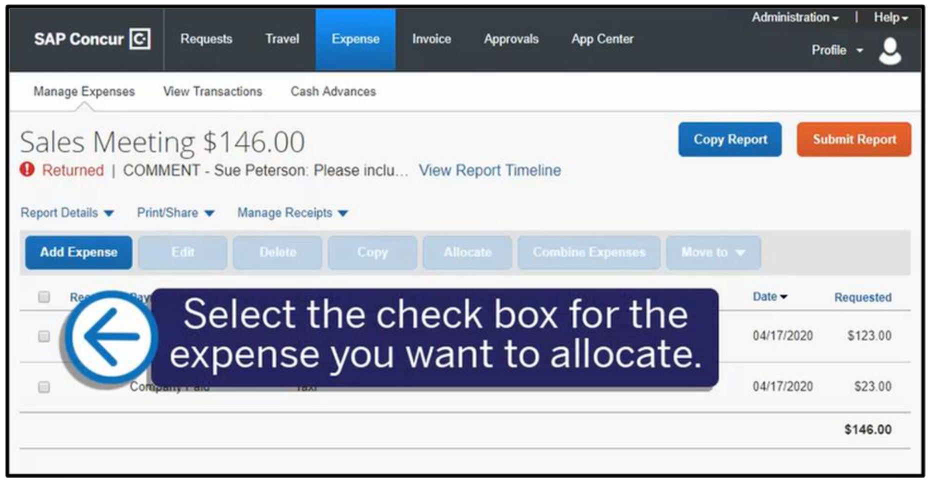
# Allocating Expenses

As you create an expense report, you can allocate expenses to different projects or departments.

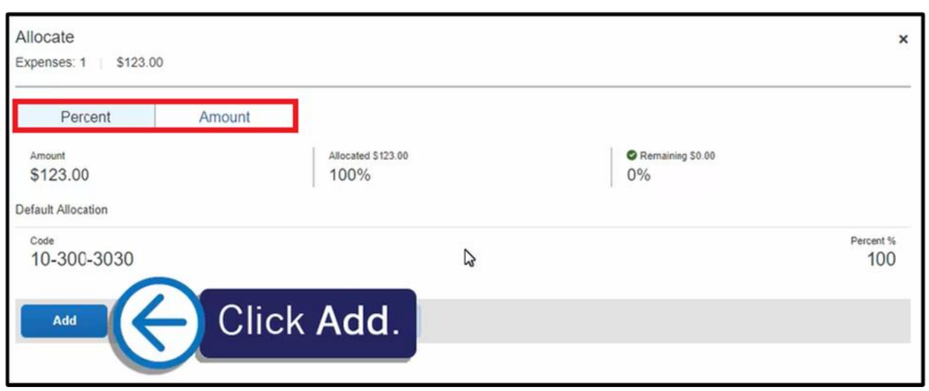
1. To allocate expenses, from the open report, select the check box for the expense you want to allocate, or the check box at the top of the column to select all expenses.




2. Click **Allocate**.

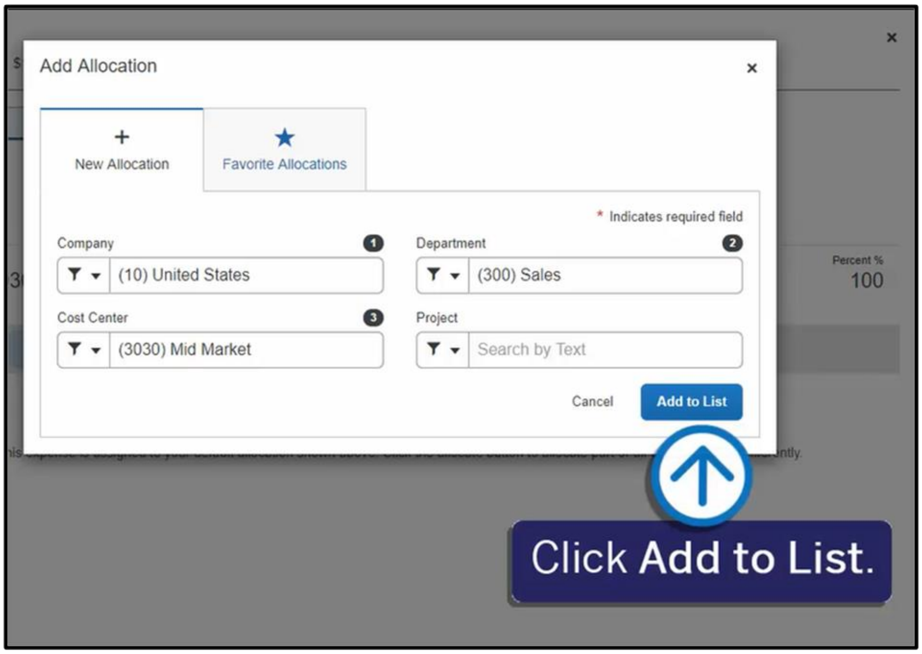

On the Allocate screen, you can allocate your expenses by **Percent** or **Amount**.

3. To allocate the expense by percent, verify that **Percent** is selected, and then click **Add**.

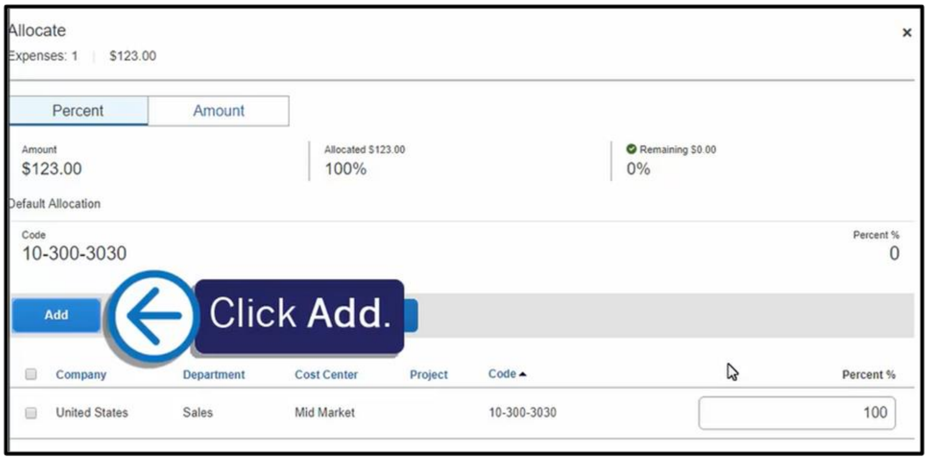


Your company determines the field names and field types that appear on the **New Allocation** tab.

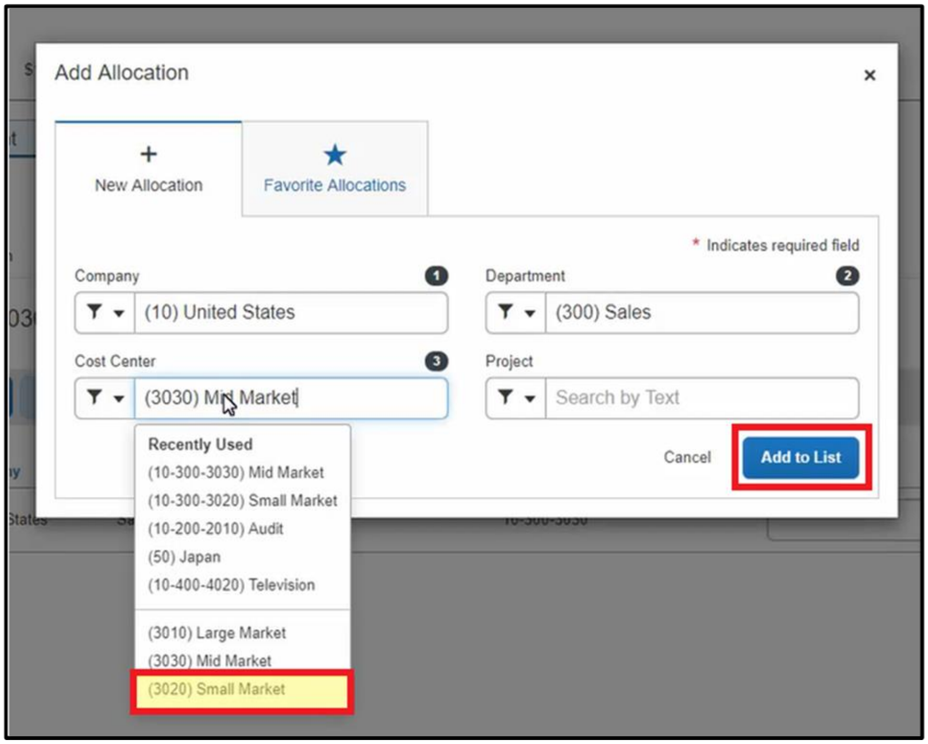
4. After you enter the appropriate information, click **Add to List**.




5. To add an additional line item to the expense, click **Add**.

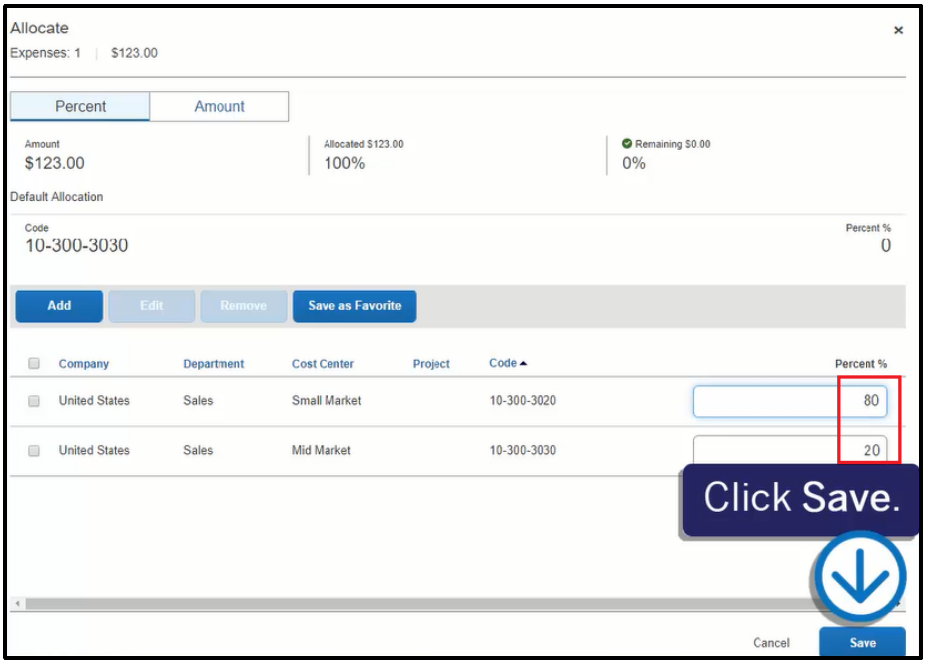


6. Select the appropriate **Cost Center**, and then click **Add to List**.



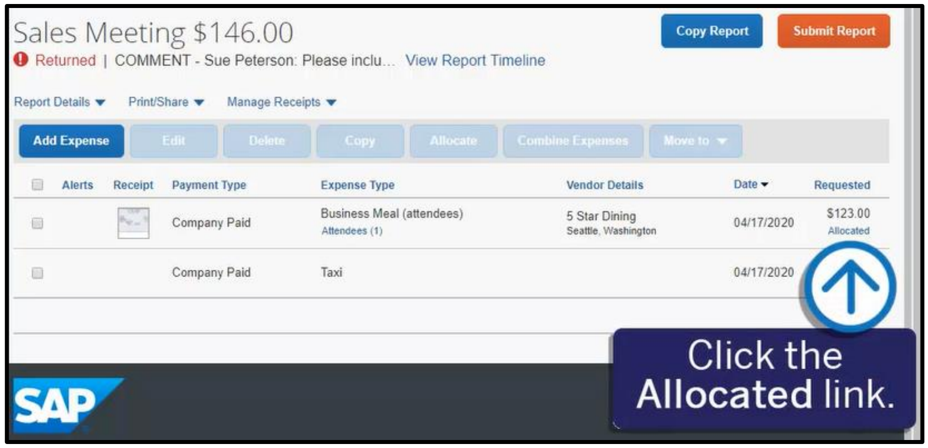

You can adjust the **Percent** amount for an allocation line item and the other line item(s) will automatically adjust to equal 100 percent.

7. To save the allocations and return to your expense report, click **Save**.



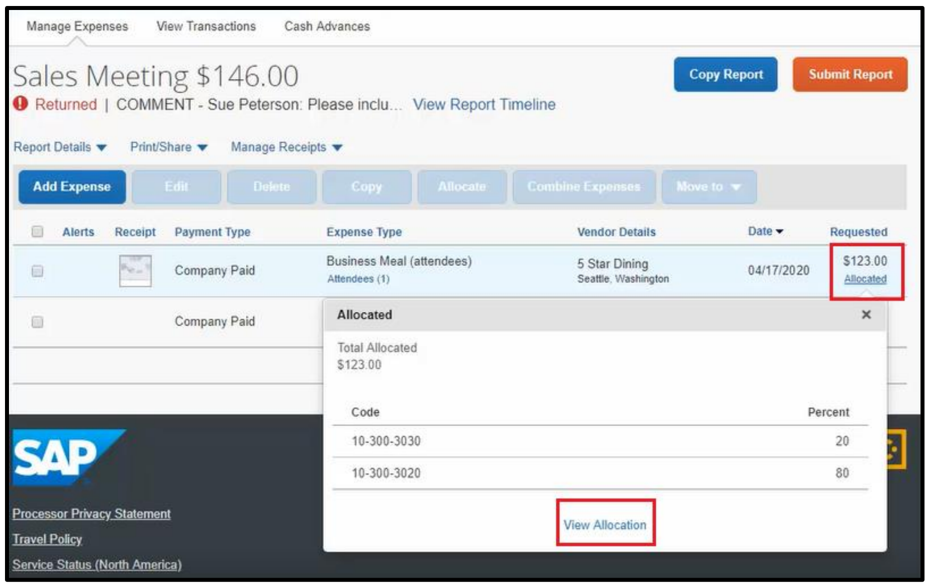
The expense displays as **Allocated**.

8. To view the allocation for this expense, click the **Allocated** link.




The allocation details appear in a separate window.

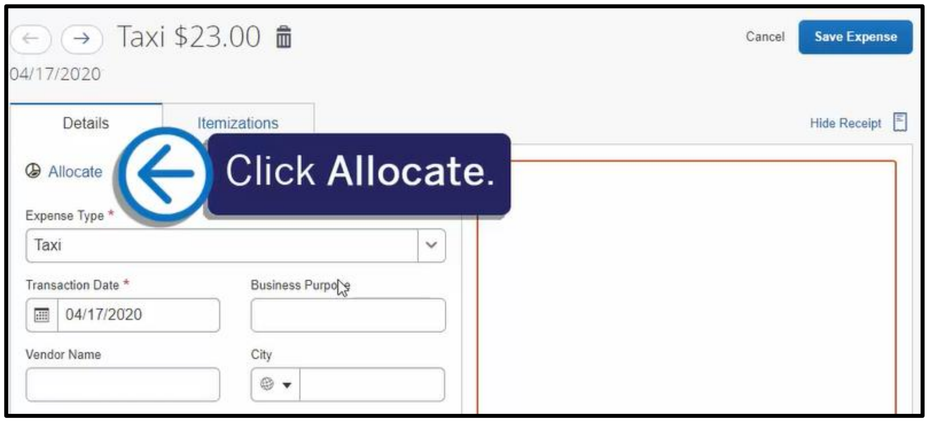
9. Click **View Allocation** if you need to modify it or click **X** to close the window.



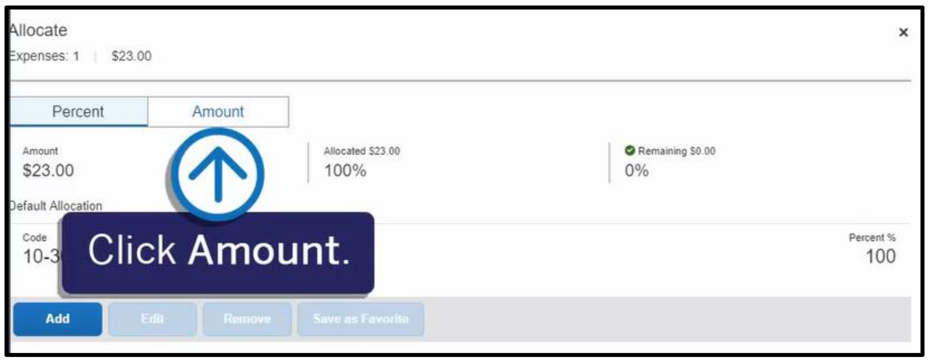

In the following example, you will see how to allocate an expense by **Amount**.

1. Click the expense to open it.

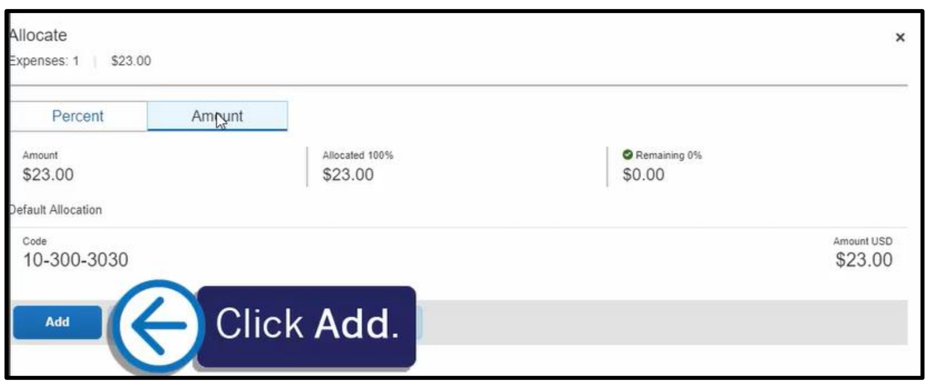
2. Click **Allocate**.



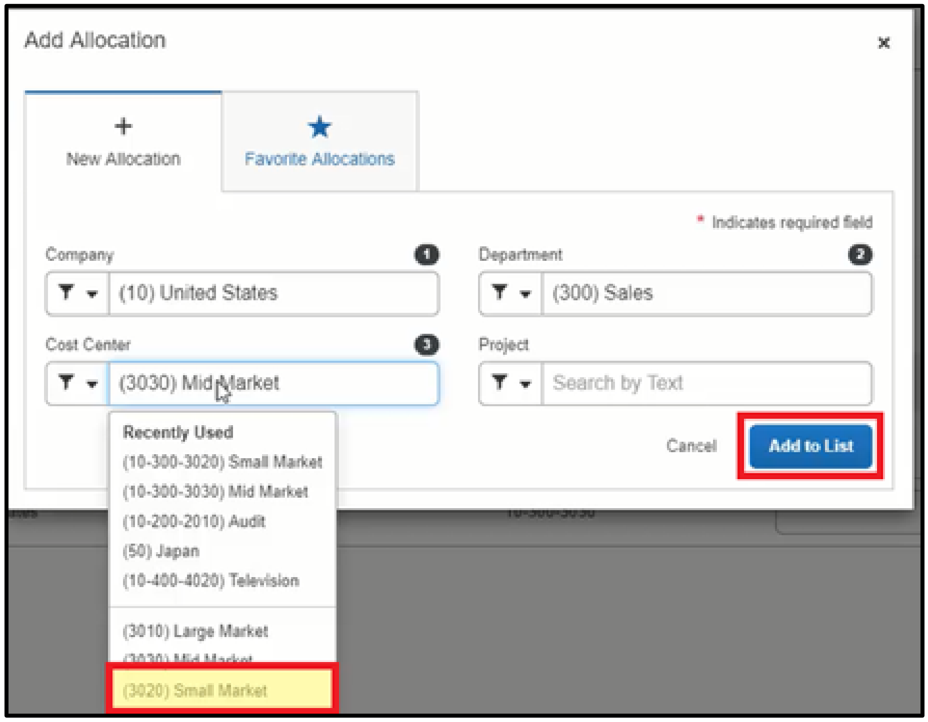

3. To assign the appropriate allocations by amount, click **Amount**.




4. To add line items to the expense, click **Add**.



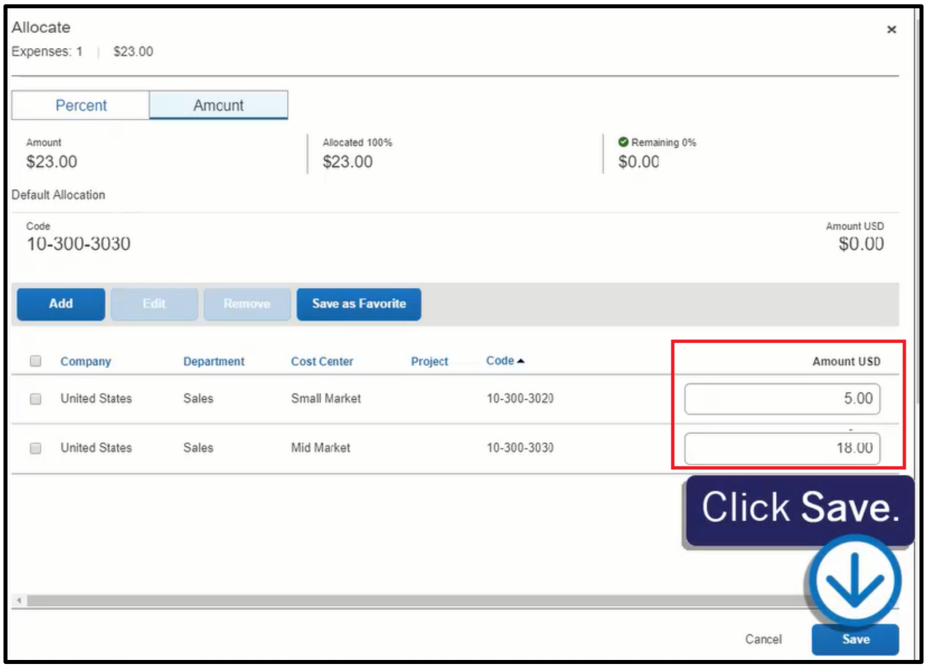
5. For this example, select the appropriate **Cost Center**, and then click **Add to List**.



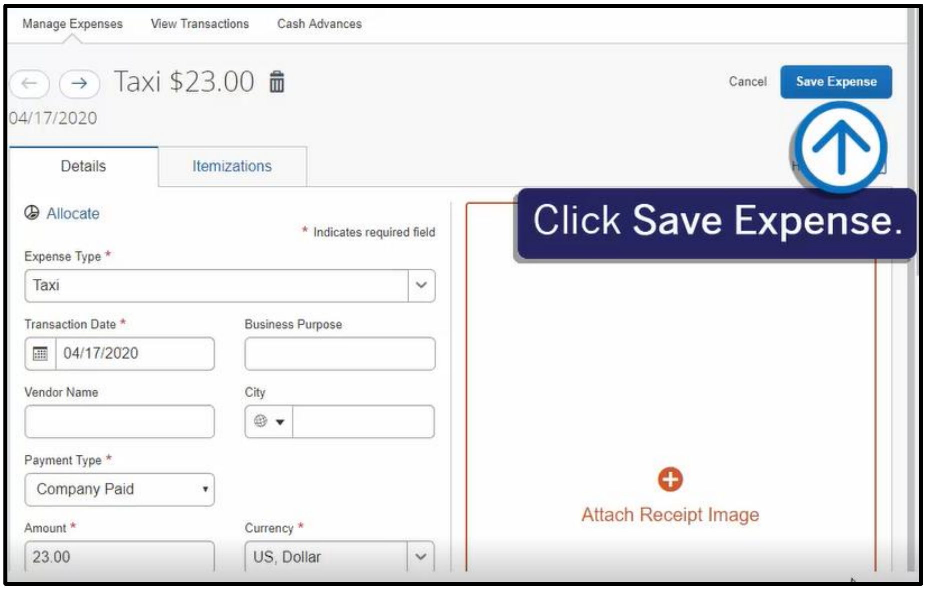

6. Modify the amounts as needed.


The amount(s) of the other line items adjust to equal the total expense amount.

7. Click **Save**.



8. To save the allocation for this expense, click **Save Expense**.




The expenses are now allocated, and you are ready to submit your report.