Manage Access Roles

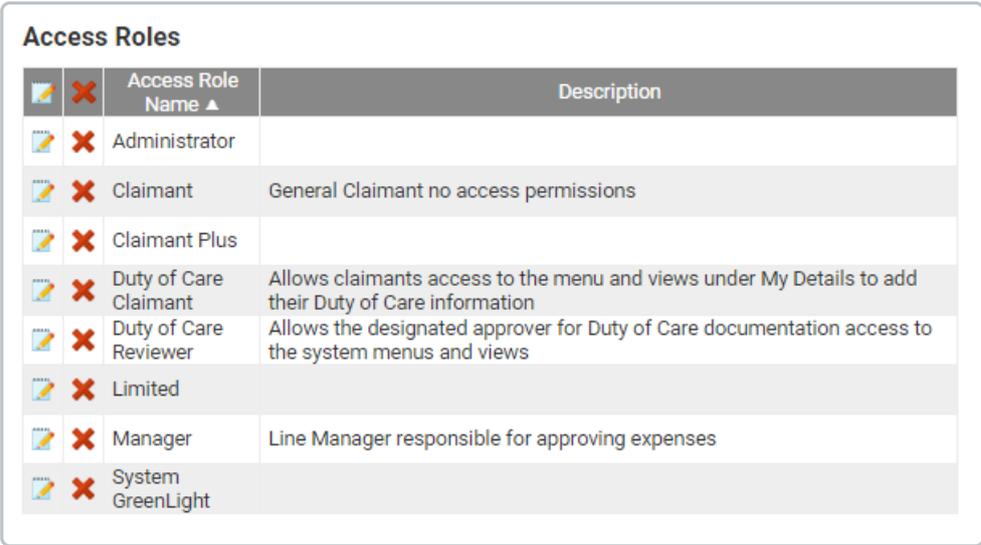| Create an Access Role	Manage Reportable Fields on an Access Role

Permissions

You will require the following permissions:

- User Management
- Access Roles

A user's Access Role determines the areas of Assure Expenses that they can access, what data they can view and/or edit and the items that they can claim.

1. Navigate from the **Home** page to **Administrative Settings | User Management | Access Roles**.

2. From the Page Options menu, click **New Access Role**. This will direct you to the Access Role Details page.
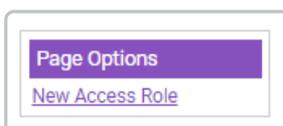
3. Enter a **Role Name** and a **Description**.

Access Role: New
Access Role Details

Role Name*

Description

4. If this role will have permission for the Reports feature, define which data can be reported on.

Reports Access   Select what data can be reported on by this access role
- ○ All data
- ● Data from employees they approve
- ○ Data from the following access roles: Set Access Roles

> **Note:** If a user has more than one Access Role, the report data that they can view is determined by the Access Role with the fewest permissions. This also applies to running financial exports.

5. Choose the **Product Access** for the Access Role by selecting the appropriate check boxes. Leaving a check box unticked will restrict the users, who are assigned to this Access Role, from accessing the product using that particular method.

Product Access

Website*   ☐

API*   ☐

6. Select the appropriate check boxes to select if the role can edit **Project Codes**, **Cost Codes** or **Departments**.

General Options

Can edit project code   ☐   Can edit cost code   ☐

Can edit department   ☐

7. Enter any claim limits if required. This will determine the maximum and minimum amount that the users assigned to this Access Role will have permission to claim for.

Maximum claim amount   Minimum claim amount

8. Select whether an employee must have an active bank account to claim expenses. If this is not

selected, users will not be able to claim expenses without setting up their bank details in Assure Expenses.

Employee must have at least one active bank account to claim expenses	☐

9. Select the appropriate **Access Role Elements** for the Access Role. This table provides you with the functionality to build a finer security policy, allowing you to specify access to certain elements of the product only.

    ○ If you select the box adjacent to the**Element heading**, all subsequent boxes within that section will be selected.

Element Access

Element	View	Add	Edit	Delete
Expenses	☐	☐	☐	☐
⊟ Base Information	☐	☐	☐	☐
Addresses	☐	☐	☐	☐
Advances	☐	☐	☐	☐
Allowances	☐	☐	☐	☐
Cost Code(s)	☐	☐	☐	☐
Countries	☐	☐	☐	☐
Currencies	☐	☐	☐	☐
Departments	☐	☐	☐	☐
Expense Categories	☐	☐	☐	☐
Expense Items	☐	☐	☐	☐
Expenses	☐	☐	☐	☐
Organisations	☐	☐	☐	☐
P11D	☐	☐	☐	☐
Pool Vehicles	☐	☐	☐	☐
Project Codes	☐	☐	☐	☐
Reasons	☐	☐	☐	Help

10. If you require the ability to control which fields can be reported on within Assure Expenses, you can specify this per access role. For more information on how to control the reportable fields, click the Manage Reportable Fields on an Access Role tab at the top of this article.

11. Click **Save** once you have finished configuring the access role.