 per day

This is a non-Canadian purchase

Description: Pizza Pizza OT Meal GST/HST: \$ Total Reimbursed: \$ 24.89

Total excluding GST: \$0.00

Your Purchase Request

Ref: PU-160404-21 State: Draft

Requester: Julie Sun Purpose: For Business Development Budget Allocation: Innovation Labs

Company: Innovation Labs Payment Method: Cheque

Cost Center: R&D Competitive Analysis (optional): Completed

Asset Class: Hardware

Items List (1)

City or Airport: [] City or Airport: []

Departure date: 2016/05/20 Preferred departure time: Before 10:00 AM Arrival date: 2016/05/22 Before 10:00 AM

Flight Details/Comments: []

Hotel/Accommodation Details

I do not require hotel for this travel I will need hotel accommodation for this trip

I do not require hotel for this travel I will need hotel accommodation for this trip

Preferred hotel/accommodation: [] Address: []

For whole duration of trip For part of the trip

Check-in: [] Check-out: []

Additional Accommodation Details/Comments: []

Public Transit need to rent a car will be using my own car

Hello Tyrean,

Shawn Lim needs your approval for the following purchase request:

Ref: PU-160309-04 Request date: March 23, 2016

Requester: Shawn Lee Asset Class: R&D Supplies

Company: Big Computing Cost Center: R&D

Purpose: UBO

Items (2)

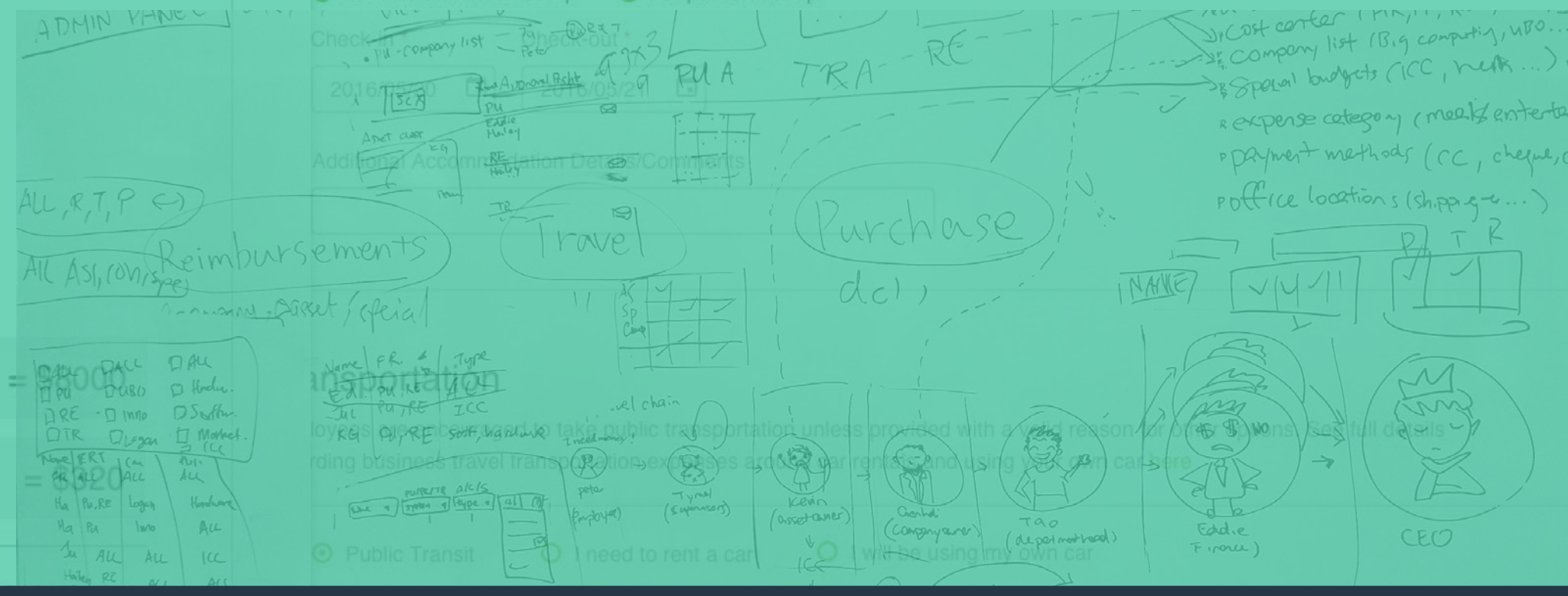
Mousepad	\$1000 /unit	x 8	=	\$8000
	~\$40 /unit	x 8	=	~\$320

Expense System

An internal tool that helps Finance with expense operations between multiple project companies.

ROLE:
Product and UX Design

DELIVERABLES:
Responsive Web Application
Training & Onboarding



Basic Information

Company

Innovation Labs

Expense System

 This is for a pre-approved travelCost Center: R&D
Asset Class: Hardware

Competitive Analysis (optional): Completed

Items List (1)

Hello Tyrean,

Please find your approval for the following purchase request:

Hotel/Accommodation Details

 I do not require hotel for this travel I will need hotel accommodation for this trip

GOAL

- Speed up expense approval process within the company across multiple project teams.
- Ability to process all purchase approvals, reimbursements, and travel approvals in an easy and intuitive way

CHALLENGE

- Complex approval structure depending on department, type of expense, and project team structure
- Lack of awareness and transparency of existing approval process
- Managing and balancing different expectations and goals between Finance, Approvers, and those submitting requests

TEAM

- 1 x Product & UX Designer (Myself)
- 1 x Frontend Developer
- 1 x Backend Developer

TIME FRAME

3 Months

- 2 Weeks Requirement Gathering, research
- 8 Weeks in Agile Design and Development
- 2 Weeks product roll out, making changes according to initial feedback from users

PROCESS

1. Understanding product goals with key stakeholders

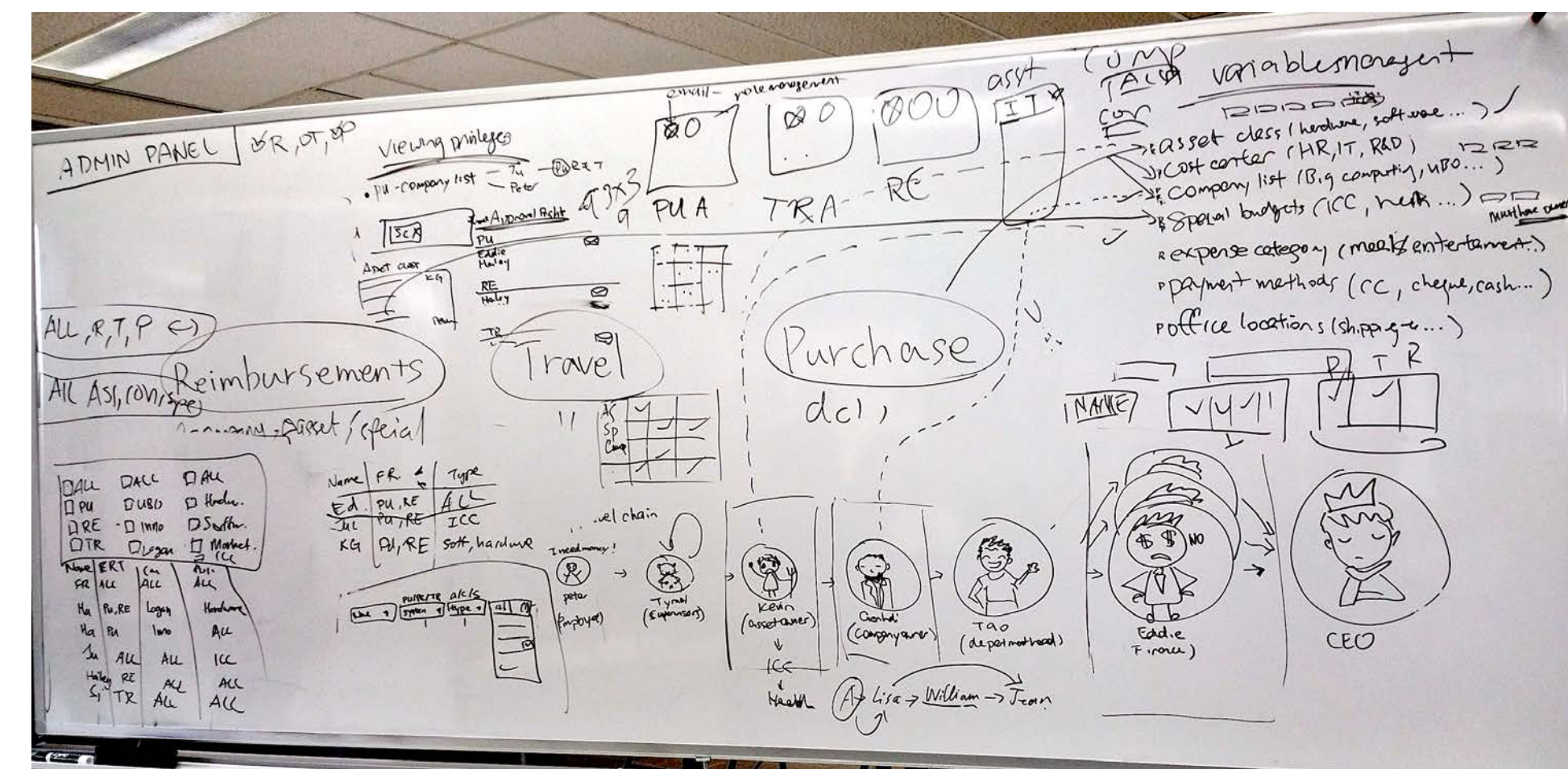
Through talking with Finance reps, Employees, and Approvers regarding current expense process, I was able to uncover existing pain points and gather initial product requirements.

2. Getting familiar with existing approval structure

By going through the approval process myself and with the aid of the Finance team, I familiarized myself with the complexity of the current approval structure...and it's a beast.

3. Conducting research and competitive analysis

After researching available market solutions that may suit the company's business needs in terms of easy of use, cost, and flexibility, we were able to determine that it was necessary to build our own approval system that truly fits our needs and also flexible and scalable.



PROCESS

4. Creating user stories and wireframes to address key pain points

Storyboards and wireframes allowed me to quickly validate and test ideas with Finance and end users as well as checking in with Developers for feasibility. Since we're all in the same office, I was able to get really quick feedback and was able to update designs immediately.

5. Creating high fidelity mockups and preparing for design handoffs to developers

It was a tag team process between me and the Frontend Developer via Sketch app and the Zeplin tool. The developers know what to expect through the latest wireframes and code in the components while I work on high fidelity mockups and would deliver them as soon as I complete so we're never waiting for one another. At the same time the Frontend Developer would work in sync with our Backend Developer to ensure all the components of the web application integrate well together.



PROCESS

6. Beta release and initial feedback gathering

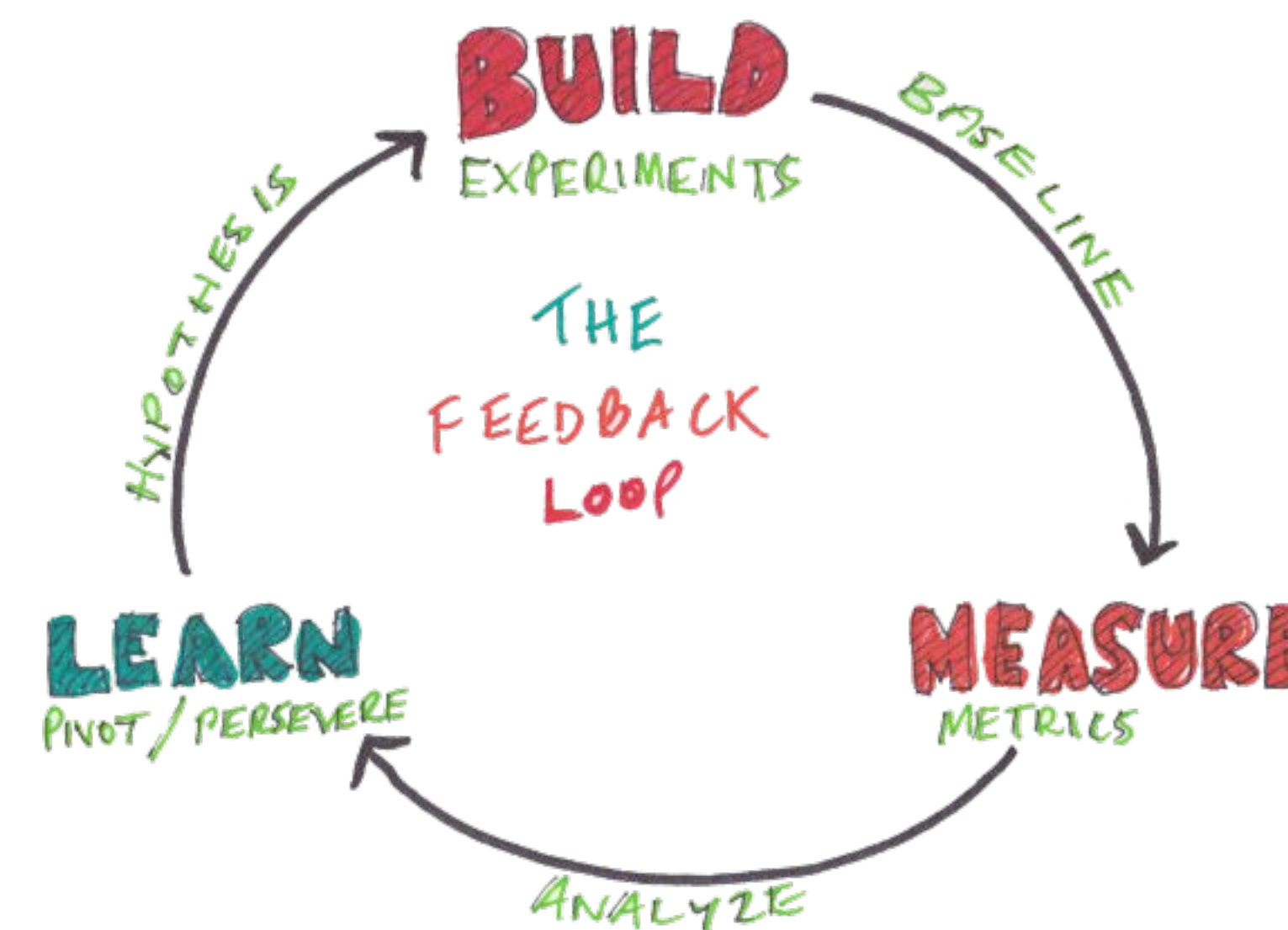
Launched a soft release of the expense system by having a sample size users trying the product interactions before the official launch.

7. Onboarding, training, getting feedback and continuing to iterate

The initial release was revealed at the monthly company wide townhall meeting. I presented and introduced the new expense approval system in front of 100+ employees. For the first time, employees gained a clear understanding of the approval process that was constantly changing.

8. Feedback loop for improvements

Due to the complexity of the business and it's change in directions that is natural for startups, the expense approval system needed to adapt along with the company. Because the system was designed with flexibility and scalability in mind, we were easily able to modify the approval structures and update the system according to company's changing needs.



Expense System

RESULTS

- A more transparent approval process that was quickly official adopted and used across company with hundreds of thousand dollars worth of expenses processed within the first 2 months.
- Sped up approval process time by 3x
- A much easier, organized, and straightforward approval system that made the complexities of the approval structure seem simple

DELIVERED

An intranet web application for expense approvals that is responsive, quick, and simple to use. It also integrates with external HRIS systems (Bamboo HR) and Email systems for quicker and more flexible approval processing.

