

Administrator Learning Map



KEY TASKS AND LEARNING AREAS

- ★ **REGULAR DATA MAINTENANCE**
USERS, EXPENSE CATEGORIES, DEPARTMENTS & CUSTOM FIELDS
- ★ **PULL REGULAR REPORTING**
ACCOUNTS PAYABLE & CUSTOM FILES
- ★ **TROUBLESHOOTING & EVERY DAY USE**
EXPENSE REPORT SUBMISSION, APPROVALS & REPORT PROCESSING

★ **Creating A Custom Output File?**
[Overview](#)
[Creating a Custom File for your ERP](#)
(Video 2:42)

1 Product Introduction

- Get Your Feet Wet**
[Overview of Implementation](#)
[Available Configuration Settings](#)
(Video 19:45 - 42:33)
- Your Data**
[Review the Implementation Template](#)
(Video 5:48)
[Overview of User Roles](#)
[Available Expense Types](#)



2 Let's Configure

- Add Department & Expense Category Lists**
[Create a Department](#)
[Update Departments](#)
[Edit Expense Categories](#)
- Determine Workflow**
[Review Locked Approval Workflow](#)
[Extra Options with Locked Approval](#)
- ★ **Enter Custom Fields**
[Custom Fields per Employee and Expense Report](#)
[Overview of Building Custom Fields](#)



3 How Does it Work?

- [Testing Overview](#)
(Video 4:19)
- ★ **Submit Test Reports**
[Get Started Submitting Expenses](#)
[Download the App on iPhone & Android](#)
[Review the Wallet](#)
[Create & Submit an Expense Report](#)
- Approve & Process** ★
[Approve and Process an Expense Report](#)
- Test Your AP Data**
[Generate the Accounts Payable Reports](#)



4 3, 2, 1...Activate!

- Add Extra Policy Requirements**
[Edit Policies](#)
[Optional Submission Requirements](#)
- Tidy Up**
[Add Mileage Rates & Custom Locations](#)
[Enter Spend Limits](#)
[Require Attendees for Meals](#)
[Making Custom Fields Required](#)
- ★ **Plan Ahead**
[Review the Launch Kit](#)

5 Spread the Word

- Add Users & Security**
[Creating & Editing Users](#)
[Upload Credit Cards for Your Users](#)
[Managing Security Settings](#)
- Send Welcome Emails & Communicate**
[Send Welcome Emails](#)
[Emailing Users through Certify](#)

6 For the First Time...

- ★ **Admin to the Rescue**
[Switch to Another User's Account](#)
[Resetting Passwords for Your Users](#)
[Re-sending Welcome Emails](#)
- First-Time Use & Refresher**
[Create & Submit an Expense Report](#)
[Add Multiple Currencies](#)
[Adjusting Currency Conversions](#)

7 Day-to-Day

- Working with Credit Cards**
[Link a Non-Reimbursable Expense to a Credit Card](#)
[Transfer a Ghost Card Expense to Another User](#)
- Data Archive**
[Accessing Your Data Archive](#)

