

Configure Advances Access

Last Modified on 22/02/2021 11:18 am GMT

Permissions

You will require an Access Role with the following permissions:

- Employees
- Access Roles

Claimant Access

- **Signoff Group** - In order to request an advance, claimants must have a signoff group selected for advances. This can be configured by editing an employee. For more information, visit [Add an Employee](#).

Note: If a claimant has any existing advances, the signoff group will be shaded and unavailable until any existing advances have been closed.

Claim Signoff	
Signoff Group	Text Test ?
Signoff Group (Credit Card)	[None] ?
Signoff Group (Purchase Card)	[None] ?
Signoff Group (Advances)	AlexAdvancesSignoff ?

Approver Access

- **Signoff Group** - The approver will need to be a stage in the claimant's advances signoff group. For more information on how to configure a signoff group, view [Configure a Signoff Group](#).

Note: The advance will not appear until it has reached the approver's stage within the signoff group.

Add / Edit Signoff Group

General Details

Name* Allow one step authorisation ?

Description

Signoff Stages

 	Stage ▲	Signoff Type	Approver	When to Include	Action
 	1	Employee	Skoczylas, Mr Jan	Always include stage	Stage is notified of claim

- **Access Role** - The approver will require the Advances Access Role element. For more information on how to configure Access Roles, view [Manage Access Roles](#).

Element Access

Element	View	Add	Edit	Delete
Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Base Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advances	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Allowances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>