




Travel Management System (TMS)

JOB AID # 5.05

Date: 03/29/2012

Job Aid Description: Allocate Expenses

1. Complete all expenses as usual.
2. Click **Details** tab and select **Allocations** from the dropdown list.
3. Select the expense(s) you wish to allocate from the Expense List. You may choose multiple or all the expense items.
4. In the upper right-hand corner of the window, click **Allocate Selected Expenses**.
5. In the **Allocate By** field, enter the appropriate **Percentage** or **Amount**.
6. Click **Add New Allocation**, and then repeat steps 5-6 for each new allocation.
7. *Note that there is a running total of how much remains to be allocated to the right of the window title (Allocations).*
8. Click in the field under the **Speed Chart** column heading, and then select the Speed Chart to be charged.
9. *Add new allocations as necessary. Default information is your home department.*
10. Click **Save**, and then click **OK**.
11. In the **Allocate Report** window, click **Done**.
12. To view the allocations you made, hover over the pie chart icon  next to the expense.