

**Objective:** This section is to guide you through the process of allocating expenses to multiple project activities.

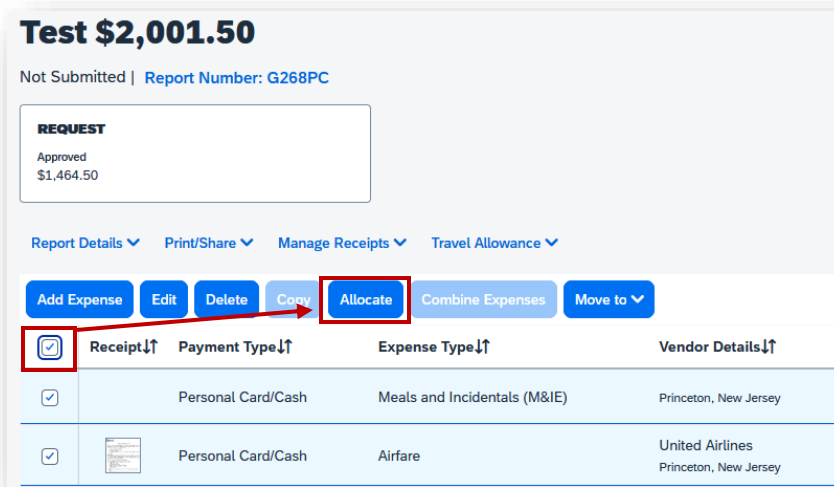


This process allows for the appropriate allocation of costs, ensuring that expenses are charged to the corresponding activities. You have the flexibility to allocate a single expense, such as registration costs to your STAP funds or allocate multiple expenses simultaneously.

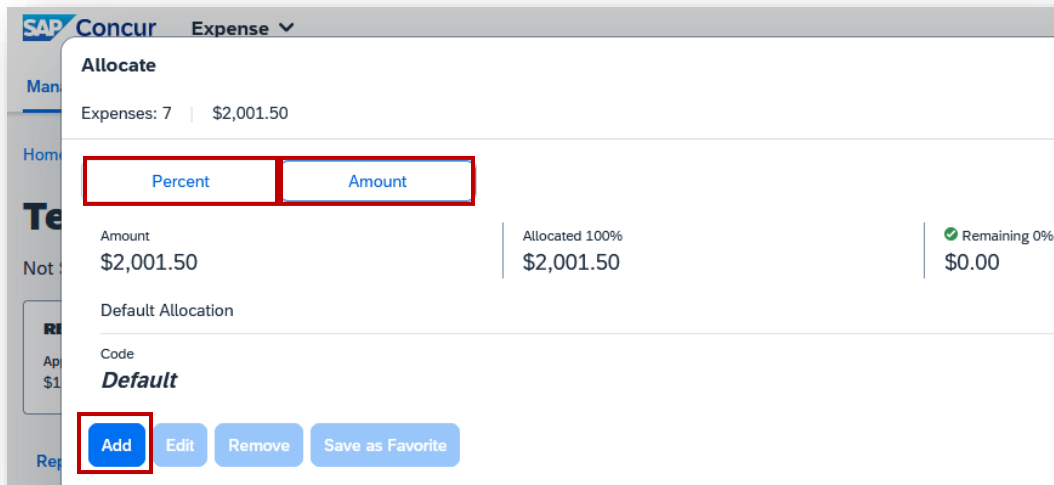
There are two methods available to allocate expenses: by total dollar amount or by selecting specific expenses and allocating their total dollar amount to a different project activity (PA).

### Method 1 – To allocate by total dollar amount or percentage.

1. After completing your expense report, select all the expenses by clicking on them, and then **click Allocate**.

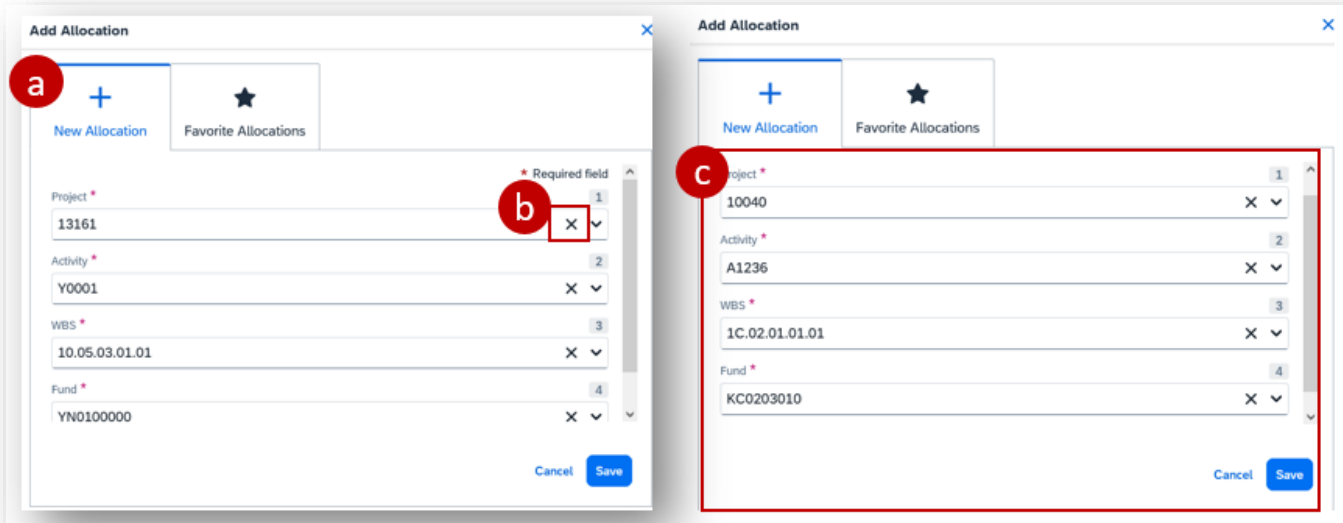


2. In the "Allocate" screen, **choose** either *Percent* or *Amount* as the form of allocation, then **click Add**, which will display the "Add Allocation" screen.

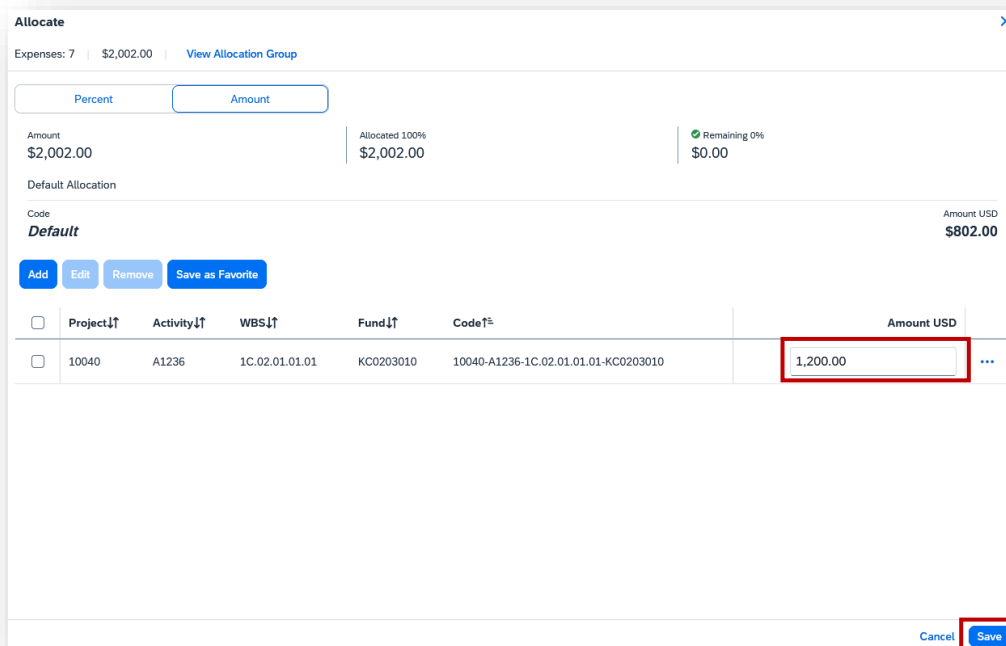


3. You should now be on the "Add Allocation" page. On this screen, you will see the default allocation, initially set to your default project with an allocation of 100%

- (a). To change the allocation, click the "x" to delete the current number
- (b). Then, enter the new project activity (PA) number you wish to allocate by **populating** the *Project*, *Activity*, *WBS*, and *Fund* fields
- (c). Once finished, **click Save**.



4. You should now be redirected back to the "Allocate" screen, which will display the new allocation PA number you entered. In the *Amount* field, enter either the dollar amount or percentage you would like to allocate to this PA. Once you have entered the desired value, **click Save** to finalize the allocation.



## Method 2 - To allocate by selecting specific expenses and allocating their total dollar amount to a different project activity (PA).

1. To begin, identify the specific expense types that you wish to allocate to a different project activity, and then click *Allocate*.

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
<input type="checkbox"/>		Personal Card/Cash	Airfare	United Airlines Princeton, New Jersey	05/16/2024	\$560.50	...
<input type="checkbox"/>		Personal Card/Cash	Car Rental	Enterprise Princeton, New Jersey	05/16/2024	\$250.00	...
<input checked="" type="checkbox"/>		Personal Card/Cash	Meals and Incidentals (M&IE)	Princeton, New Jersey	05/13/2024	\$51.75	...
<input checked="" type="checkbox"/>		Personal Card/Cash	Meals and Incidentals (M&IE)	Princeton, New Jersey	05/14/2024	\$69.00	...
<input checked="" type="checkbox"/>		Personal Card/Cash	Meals and Incidentals (M&IE)	Princeton, New Jersey	05/15/2024	\$69.00	...
<input checked="" type="checkbox"/>		Personal Card/Cash	Meals and Incidentals (M&IE)	Princeton, New Jersey	05/16/2024	\$51.75	...
<input type="checkbox"/>		Personal Card/Cash	Training/Registration	Princeton, New Jersey	05/16/2024	\$950.00 Itemized	...
						<b>\$2,002.00</b>	

2. Proceed by following [steps 2 through 4 outlined in Method 1](#) above to finalize the allocation process.



To view a summary overview of your expense allocation, navigate to Report Details > Allocation Summary.

Code	Amount
10040-A1236-1C.02.01.01.01-KC0203010	<b>\$1,200.00</b>
10040 - A1236 - 1C.02.01.01.01 - KC0203010	
13161-Y0001-10.05.03.01.01-YN0100000	<b>\$802.00</b>
13161 - Y0001 - 10.05.03.01.01 - YN0100000	