Manage Item Roles

Last Modified on 23/02/2021 11:23 am GMT

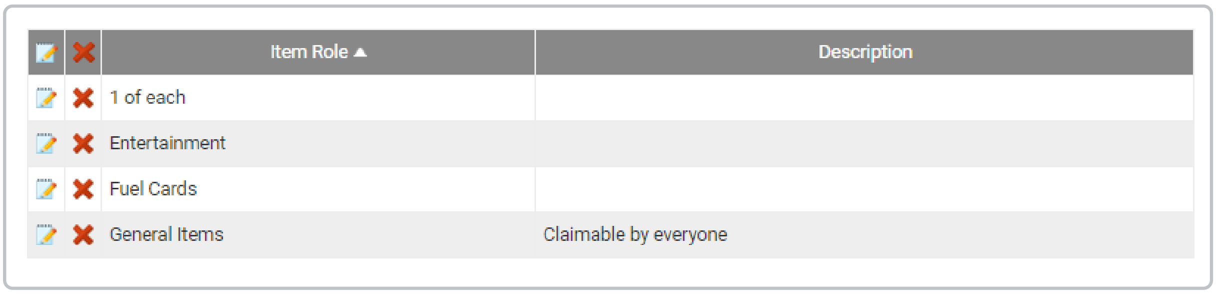
Permissions

You will require an Access Role with the following permissions:

- Item Roles
- Employees
- Expense Items

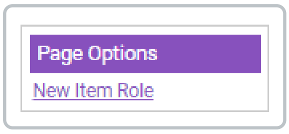
Add an Item Role

1. Navigate from the **Home** page to **Administrative Settings | User Management | Item Roles**. This will display a list of existing Item Roles and their descriptions.

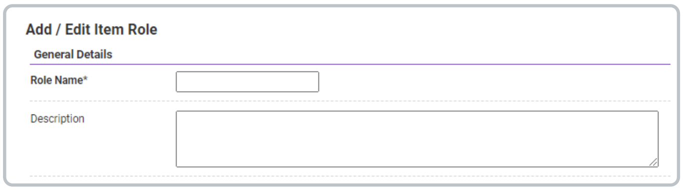


		Item Role ▲	Description
		1 of each	
		Entertainment	
		Fuel Cards	
		General Items	Claimable by everyone

2. Click **New Item Role** in the Page Options menu.

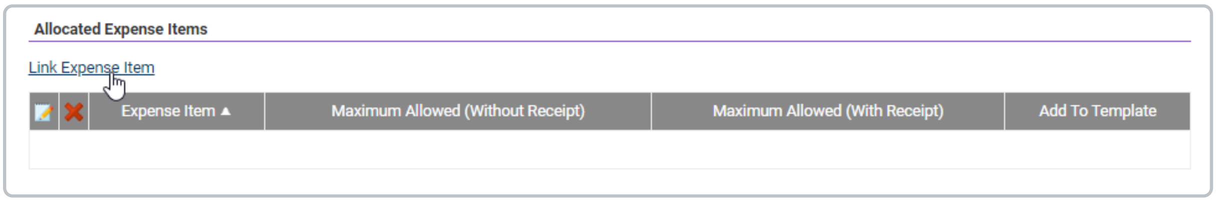


3. Complete the **General Details** section:

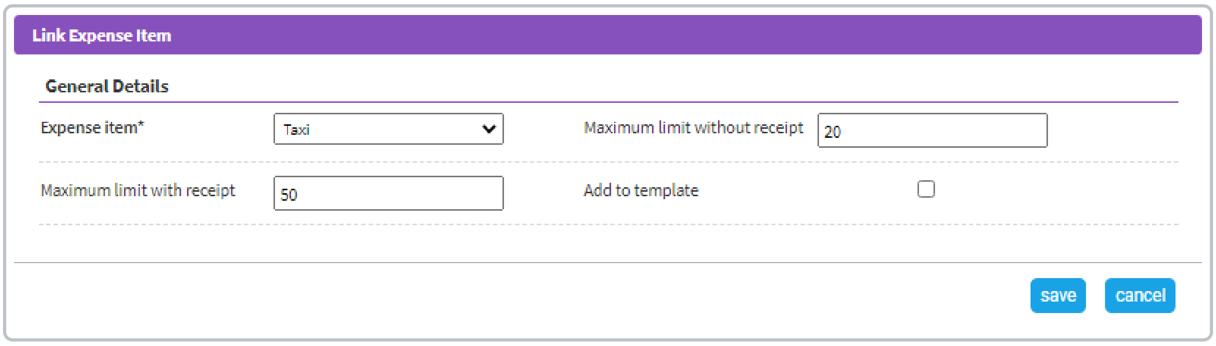


Field	Description
Role Name*	Enter a name for the role.
Description	Enter a description for the role.

4. Click **Link Expense Item** to add an expense item to the item role. The General Details window will be displayed.



5. Complete the expense item General Details.



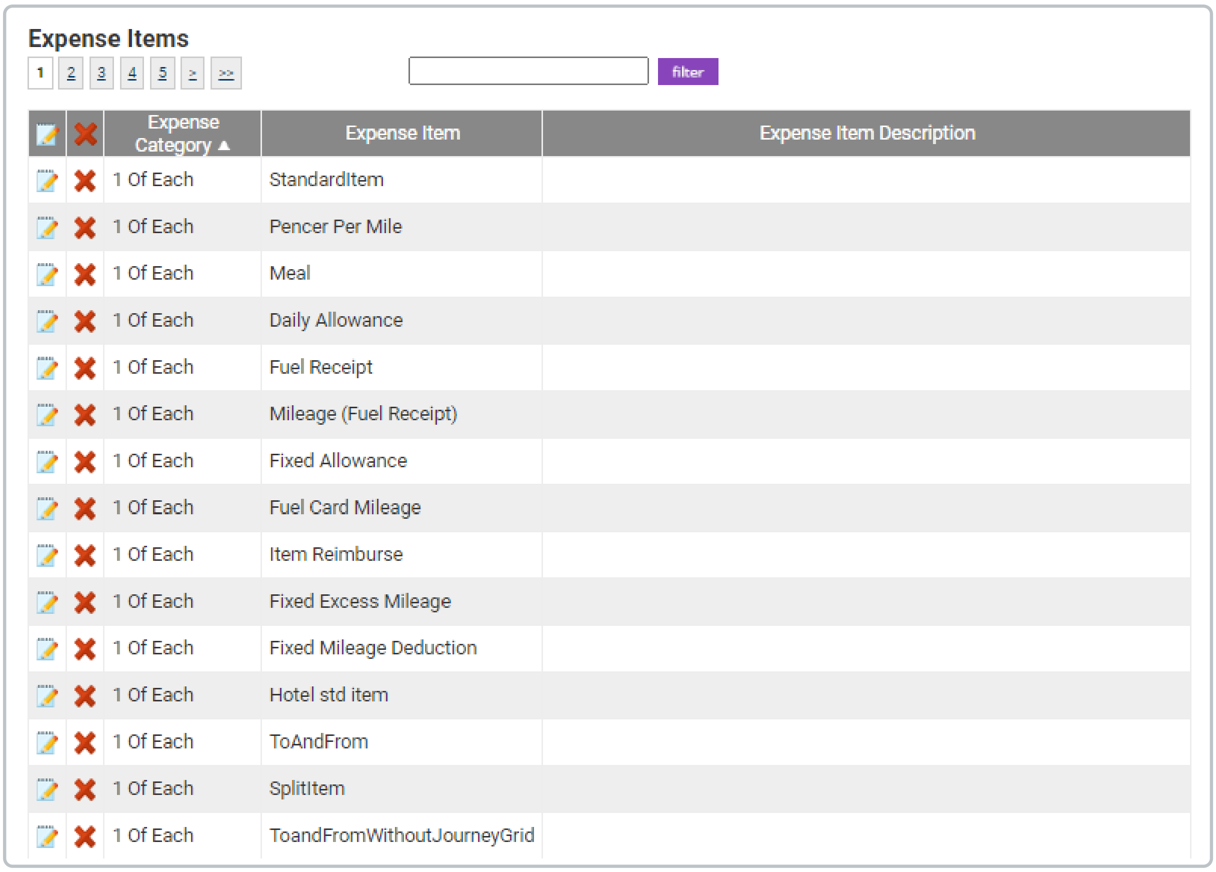
Field	Description
Expense Item*	Select an expense item from the drop-down list. Any expense items selected will appear within the claimant's **My Expense Items** list when making a claim.
Maximum limit without receipt	Enter the maximum spend that is accepted without a receipt for the expense item.
Maximum limit with receipt	Enter the maximum spend that is accepted with a receipt for the expense item.
Add to template	Select the check box to make the expense item available for users with this Item Role assigned.

6. Click **Save** to add the expense item to the Item Role.

7. Click **Save** to store the Item Role or**Cancel** to discard any changes.

Assign an Expense Item to an Item Role

1. Navigate from the **Home** page to **Administrative Settings | Base Information | Expense Items**



Expense Items

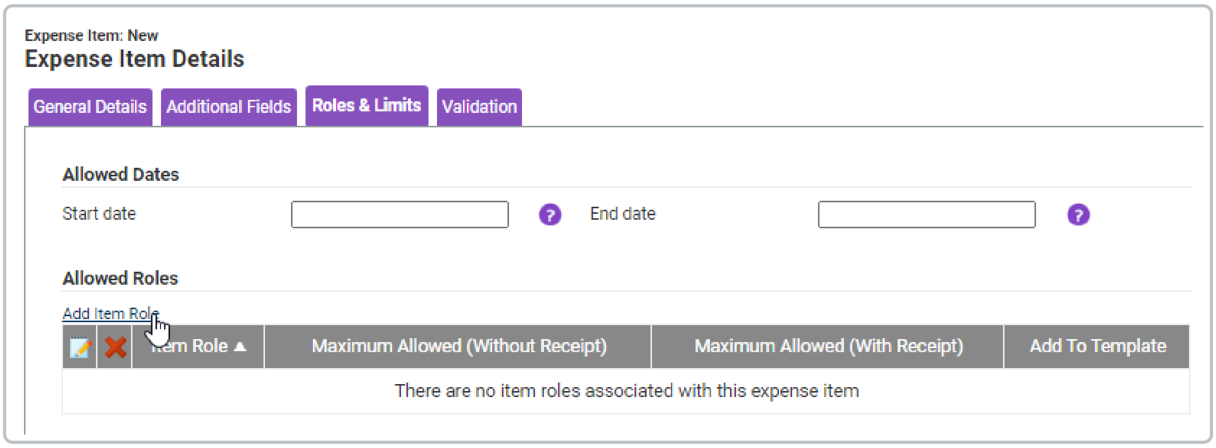
1 2 3 4 5 > >> filter

		Expense Category ▲	Expense Item	Expense Item Description
		1 Of Each	StandardItem	
		1 Of Each	Pencer Per Mile	
		1 Of Each	Meal	
		1 Of Each	Daily Allowance	
		1 Of Each	Fuel Receipt	
		1 Of Each	Mileage (Fuel Receipt)	
		1 Of Each	Fixed Allowance	
		1 Of Each	Fuel Card Mileage	
		1 Of Each	Item Reimburse	
		1 Of Each	Fixed Excess Mileage	
		1 Of Each	Fixed Mileage Deduction	
		1 Of Each	Hotel std item	
		1 Of Each	ToAndFrom	
		1 Of Each	SplitItem	
		1 Of Each	ToandFromWithoutJourneyGrid	

2. Use the search filter on the 'Expense Items' page to search for an expense item.

3. Click next to the expense item to open the 'Expense Item Details' page.

4. Within the **Roles & Limits** tab, click **Add Item Role**. This will display a window that allows you to select the Item Role that you want to assign to the expense item.



5. Select an Item Role from the **Item Role** drop-down list to assign the expense item to. If required, choose a minimum and maximum limit that can be claimed with or without a receipt. Click **Save** to store the changes.

6. Click **Save** on the Expense Item Details page to complete this process.