EX-15 Splitting Expense Allocations

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how users can split Expense Allocation in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of splitting Expense Allocation in NCFS.

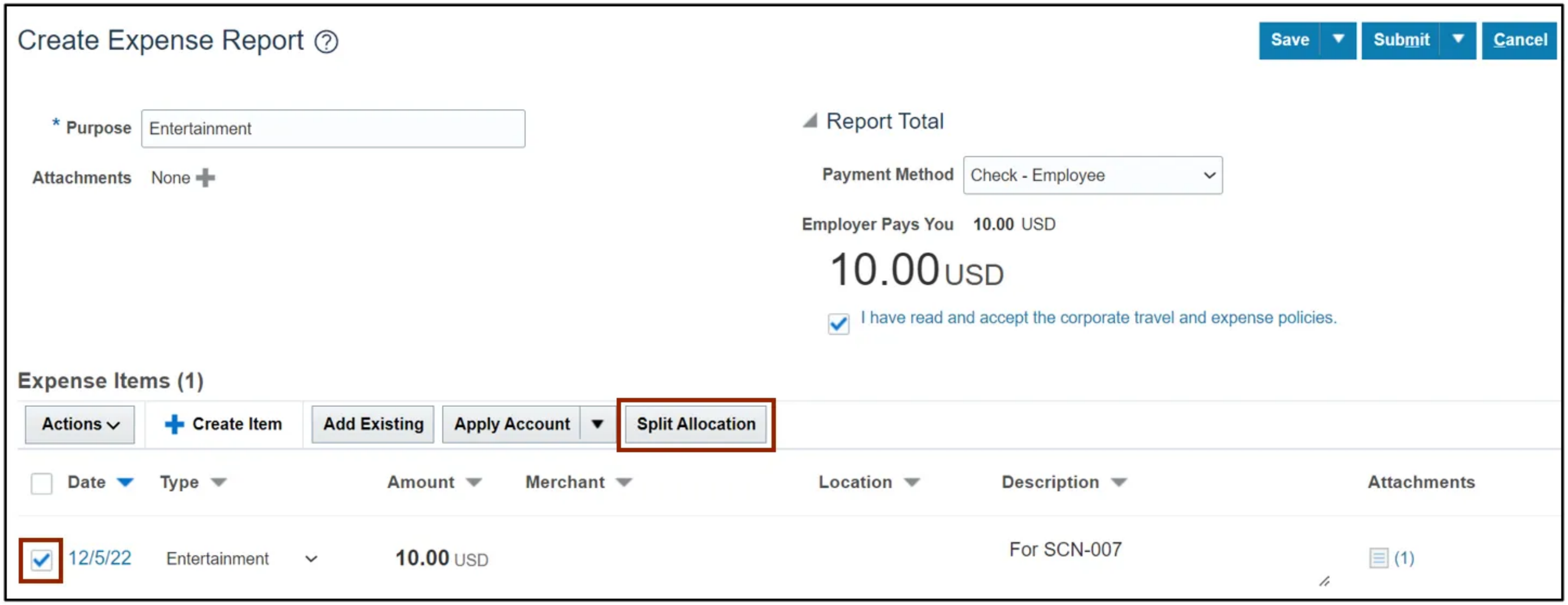
Splitting of Expense Allocation

To split expense allocation, please follow the steps below. There are 4 steps to complete this process.

Step 1. Navigate to the Expense report and on the **Create Expense Report** page and enter a Purpose and click the Terms and Conditions checkbox. Click the checkbox next to the required Expense Report, and then click the **Split Allocation** button.

In this example, we choose **Entertainment**.

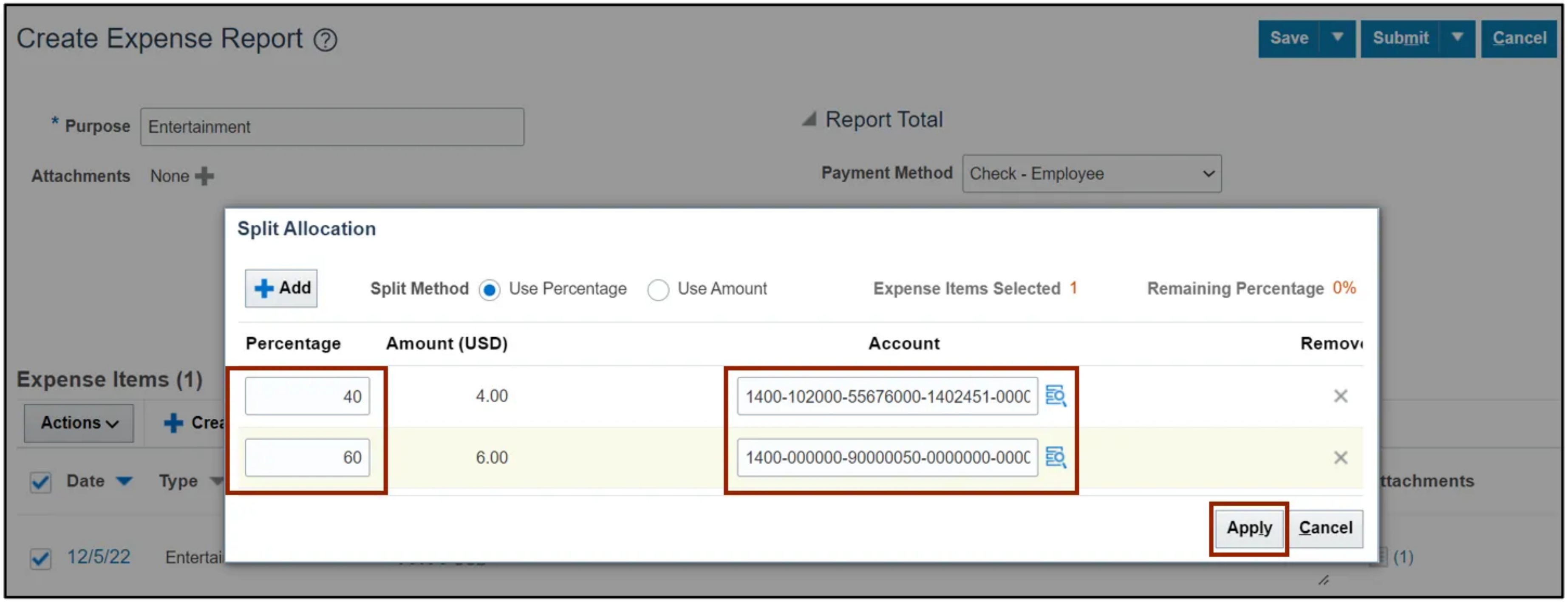
Image



Step 2. The *Split Allocation* pop-up appears. Enter the **Account** details for both the accounts, and in the ***Percentage*** column, enter values between 1 to 100, that total to a 100 percent.

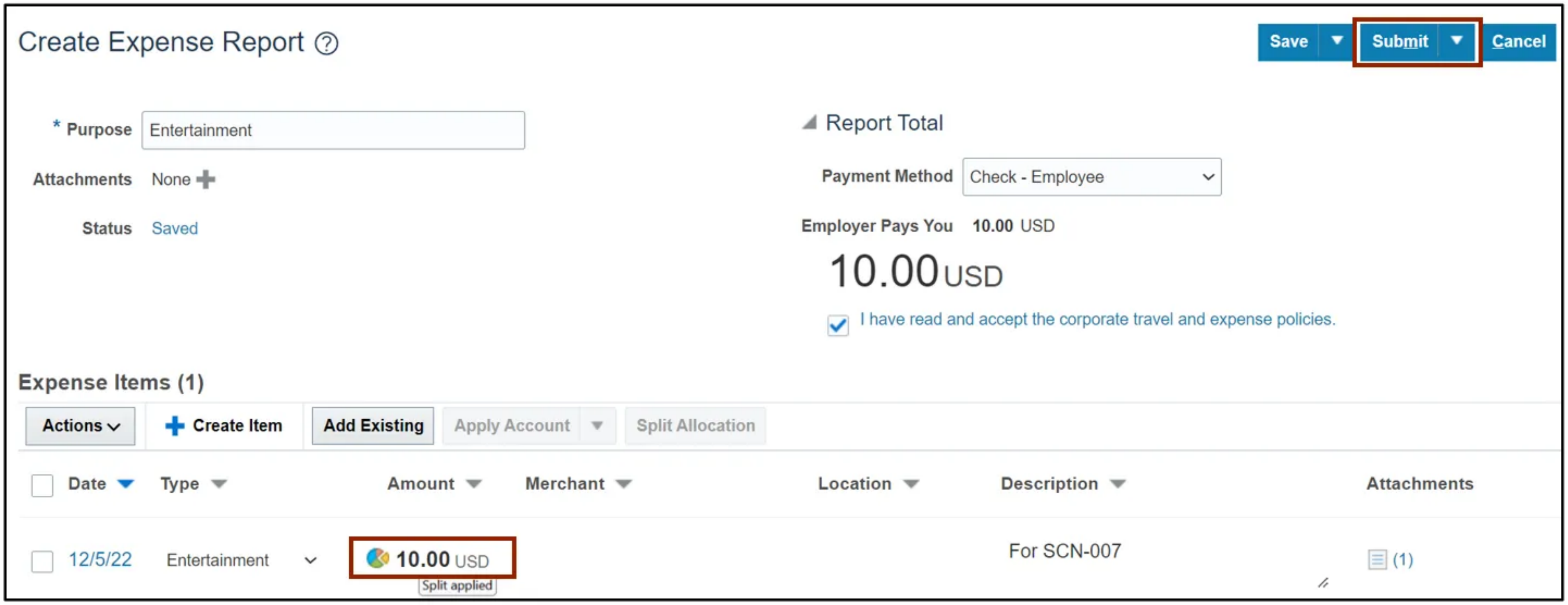
In this example, we choose **40** and **60**. Now, click the **Apply** button.

Image



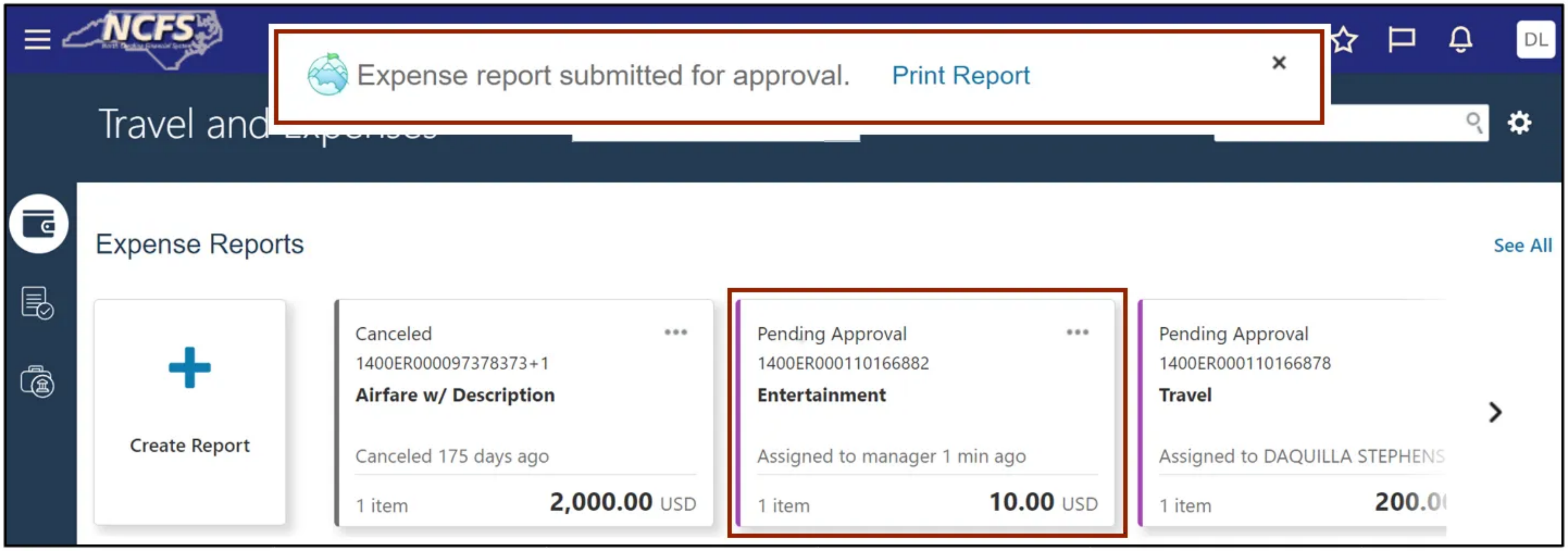
Step 3. On the **Expense Report** page, the split applied is displayed. Click the **Submit** button.

Image



Step 4. A *Confirmation* pop-up appears. The Expense Report is submitted for approval and the status shows as **Pending Approval**.

Image



Wrap-Up

NCFS users can Split Expense Allocation using the steps above.

Additional Resources

- Virtual Instructor Led Training (vILT)
  - [EX 100: Expense Reports & Cash Advances]

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