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CU Concur Tip: How do I create and save frequently used ChartString Allocations?

2 messages

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💡 CU Concur Tip: How do I create and save frequently used ChartString Allocations?

What is It?

Concur uses the ChartString that you entered in your Expense Profile as the default whenever you create a new Expense Report. You can edit the default ChartString on the Report Header, which defaults to each new expense line. If necessary, you can select Expense Items within your Expense Report and allocate them to one or more alternate ChartStrings and save the Allocation as a Favorite that you can reuse in the future.

Who's it for?

Anyone who creates Expense Reports and needs to use multiple ChartStrings.

How do I do it?

After you have added Expense Items to the Expense Report you created:

1. Select the checkbox(es) next to the Expense Items you are allocating to alternate ChartStrings.

2. Click the **Allocate** button. The Allocate screen appears indicating the Default (ChartString) for the report is allocated for 100%.
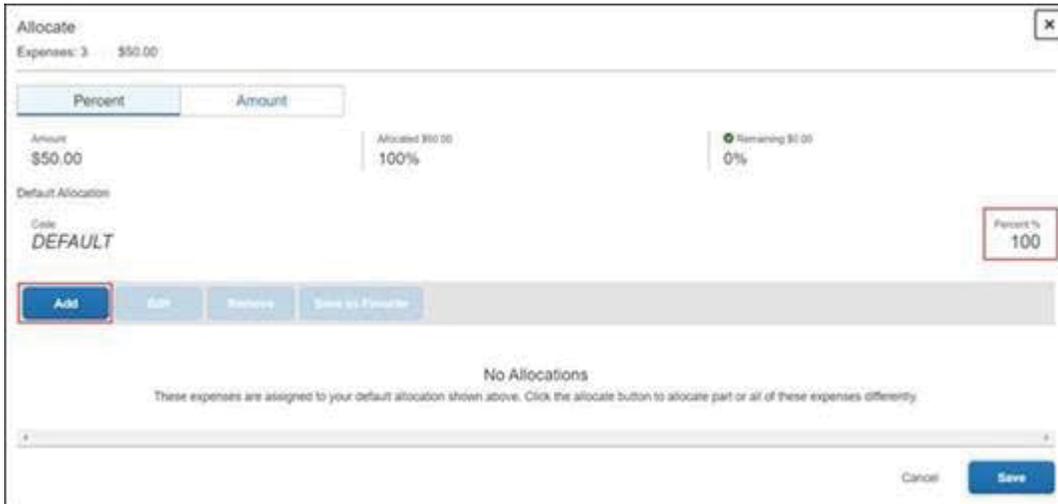
3. Click the **Add** button. The Add Allocation window appears.
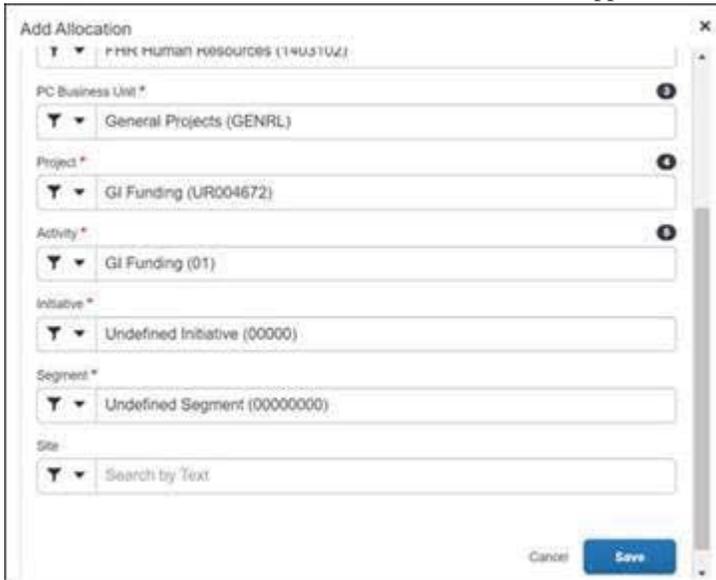
4. Edit the desired **ChartFields** and click **Save**. The ChartString is listed in the Allocation Screen. If needed, repeat steps 3 and 4 to add additional ChartStrings to the Allocation.
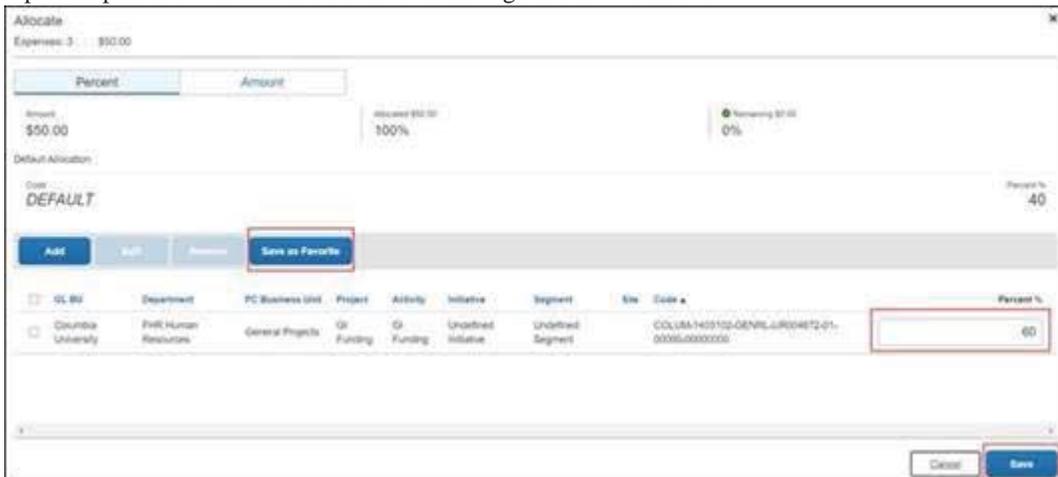
5. Indicate the **Percent %** of each ChartString in the allocation. Alternatively, you can select **Amount** and indicate the amount for each Chartstring in the allocation. If the allocation of the ChartString(s) you added is less than 100%, the remaining percent or amount will be allocated to the Default.

6. Click the **Save as Favorite** button to save this Allocation to re-use for future Expense Reports and then click **Save**.