

## Allocating a Request to Multiple Project-Activity Codes

**Objective:** In this segment we will go through how to allocate costs to multiple project-activity codes. This is used when you want to split expenses to different projects.



**Note:** To avoid having to allocate each expense individually, perform the allocations after you have finished adding all the expenses to your report.

1. After adding all the necessary expenses, highlight any expense and click Allocate.

Name Your Request: Benefit to the Government:	Approval Flow			Amount: \$1,178.00
New Expense     Delete     Date     Expense Tun	Approvar Prow Audit Train	Requested	Expense Type Per Diem Start Date Meals - Single Location V 05/23/2017	Per Diem End Date 05/24/2017
O5/23/2017 Meals - Single     O5/23/2017 Logging - Single	E Locat \$111.00	\$111.00 \$26/.00	Destination City         Transaction Amountly?           San Francisco, California         111.00         USD	Comment
05/23/2017 Airfare	\$800.00	\$800.00		
	TOTAL AMOUNT \$1,178.00	TOTAL REQUESTED \$1,178.00		Allocate

- 2. The Allocations for Request window will appear.
- 3. Check the check boxes on the left hand side to select all the expenses that need to be allocated.
- 4. Click Allocate Selected Expenses.

Allocate Selected Expenses Clear Selections Summary					
Select Group 🔹					
Date •	Expense Type	Group	A	mount	
05/23/2017	Meals - Single		S	111.00	
05/23/2017	Lodging - Sing		\$	267.00	
05/23/2017	Airfare		Ś	800.00	

- 5. The right hand side of the Allocations for Request window will have an entry.
- 6. You can allocate your costs based on either percentage or amount.



7. You can toggle between these two using the Allocate By: drop-down.

Allocations				
Allocate By: •	Add New Allo	ocation		
Percentag     Amount	je Project	Activ		

- 8. Enter either the percentage or the amount you would like to allocate.
- 9. Fill out the project, activity, WBS and fund that you would like to allocate your expenses to.

## 10. Click Save.

Allocations			Total:\$1,178.00	Allocated:\$1,178.00(10	00%) Remaining:\$0.00(0%)	
Allocate By: •	Add New Allocati	on Delete Selec		Favorites • Add	d to Favorites	
Percentage	Project	Activity	WBS	Fund	Code	
50	99101	10000	10.05.03.01.01	YN0100000	99101-10000-10.05	
50 🔸	10023	A4001	14.99.01.01.01	KC0401060	10023-A4001-14.99	
				_	Save Cancel	

- 11. If you do not allocate 100% of the costs, a pop up window will show letting you know that less than 100% of the costs are being allocated.
- 12. Click No to edit the allocation percentages.

Please Confirm	×
The allocation percentages do not add up to 100%. Click Yes to accept the allocation percentages.	25.

13. Continue and fill out the rest of the request and hit *submit request* when finished.

**Note:** Please DO NOT allocate STAP funds in your request. If you try to use the STAP fund code, 99101-10000, you will get an error preventing you from submitting the request. You can allocate to STAP funds during your expense report.