Access Roles - Feature Overview

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Overview

Access Roles are used within the product to delegate permissions to users within your organisation. Each menu or feature can be controlled separately with varying levels of permission including View, Add, Edit and Delete.

Create multiple Access Roles to allow your organisation to manage different types of users within Assure Expenses. This type of implementation is perfect for larger organisations where multiple administrators can have delegated authority for different areas of the product, for example, employees or vehicles.

Alongside providing access to different areas of the product administration menu, each Access Role allows you to specify whether a user has access to the Website, Mobile App or the API.

If your organisation takes advantage of GreenLight, you can also manage each individual GreenLight, providing the same access control as you can with the standard Access Role elements.

Features

Feature	Description
Create and assign multiple Access Roles to a user	Use multiple access roles to finely tune permissions for users and groups of users within your system.
Highly customiseable role permissions	Create specific access roles using a huge variety of permissions and levels of permissions.
Reporting data control	Control the access for reporting by setting which fields can/cannot be reported on and what level of hierarchical data can be viewed.
Define product access	Provide access to the website, mobile app or the API.
Provide costing breakdown permissions	Provide access for users to amend their costing breakdown when adding an expense.
Set claim amounts	Set minimum and maximum claim amounts for users with a certain access role
Control access to GreenLights	If your organisation uses GreenLight, control which users will be able to use GreenLight based upon their access role.

Implementation

1. Consider and plan which Access Roles you will need to create and what they will be used for. At this point, you should also consider whom you will assign the Access Roles to and whether these users already have Access Roles assigned.

> **Note:** Ensure that you have planned Access Role changes thoroughly before making the changes within Assure Expenses. Take caution when creating, editing or assigning an Access Role as this could potentially lead to data being available to users who are not authorised to access it.
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> You may want to consider the following questions during your planning:
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> - Which users will be assigned this access role and how does their job require that they use our Assure Expenses system?
> - Which Access Roles do we already have in our system and what permissions do they provide to users?

2. Create the appropriate Access Roles including permissions and options. For more information on creating an Access Role, view Manage Access Roles.
3. Assign the Access Roles to the relevant users.