

Concur How-to: Allocating Expenses ^[1]

Allocating an expense means you assign a SpeedType to it.

For travel expense reports, each expense defaults to the SpeedType on the Report Header. You only need to allocate an expense if you want to change to a different SpeedType.

For Procurement Card expense reports, you need to allocate every expense.

Watch the video

Read the procedures

1. **To allocate an individual expense:** Select the expense from the left side of your screen, click **Allocate** (lower right corner of screen) within the expense.

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. Use the uppermost checkbox to select all expenses at once.
2. The Allocations window will appear.
3. 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.
4. 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.)
5. 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.
6. Once the allocations appear correctly, click **Save**. A confirmation message will appear; click **OK**. Click **Done** to close the Allocations window.
- 7.

A pie-chart icon will appear under the expense's date once it has been allocated.

8. To review an expense's allocation, hover your mouse over the pie-chart icon for the Allocations pop-up to appear.
9. Remember, all expenses that require allocation must be allocated before the expense report can be submitted for approval.
10. 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.

Have a question or feedback?

Questions & Feedback ^[2]

Feedback or Question *

Your Name

Your Email Address

CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

Controller

Source URL: <https://www.cu.edu/psc/concur-how-allocating-expenses>

Links

[1] <https://www.cu.edu/psc/concur-how-allocating-expenses> [2]
<https://www.cu.edu/controller/forms/questions-feedback-0>