

Item Roles - Feature Overview

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Overview

Item Roles are permissions which are assigned to claimants to determine which expense items they are permitted to claim for. Each Item Role can have multiple expense items assigned to it and this can then be assigned to single users or groups of users. This functionality lets your organisation determine and control which groups of users are able to claim certain expense items which are available in your system.

This functionality also enables you to determine dates ranges of when certain expense items can be claimed as well as specifying maximum and minimum amounts which can be claimed, depending on if there is a valid receipt for the expense.

Features

Feature	Description
Create and Assign Multiple Item Roles	Use Item Roles to configure which expenses can be claimed by individuals and groups of users within your system.
Customisable Item Role Permissions	Manage which expenses a user can claim with the roles that they are assigned.
Specify Item Role Date Ranges	Select active date ranges for Item Roles.
Manage Claim Amounts	Set minimum and maximum claim amounts for expense items on an Item Role.

Implementation

1. For an administrator to fully configure item roles within your system they will require the following permissions on their
(<http://expenses.knowledgeowl.com/help/access-roles-feature->

overview)." data-original-title="" data-toggle="popover" title="">Access Role:

- User Management (Item Roles)
- User Management (Employees)

2. Navigate from the **Home** page to **Administrative Settings | User Management | Item Roles** to create a new Item Role. For more information on how to create Item Roles, view [Manage Item Roles](#).
 3. Navigate from the **Home** page to **Administrative Settings | User Management | Employees** to assign Item Roles to users. For more information on how to assign Item Roles, view [Manage Item Roles](#).
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