MANAGE EXPENSE DELEGATIONS

EX

QUICK REFERENCE GUIDE EX-10

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Manage Expense Delegations in the North Carolina Financial System (**NCFS**).

Introduction and Overview

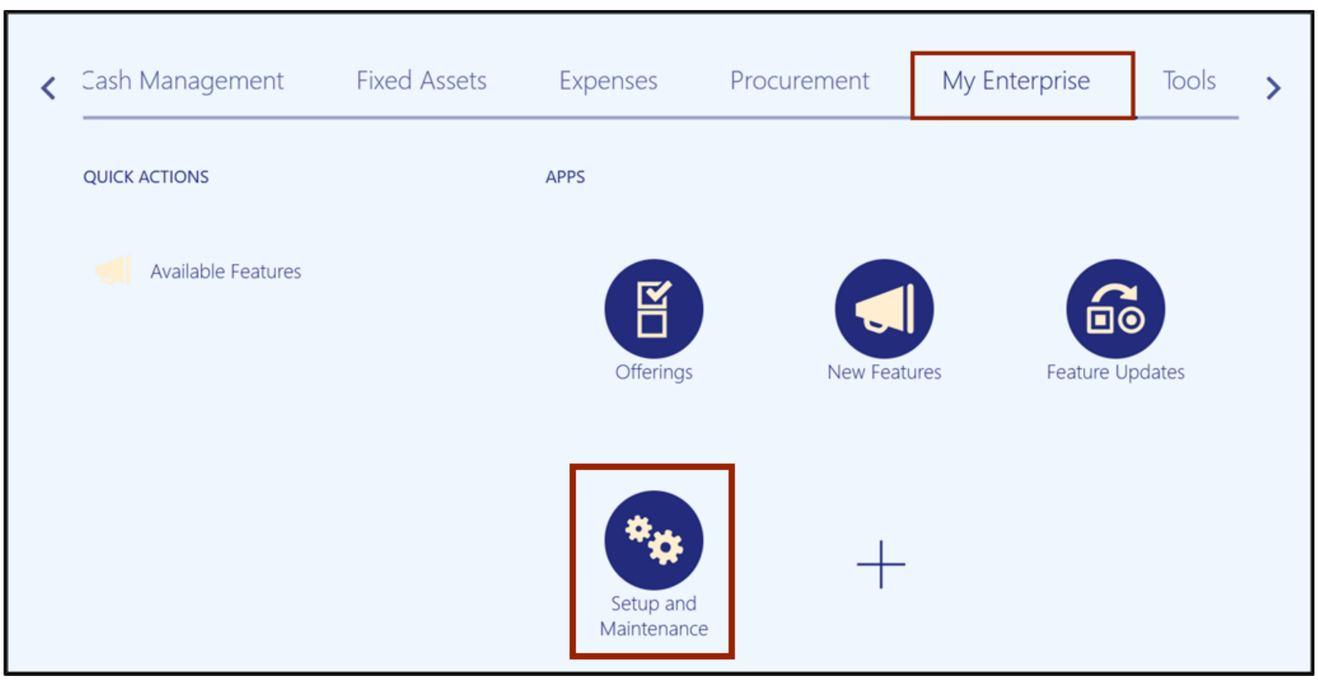
This QRG covers the creation of Expense Delegations to specify a person who enters expense reports on behalf of others in NCFS.

Manage Expense Delegations

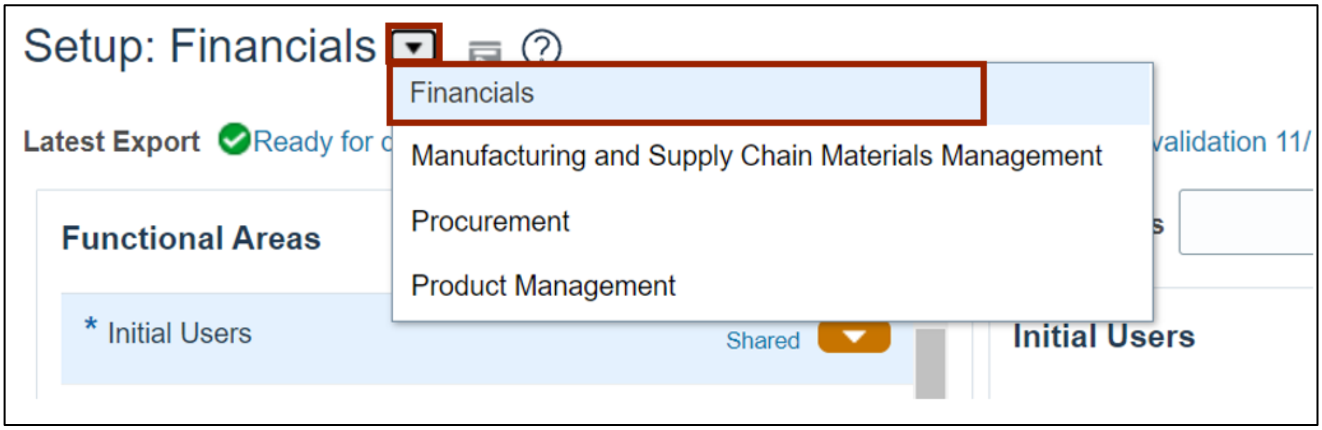
To Manage Expense Delegations in the NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.

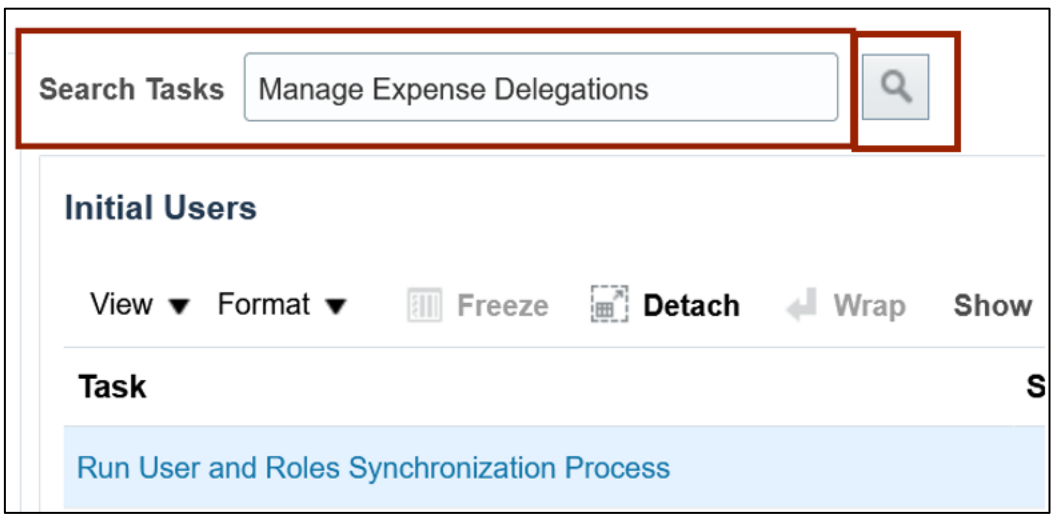
2. On the **Home** page, click the **My Enterprise** tab and click the **Setup and Maintenance** app.



3. On the top left corner of **Setup and Maintenance** Page, click the drop-down choice list icon [ ] and select **Financials.**



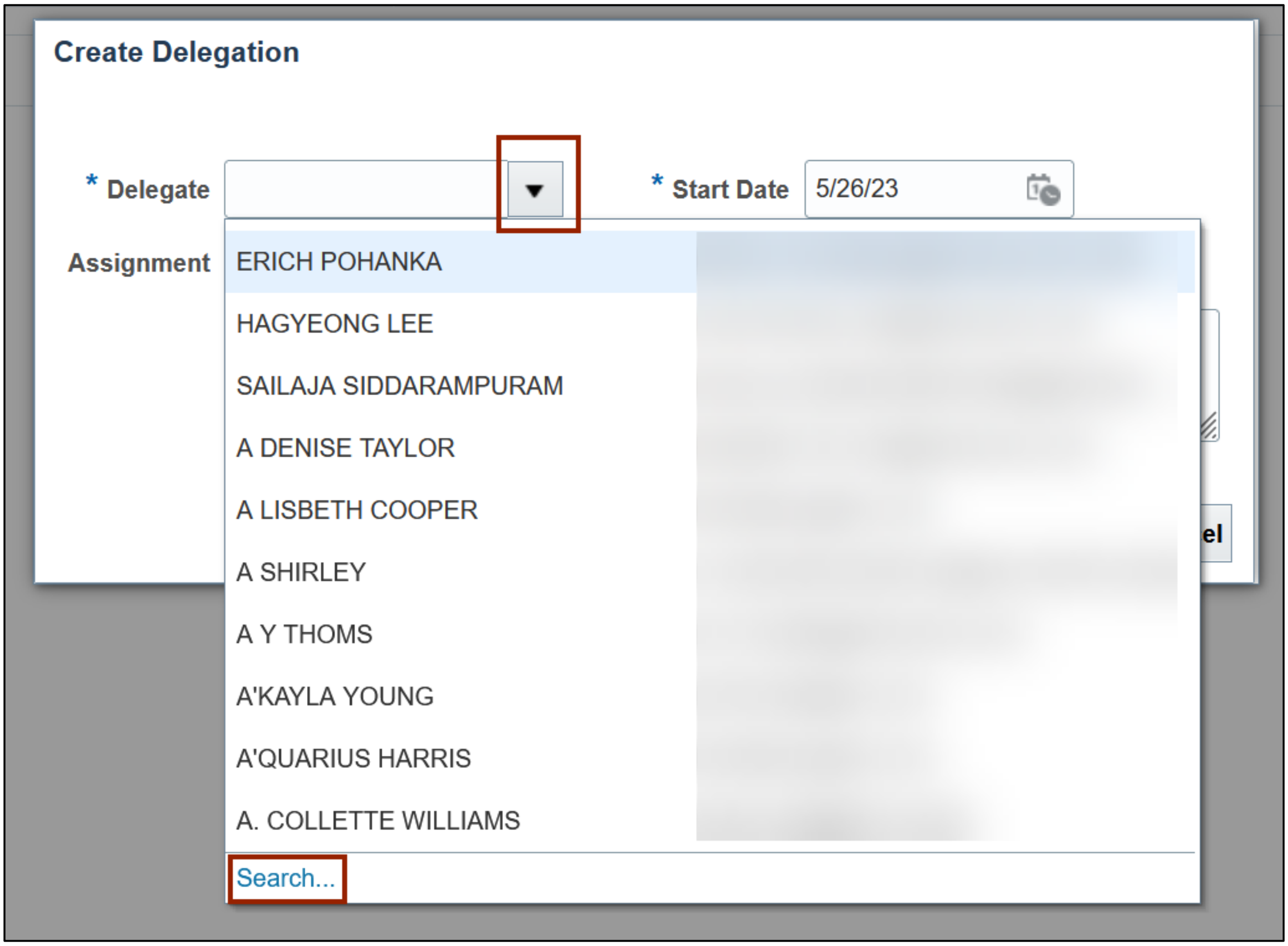
4. Enter **Manage Expense Delegations** in the ***Search Tasks*** field and click the **Search** [ ] icon.



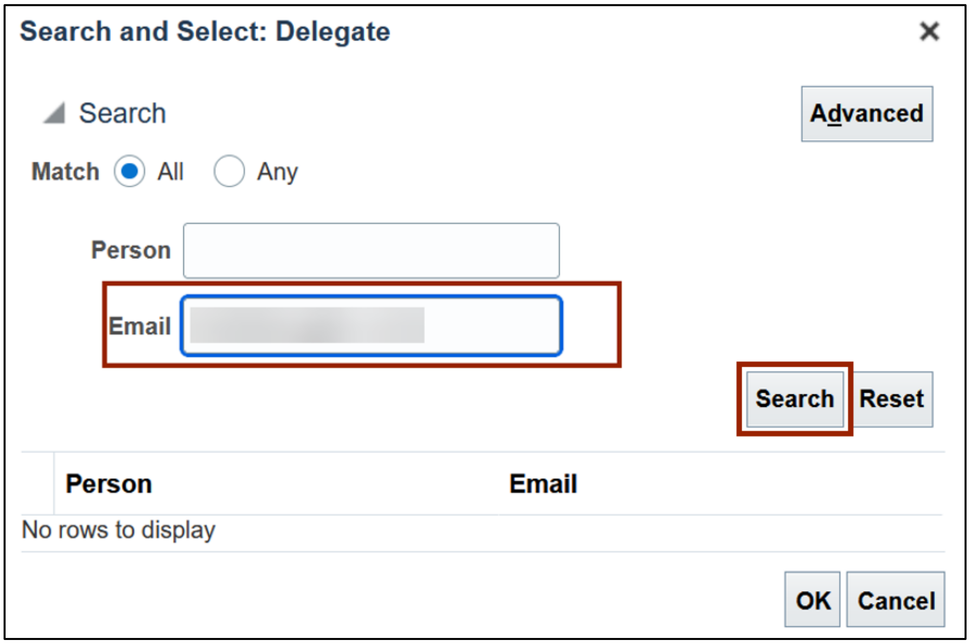
5. In the *Expenses* section, click **Manage Delegations.**

6. Click the Plus [➕] icon to create a new **Delegation.**

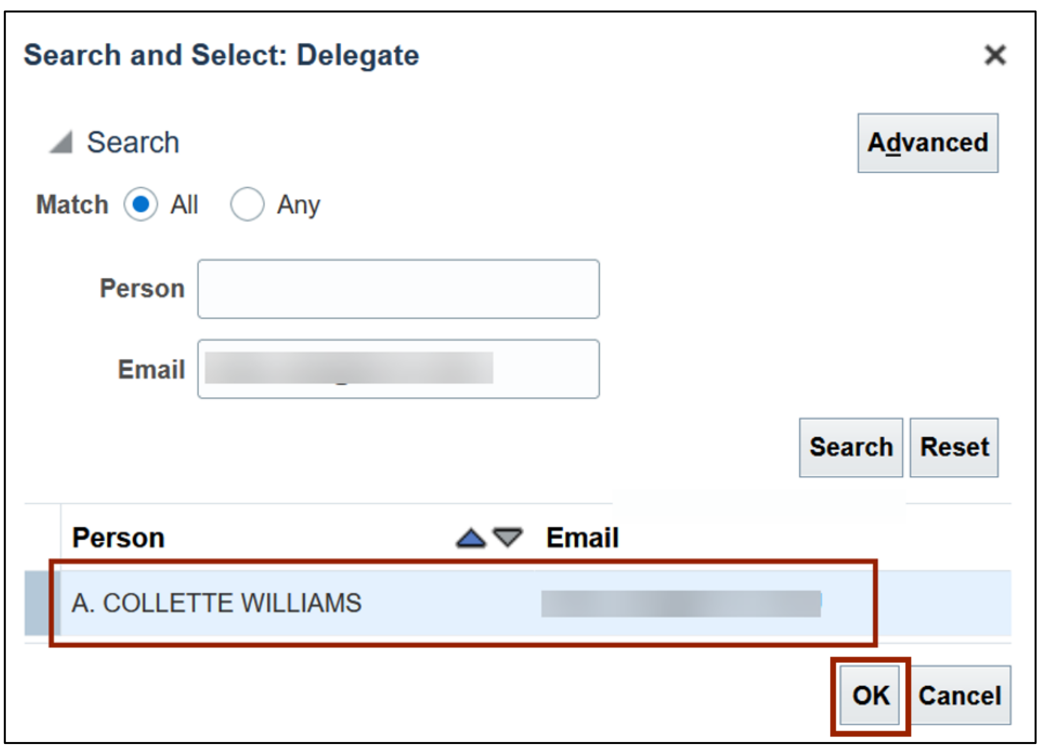
7. On the *Create Delegation* pop-up page, click the drop-down list choice list icon [ ] next to the ****Delegate*** field and click **Search** to specify a person who enters expense reports on behalf of others.



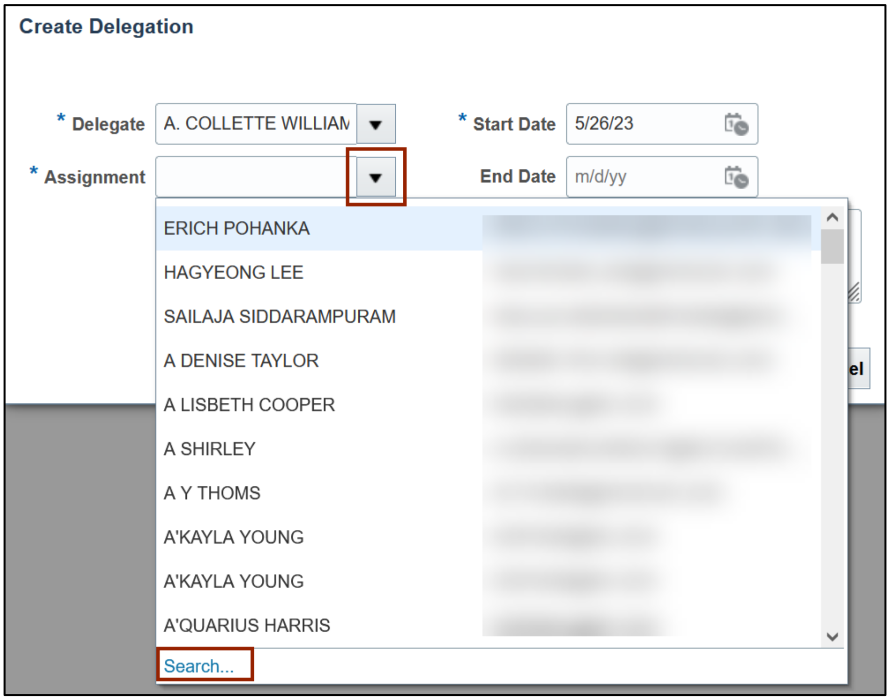
8. On the *Search and Select: Delegate* pop-up, Enter the **Email** of the Delegate in the *Email* field. Alternatively, you can enter the person's name in the **Person** field if the email ID is not available and click the **Search** button.



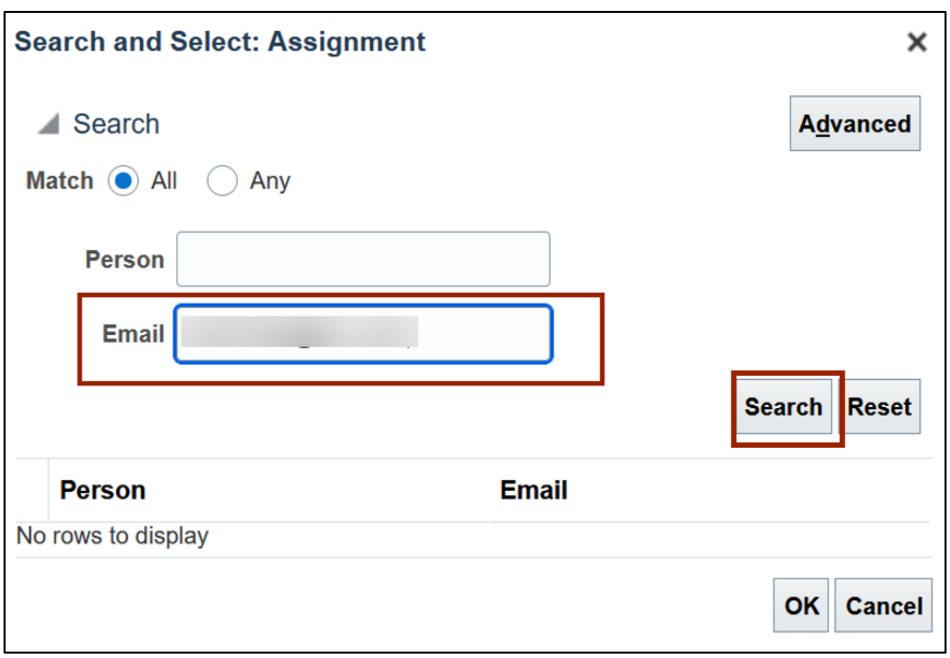
9. Select the **Delegate details** in the ***Person*** column and click the **OK** button.



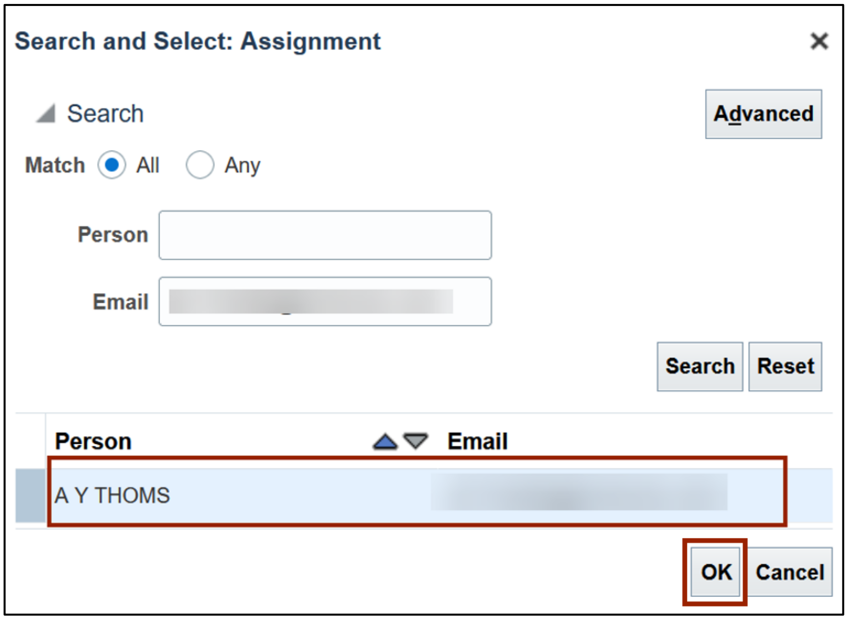
10. The *Create Delegation* pop-up appears, click the drop-down list icon [ ] next to the **Assignment** field and click **Search** to specify a person for whom the delegate enters expense reports.



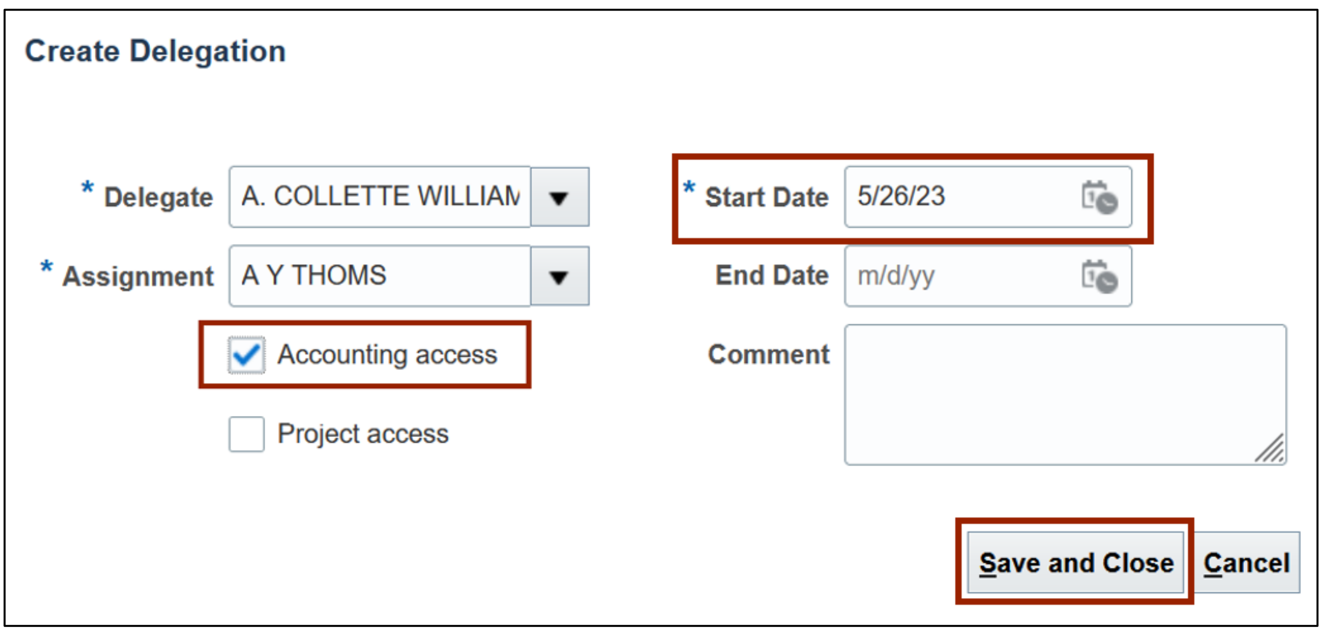
11. On the *Search and Select: Assignment* pop-up page, Enter **Email ID** of the Assigned Person in the ***Email*** field and click the **Search** button. Alternatively, you can enter the person's name in the ***Person*** field if the email ID is not available.



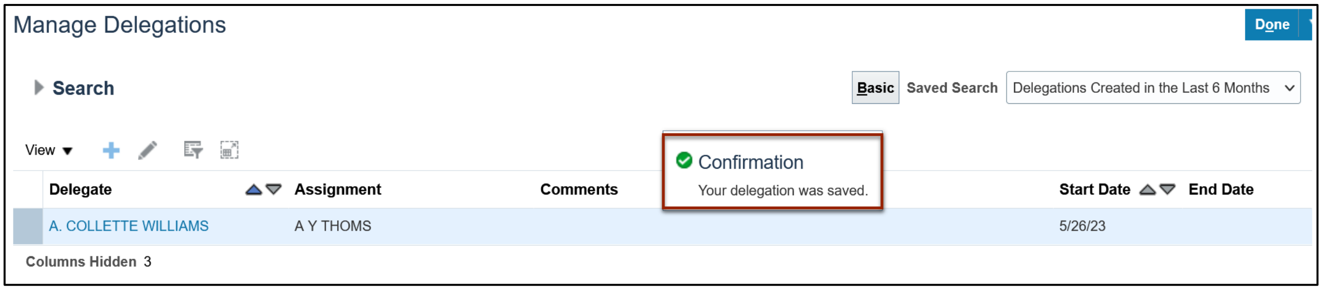
12. Select the **Assignment** details in the ***Person*** column and click the **OK** button.



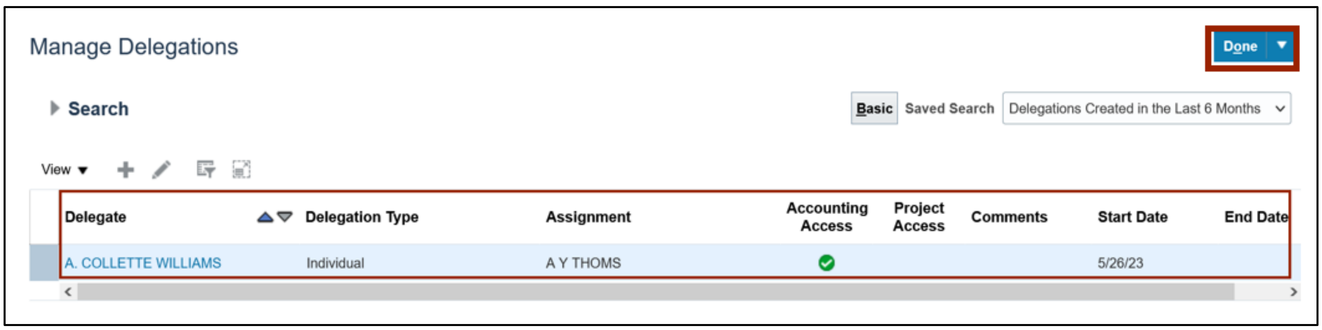
13. Click the checkbox [ ] next to **Accounting Access** to allow editing of the charge account details. The date will auto-populate and then click the **Save and Close** button.



14. A *Confirmation* pop-up page appears.



15. Verify the Delegation details and click the **Done** button.



Wrap-Up

Create Expense Delegations using the steps above in NCFS to specify a person who enters expense reports on behalf of others.

Additional Resources

- NA