Concur

Charging / Allocating Expense Line(s) To Chartfields

1) Select the "**Expense**" tab.
2) Open an existing report or create a new one
3) Fill in all fields marked in RED.

Your default chartfield information is determined by profile with Human Resources.

- Note, all expense lines in this report will be charged to this chartfield string.

4) Select a previously used chartfield string from the drop-down menu or select each chartfield separately.
    a. Remember the "**Project and Operating Unit**" must be set to "**None**" if not applicable.

To change the chartfield for a specific expense line, you will need to "**Allocate**" to the new Chartfield.

5) Select "**Next**" to continue.
6) To charge to a different chartfield string, check the expense line and click "**Allocate**".
7) Indicate how much should be charged to a specific Chartflied. Note the amount is show in percent format.
    a. If you have a previously saved "**chartfiled string**" you can select it in the dropdown menu.
    b. Or you can select the chartfields individually.
8) Choose the appropriate "**Project**" or "**None**" if not applicable.
9) Choose the appropriate "**Operating Unit**" or "**None**" if not applicable.
10) Select "**Save**" to complete your changes.
11) Select "**Done**" to return to your expense report.
12) You will see the "**allocations**" icon appear under the date field.

Hover over the icon to display the Chartfield information associated with the expense line.

All Done!