

# 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 Professional](#)

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](#)

