

# Add Item Roles 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 **Home** page to **Administrative Settings | User Management | Employees**.
2. Use the search filters on the Employees page to search for an employee. Click the **Search** button to perform the search.

### Employees

#### Search Options

Enter surname of employee (or lead characters)	<input type="text"/>	Username	<input type="text"/>
E-mail Address	<input type="text"/>		
Role	<input type="text" value="[None]"/>		
Signoff Group	<input type="text" value="[None]"/>		
Default Department	<input type="text"/>		
Default Costcode	<input type="text" value="[None]"/>		

3. Click  next to the employee record to open the Employee Details page.

### 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

4. Within the **Claims** tab, click **Add Item Role**. This will display a window that allows you to select the Item Roles that you want to assign to the employee. For more information on creating and assigning Item Roles, view [Manage Item Roles](#)

Employee: Peter  
**Employee Details**

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

**Claim Signoff**

Signoff Group: Line Manager ?

Signoff Group (Credit Card): [None] ?

Signoff Group (Purchase Card): [None] ?

Signoff Group (Advances): [None] ?

**Item Roles**

Add Item Role

		Item Role ▲	Start Date	End Date
		General Items		

- Select the check boxes next to each Item Role to assign them to the employee and if required, choose the active date ranges for each Item Role. Click **Save** to store the changes.

**Add Item Roles**

<input type="checkbox"/>	Item Role ▲	Start Date	End Date
<input type="checkbox"/>	Entertainment	<input type="text"/> 12	<input type="text"/> 12
<input type="checkbox"/>	Fixed Allowances	<input type="text"/> 12	<input type="text"/> 12
<input type="checkbox"/>	Fuel Cards	<input type="text"/> 12	<input type="text"/> 12
<input type="checkbox"/>	Quality Assurance	<input type="text"/> 12	<input type="text"/> 12
<input type="checkbox"/>	Standard Expense	<input type="text"/> 12	<input type="text"/> 12
<input type="checkbox"/>	Validate	<input type="text"/> 12	<input type="text"/> 12

**Note:** Item Role date ranges are optional and can be left blank. Any expense items that have active date ranges outside of the Item Role date range will not appear within the claimant's My Expense Items menu.

- Click **Save** on the Employee Details page to complete this process.