

Allocating an Expense to Another Budget

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Learn how to allocate expenses to another FOAPAL/budget in Pioneer Travel & Expense.

This article applies to employees who make business purchases on behalf of the University which are funded by multiple budgets.



Important Note:

Expenses in Pioneer Travel & Expense will automatically be charged to your default budget. The process below is used to move single expenses to another budget. If you need to allocate the contents of an entire expense report to another budget, see [Allocating a Report to Another Budget](https://dusharedservicescenter.freshdesk.com/support/solutions/articles/30000033724-allocating-a-report-to-another-budget) (<https://dusharedservicescenter.freshdesk.com/support/solutions/articles/30000033724-allocating-a-report-to-another-budget>).

To allocate an expense to another FOAPAL/budget:

1. [Login to Pioneer Travel & Expense](https://dusharedservicescenter.freshdesk.com/support/solutions/articles/30000034033-logging-in-to-pioneer-travel-and-expense) (<https://dusharedservicescenter.freshdesk.com/support/solutions/articles/30000034033-logging-in-to-pioneer-travel-and-expense>).
2. [Open the report](https://dusharedservicescenter.freshdesk.com/support/solutions/articles/30000034071-opening-an-expense-report) (<https://dusharedservicescenter.freshdesk.com/support/solutions/articles/30000034071-opening-an-expense-report>) containing the expense that needs allocating.
3. Click on the expense you need to allocate, then click the **Allocate** button.

Expenses	Move	Delete	Copy	View	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>					Office Supplies STAPLES	\$22.08	\$22.08
<input type="checkbox"/>					Office Supplies STAPLES	\$21.24	\$21.24
		TOTAL AMOUNT				\$43.32	
		TOTAL REQUESTED				\$43.32	

Expense	Receipt Image	Available Receipts
Expense Type Office Supplies	Transaction Date 11/10/2018	
Report/Trip Purpose Instruction/Teaching	Enter Vendor Name STAPLES	
Payment Type *P-Card	Amount 22.08	USD
Description Notebooks requested by Leia		
Save Itemize Allocate Attach Receipt Cancel		

4. In the Allocation window, select the **Division**, then the **Org/Dept**, then the **Fund**. **(These fields must be completed in this order)**.



Important Note:

Use caution when selecting the FOAPAL for reallocation. The system will not prevent you from entering an incorrect FOAPAL.

5. When finished, click **Save**.

Allocations for Report: November Expenses

Expense List Allocations Total: \$22.08 Allocated: \$22.08 (100%) Remaining: \$0.00 (0%)

Allocate Selected Expenses Clear Selections Summary Allocate By: ▾ Add New Allocation Delete Selected Allocations Favorites ▾ Add to Favorites

Select Group ▾

Date	Expense T...	Group	Amount
<input type="checkbox"/>	11/10/2018	Office Sup...	\$22.08
<input type="checkbox"/>	10/27/2018	Office Sup...	

Percentage	Division	Org/Department	Fund	Activity Code	Location	Code
<input type="checkbox"/>	100	(2070) Shared ...	(382101) Shar...	(10000) Curren...		2070-382101-10...

Note: You must enter FOAP information in this order: Division > Org/Dept > Fund

Save Cancel Done

Need more help?

Submit a new help ticket
at the bottom of this page

Or

Call us at 303.871.7420