Flags - Feature Overview

Overview

Flags can be configured to enforce specific expenses policy and to alert claimants and approvers of policy breaches.

There are two actions that can applied to the flag if the claimant is in breach of the rule, either a 'flag' which will allow the expense to be added to a claim but alert claimants and approvers of the policy breach, or a 'block' to prevent the expense from being added to a claim.

Flags are extremely customisable; each base flag has multiple options allowing you configure the flag to match your expenses policy.

Features

Feature	Description
Create Flag Rules	Create flag rules to enforce expenses policy.
Customisable Flag Rules	Tailorable options to cover various scenarios.
Flag Levels	Specify a flag level to easily identify the level of policy breach.
Associate to Item Roles and Expense Items	Apply flag rules to specific item roles and expenses items.
Add Justifications	Enforce claimant or approver justifications for policy breaches.

Implementation

1. For an administrator to fully configure Flag Rules within your system they will require the following permissions on their (http://expenses.knowledgeowl.com/help/access-roles-feature-overview)." data-original-title="" data-toggle="popover" title="">Access Role:

    - Policy Information (Flag Management)

Element Access				
Element	View	Add	Edit	Delete
Expenses	☐	☐	☐	☐
⊞ Base Information	☐	☐	☐	☐
⊞ Global	☐	☐	☐	☐
⊞ GreenLight Management	☐	☐	☐	☐
⊞ Help & Support	☐	☐	☐	☐
⊞ Imports/Exports	☐	☐	☐	☐
⊞ Miscellaneous	☐	☐	☐	☐
⊟ Policy Information	☐	☐	☐	☐
Broadcast Messages	☑	☑	☑	☑
Company Policy	☑		☑	
Expenses Policy	☑	☑	☑	☑
Flag Management	☑	☑	☑	☑

2. Navigate from the **Home** page to **Administrative Settings | Policy Information | Flag Management** to create a new Flag Rule. For more information on how to create Flag Rule, view Create a Flag Rule.