

## 9.2 Defining an Allocation Group

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

**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

WACTC

Allocation Group

ExpByDept

Add

[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**

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### Allocation Group

SetID    WACTC                      Group    EXPBYDEPT

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**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		
<div>EXPPRO </div>	<div>Update/Create</div>	.	<div><input checked="" type="checkbox"/></div>	<div>+</div>	-
<div></div>	<div>Update/Create</div>		<div><input type="checkbox"/></div>	<div>+</div>	-

Save Notify Add Update/Display Include History Correct History