Employees - Admin FAQs

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Why can I not change an employee's Primary Currency?

In order to change an employee's primary currency, you must select a different currency from the 'Primary Currency' drop-down list within **Administrative Settings | User Management | Employees.** This is located under the 'Work' tab.

If the Primary Currency drop-down list is disabled, it is because the claimant that you are attempting to edit already has a current claim. Once their claim has been submitted or deleted, the 'Primary Currency' list will become active again.

How do I manually archive employees?

To learn how to archive employees and alter any important data regarding archived employees, please view Archive Employees.

How do I add an Access Role to an employee?

Navigate from the homepage to **Administrative Settings | User Management | Employees**. When you have selected to edit an employee, click on the 'Permissions' tab to be shown access roles that the employee has assigned.

For more information about assigning Access Roles to an employee, please view Add an Access Role to an Employee.

Am I able to delete a vehicle associated with an employee?

Yes. If you navigate from the homepage to **Administrative Settings | User Management | Employees**, edit the employee and then click **Vehicles** from the page options menu. You will then be able to click next to the vehicle you want to delete.

How do I add a line manager to an employee?

Navigate from the homepage to **Administrative Settings | User Management | Employees**. Edit the employee and then click on the **Work** tab. Click into the 'Line Manager' field and start typing the name of the employee that you want to set as the line manager. Relevant search results will be returned after typing 3 characters. Click to the select the employee.

For more information about adding a line manager, visit Add a Line Manager to an Employee.

How do I set the authoriser level for an employee?

Navigate from the homepage to **Administrative Settings | User Management | Employees**. Edit the employee and then click on the **Authoriser Level** tab. Select the authoriser level amount that the employee is permitted to approve.

For more information about authoriser levels, visit Manage Authoriser Levels.

I want to change the Signoff Group for an employee, but the field isn't clickable. Why is this?

You are unable to change an employee's Signoff Group when the employee has a claim that is currently in the approval process. Once the claim(s) have been approved or deleted you will be able to change the Signoff Group by navigating from the homepage to **Administrative Settings | User Management | Employees**. When you have selected to edit an employee, click on the **Claims** tab and then select the appropriate Signoff Group.

For more information about Signoff Groups, visit Signoff Groups - Feature Overview.

I want to link a corporate card to an employee. How do I do this?

Navigate from the homepage to **Administrative Settings | Imports/Exports | Corporate Card Imports**. Locate the appropriate statement and then click the number in the 'Unallocated Cards' column. Locate the correct card, click **Match Number** and then search for the employee.

For more information about corporate cards, visit Match a Corporate Card to an Employee.