

Add a Signoff Group to an Employee

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Permissions

You will require an Access Role with the following permissions:

- (User Management) Employees

1. Navigate from the homepage 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 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 **Claims** tab to configure the employee's Signoff Groups. This will determine the approval process that their claims will go through.

Employee: Peter
Employee Details

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

Claim Signoff

Signoff Group ?

Signoff Group (Credit Card) ?

Signoff Group (Purchase Card) ?

Signoff Group (Advances) ?

Item Roles

[Add Item Role](#)

	Item Role ▲	Start Date	End Date
	General Items		

4. 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](#).
 5. Click **Save** to store the changes or Cancel to discard the changes.
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