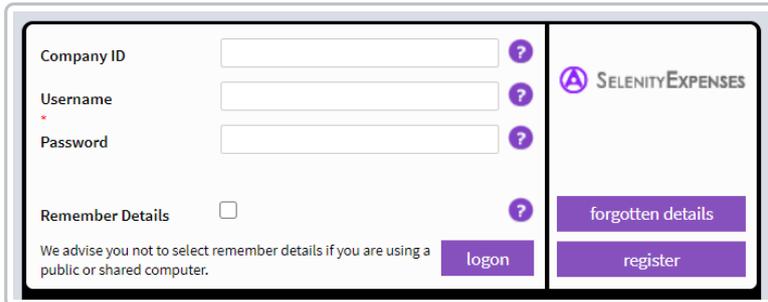


# Self Registration

Last Modified on 05/01/2023 1:21 pm GMT

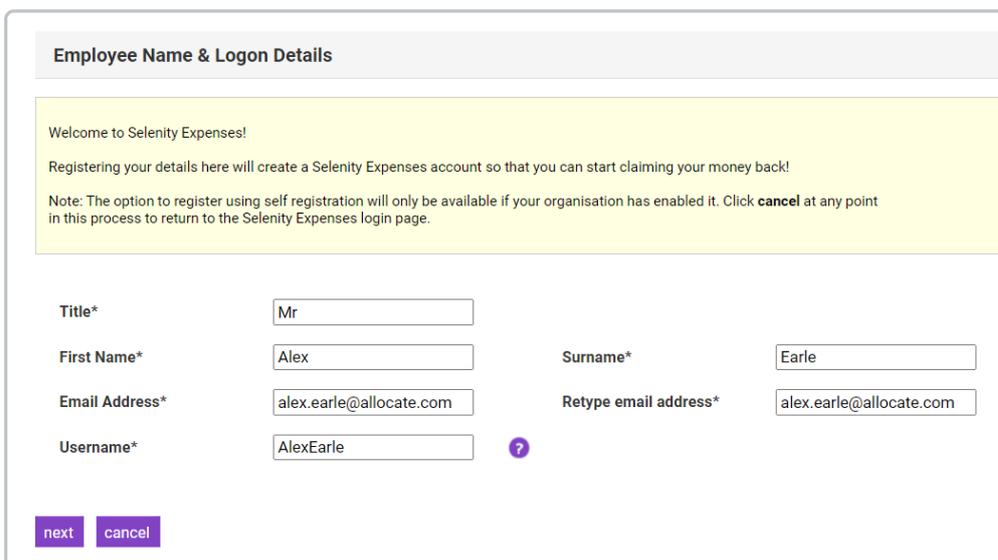
Self Registration allows you to register your own details with Assure Expenses. This feature will only be available if it is enabled by your system administrator.

1. Navigate to the Assure Expenses logon page.
2. Click **Register**.



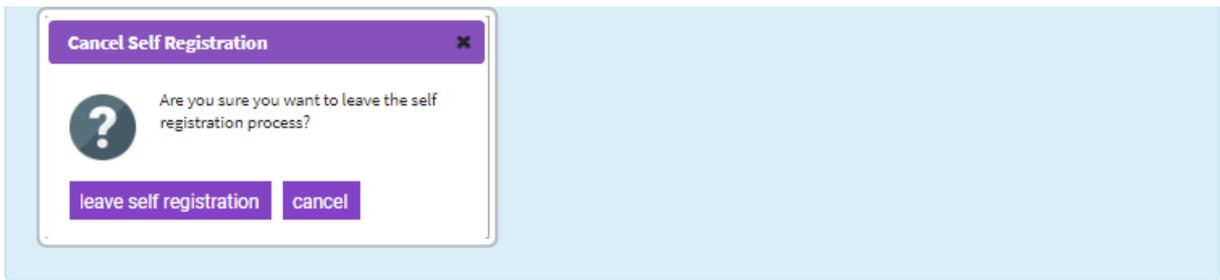
The screenshot shows the Selenity Expenses logon page. On the left, there are input fields for 'Company ID', 'Username', and 'Password', each with a help icon. Below these is a 'Remember Details' checkbox and a warning: 'We advise you not to select remember details if you are using a public or shared computer.' There are 'logon' and 'register' buttons. On the right, the 'SELENITYEXPENSES' logo is displayed, along with 'forgotten details' and 'register' buttons.

3. You will be sent to the 'Employee Name & Logon Details' page. Enter your details and then click **Next**.



The screenshot shows the 'Employee Name & Logon Details' page. It features a yellow banner with a welcome message and a note about self-registration availability. Below the banner are input fields for 'Title\*' (Mr), 'First Name\*' (Alex), 'Surname\*' (Earle), 'Email Address\*' (alex.earle@allocate.com), and 'Username\*' (AlexEarle). There is also a 'Retype email address\*' field. At the bottom, there are 'next' and 'cancel' buttons.

**Note:** If you would like to leave the self registration process, click **Cancel** and then click **Leave Self Registration**. You will be taken back to the Assure Expenses logon page.

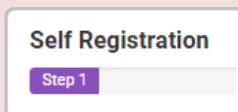


4. You will need to enter a password and then click **Next**. Your password will need to comply with your organisation's password policy which is displayed under the 'Password Policy' section.

A form titled "Password" with a grey header. Below the header is a yellow warning box containing the text: "Looks like you're registering for **Allocate**. If this isn't right, click **Cancel** and contact your local administrator. If **Allocate** is correct, create a password, keeping an eye on the 'Password Policy' below." Below the warning box are two input fields: "Password\*" and "Retype Password\*", both containing masked characters (dots). Below the input fields is a section titled "Password Policy" with a list of requirements: "Your password length must be greater than 10 characters". At the bottom of the form are three buttons: "back", "next", and "cancel".

**Warning:** It is important to note that steps 5 to 13 are fully configurable, and therefore you may not see some of the information detailed below. If this is the case, move on to the next relevant step.

A progress bar will be present at the top of your page during self registration.



5. From the 'Employee Home Details' page, enter your home address details and then click **Next**.

**Note:** You will not be able to register without your home address as it is a mandatory field.

### Employee Home Details

Click the 'Address Search' field to input your postcode. This will display a list of addresses to choose from.

Note: Your address is needed for accurate mileage reimbursements.

If you cannot find your address, click **Can't find what you're looking for?** to manually input your address.

Address Search	<input type="text"/>	Address Line 1*	<input type="text" value="Nibley House"/>
Address Name	<input type="text" value="Selenity Ltd"/>	City/Town	<input type="text" value="Lincoln"/>
Address Line 2	<input type="text" value="5 Low Moor Road"/>	Country*	<input type="text" value="United Kingdom"/>
County	<input type="text" value="Lincolnshire"/>	When did you move to this Address?*	<input type="text"/> 12
Postcode/Zip*	<input type="text" value="LN6 3JY"/>	Home Email Address	<input type="text"/>
Home Telephone	<input type="text"/>		

[back](#) [next](#) [cancel](#)

**Tip:** Click on the 'Address' field to use the address widget for an easy way to find your address automatically.

6. From the 'Employee Work Details' page, enter your employment details and then click **Next**.

### Employee Work Details

Enter your work details below. This information will determine the steps that will have to be taken in order for you to get paid.

Note: These fields are not mandatory but will be checked by your administrator. These details can be changed by navigating to **My Details | Change My Details** within Selenity Expenses.

Credit Account / Purchase Ledger Number	<input type="text"/>	Position	<input type="text"/>
Payroll Number	<input type="text" value="123456"/>	Line Manager	<input type="text" value="Sykes, Mr Kieron (ki..."/>
Primary Country	<input type="text" value="United Kingdom"/>	Primary Currency	<input type="text" value="Pound Sterling"/>
Extension Number	<input type="text"/>	Mobile Number	<input type="text"/>
Pager Number	<input type="text"/>		

[back](#) [next](#) [cancel](#)

7. From the 'Bank Details' page, enter your bank details and then click **Next**.

**Bank Details**

Enter your bank details below. It is important that this information is correct to allow payments to be made to your account.

Note: These details are not mandatory and can be entered after registration by navigating to **My Details | My Bank Accounts** within Selenity Expenses. IBAN and SWIFT Code are only applicable to bank accounts outside the UK.

Account Name	<input type="text" value="HSBC Current Account"/>	Account Number	<input type="text" value="12345678"/>
Account Type	<input type="text" value="Current"/>	Sort Code	<input type="text" value="123456"/>
Reference	<input type="text"/>	Account Currency	<input type="text" value="Pound Sterling"/>
Country	<input type="text" value="United Kingdom"/>	IBAN	<input type="text"/>
SWIFT Code	<input type="text"/>		

8. From the 'Access Roles' page, select the appropriate Access Role and then click **Next**. This will determine your permissions and the areas of Assure Expenses that you have access to.

**Access Roles**

Select an Access Role by clicking an item within the drop-down menu. You are also able to search by typing within the field.

Note: Having an Access Role is a mandatory requirement to determine which areas of Selenity Expenses you can see. You will not be able to proceed without an Access Role unless your administrator has created a default Access Role for you.

**Note:** You will not be able to proceed without an Access Role unless your administrator has created a default Access Role for you.

9. From the 'Item Roles' page, select the appropriate Item Roles and then click **Next**. This determines which expense items you are allowed to claim.

**Item Roles**

Select an Item Role by clicking an item within the drop-down menu. You are also able to search by typing within the field.

Note: Having an Item Role is not a mandatory requirement, but it will determine which expense items can be added to your claims, such as parking or lunch.

Claimant - Claimant x

back next cancel

10. From the 'Signoff Group' page, select a Signoff Group. If applicable, select a Signoff Group for advances and then click **Next**. This will determine the approval stages that your claims will have to go through before any reimbursements are made.

**Signoff Group**

Select a Signoff Group and, if applicable, an Advances Signoff Group by clicking an item within the drop-down menu. You are also able to search by typing within the field.

Note: Having a Signoff Group is not a mandatory requirement, but it will determine who will check and approve your claims before payments can be made.

Signoff Group  Advances Signoff Group

back next cancel

tech

Technical Author

Technical Writing

11. From the 'Costing Breakdown' page, select the appropriate Costing Breakdown and then click **Next**. These are used to correctly allocate the cost of your expenses to the correct area of your company.

**Costing Breakdown**

Select your Costing Breakdown by selecting an item within the drop-down menu.

Note: Selecting a Costing Breakdown is not mandatory, but it will allocate the cost of your expenses to the correct area of your company, such as the 'Payroll/Finance' project in the 'Technical' department.

Department  Cost Code

Project Code

back next cancel

12. From the 'Vehicle & Mileage Details' page, start by entering your vehicle's registration number, at which point, Assure Expenses will perform a lookup to automatically populate your vehicle details. You can then complete the rest of the fields and click **Next**.

**Note:** The Vehicle Journey Rate will determine the thresholds and mileage rate that you are allowed to claim for. This is a mandatory field if you selected 'Do you use a vehicle in the course of your work?'

### Vehicle & Mileage Details

If you use a vehicle in the course of your work, then select 'Do you use a vehicle in the course of your work?' and type in your Registration Number. Selenity Expenses will automatically populate your vehicle details. If this does not apply, click **next**.

Where the vehicle details are not found or are incorrect, please update them manually.

Select a Vehicle Journey Rate to determine the rate you will be paid for mileage.

Note: It is important that your vehicle details are entered if you use a vehicle in your course of work so that any mileage claims can be processed.

Do you use a vehicle in the course of your work?

Registration No

Make  Model

Vehicle Type  Engine Type

Engine Size (cc)

Mileage Unit of Measure

Vehicle Journey Rate

[back](#) [next](#) [cancel](#)

13. If applicable, complete any additional user defined fields added by your organisation and click **Next**.

### Other Information

Complete any additional details that your organisation needs below.

14. You will be directed to the summary screen. Check that the information you have entered is correct and then click **Register**. We'll send your details over to your administrator for activation and let you know when you can start using Assure Expenses.

## Summary

A summary of all the details you have entered is below.

Click on each section to expand it and review the information you have entered. Double check you're happy and then click **register** to complete the self registration process.

▶ Employee Name & Logon Details

▶ Employee Home Details

▶ Employee Work Details

▶ Bank Details

▶ Access Roles

▶ Item Roles

▶ Signoff Group

▶ Department/Costcode Breakdown

▶ Vehicle and Mileage Details

▶ Other Information

[back](#)

[register](#)

[cancel](#)

## Registration Successful

**Welcome! Thank you for registering with Selenity Expenses.**

We're sending your details across to your administrator to finish the process and we'll let you know when you can start reclaiming your expenses. In the meantime please verify your account by following the instructions in the email we have sent you.

[close](#)