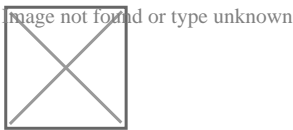


Concur Expense: Allocations ^[1]

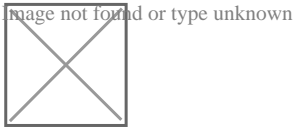
Users can access **Allocations** from the main expenses page or within the expense itself.

NextGen UI

From the Expenses main page:

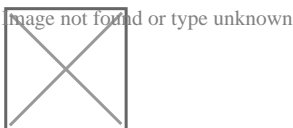


From within the Expense itself:



The Default Allocation (SpeedType used at the Report Header), will always remain at the top of the *Allocate* page. The Percent % will change based on the allocation(s) being added to the expense.

To change or add an allocation users must click the blue **Add** button.

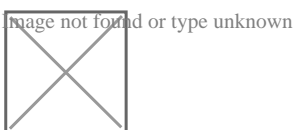


A new pop-up will appear with two tabs, *New Allocation* and *Favorite Allocations*.

To use a stored favorite, click on the *Favorite Allocations* tab and select the desired favorite.

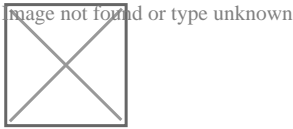
When creating a *New Allocation*, to change 100% of the expense, simply click in the single allocation line to expose the drop-down list or delete the existing text and begin typing the new SpeedType.

Select from the filtered results and click **Save**.



Users can see that 100% of the amount was coded to the new allocation and the default will

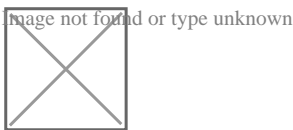
now show 0%.



Splitting Allocations

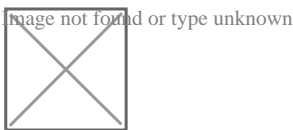
To split the allocation between SpeedTypes, click the blue **Add** button. If the expense is to be split with the Default Allocation and another SpeedType, update the allocation in the pop-up to the secondary SpeedType and click **Save**.

Notice the new allocation shows at 50% and the Default Allocation is now at 50%. If this split needs to be modified to a different percentage, update the new allocation line and the Default Allocation will update automatically.



If the expense is being split between two different SpeedTypes and the original SpeedType is no longer needed, click the **Add** button again to add additional SpeedTypes and edit the Percent on each as appropriate.

Once the expense(s) is 100% allocated, click **Save**.



Source URL: <https://www.cu.edu/psc/concur-expense-allocations>

Links

[1] <https://www.cu.edu/psc/concur-expense-allocations>