

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 interface for 'Request 39UP'. At the top right, there are buttons for 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request'. Below these, the status is 'Not Submitted' and the amount is '\$987.00'. The main content area has tabs for 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. Under the 'Segments' tab, there is an 'Add Segment' section with icons for an airplane, a hotel, and a car. Below this, an 'Air Ticket' segment is shown with details: 'Round Trip', 'Amount: \$450.00', 'Outbound' (Lincoln Municipal to Logan Intl, Sept 10, 2018), and 'Return' (Sept 12, 2018). At the bottom right of the segment, there are buttons for 'Allocate', 'Delete', and 'Modify', with the 'Allocate' button highlighted by a red box.

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

The screenshot shows a window titled 'Allocations for Request : Boston, MA'. It has a 'Request List' section with buttons for 'Allocate Selected Expenses', 'Clear Selections', and 'Summary'. Below this is a table of expenses:

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

There are also buttons for 'Allocate By' and 'Add New Allocation' on the right side of the interface.

ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

Updated September 10, 2018

Click on **Add New Allocation**.

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

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

<input type="checkbox"/> 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/or the Cost Object or WBS.

Allocations Total:\$750.00 Allocated:\$750.00(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	(WBS) Project ...	(54-0518-0004...	(UNS005) Sand...

Save Cancel

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

Allocate By: ▾

- Percentage
- Amount

Click on **Save**.

Allocations Total:\$750.00 Allocated:\$750.00(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	(WBS) Project ...	(54-0518-0004...	(UNS005) Sand...

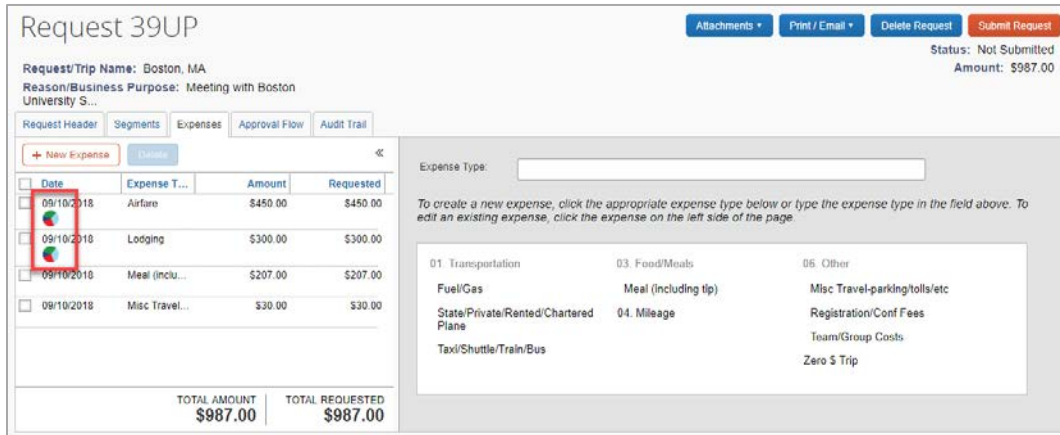
Save Cancel

ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

Travel Quick Reference Guide

Updated September 10, 2018

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



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

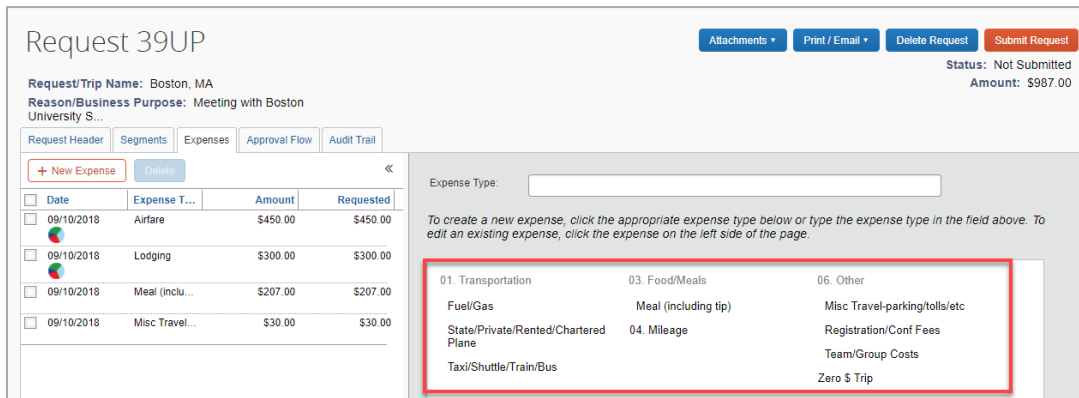
Expense Type:

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

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

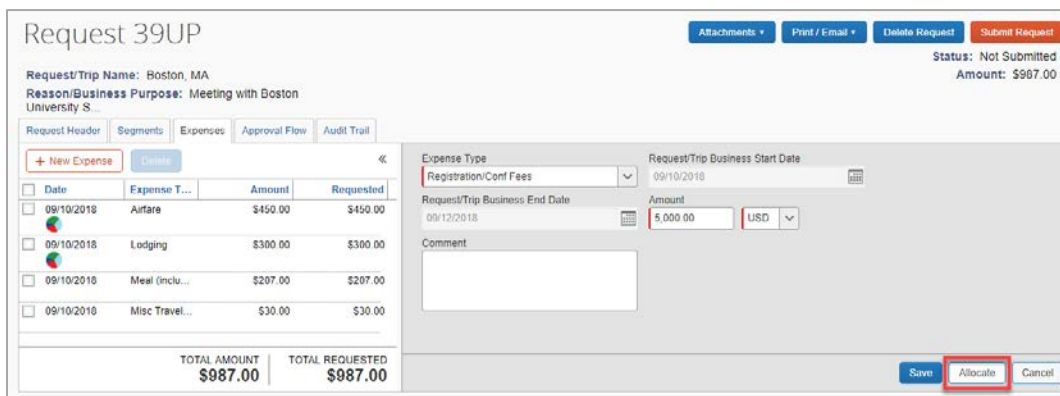
Date	Expense T...	Amount	Requested
09/10/2018	Airfare	\$450.00	\$450.00
09/10/2018	Lodging	\$300.00	\$300.00
09/10/2018	Meal (inclu...	\$207.00	\$207.00
09/10/2018	Misc Travel...	\$30.00	\$30.00

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**.



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

Comment:

Save Allocate Cancel

ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

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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 ▾

<input type="checkbox"/>	Date ▾	Expense Type	Group	Amount
<input type="checkbox"/>	09/10/2018	Airfare	1	\$450.00
<input type="checkbox"/>	09/10/2018	Lodging	1	\$300.00
<input type="checkbox"/>	09/10/2018	Meal (includin...		\$207.00
<input type="checkbox"/>	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
☰ ▾

<input type="checkbox"/>	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 ▾

<input type="checkbox"/>	Date ▾	Expense Type	Group	Amount
<input type="checkbox"/>	09/10/2018	Airfare	1	\$450.00
<input type="checkbox"/>	09/10/2018	Lodging	1	\$300.00
<input type="checkbox"/>	09/10/2018	Meal (includin...		\$207.00
<input type="checkbox"/>	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
☰ ▾

<input type="checkbox"/>	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.

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

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

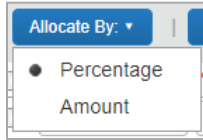
<input type="checkbox"/>	Percentage	* Cost Object T...	* Cost Object	Code
<input type="checkbox"/>	50	(CC) Cost Center	(5107110100) ...	(UNS005) Sand...
<input type="checkbox"/>	50	(CC) Cost Center	(2101010006) ...	(UNS005) Sand...

Save
Cancel

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

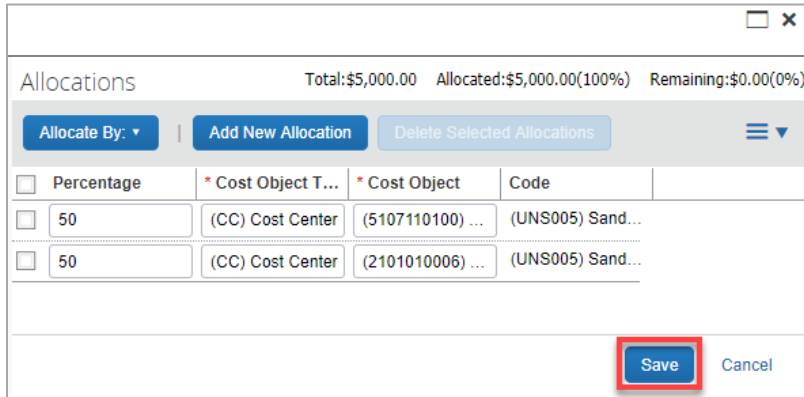
ALLOCATE TRAVEL REQUESTS (SPLIT FUNDING)

Updated September 10, 2018



Allocate By: ▾
● Percentage
Amount

Click on Save.



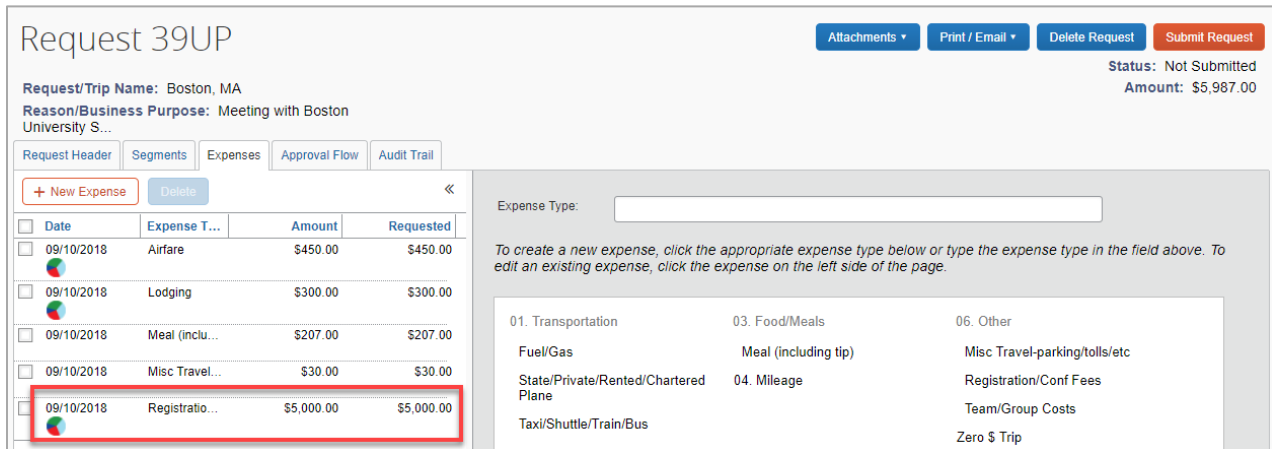
Allocations Total:\$5,000.00 Allocated:\$5,000.00(100%) Remaining:\$0.00(0%)

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.



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 checked="" 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