

# 9.2 Defining an Allocation Group

**Purpose:** Use this document as a reference for defining an allocation group in ctLink.

**Audience:** Finance staff

 You must have at least one of these local college managed security roles:

- ZZ General Ledger Allocations

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

## Defining an Allocation Group

**Navigation:** NavBar > Navigator > Allocations > Define and Perform Allocations > Define Allocation Group

1. The **Define Allocation Group** search page displays.
2. Select the **Add a New Value** tab.
3. Enter **SetID**.
4. Enter **Allocation Group**.
5. Select **Add**.

Manager Self Service Define Allocation Group

### Define Allocation Group

[Find an Existing Value](#) [Add a New Value](#)

---

SetID

Allocation Group

[Find an Existing Value](#) | [Add a New Value](#)

6. The **Allocation Group** page displays.
7. Enter **Effective Date**.
8. Enter **Description**.
9. Enter **Comments**.
10. Select **Step**.
11. Select the **Update/Create** link to open the Define Allocation Step page in a new window.
12. Select the **Continue** checkbox if you want the system to continue processing even if the allocation step fails.
13. Select the **Add a New Row [+]** icon to continue adding Steps.
14. Select **Save**.

**Manager Self Service** **Define Allocation Group**

**Allocation Group**

SetID: WACTC      Group: EXPBYDEPT

---

**Effective date** 1 of 1 | View All

\*Effective Date: 05/27/2019       Status: Active

Description: Expenses by Department

Comments:

---

**Steps** 1-2 of 2 | View All

Step	Description	Continue			
EXPPRO <input type="text"/>	Update/Create	<input checked="" type="checkbox"/>	+	-	
<input type="text"/>	Update/Create	<input type="checkbox"/>	+	-	

---

Save Notify Add Update/Display Include History Correct History

15. Process complete.