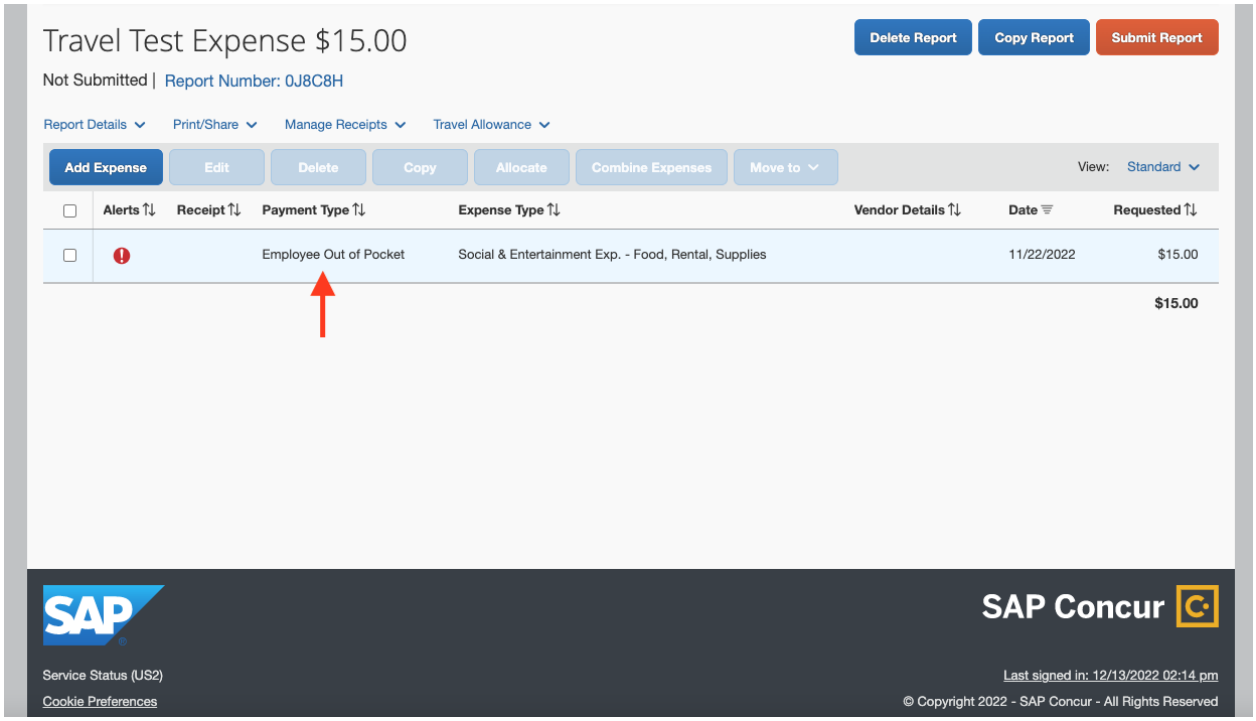
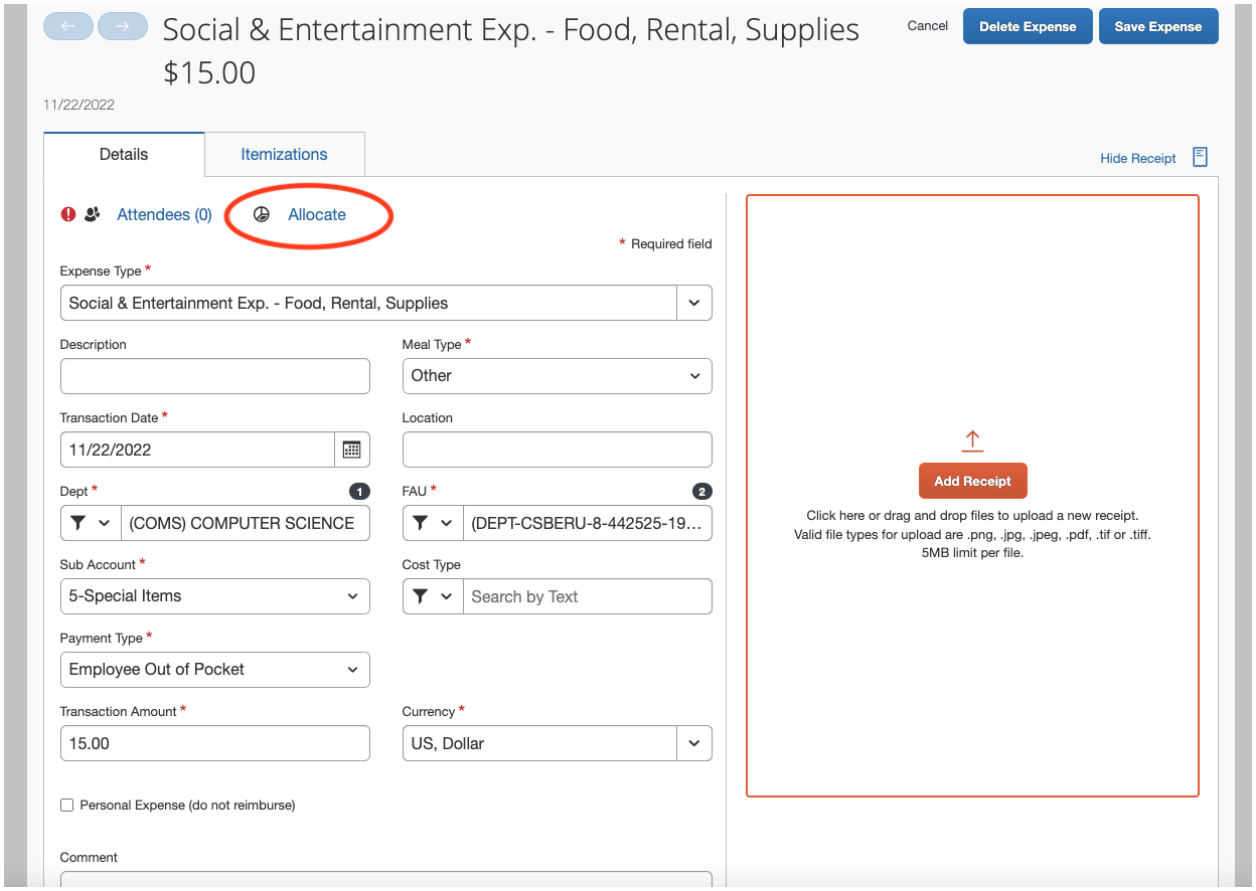
How to Allocate in Concur

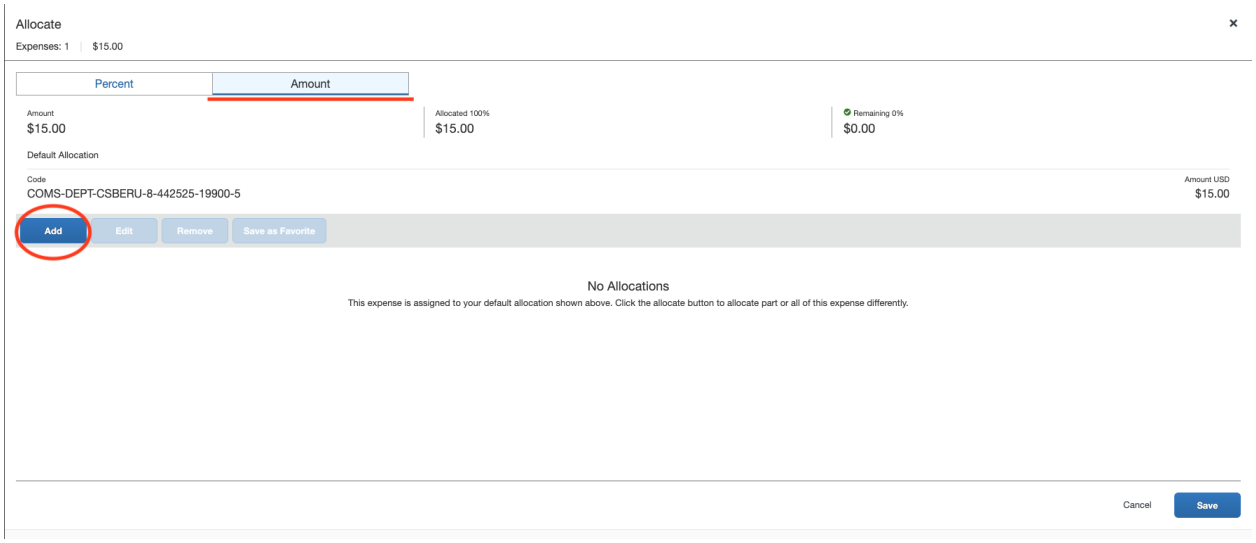
1. When you are in Concur, click on one of the Expense Lines in the Report.



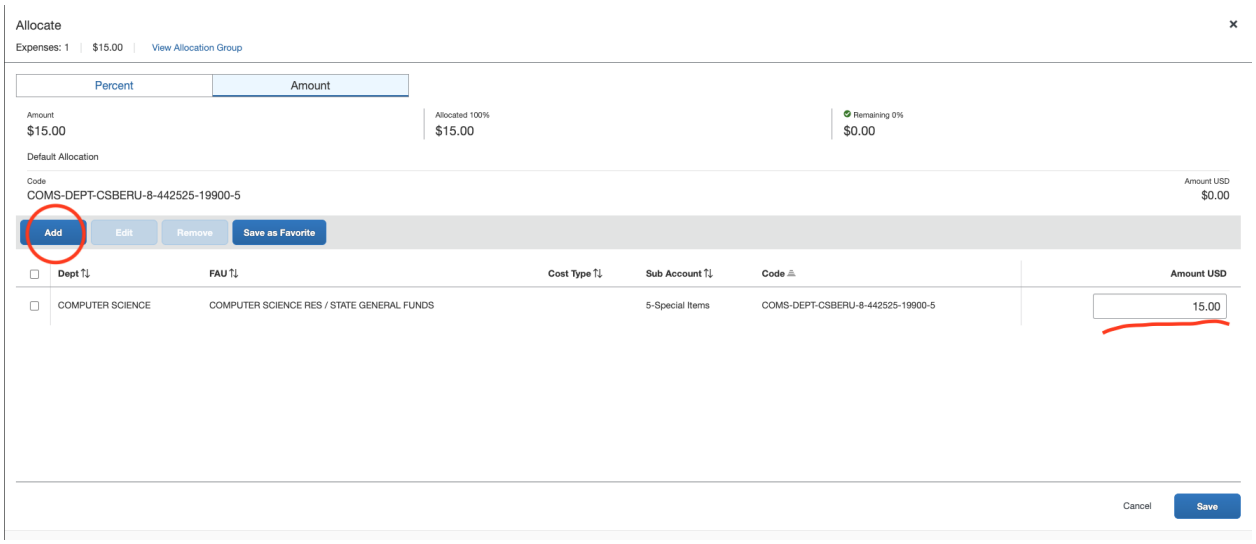
2. When you click into the expense, you'll see the option to Allocate. Click on this option.



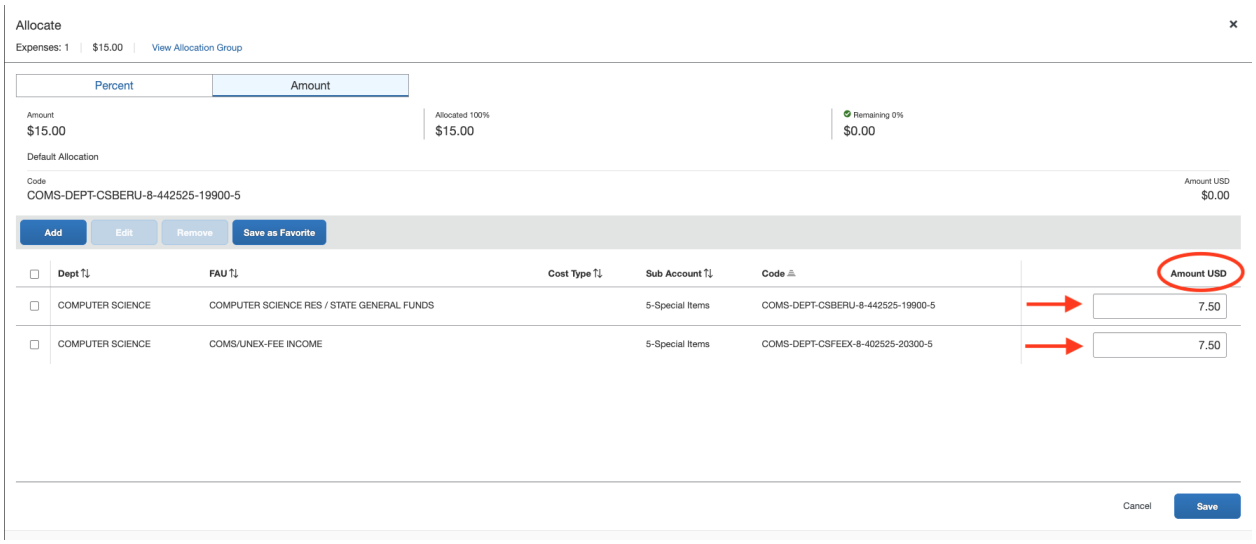
3. It'll take you to this page. Make sure to switch the option from Percent to Amount. This will allow you to input the specific amounts needed to be charged to each funding source. Go ahead and click on the Add button. This is where you'll be adding the travel grant and funds from William.



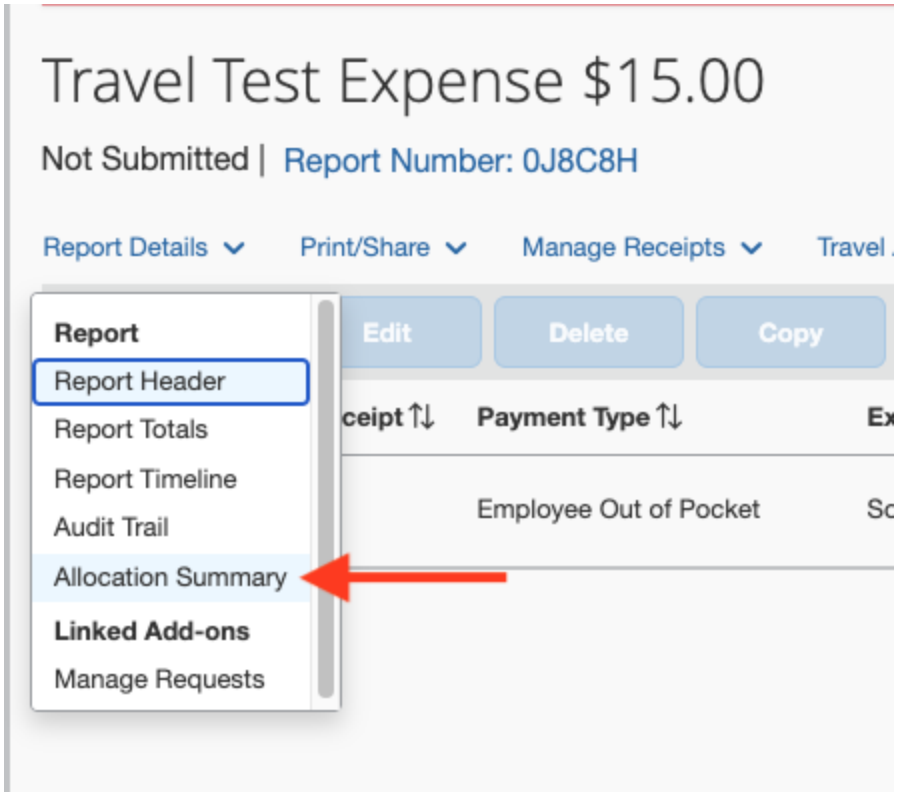
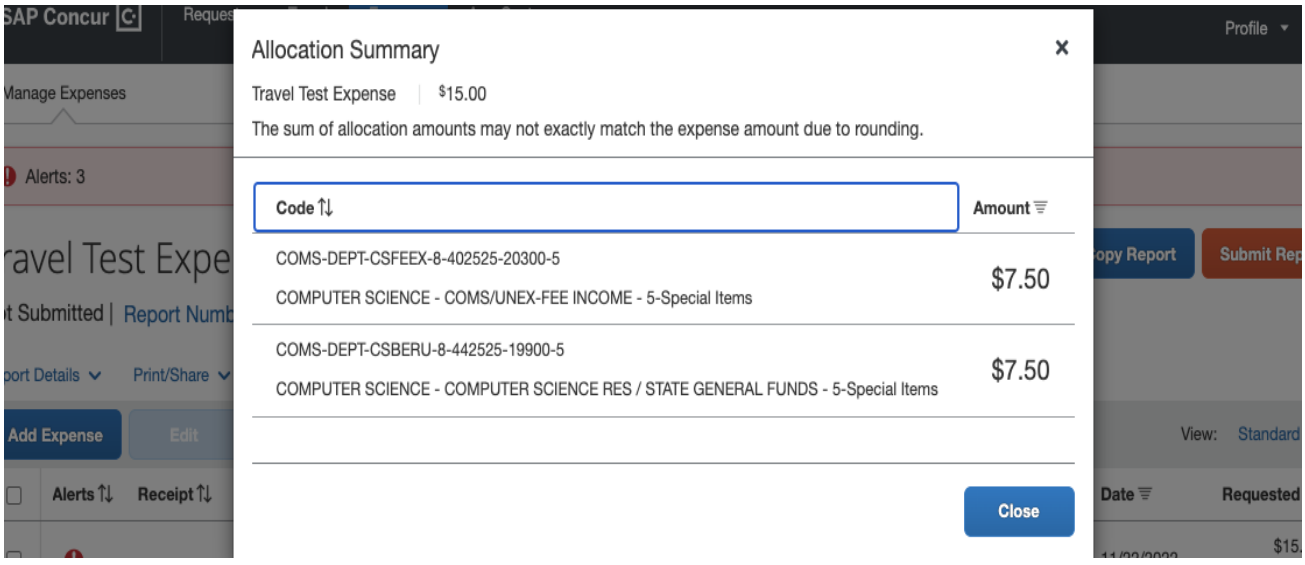
4. Once you add one of the funds, it'll show up here. Go ahead and repeat what you did and add the next funding source.



5. After adding the funding sources, it'll show up together on this page. At the right side it'll show how much is being charged to each account. You can edit the amounts, such as the Travel Grant being equal to or less than $1500. When you are done, please click the Save button at the bottom.



6. To check that you did it right click on Report Details > Allocation Summary.



7. Allocation Summary shows how the report is splitting the funds. Then you should be all done!