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*.
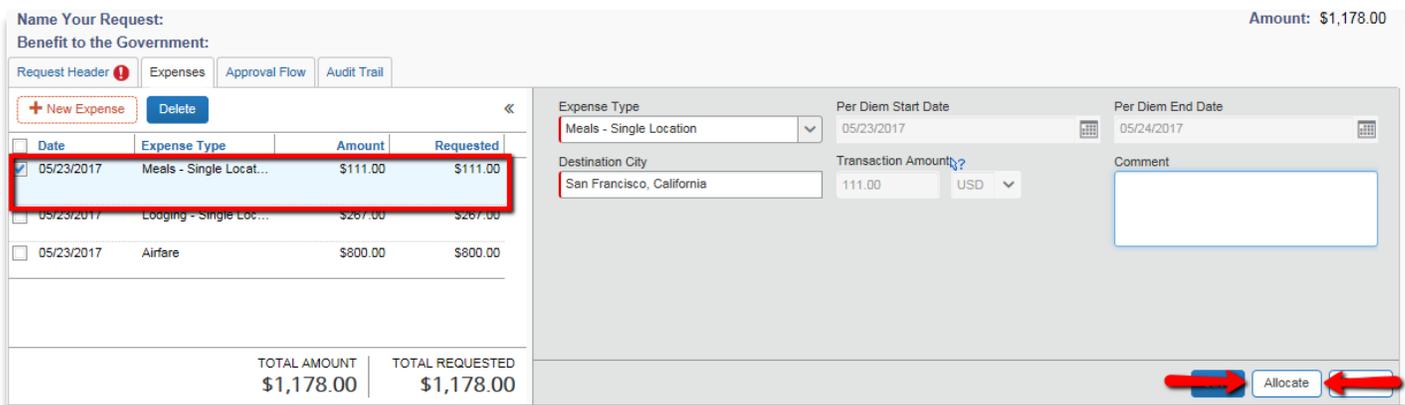
2. The *Allocations for Request* window will appear.

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*.

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.
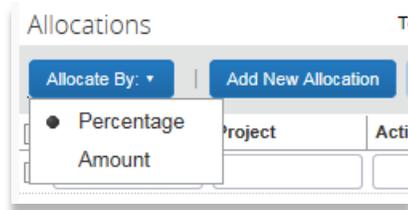
8. **Enter** either the percentage or the amount you would like to allocate.

9. Fill out the *project, activity, WBS and fund* that you would like to allocate your expenses to.

10. **Click** *Save.*
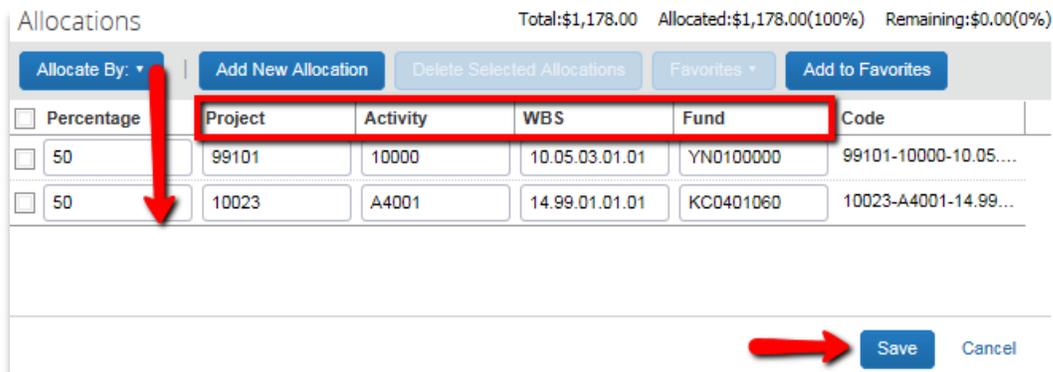
11. If you do not allocate 100% of the costs, a pop up window will show letting you know that less than 100% of the costs are being allocated.

12. **Click** *No* to edit the allocation percentages.

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.