

Add an Access Role to an Employee

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Permissions

You will require an Access Role with the following permissions:

- (User Management) Employees

1. Navigate to **Administrative Settings | User Management | Employees**.

Employees

Search Options

Enter surname of employee (or lead characters) Username

E-mail Address

Role

Signoff Group

Default Department

Default Costcode

2. Search for an existing employee and then click .

Employees

Display Filter

    	Username	Title (Mr/Mrs/Dr)	First Name	Surname	Group Name	E-mail Address ▼
   	Peter	Mr	Peter	Cowen	Line Manager	peter.cowen@allocatesoftware.com

3. Click on the **Permissions** tab to manage the employee's Access Roles. An Access Role will determine the employee's roles and permissions within Assure Expenses.

Employee: Peter
Employee Details

General Details | **Permissions** | Work | Personal | Claims | Notifications | Authoriser Level

Employee Role Assignment

[Add Access Role](#)

Default Sub-Account:

<input checked="" type="checkbox"/>	Access Role Name ▲	Sub-Account Description
<input checked="" type="checkbox"/>	Administrator	Main Account
<input checked="" type="checkbox"/>	Claimant	Main Account

4. Click **Add Access Role** to display the 'Add Access Roles' window.

5. Select the check box next to each Access Role that you want to assign to the employee.

Add Access Roles

Sub-Account *

<input type="checkbox"/>	Access Role Name ▲
<input type="checkbox"/>	Administrator
<input type="checkbox"/>	Claimant
<input type="checkbox"/>	Claimant Plus
<input type="checkbox"/>	Duty of Care Claimant
<input type="checkbox"/>	Duty of Care Reviewer
<input type="checkbox"/>	Financial Reporting
<input type="checkbox"/>	Limited
<input type="checkbox"/>	Manager
<input type="checkbox"/>	System GreenLight
<input type="checkbox"/>	View Administrator Information

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