

# ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

## TRAVEL APPLICATION

Request

## HELPFUL HINTS

- Segments will be allocated as one group. Other projected expenses can be allocated individually.
- Allocations can be made by percentage or amount.

## ALLOCATE SEGMENTS

To allocate an estimated expense for airfare, hotel and car rental, first enter the information and click on save.

Click on **Allocate** from within one of the Segments.

The screenshot shows a web application interface for 'Request AQLK'. At the top right, there are buttons for 'Attachments', 'Print/Email', 'Delete Request', and 'Submit Request'. The status is 'Not Submitted' and the amount is '\$850.00'. Below this, there are tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. The 'Segments' tab is active, showing an 'Add Segment' section with icons for Air Ticket, Hotel, and Car Rental. The 'Air Ticket' segment is selected, showing details for a round trip from Lincoln, Nebraska to Denver, Colorado on May 3, 2021, with a return on May 5, 2021. The amount for this segment is \$300.00. At the bottom right of the segment details, there are buttons for 'Allocate', 'Delete', and 'Modify'. The 'Allocate' button is highlighted with a red box.

Checkmark one of the Segments – this automatically selects any other segments listed. Click on **Allocate Selected Expenses**.

# ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

Allocations for Request : Denver, CO

Request List

Allocate Selected Expenses | Clear Selections | Summary

Select Group ▾

<input checked="" type="checkbox"/>	Date ▾	Expense Type	Group	Amount
<input checked="" type="checkbox"/>	05/03/2021	Airfare (comm...		\$300.00
<input checked="" type="checkbox"/>	05/03/2021	Lodging		\$400.00
<input checked="" type="checkbox"/>	05/03/2021	Car Rental		\$150.00

Allocations

Allocate By: ▾ | Add New Allocation

Click on **Add New Allocation**.

Allocations Total:\$850.00 Allocated:\$850.00(100%) Remaining:\$0.00(0%)

Allocate By: ▾ | **Add New Allocation** | Delete Selected Allocations | Favorites ▾ | Add to Favorites

<input type="checkbox"/>	Percentage	* Cost Object Ty...	* Cost Object	Code
<input type="checkbox"/>	100	(CC) Cost Center	(2105120001) ...	(UNS005) Sand...

Save Cancel

Another row is added. Make changes to the percentage and/or the Cost Object or WBS.

Allocations Total:\$850.00 Allocated:\$850.00(100%) Remaining:\$0.00(0%)

Allocate By: ▾ | Add New Allocation | Delete Selected Allocations | Favorites ▾ | Add to Favorites

<input type="checkbox"/>	Percentage	* Cost Object Ty...	* Cost Object	Code
<input type="checkbox"/>	50	(CC) Cost Center	(2105120001) ...	(UNS005) Sand...
<input type="checkbox"/>	50	(CC) Cost Center	(2101010006) ...	(UNS005) Sand...

Save Cancel

Note: the expenses can be allocated by percentage or amount.

Allocate By: ▾

- Percentage
- Amount

Click on Save.

# ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

Allocations Total:\$850.00 Allocated:\$850.00(100%) Remaining:\$0.00(0%)

Allocate By: Add New Allocation Delete Selected Allocations Favorites Add to Favorites

<input type="checkbox"/>	Percentage	* Cost Object Ty...	* Cost Object	Code
<input type="checkbox"/>	50	(CC) Cost Center	(2105120001) ...	(UNS005) Sand...
<input type="checkbox"/>	50	(CC) Cost Center	(2101010006) ...	(UNS005) Sand...

Save Cancel

Click on the Expenses tab. The  icon indicates the expenses have been allocated.

Request 39UP Attachments Print / Email Delete Request Submit Request

Request/Trip Name: Boston, MA Status: Not Submitted  
 Reason/Business Purpose: Meeting with Boston University S... Amount: \$987.00

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

<input type="checkbox"/>	Date	Expense T...	Amount	Requested
<input type="checkbox"/>	09/10/2018	Airfare	\$450.00	\$450.00
<input type="checkbox"/>	09/10/2018	Lodging	\$300.00	\$300.00
<input type="checkbox"/>	09/10/2018	Meal (inclu...	\$207.00	\$207.00
<input type="checkbox"/>	09/10/2018	Misc Travel...	\$30.00	\$30.00

TOTAL AMOUNT **\$987.00** | TOTAL REQUESTED **\$987.00**

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Transportation	03. Food/Meals	06. Other
Fuel/Gas	Meal (including tip)	Misc Travel-parking/tolls/etc
State/Private/Rented/Chartered Plane	04. Mileage	Registration/Conf Fees
Taxi/Shuttle/Train/Bus		Team/Group Costs
		Zero \$ Trip

## ALLOCATE EXPENSE TYPES

To allocate an estimated expense other than airfare, hotel and car rental, click on an expense type from the Expense tab.

Request 39UP Attachments Print / Email Delete Request Submit Request

Request/Trip Name: Boston, MA Status: Not Submitted  
 Reason/Business Purpose: Meeting with Boston University S... Amount: \$987.00

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

<input type="checkbox"/>	Date	Expense T...	Amount	Requested
<input type="checkbox"/>	09/10/2018	Airfare	\$450.00	\$450.00
<input type="checkbox"/>	09/10/2018	Lodging	\$300.00	\$300.00
<input type="checkbox"/>	09/10/2018	Meal (inclu...	\$207.00	\$207.00
<input type="checkbox"/>	09/10/2018	Misc Travel...	\$30.00	\$30.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Transportation	03. Food/Meals	06. Other
Fuel/Gas	Meal (including tip)	Misc Travel-parking/tolls/etc
State/Private/Rented/Chartered Plane	04. Mileage	Registration/Conf Fees
Taxi/Shuttle/Train/Bus		Team/Group Costs
		Zero \$ Trip

Enter the required expense information and click on Allocate.

ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

Updated September 10, 2018

Request 39UP

Request/Trip Name: Boston, MA  
Reason/Business Purpose: Meeting with Boston University S...

Status: Not Submitted  
Amount: \$987.00

Request Header | Segments | Expenses | Approval Flow | Audit Trail

+ New Expense | Delete

Date	Expense T...	Amount	Requested
09/10/2018	Airfare	\$450.00	\$450.00
09/10/2018	Lodging	\$300.00	\$300.00
09/10/2018	Meal (inclu...	\$207.00	\$207.00
09/10/2018	Misc Travel...	\$30.00	\$30.00

TOTAL AMOUNT: \$987.00 | TOTAL REQUESTED: \$987.00

Expense Type: Registration/Conf Fees | Request/Trip Business Start Date: 09/10/2018  
Request/Trip Business End Date: 09/12/2018 | Amount: 5,000.00 | USD

Save | Allocate | Cancel

Select the expense to be allocated and click on **Allocate Selected Expenses**.

Allocations for Request : Boston, MA

Request List

Allocate Selected Expenses | Clear Selections | Summary

Select Group

Date	Expense Type	Group	Amount
09/10/2018	Airfare	1	\$450.00
09/10/2018	Lodging	1	\$300.00
09/10/2018	Meal (includin...		\$207.00
09/10/2018	Misc Travel-pa...		\$30.00
<input checked="" type="checkbox"/>	09/10/2018	Registration/C...	\$5,000.00

Allocations

Total:\$750.00 Allocated:\$0.00(0%) Remaining:\$750.00(100%)

Allocate By: | Add New Allocation | Delete Selected Allocations

Percentage	* Cost Object T...	* Cost Object	Code
<input type="checkbox"/>			

Click on **Add New Allocation**.

Allocations for Request : Boston, MA

Request List

Allocate Selected Expenses | Clear Selections | Summary

Select Group

Date	Expense Type	Group	Amount
09/10/2018	Airfare	1	\$450.00
09/10/2018	Lodging	1	\$300.00
09/10/2018	Meal (includin...		\$207.00
09/10/2018	Misc Travel-pa...		\$30.00
<input checked="" type="checkbox"/>	09/10/2018	Registration/C...	\$5,000.00

Allocations

Total:\$5,000.00 Allocated:\$5,000.00(100%) Remaining:\$0.00(0%)

Allocate By: | **Add New Allocation** | Delete Selected Allocations

Percentage	* Cost Object T...	* Cost Object	Code
<input type="checkbox"/>	100	(CC) Cost Center	(5107110100) ... (UNS005) Sand...

Save | Cancel

Another row is added. Make changes to the percentage and the Cost Object or WBS.

## ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

Allocations Total:\$5,000.00 Allocated:\$5,000.00(100%) Remaining:\$0.00(0%)

Allocate By: ▾ | Add New Allocation | Delete Selected Allocations

<input type="checkbox"/>	Percentage	* Cost Object T...	* Cost Object	Code
<input type="checkbox"/>	50	(CC) Cost Center	(5107110100) ...	(UNS005) Sand...
<input type="checkbox"/>	50	(CC) Cost Center	(2101010006) ...	(UNS005) Sand...

Save Cancel

Note: the expenses can be allocated by percentage or amount.

Allocate By: ▾

- Percentage
- Amount

Click on Save.

Allocations Total:\$5,000.00 Allocated:\$5,000.00(100%) Remaining:\$0.00(0%)

Allocate By: ▾ | Add New Allocation | Delete Selected Allocations

<input type="checkbox"/>	Percentage	* Cost Object T...	* Cost Object	Code
<input type="checkbox"/>	50	(CC) Cost Center	(5107110100) ...	(UNS005) Sand...
<input type="checkbox"/>	50	(CC) Cost Center	(2101010006) ...	(UNS005) Sand...

Save Cancel

The  icon indicates the expenses have been allocated.

ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

Updated September 10, 2018

Request 39UP Attachments ▾ Print / Email ▾ Delete Request Submit Request

Request/Trip Name: Boston, MA Status: Not Submitted  
Reason/Business Purpose: Meeting with Boston University S... Amount: \$5,987.00

Request Header Segments Expenses Approval Flow Audit Trail

[+ New Expense](#) [Delete](#) <<

<input type="checkbox"/>	Date	Expense T...	Amount	Requested
<input type="checkbox"/>	09/10/2018	Airfare	\$450.00	\$450.00
<input type="checkbox"/>	09/10/2018	Lodging	\$300.00	\$300.00
<input type="checkbox"/>	09/10/2018	Meal (inclu...	\$207.00	\$207.00
<input type="checkbox"/>	09/10/2018	Misc Travel...	\$30.00	\$30.00
<input type="checkbox"/>	09/10/2018	Registratio...	\$5,000.00	\$5,000.00

Expense Type:

*To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.*

01. Transportation	03. Food/Meals	06. Other
Fuel/Gas	Meal (including tip)	Misc Travel-parking/tolls/etc
State/Private/Rented/Chartered Plane	04. Mileage	Registration/Conf Fees
Taxi/Shuttle/Train/Bus		Team/Group Costs
		Zero \$ Trip