In the Concur Travel & Expense System, allocating refers to assigning, changing or splitting the SpeedType(s) for an expense. All expenses that require allocation must be allocated before the report can be submitted for approval.

> For Travel Reconciliation expense reports, each expense is automatically allocated to the Routing/Reimbursement SpeedType on the Report Header. You will need to do this step to allocate each expense that should be assigned to a SpeedType **other than** the one entered as the Routing/Reimbursement SpeedType on the Report Header.

Note for delegates: Prior to notifying an employee that an expense report is ready to be submitted, verify that all expenses on the expense report have been allocated. Concur does provide a warning exception – which stops the report from submission – if an expense has not been allocated. However, the warning exception does not appear until the employee attempts to submit the report…and won't disappear until submission is attempted again, even if all expenses have been allocated.

The first step was to create your expense report by completing the Report Header. Then, expenses were added to your expense report. Now it is time to allocate those expenses.

To allocate an individual expense, click **Allocate** (lower right corner of screen) within the expense.

Or, to allocate multiple expenses at the same time, use the left checkboxes to select expenses and click the **Allocate** link from the right-hand pane.
Note: Use the uppermost checkbox to select all expenses at once.
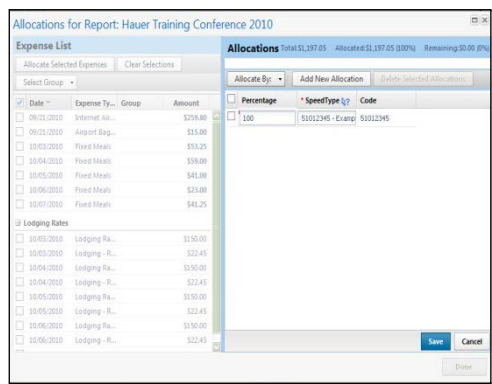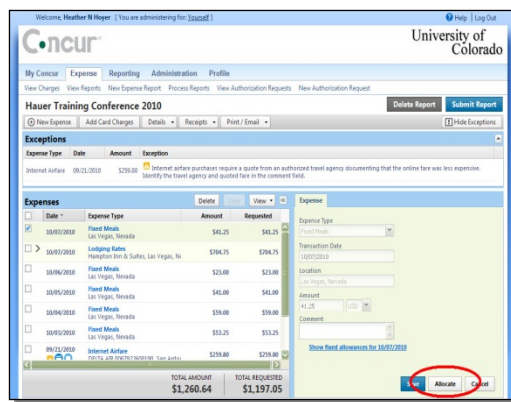
The Allocations window will appear.

If you would like to allocate by *Amount* – instead of by the default *Percentage* – use the **Allocate By** dropdown.
*Note:* You must allocate by Amount when allocating a credit expense.

The SpeedType that appears here was entered as the SpeedType on the Report Header when creating your expense report. You can change the allocation SpeedType here if need be. (It will not change the SpeedType on the Report Header.)

When allocating to multiple SpeedTypes, modify the percentage (or amount) to reflect one SpeedType's portion. Then, click the **Add New Allocation** button to allocate to an additional SpeedType. Repeat as many times as needed.

Once the allocations appear correctly, click **Save**. A confirmation message will appear; click **OK**. Click **Done** to close the Allocations window.
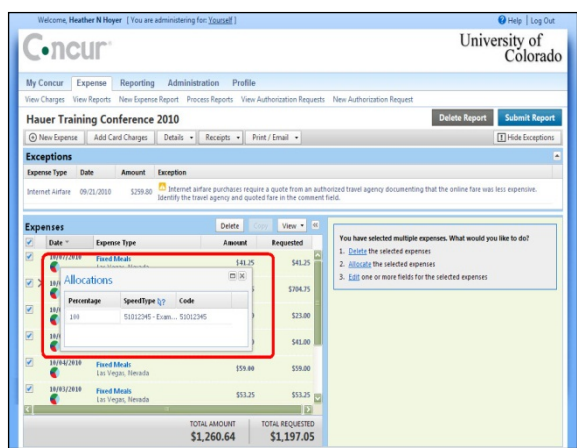
A pie-chart icon will appear under the expense's date once it has been allocated.

To review an expense's allocation, hover your mouse over the pie-chart icon for the Allocations pop-up to appear.

Remember, all expenses that require allocation must be allocated before the expense report can be submitted for approval.

> Personal expenses (i.e., those with a Personal Travel Charge Expense Type) cannot be allocated. Also, expenses that are itemized are allocated at the individual itemizations and cannot be allocated at the expense header.

Now that you have allocated your expenses, you are ready to go on to **Step 4 – Attaching Documentation**. *There are several ways to attach documents to your expense report, each one with its own Step-by-Step Guide available on the [Concur Learning Resources web page](#):*

 ➢ *Attaching Documents by Scan*

 ➢ *Attaching Documents by Fax*

 ➢ *Attaching Documents by Receipt Store to Individual Expenses*