
Django Expense Documentation

Release 0.5.1

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This documentation covers the django-expense, a simple personal expense tracker application for Django.

For sample screenshots or detailed description see *User guide*.

The source code of the project is hosted on bitbucket.org/szunyog/django-expense and the latest version of this documentation can be found on django-expense.readthedocs.org.

Installation

Before installing django-expense, you'll need to have a copy of [Django](#) already installed. Django version 1.8 is required.

Note: If you need Django 1.3 support, use version 0.2.2.

For further information, consult the [Django download page](#), which offers convenient packaged downloads and installation instructions.

Installation from source code and using development server

Getting the code

If you would like to try out the latest in-development code, you can obtain it from the django-expense repository, which is hosted at [Bitbucket](#) and uses [Mercurial](#) for version control. To get the latest code and documentation type the following commands:

```
hg clone http://bitbucket.org/szunyog/django-expense/
```

This will create a copy of the django-expense Mercurial repository on your computer.

Or you can download the source code from the [downloads](#) page. Use the **tip** tag for the latest release.

Starting the development server

A sample test project is included into the source tree, so if you want to try you can simple start this test project, to do this you need to enter the following commands:

```
cd testapp
python manage.py syncdb
python manage.py runserver
```

Note: The development server is configured to use `sqlite` database, so required packages should be installed.

Installation from package

Download the package

You can download the source code from the [downloads](#) page. Use the **tip** tag for the latest release.

Install

Once you've downloaded the package, from a command line in that directory, type:

```
python setup.py install
```

Note: On some systems you may need to execute this with administrative privileges (e.g., `sudo python setup.py install`).

Required settings

Begin by adding `'django.contrib.admin'` and `expense` to the `INSTALLED_APPS` setting of your project:

For example, you might have something like the following in your Django settings file:

```
INSTALLED_APPS = (
    'django.contrib.auth',
    'django.contrib.sites',
    'django.contrib.admin',
    'expense',
    # ...other installed applications...
)
```

Once you've done this, run `manage.py syncdb` to install the model used by the default setup.

Setting up URLs

Expense application working on Django admin interface, so you have to enable it in your `urls.py`:

```
from django.conf.urls import include, url
from django.contrib import admin
from django.contrib.auth import views as auth_views

urlpatterns = [
    url(r'^expense/', include('expense.urls')),
    url(r'^admin/', include(admin.site.urls)),
```



```
url('^login/$', auth_views.login,
    {'template_name': 'login.html'})
]
```

Note: Using this URL configuration your django admin site will be in the root.

Setting up login

The expenses app requires authentication. It has a custom login form. To set up the default login url set the `LOGIN_REDIRECT_URL` variable in your `settings.py`:

```
LOGIN_REDIRECT_URL = '/expense/add'
```

User guide

Introduction

Django expense has two types of user interface, one is integrated into the Django's admin interface and the other is a custom one designed to the simplest as possible to be able to use it with mobile devices.

Admin site

When you finished installation, django-expense will appear on your Django admin site. From the admin menu you can edit three types of entities:

- **Type:** These are the Expense basic types such as income, outcome, savings etc... or you can use as bank account as well.
- **Categories:** These are the sub-categories under each type such as outcome/household, etc...
- **Expenses:** These are the expense items.

Main screen, expense list

The Expense `change_list` view is extended by a simple report, this page by default shows your expenses for the current month and summarizes your items by categories. Using the filters of the right hand side you can change the default filter expressions. You can filter the list by:

- Users: Individual user or all.
- Date: Month, year, all time.
- Category

The following figure shows the main screen of the application:

Django administration Welcome, demo. View site / Change password / Log out

Home > Expense > Expenses

Expenses of July 2015 Add expense +

| Date | Category | Description | Amount |
|-------------------------------------|--------------------|----------------------|---------|
| <input type="checkbox"/> 2015-07-03 | Expenses - Banking | Money transfer costs | 15.00 |
| <input type="checkbox"/> 2015-07-02 | Income - Salary | Salary | 3000.00 |
| <input type="checkbox"/> 2015-07-01 | Expenses - Car | Change tyres | 5000.00 |

| Expenses | | Income | | Investments | |
|----------|---------|----------|---------|-------------|--------|
| Category | Amount | Category | Amount | Category | Amount |
| Banking | 15.00 | Salary | 3000.00 | Total | 0 |
| Car | 5000.00 | Total | 3000.00 | | |
| Total | 5015.00 | | | | |

3 expenses

Filter

By user

- All
- demo
- (None)

By date

- Any date
- July 2015
- June 2015
- 2015 total

By category

- All
- Expenses - Banking
- Expenses - Car
- Expenses - Education
- Expenses - Entertainment
- Expenses - Health
- Expenses - Overhead
- Expenses - Taxes
- Income - Bonus
- Income - Salary
- Investments - Bonds
- Investments - Savings
- Deposit
- Investments - Stocks
- (None)

Add expense screen

Expenses can be added on this screen. The user field is defaulted with the currently logged on one, otherwise it is a default django admin screen.

Add expense

User: husband ▼ +

Category: ----- ▼ +

Date: Today |

Description:

Amount:

Save and add another
Save and continue editing
Save

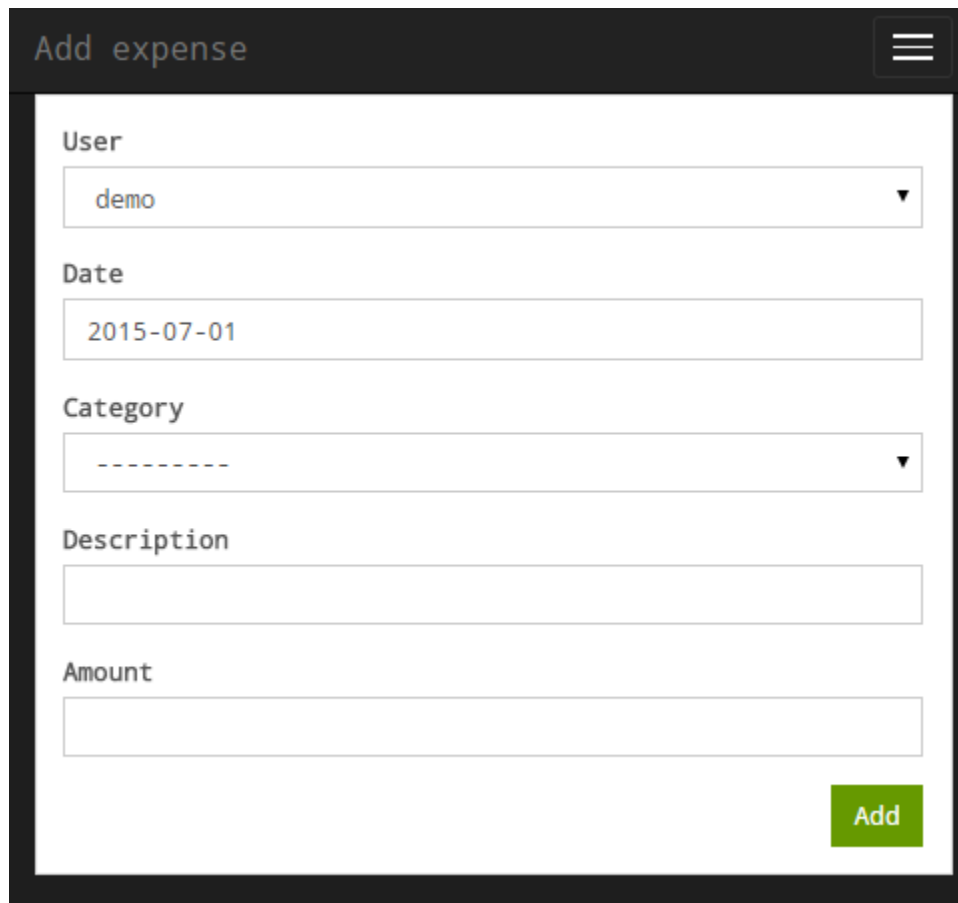
Custom/Mobile interface

The custom interface is based on a Bootstrap desing, especially on the [Holo](#) theme.

It supports the following views:

Add

Here, you can store your expenses.



The screenshot shows a mobile application interface for adding an expense. The form is titled "Add expense" and has a hamburger menu icon in the top right corner. The form contains the following fields:

- User:** A dropdown menu with "demo" selected.
- Date:** A text input field containing "2015-07-01".
- Category:** A dropdown menu with "-----" selected.
- Description:** A text input field.
- Amount:** A text input field.

A green "Add" button is located at the bottom right of the form.

Log

On the log view, the recorded entries are visible:

Monthly report


Summarized monthly report. The displayed data is filtered by the actual month and aggregated by categories.

There is navigation bar on the bottom of the page to select other months.

Changelog

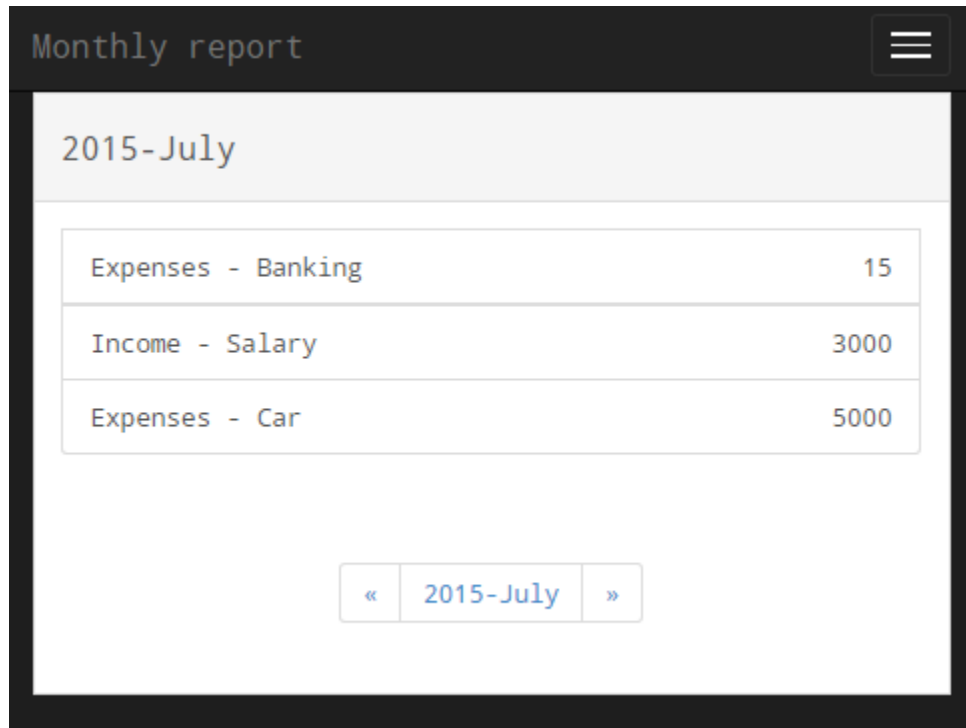
Version 0.5.1

- added hidden categories

View log 

| |
|------------------------------------------------------------------------|
| July 3, 2015: Expenses - Banking (demo) Money transfer costs 15 |
| July 2, 2015: Income - Salary (demo) Salary 3000 |
| June 15, 2015: Expenses - Education (demo) Book about Django 150 |
| July 1, 2015: Expenses - Car (demo) Change tyres 5000 |

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Version 0.5.0

- Added custom ui
- removed charts from the admin ui

Version 0.4.0

- Change code to work with Django 1.8
- Fix code formatting

Version 0.3.0

- Upgraded minimum Django version to 1.4
- Replaced filterspec.py with filters.py, reflecting the new mechanism for custom filters for the admin interface in Django 1.4
- Corrected some English throughout the code

Version 0.2.2

- Fix y axis text orientation on bar charts.
- Fix documentation copy/paste errors.
- Integrate sphinx version with application version number.

Version 0.2.1

- Changed label orientation on bar charts to avoid text overlapping.

Version 0.2.0

- Added charts, using `flot` jQuery library.
- Updated documentation with screen shoots.
- Fixed expense screen appearance with django 1.3.
- Added test application into the source tree to make trying/testing easier.
- Added initial data.

Version 0.1.0

- Initial data structure.
- Basic administration interface with customized change list view.

License

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```