Add an Employee

Last Modified on 24/07/2023 10:36 am BST

Core Options	Additional Options

Permissions

You will require an Access Role with the following permissions:

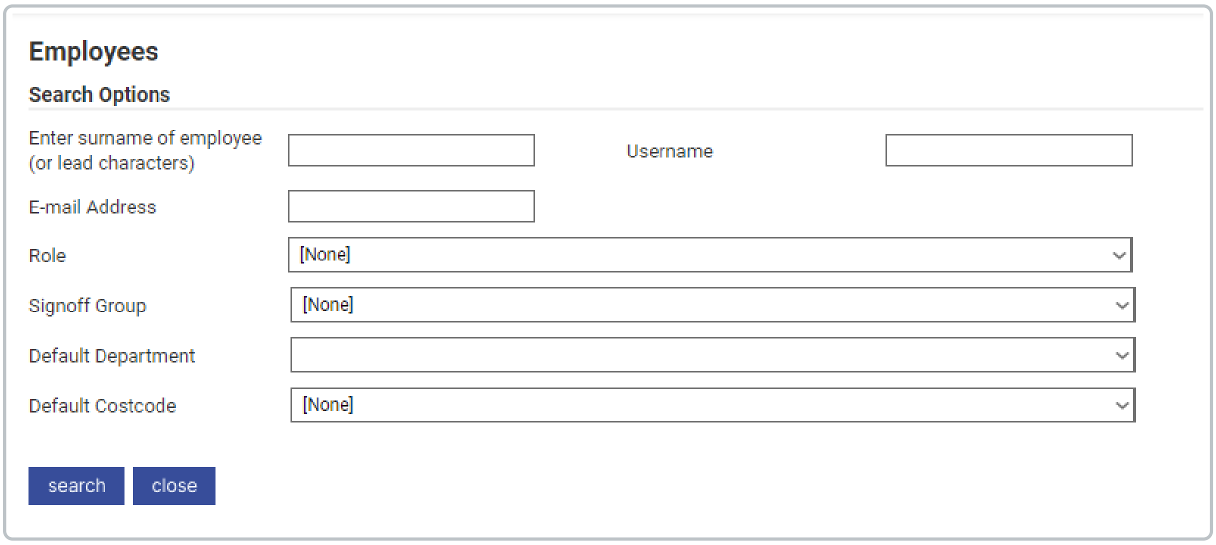
- Employees

There are a large amount of options to configure when creating an employee within Assure Expenses. To help you understand the process, we have split this article into two sections:

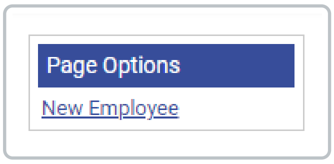
- Core Options
- Additional Options

The core options are likely to be configured by the majority of organisations for new employees within Assure Expenses, such as their General Details, Permissions and Signoff Process. The additional options may not be required by all organisations and should not affect the core functionality that an employee will need to use Assure Expenses.

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



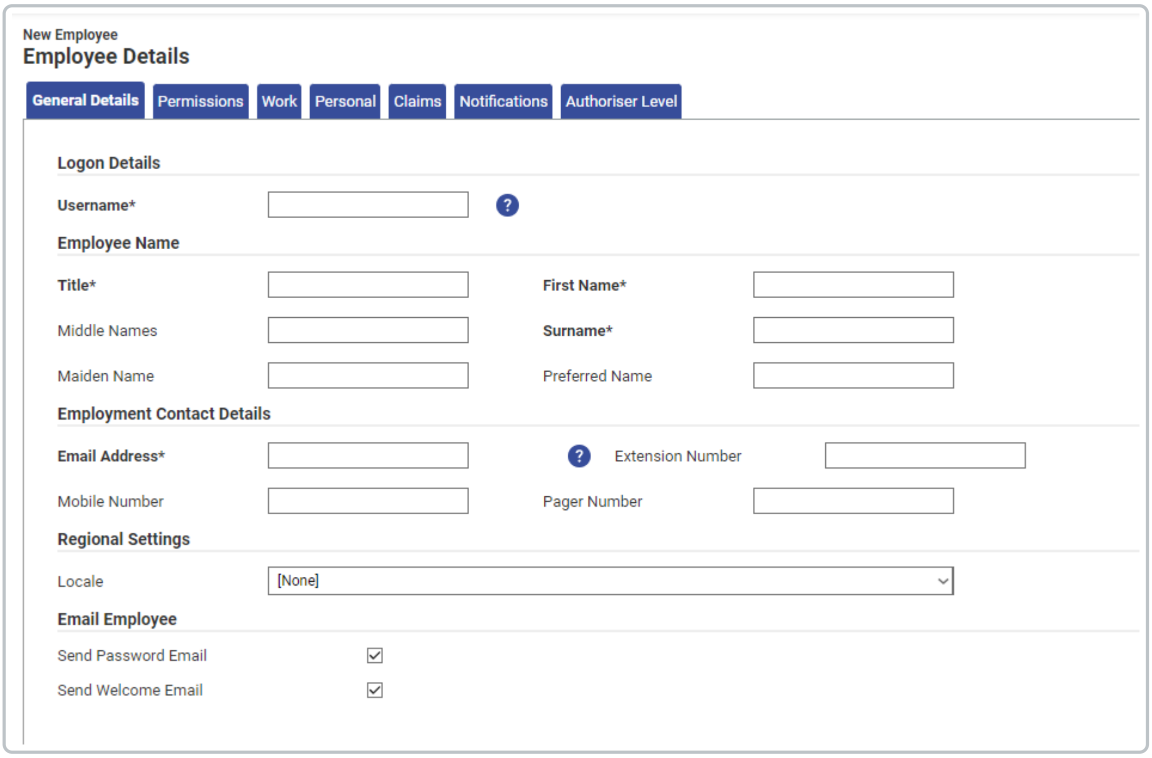
2. Click **New Employee** from the Page Options menu.



General Details

1. Click on the **General Details** tab and complete the following fields:

    - Username
    - Title
    - First Name
    - Surname
    - Email



> **Note:** The **Username** can take any form but must be unique. Typically, organisations will use existing formats such as the employee's network ID or *firstname.surname*

2. Configure the employee email check boxes to enable emails upon creation of the employee record. Depending on your system configuration, new employees may receive two emails:

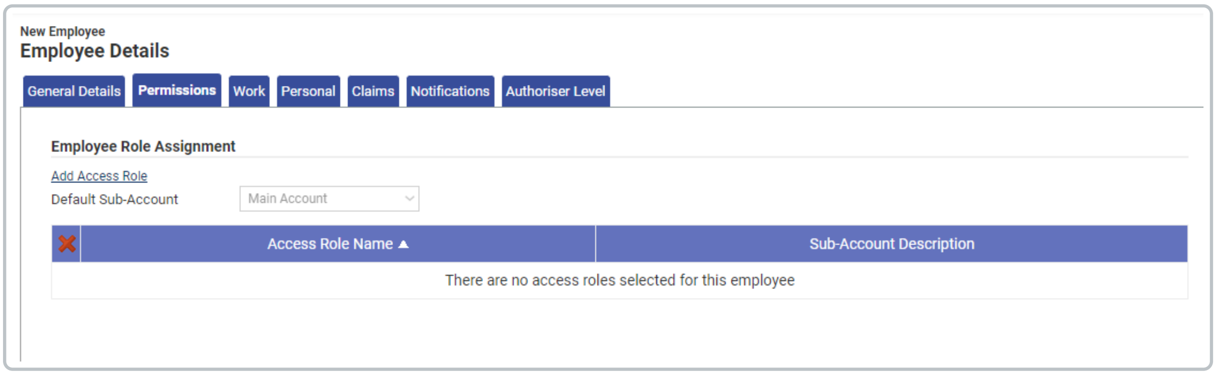
Option	Description

Option	Description
Send Password Email	This is enabled by default. Upon employee creation the following emails will be sent. ◦ Password Request - Explains that a password reset request has been made and that a separate email will be sent. Includes the employee's Company ID and Username. ◦ Password Details - Provides a link and instructions on how to reset their password. **Note:** If your organisation is using the Login with SSO feature, then this option won't be available as you will authenticate through SSO. However, if your organisation is using traditional authentication with company ID, username, and password, then the option will be available and you will be able to send a password reset email.
Send Welcome Email	Select the check box to enable the email below on creation of the employee record: ◦ Company Expenses - Details how to claim expenses, provides a link to the Assure Expenses website and includes the approver's email

Note: Both notification templates are fully customisable.

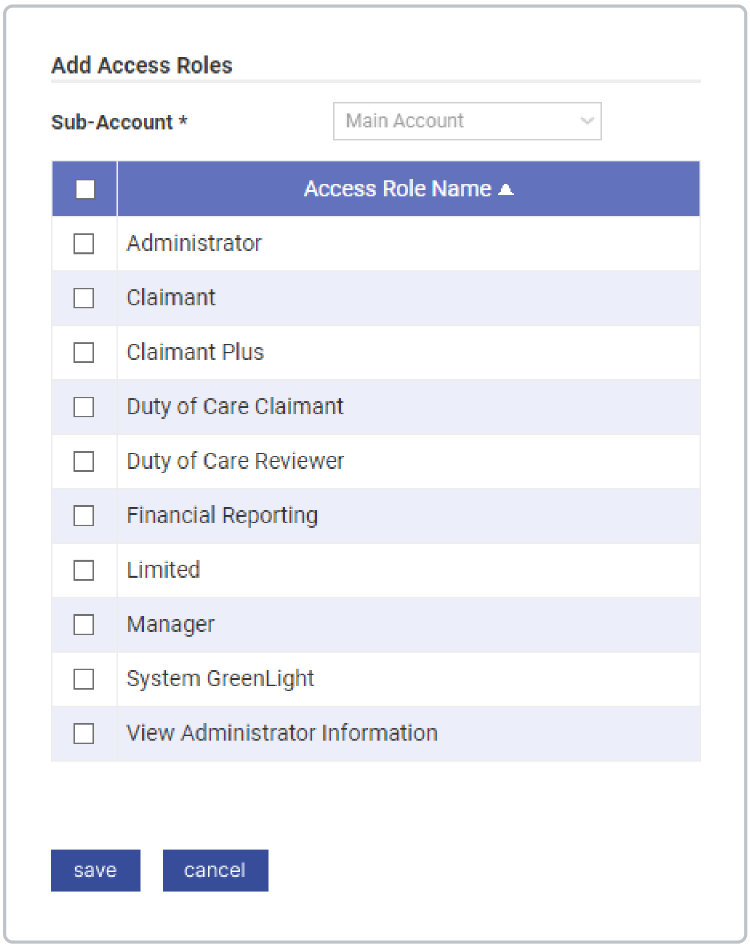
Permissions

1. Click on the **Permissions** tab to configure the employee's Access Roles. This will determine the employee's roles and permissions within Assure Expenses.



2. Click **Add Access Role** to display the Add Access Roles selection window.

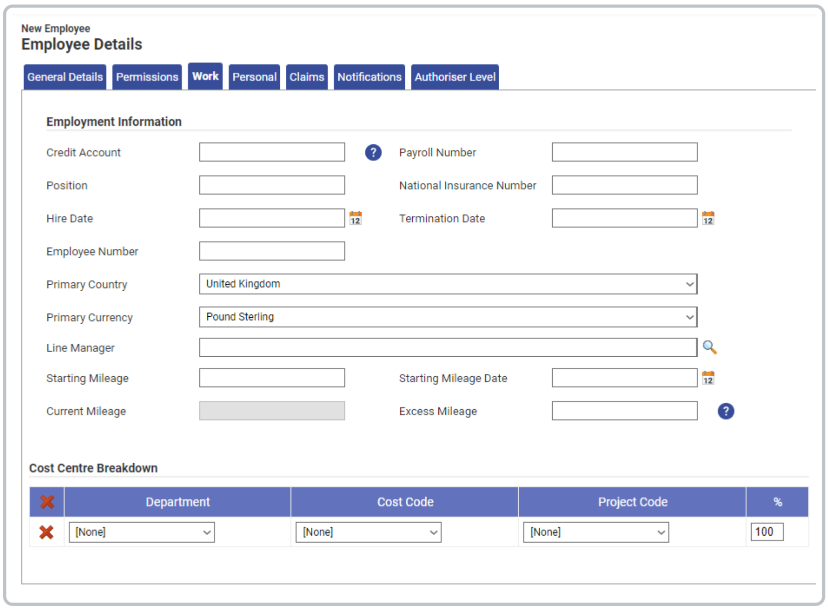
3. Select the check box for any Access Roles that you wish to assign to the employee.



4. Click **Save** to confirm or Cancel to discard the changes.

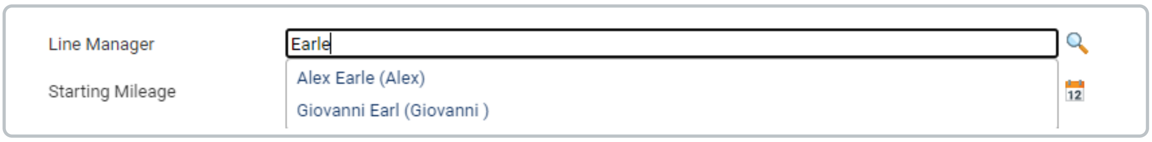
Work

1. Click on the **Work** tab to configure certain parts of the approval process and cost centres which the employee's expenses can be assigned to.



2. Depending on how your organisation has configured Signoff Groups, you may want to set the employee's Line Manager or for NHS organisations, the employee's ESR Assignment and Assignment Supervisor.

    - To set the Line Manager, click in the 'Line Manager' field and then type to search for an employee. Alternatively, click to browse through the list of employees.



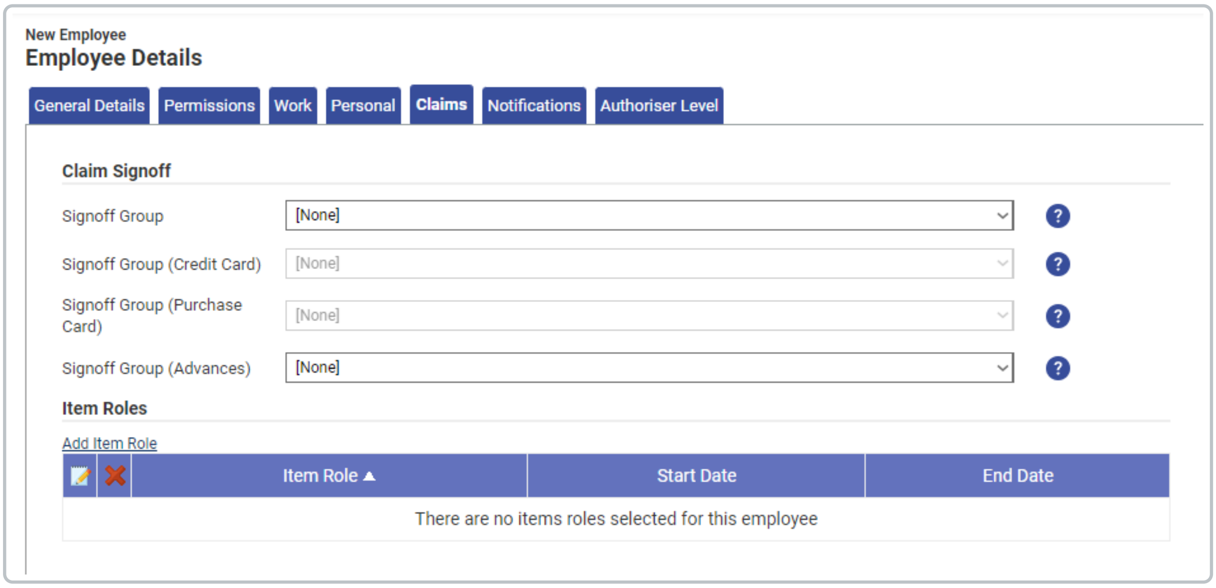
    - To add an ESR Assignment, click 'Add ESR Assignment' and then complete the details.

3. Configure any Cost Codes, Project Codes or Department for the employee. For more information, view Costing Breakdown.

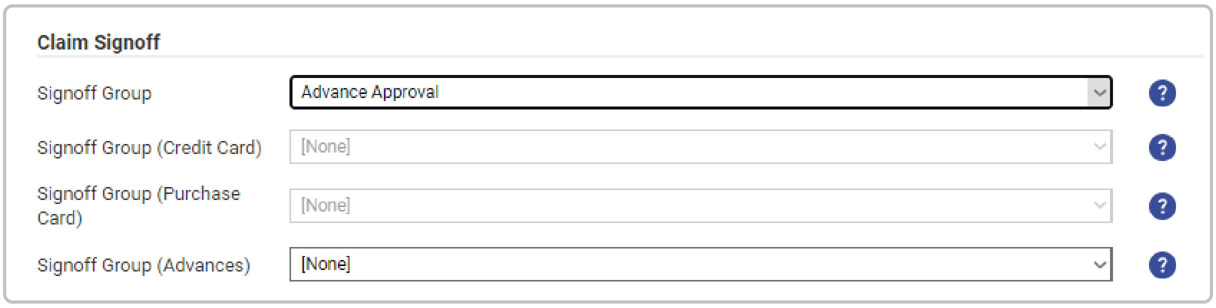
Claims

1. Click on the **Claims** tab to configure the employee's Signoff Groups and Item Roles. This will determine the process that their claims will go through as well as what expense items they will

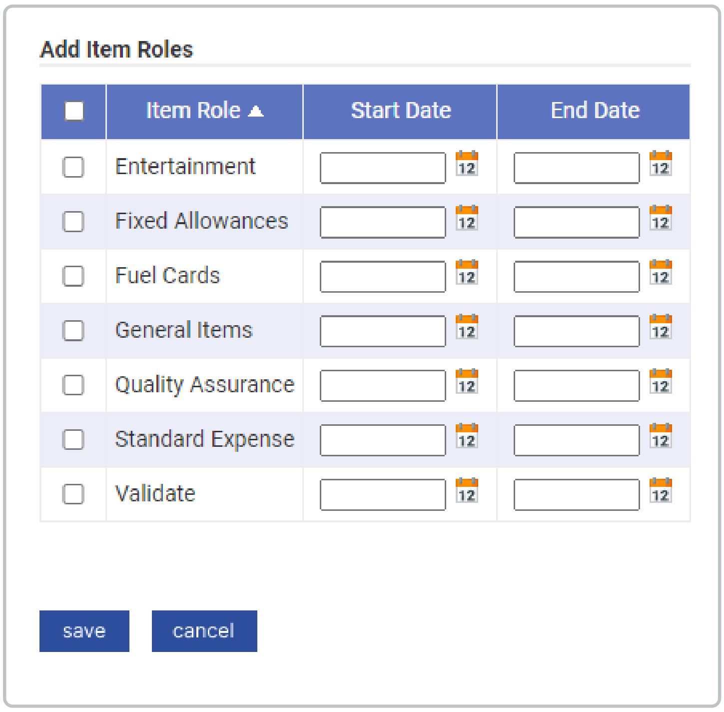
be permitted to claim for.



2. Within the Claim Signoff section, select a Signoff Group from the available drop-down list. Additional Signoff Groups can be selected for Credit Cards, Purchase Cards and Advances. For more information on how to configure Signoff Groups, view Configure a Signoff Group.



3. Within the Item Roles section, click **Add Item Role** to open the Add Item Roles window. For more information on creating and assigning Item Roles, view Manage Item Roles.



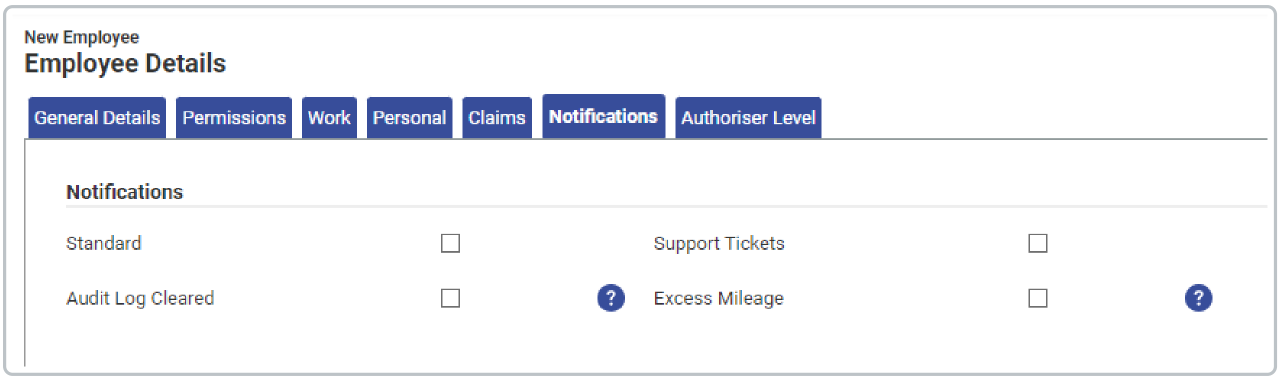
4. Select the check box for any Item Roles that you wish to add to the employee.

> **Note:** Start Dates and/or End Dates can be specified on each Item Role to determine when the Item Roles are active on the employee record.

5. Click **Save** to store the changes or Cancel to discard the changes.

Notifications

Click the **Notifications** tab and select the check boxes to configure which notifications the employee will receive.



Notification	Description
Standard	Obsolete. To be removed in a future product update.

Notification	Description
Support Tickets	Sends an email to any subscribed users when a support ticket is created or updated. This email can be customised. For more information visit Edit a System Email Template.
Audit Log Cleared	Sends an email to any subscribed users when the audit log is cleared. This email can be customised within the 'Email Templates' menu.
Excess Mileage	Notifies any subscribed users when a home or work address is added, edited or deleted for a claimant. **Note:** This will only send a notification for claimants that have an 'Excess Mileage' value set on their employee record. **Note:** When using ESR, this email will be triggered when the outbound file processes the address change for each claimant.
ESR Outbound Import Summary	Creates a task and email which outlines: • Which users need archiving. • Which users need their account activating. • Which users have an assignment that needs archiving. • Which users have a vehicle that needs activating, if it has been created using the outbound interface.
ESR Outbound Invalid Postcodes	Creates a task and email which informs the subscribed user that their Home or Office address could not be added due to an invalid postcode.

Vehicles

From the Page Options menu, click **Vehicles**. For more information on how to Add a Vehicle, view Manage My Vehicles.

Page Options

Employee Details

Vehicles

Pool Vehicles

Corporate Cards

Work Addresses

Home Addresses

Page Options

New Vehicle