Alerts

Alerts, previously known as Exceptions, are classified as the yellow or red notifications that appear on an expense report. Alerts are used to prevent errors with expense report submission and expedite the reimbursement process. Yellow Alerts⚠️ are warnings or reminders that there may be an issue with a particular expense type or something missing from the overall report. Red Alerts❗️ are hard stops that require some type of update to a particular expense type or the overall report before submission. Please use this guide to appropriately review Alerts.

Expense Report

1. If Alerts exist, they can appear both at the top of the expense report or on the individual transaction lines.

2. To view the report-level exceptions, click the Report Header hyperlink. To view the entry-level exceptions, click the Expense Type associated with the flag.

3. When an Alert appears, review the text associated with the Alert by expanding the menu at the top or clicking on the individual Alerts. The text should provide instruction on what needs to be altered or added to remove the Alert.
4. To ensure that all Alerts are cleared prior to the traveler submitting the report, the Submit Report button appears available to delegates. When a delegate clicks on Submit Report, the system is actually checking for any Alerts that may exist on the report, not just an individual expense line. Delegates do not have the ability to submit an expense report on behalf of an active employee/traveler.

5. Some Alerts will require either the Save Expense or the Submit Report buttons to be clicked again in order to evaluate and then clear the Alerts.