

Concur Expense: Audit Rules (Validation Rules) Setup Guide

Last Revised: August 5, 2022

Applies to these SAP Concur solutions:

- ☒ Expense
 - ☒ Professional/Premium edition
 - ☐ Standard edition
- ☐ Travel
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Invoice
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Request
 - ☐ Professional/Premium edition
 - ☐ Standard edition

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Revision History

Date	Notes / Comments / Changes
August 5, 2022	Added information about the NextGen UI; made modifications throughout; cover revision date updated
May 10, 2022	Added Special Considerations section outlining sequence of validation rules
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
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October 7, 2020	Added a note to the <i>Events (Triggers)</i> section.
April 9, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 2, 2020	Updated the copyright; no other changes; cover date not updated
June 8, 2019	Added information about using the Or function with parentheses to the <i>Validation Conditional Expressions</i> section.
January 2, 2018	Added the following clarification note to the <i>Triggers (Events)</i> section: "Cost Object Approval processing occurs BEFORE validation rules are executed, so cost objects that are updated by approver actions via validation rules will not reset the cost object workflow."
July 19, 2018	Added information to clarify the use of Calculation Formulas; you can only have one condition set up – per validation rule field – for the Calculation Formula action to perform successfully.
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January 3 2018	Updated the copyright; no other changes; cover date not updated
December 15 2017	Added a caution to *not* update any connected list fields via validation rules.
September 19 2017	Added a note about the exception Message text to clarify that this is a text field and does not support HTML formatting.
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September 15 2014	Clarified - You can only have one validation rule set up – per entity – to provide these values to the calculation engine.
April 15 2014	Changed copyright and cover; no other content changes
September 20 2013	A new Site Setting, <i>Enable Validation Rules</i> , removes the Validation tab from the Audit Rules tool (it does not remove existing functionality however – it only suppresses display of the tab itself).
December 28 2012	Made rebranding and/or copyright changes; no content changes.

Date	Notes / Comments / Changes
January 2012	Changed copyright; no content changes.
September 23 2011	Added information about Calculation Formulas.
May 20 2011	Update document for new user interface appearance.
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Audit Rules (Validation Rules)

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Section 1: Permissions

You may or may not have the correct permissions to use this feature. You may have limited permissions, for example, you can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*). The Expense Configuration Administrator (Restricted) permission grants access to this feature. Other user roles may have access to this feature as well.

If you need to use this feature and do not have the proper permissions, contact your SAP Concur administrator.

Also, be aware that some of the tasks described in this guide can be completed only by SAP Concur. In this case, your company must initiate a service request with SAP Concur Support.

Section 2: Overview

Validation Rules are used to compare values in expense report fields to a table of predefined values, imported by the client. The comparison can be configured to take place on entry save and submit, allocation save, and report save, submit, or post submission. If the comparison uncovers a mismatch, the validation rule can throw an exception, update the report field (except on allocation save), or both.



Refer to the *Expense: Audit Rules Setup Guide* and the *Shared: Validation Table Import Specification* for more information.

Activation of Validation Rules Module and Site Setting Option Required

A Service Request must be submitted to SAP Concur to enable the Validation Rules module of Audit Rules. The process involves enabling the OID Import job.

In addition, the *Enable Validation Rules* setting must be enabled in order for the tab to appear. Conversely, you may elect to suppress this tab using this same functionality (**Administration > Expense > Site Settings**).

General Concepts

Visibility

When creating or editing a validation rule that uses the Generate Exception action, the administrator defines who sees the exception text:

- **Traveler (user), Approver, and Expense Processor:** The user, Approver, and Expense Processor see the exception text.
- **Approver and Expense Processor:** The user does not see the exception text and, hence, does not know the report will be audited.
- **Expense Processor:** The user and Approver do not see the exception text and, hence, do not know the report will be audited.

The exception text appears along with:

- A yellow flag if the exception does not prevent submission of the expense report
- A red flag if the exception prevents submission of the expense report
- A gray flag if the Expense Processor has cleared the exception

Exceptions

When creating or editing a validation rule that uses the Generate Exception action, the administrator can choose to assign an exception. All exceptions contain the following:

- **Exception code:** This is the company-defined code for the exception, up to eight alphanumeric characters, all uppercase.
- **Exception level:** The company decides how many exception levels (up to 99) to use. For example, assume the company decides to have six exception levels, with level 1 being a minor exception and level 6 being a severe exception. The company also decides the point at which the severity of the exception prevents the user from submitting the expense report (via Expense Configuration Administrator > Workflows > Settings). For example, assume the system does not allow the user to submit an expense report if it contains a level 6 exception.
- **Exception text:** This is the actual message that appears, such as "The project code selected is not a valid project code."

Events (Triggers)

When creating or editing a validation rule, the administrator specifies the event that triggers the rule, for example:

- **Allocation Save:** This rule is triggered as each individual allocation "line item" is saved.
- **Entry (Expense) Save:** The rule is triggered when an expense is saved, whether by the user, approver, or processor.

NOTE: Tax calculations occur *before* Validation rules in the Save process. Validation rules should not be used to set field values that drive tax calculations.

- **Entry (Expense) Submit:** The rule is triggered when the expense is submitted.
-

NOTE: Entry Submit rules are processed before Report Submit rules.

- **Post Report Submit:** The rule is triggered immediately after a report enters the first step of workflow. Any exceptions generated will not prevent the report from being submitted.
 - **Report Save:** The rule is triggered immediately after the report header information is saved whether by the employee, approver, or processor.
 - **Report Submit:** The rule is triggered when the report is submitted. If there are exceptions generated that are above the exception level limit (that is, prevents report submission; described in *Exceptions* in this guide), then the report will not be submitted and will not enter the first step of a workflow.
-

NOTE: Cost Object Approval processing occurs BEFORE validation rules are executed, so cost objects that are updated by approver actions via validation rules will not reset the cost object workflow.

Execution Basis

When creating a validation rule, the administrator chooses whether the rule executes when the condition listed is True or False. Each set of validation conditions will always evaluate to True or False.

Special Considerations – Order of Execution

It is important to understand when a validation rule is executed during some operations, in order to avoid unintended outcomes.

Calculation formulas: Calculation formulas execute *before* any other validation rules or audit rules during the expense entry Save process.

Copy down: Validation rules generally execute *after* copy down during the Save operation, therefore it is not recommended to use validation rules to change the value of a field that is copied down to lower-level records.

Cost object approval workflows: Cost Object Approval processing occurs *before* validation rules are executed, so cost objects that are updated by approver actions via validation rules will not reset the cost object workflow.

Tax calculations: Tax calculations occur *before* Validation rules in the expense entry Save process. Validation rules should not be used to set field values that drive tax calculations.

Summary – The Basic Process of Creating Validation Rules

When creating the validation rule, the administrator:

1. Names the rule
2. Identifies the event that triggers the rule
3. Identifies the administrator (group) that can edit the rule
4. Identifies the group to which the rule applies and whether or not the rule is inherited to the groups below it in the group's hierarchical structure
5. Chooses whether the rule should act when the condition is True or False
6. Defines the conditions using the Validation Rules condition editor
7. Defines the Validation action:
 - ♦ Exception only
 - ♦ Field update only
 - ♦ Field update, then exception
 - ♦ Calculation Formula



Refer to the *Calculation Formulas* section of this guide for more information.

8. For **Field Update**: Chooses which fields to move data between

! **IMPORTANT:** Neither *Field update*, nor *Field update, then exception* actions may be used to update connected list fields. Values set by validation rules will not be checked to ensure that they are legitimate choices within the list, therefore invalid field values may be set accidentally. DO NOT update any connected list fields via validation rules.

9. For **Exception**: Defines who sees the exception text, and selects or creates the appropriate exception

Validation Conditional Expressions

NOTE: Basic information about conditional expressions can be found in the *Concur Expense: Audit Rules Setup Guide*. This section in this guide contains the Validation Rules variations.

Conditional expressions in Validation Rules are similar to creating database queries. Each condition using the Field Validation data object narrows down the list of potential matches. In order to match a report/entry field with a field in the validation table, it is necessary to use multiple conditions to specify the correct validation table row. For example, this condition:

InsertRemove

	Data Object/Operator	Field/Value	Operation
<input type="checkbox"/>	<div>▼</div>		
	Entry ▼	Amount	
	Equal		
	Field Validation ▼	Amount1	<div></div> <div>▼</div>
	<input checked="" type="radio"/> And <input type="radio"/> Or		
<input type="checkbox"/>	<div>▼</div>		
	Field Validation ▼	Type	
	Equal		
	Value ▼	City Limit	<div></div> <div>▼</div>
	<input checked="" type="radio"/> And <input type="radio"/> Or		
<input type="checkbox"/>	<div>▼</div>		
	Field Validation ▼	Id 01	
	Equal		
	Value ▼	New York	<div></div> <div>▼</div>

Will evaluate as:

The entry amount equals the validation table Amount1 (where the validation table row contains Type = CityLimit and Id_01 = New York)

When creating or editing conditional expressions, the administrator should consider the following.

- The Field Validation data object must be selected in order to use fields in the validation table for comparison.
- The List Validation data object is used to compare report/entry fields to a simple configured list.
- The **Type** field in the validation table allows the client to reuse columns for different data.
- The **Type** and **Id 01** fields must be included when using the Field Validation data object.

Section 2: Overview

- The only operator that can be used against the Id columns and the Type column is the equal operator. This is the same for the List Validation object.
- When using the Field Validation object the Id fields must all be used in numeric order 1 through n. For example, if you use Id 5 you must use Id 1 through Id 4 first.
- The List Validation object can only be on the right-hand side of the expression.
- When looking up list values, the list item short code is used:
 - ♦ When copying from one list to another, the source list short code for the current value is used to look up the short code in the target list.
 - ♦ When copying from a text field, the text field value is compared to the short code value.
 - ♦ When copying from a constant value that value is compared to the short code value.
- When using the Entry City field in validations, the location code for the city is used. You must import the location codes into the validation table to validate the city values.
- When using the Entry State/Province field in validations, the country sub code for the state/province is used. You must import the codes into the validation table to validate the State/Province values. Validation conditions using this field must have the validation on the left side of the condition, and the State/Province field on the right side: `Field_validation.ID_1 = Entry.State/Province`.
- When using the Entry Country field in validations, the country code for the country is used. You must import the location country codes into the validation table to validate the country values.
- When the List Validation object is selected, the List Validation helper pane will appear on the right side of the page, displaying the configured simple lists.

1 Validation Rule2 Conditions3 Actions4 Exception

InsertRemove

Data Object/Operator	Field/Value	Operation
<input type="checkbox"/> <div></div>		
Entry	Vendor	
Equal		
List Validation		

List Validation Helper

List Validation Helper

Select the list that will be used in the validation rule condition.

Employee Groups

Travel Allowance Trip Types

Trip Length

Travel Allowance Norway Lodging Types

Travel Allowance Germany Lodging Types

Travel Allowance Germany Meal Provided Types

UNSPSC Commodity Code List

Sponsor List

Exec Type

DummyCountries

Global Ranks

Engagement

Office Location

Floor

Expense Groups

USING OR

The **Or** function applies to an entire expression. The sections of an expression that use the **Or** function must be balanced before and after the **Or** function.

! IMPORTANT: Using nested parentheses will not overcome this limitation.

For example, the following condition is misconfigured with three parts (instead of a balanced four parts) and attempts to apply the **Or** expression to only the second and third parts of the expression by grouping the second and third parts using parentheses. With this configuration, the exception will not trigger when only the first and third sections are true.

Section 2: Overview

Insert Remove

☐ ☐ ☐

Field Validation ☐ Type

Equal

Value ☐ Threshold

☐ ☐

☒ And ☐ Or

☐ ☐

Field Validation ☐ Id 01

Equal

Employee ☐ Country

☐ ☐

☒ And ☐ Or

☐ ☐

Field Validation ☐ Id 02

Equal

Entry ☐ Expense Type

☐ ☐

☒ And ☐ Or

☐ ☐

Field Validation ☐ Id 03

Equal

Value ☐ Per Transaction

☐ ☐

☒ And ☐ Or

☐ ((☐

Entry ☐ Country

Equal

Value ☐ United Kingdom

☐ ☐

☒ And ☐ Or

☐ ☐

Entry ☐ Amount

Greater Than

Field Validation ☐ Amount1

☐ ☐

☐) ☐

☐ ☐

☐ (☐

Entry ☐ Country

Not Equal

Value ☐ United Kingdom

☐ ☐

☐) ☐

☒ And ☐ Or

☐ ☐

Entry ☐ Amount

Greater Than

Field Validation ☐ City Limit

☐ ☐

☐)) ☐

This same expression, correctly configured with an equal number of parts before and after the **Or** function, looks like this:

The image displays two side-by-side screenshots of a validation rule configuration interface. Both screenshots show a complex logical expression builder with multiple conditions connected by logical operators.

Left Screenshot: The logical operator between the first and second conditions is set to "And". The conditions are:

- Field Validation: Type (Equal)
- Field Validation: Id 01 (Equal)
- Field Validation: Id 02 (Equal)
- Field Validation: Id 03 (Equal)
- Entry: Country (Equal)
- Entry: United Kingdom (Equal)
- Entry: Amount (Greater Than)
- Field Validation: Amount1 (Equal)

Right Screenshot: The logical operator between the first and second conditions is set to "Or", which is highlighted by a red circle. The conditions are:

- Field Validation: Type (Equal)
- Field Validation: Id 01 (Equal)
- Field Validation: Id 02 (Equal)
- Field Validation: Id 03 (Equal)
- Entry: Country (Equal)
- Entry: Not Equal (Value: United Kingdom)
- Entry: Amount (Greater Than)
- Field Validation: Amount2 (Equal)

Calculation Formulas

Expense types can be configured to use calculations to determine the transaction or adjusted amount. Validation rule fields Amount1 and Amount2 can be used in the expense type calculation formulas. In order to use those fields, the administrator must configure a validation rule that makes the amount values available to the formula calculations. The validation rule requires the following settings:

- The event must be Entry Save.
- The conditions must contain the Type and Id 01 fields.
- The action must be Calculation Formula.

You can only have one validation rule set up – **per entity** – to provide these values to the calculation engine. If there is already a validation rule configured for the Calculation Formula action, that action will not be available for other rules.

NOTE: Calculation formulas execute before any other validation rules or audit rules.

You can only have one condition set up – **per validation rule field** – for the Calculation Formula action to perform successfully. If a Calculation Formula action is assigned to a validation rule and there is more than one condition assigned to the same Field Calculation, then the calculation action will not be performed.

For example, this condition:

The screenshot shows a configuration window for validation rules. At the top are 'Insert' and 'Remove' buttons. Below is a table with columns: 'Data Object/Operator', 'Field/Value', and 'Operation'. There are two rows of conditions, each preceded by an unchecked checkbox. The first row has a dropdown menu, 'Entry' (with a dropdown arrow), 'Custom 04', 'Equal', 'Field Validation' (with a dropdown arrow), 'Id 04', and an empty 'Operation' field with a dropdown arrow. The second row has a dropdown menu, 'Entry' (with a dropdown arrow), 'Custom 05', 'Equal', 'Field Validation' (with a dropdown arrow), 'Id 05', and an empty 'Operation' field with a dropdown arrow. Between the two rows are radio buttons for 'And' (selected) and 'Or'.

Will evaluate as:

The entry Custom 04 equals the validation rule field Id 04.

- or -

The entry car Custom 05 equals the validation rule field Id 05.

NOTE: There can only be one condition for Id 04 and one condition for Id 05.

Section 3: The Validation Condition Page

The **Condition** page in Validation Rules is similar to the **Condition** page used for Workflow and Processor.

Field	Description
A: Left Parenthesis	Select zero to three parentheses, depending on the complexity of the condition.
B: Data Object	<p>The choices that appear in this list are based on the event that triggers the rule:</p> <ul style="list-style-type: none"> • Employee: To create a condition based on employee-level fields. • Entry (expense): To create a condition based on expense-level fields. • Entry (expense) Allocation: To create a condition based on an allocation. • Report: To create a condition based on report-level fields. • Report Exception: To create a condition based on report exceptions. • Field Validation: To create a condition based on evaluating a report field against an external field.
C: Field / Value	<p>Select an item from the helper pane that appears. The information that appears in this pane is based upon the selection the administrator made in the Data Object list.</p> <p>Field Validation: This will display the list of columns from the validation table.</p>

Field	Description
D: Operator	<p>Select an item from the helper pane that appears. The information that appears in this pane is based upon your previous choices.</p> <p>NOTE: Some fields can have multiple values. When a field with multiple values is selected, the administrator must choose whether the condition will fire if Any or Every value matches.</p> <p>NOTE: If you use the In or Not In operators for Expense Types, you can select multiple check boxes to include as many expense types as are required.</p>
E: Data Object	<p>The system provides the option that best suits the previous choices. Change it if necessary.</p> <p>List Validation: This will display all currently configured custom simple lists, and is only available on the second data object selection list.</p>
F: Field / Value	<p>Select an item from the helper pane that appears. The information that appears in this pane is based upon the selection the administrator made in the Data Object list.</p> <p>List Validation: This will display all currently configured custom simple lists.</p> <p>Field Validation: This will display the list of columns from the validation table. Only columns that match the data type selected in field C above will display.</p>
G: Right Parenthesis	Select zero to three parentheses, depending on the complexity of the condition.
H: And / Or	Select either option to join the current condition to the next condition.

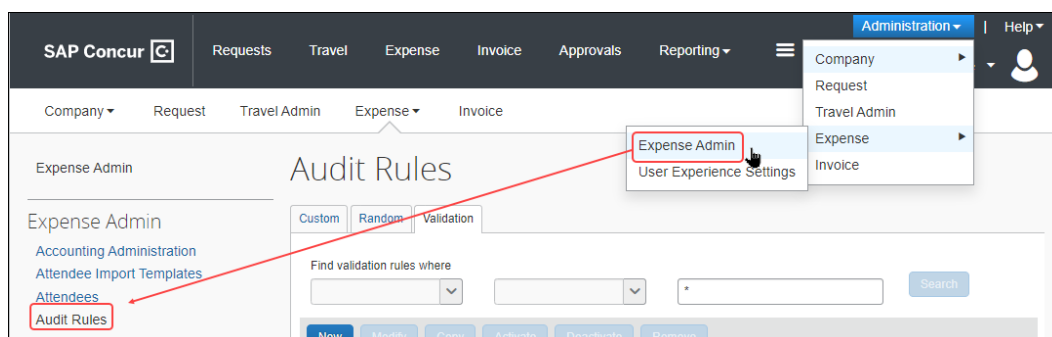
Section 4: Procedures

Accessing Validation Rules

NOTE: If the **Validation** tab does not appear, you will need to enable the module and/or enable the *Enable Validation Rules* setting in the Site Settings tool.

► **To access Validation Rules:**

1. Click **Administration > Expense > Expense Admin > Audit Rules**.



2. Click the **Validation** tab. The **Validation Rule List** page appears.



Adding a Validation Rule

► **To add a validation rule:**

1. On the **Validation** tab, click **New**. The page refreshes into a four-step wizard, starting with the **Validation Rule** page:

2. Complete the appropriate fields.

Field	Description
Validation Rule Name	Type the name of the rule.

Field	Description
Event	<p>Select either:</p> <ul style="list-style-type: none"> • Allocation Save: This rule is triggered as each individual allocation "line item" is saved. (Though this type of rule is triggered when the allocation is saved, the exception icon and message appear on the Add Expense, Edit Expense, or Expense List pages. The message and icon do not appear on the Allocation page.) • Entry (Expense) Save: The rule is triggered when an expense is saved, whether by the user, approver, or processor. • Entry (Expense) Submit: The rule is triggered when the expense is submitted and occurs before Report Submit events. • Post Report Submit: The rule is triggered immediately after a report enters the first step of workflow. Any exceptions generated will not prevent the report from being submitted. • Report Save: The rule is triggered immediately after the report header information is saved whether by the employee, approver, or processor. • Report Submit: The rule is triggered when the report is submitted. If there are exceptions generated that are above the exception level limit (that is, prevents report submission; described in <i>Exceptions</i> in this guide), then the report will not be submitted and will not enter the first step of a workflow.
Execute action when validation condition is:	<p>This field controls when the action for the rule is executed. When the condition is:</p> <ul style="list-style-type: none"> • True • False
Editable By Groups	Click the link; the associated helper pane appears. Select the appropriate group(s).
Applies To Groups	Click the link; the associated helper pane appears. Select the appropriate group(s).
Active	Select Yes (if necessary) to activate the rule upon completion.

3. Click **Next**. The **Conditions** page appears.

Section 4: Procedures

The screenshot shows the 'Validation Rule' configuration page with the 'Conditions' tab selected. The page has tabs for 'Custom', 'Random', and 'Validation'. Below the tabs are four numbered steps: 1. Validation Rule, 2. Conditions, 3. Actions, and 4. Exception. The 'Conditions' step is active. The main area contains an 'Insert' button and a 'Remove' button. Below these are three rows of input fields. The first row has a checkbox, a dropdown menu with 'Select One' selected, and a text input field. The second row has a text input field. The third row has a dropdown menu with 'Value' selected, a text input field, and a small dropdown menu with a downward arrow.

4. Complete the appropriate fields.



Refer to *Validation Conditional Expressions* in this guide for a description of this page.

5. Click **Next**. The **Actions** page appears.

The screenshot shows the 'Validation Rule' configuration page with the 'Actions' tab selected. The page has tabs for 'Custom', 'Random', and 'Validation'. Below the tabs are four numbered steps: 1. Validation Rule, 2. Conditions, 3. Actions, and 4. Exception. The 'Actions' step is active. The main area contains a 'Rule Action:' label and a dropdown menu. The dropdown menu is open, showing four options: 'Field update only', 'Exception only', 'Update, then exception', and 'Calculation Formula'. A mouse cursor is pointing at the 'Calculation Formula' option.

6. Select the appropriate action:
 - ♦ **Field update only:** If the rule is triggered, it will update the specified field. The report will continue through the workflow.
 - ♦ **Exception only:** If the rule is triggered, it will flag the entry. Depending on your exception level settings, it may prevent report submission.
 - ♦ **Update, then exception:** If the rule is triggered, it will update the specified field and flag the entry. Depending on your exception level settings, it may prevent report submission.

- ♦ **Calculation Formula:** If the rule is triggered, it will pass the values in the Amount1 and Amount2 fields to the Expense Type calculation formula engine.



Refer to the *Calculation Formulas* section of this guide for more information.

7. If you selected a field update action, the **Actions** page refreshes with additional fields.

The screenshot shows the 'Actions' tab in the SAP Concur Audit Rules (Validation Rules) Setup Guide. The 'Rule Action' dropdown is set to 'Field update only'. Below it are five dropdown menus for 'From Data Source', 'From Field Name', 'To Data Source', and 'To Field Name', all of which are currently empty.

8. On the **Actions** page, select the fields to be modified.

Field	Description
From Data Source	<p>The source of the fields that will be used for the update. The available sources will change depending on the event selected. They include:</p> <ul style="list-style-type: none"> • Constant • Employee • Report Entry • Report Header • Validation Table

Field	Description
From Field Name	The field from the Data Source that will be used to update the Expense field. The list of fields displayed will change depending on the Data Source selected.
To Data Source	The Data Source of the field to be updated: <ul style="list-style-type: none"> Report Header Report Entry NOTE: The options available will change depending on the event type selected for the audit rule.
To Field Name	The Expense field that will be updated. The list of fields displayed will change depending on the Data Source selected.

9. Click **Next**. If you selected an action including an exception, the **Exception** page appears.

Custom Random Validation

1 Validation Rule 2 Conditions 3 Actions 4 Exception

Exception Visibility:
Traveler, Approver and Expense Processor

Exception Code: Exception Level: Exception Text:

New Modify Remove

Code	Level	Editable By	Product Code	Message
ALLOC1	2	Global	EXP	This allocation is not valid.
ATMCHECK	1		EXP	Warning: This expense report contains a regul...
ATNMOR	99	Global	EXP	This expense must include two or more attend...
CAS	1	Global	EXP	This report has been selected for Expense Re...
CESBUS	1	Global	EXP	The expense amount exceeds \$75.00 per atte...
CESINFO	2	Global	EXP	Expense does not conform to corporate travel...
CESITMIZ	99	Global	EXP	This entry must be itemized before the report ...
CESLIMIT	1	Global	EXP	Amount for the Lunch expense type has exce...
CESPAY	1	Global	EXP	The preferred payment method for this expen...
CESPREF	1	Global	EXP	This vendor is not a preferred vendor, please ...
CESWARN	1	Global	EXP	Manager approval and audit required.
CORPCMP2	99		EXP	This expense is over the limit allowed by your ...

10. Choose from an existing exception, or decide to create a new exception by first choosing from **Exception Visibility**.

Field	Description
Exception Visibility	Select the users who are able to see the exception message by selecting: <ul style="list-style-type: none"> Traveler (user), Approver, and Expense Processor Approver and Expense Processor Expense Processor

11. Click **New** to open the **New Exception** window.

The screenshot shows a 'New Exception' dialog box. It contains the following fields:

- Exception Code:** A text input field.
- Exception Level:** A text input field.
- Message:** A larger text area for a detailed message.
- Editable By:** A dropdown menu to select user groups.

At the bottom right, there are **Save** and **Cancel** buttons.

12. Complete the appropriate fields.

Field	Description
Exception Code	The company-defined code for the exception, up to eight alphanumeric characters, all uppercase.
Exception Level	The numeric exception level of the audit rule. The company decides how many exception levels (up to 99) to use. For example, the company can decide to have six exception levels, with level 1 being a minor exception and level 6 being a severe exception.
Message	The exception message that appears to the user, approver and/or processor. NOTE: This is a text field and does not support HTML formatting.
Editable By	Select the group(s) that can edit the exception.

13. Click **Save**.
14. The exception you created is pre-selected - click **Done** to include the exception with the validation rule and finish this task.

Editing a Validation Rule



For detailed information about all of the fields on this page, refer to *Adding a Validation Rule* in this guide.

► To edit a validation rule

1. On the **Validation** tab, select the desired rule.
2. Click **Modify**.

The screenshot shows the 'Validation' tab selected. Below the search bar, there are buttons for 'New', 'Modify', 'Copy', 'Activate', 'Deactivate', and 'Remove'. The 'Modify' button is highlighted with a mouse cursor. Below the buttons is a table with columns: Name, Event, Rule Action, Editable By, Applies To, and Active. The first row shows 'Name' as the rule name, 'Entry Save' as the event, 'Field update only' as the rule action, 'Global' as the editable by, 'Global' as the applies to, and 'No' as the active status. A tooltip 'Click here to edit an Audit Rule' is visible over the 'Entry Save' event.

3. Make the desired changes.
4. Click **Done**.

Deactivating / Activating a Validation Rule

Instead of deleting a rule, you can deactivate it. This way, the rule is still available if you want to use it in the future.

► To deactivate / activate a validation rule

1. On the **Validation** page, select the rule to activate or deactivate.

The screenshot shows the 'Validation' tab selected. Below the search bar, there are buttons for 'New', 'Modify', 'Copy', 'Activate', 'Deactivate', and 'Remove'. The 'Activate' and 'Deactivate' buttons are highlighted with a red rectangle and a mouse cursor. Below the buttons is a table with columns: Name, Event, Rule Action, Editable By, Applies To, and Active. The first row shows 'Name' as the rule name, 'Entry Save' as the event, 'Field update only' as the rule action, 'Global' as the editable by, 'Global' as the applies to, and 'No' as the active status.

2. Select **Activate** or **Deactivate** depending on the action you want to perform.

Deleting a Validation Rule

Deleted rules are permanently removed. Instead of deleting a rule, you can deactivate it. This way, the rule is still available if you want to use it in the future.

► **To delete a validation rule:**

1. On the **Validation** page, select the rule to delete.

Custom Random Validation

Find validation rules where

Name Contains ** Search

New Modify Copy Activate Deactivate Remove

Name ▲	Event	Rule Action	Click here to remove an Audit Rule	Active
Name	Entry Save	Field update only	Global	No

2. Click **Remove**.

