# SAP Concur C·

ALLOCATIONS

Allocations to an expense report can be made by the traveler or by an approver in the workflow.

ALLOCATIONS BY TRAVELER

Each expense can be allocated to different accounting templates by selecting the **Allocate** link within the expense line. *Note: Approvers in the workflow will have the capability to make adjustments to allocations as necessary.*
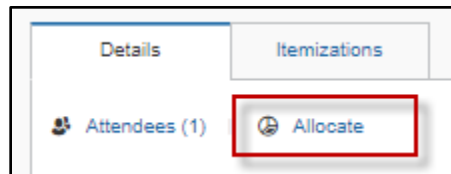
Expenses can also be allocated as a group by clicking the box(es) on each expense line and selecting the **Allocate** button.

A screen will appear to allocate by either Percentage or Amount. Select **Add** button to add lines to allocate by.

Enter information into the **Department**, **Accounting Group** and **Accounting Template** fields by either selecting **Text** or **Code**. Once information has been keyed, select **Save**.

NOTE: Adding allocations may add approval roles to the workflow of the document.

After the desired template(s) is added, you can allocate the expenses either by percent or amount, based on the selection that is made at the top of the screen. Click **Save** when done.

Once the allocations have been saved, an **Allocated** hyperlink will be visible on each accounting line. This allows the user to click and view the allocations that have been applied to the expense line.

An Allocation Summary is also available by selecting **Report Details** -> **Allocation Summary**.

ALLOCATIONS BY APPROVER

Approvers have authority to add allocations to an expense report. To do so, select the **Details** link to view the following drop-down and select **Allocations**.
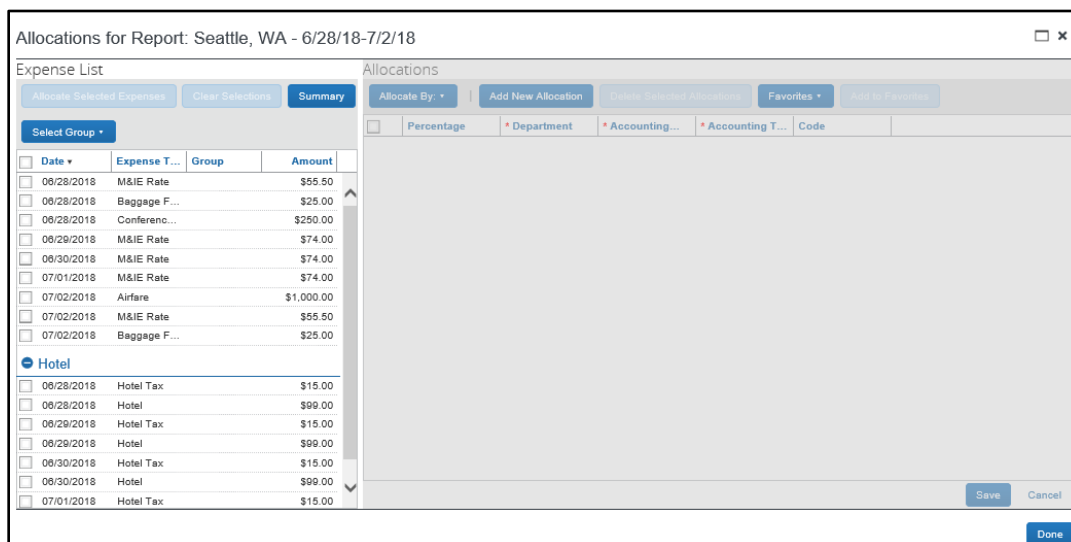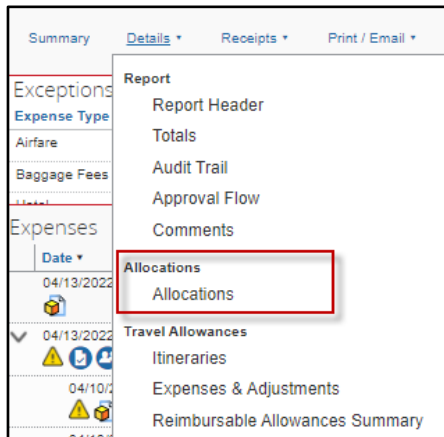
Allocations can be changed by selecting individual expenses or by clicking the box next to **Date** to select them all. Once expenses are selected, you will have the option to **Allocate Selected Expenses**.

Select **Allocate By** to allocate by either Percentage or Amount. Select **Add New Allocation** to add lines to allocate by.

Enter information into the **Department**, **Accounting Group** and **Accounting Template** fields by either selecting **Text** or **Code**. Once information has been keyed, select **Save**.

Note: Adding allocations may add approval roles to the workflow of the document.