

Manage Item Roles

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

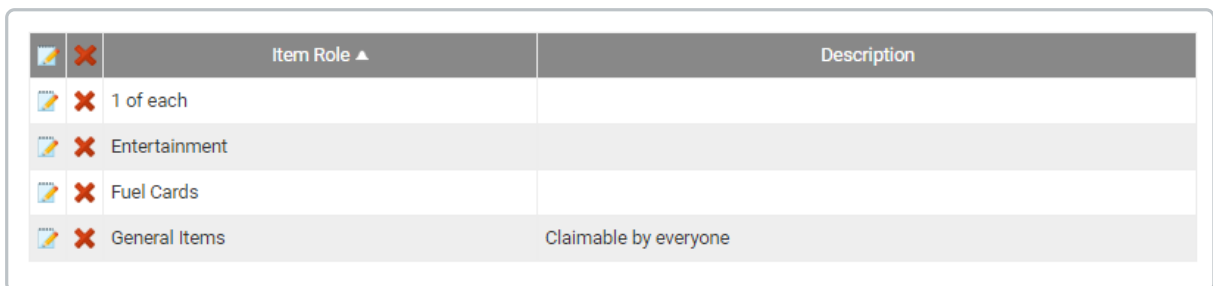
Permissions

You will require an Access Role with the following permissions:

- Item Roles
- Employees
- Expense Items

Add an Item Role

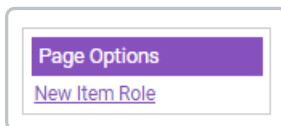
1. Navigate from the Home page to **Administrative Settings | User Management | Item Roles**. This will display a list of existing Item Roles and their descriptions.



A screenshot of a table listing existing Item Roles. The table has two columns: 'Item Role' and 'Description'. There are four rows of data, each with a small icon and a red 'X' in the first column. The 'Description' column for the last row contains the text 'Claimable by everyone'.

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:



A screenshot of the 'Add / Edit Item Role' form. The form has a title 'Add / Edit Item Role' and a section 'General Details'. There are two input fields: 'Role Name*' and 'Description'.

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.

Allocated Expense Items

[Link Expense Item](#)

Expense Item ▲	Maximum Allowed (Without Receipt)	Maximum Allowed (With Receipt)	Add To Template

5. Complete the expense item General Details.

Link Expense Item

General Details

Expense item* Maximum limit without receipt

Maximum limit with receipt Add to template

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	

- Use the search filter on the 'Expense Items' page to search for an expense item.
- Click  next to the expense item to open the 'Expense Item Details' page.
- 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.

Expense Item: New

Expense Item Details



General Details Additional Fields **Roles & Limits** Validation

Allowed Dates

Start date ? End date ?

Allowed Roles

[Add Item Role](#)

 	Item Role ▲	Maximum Allowed (Without Receipt)	Maximum Allowed (With Receipt)	Add To Template
There are no item roles associated with this expense item				

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

