



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**).

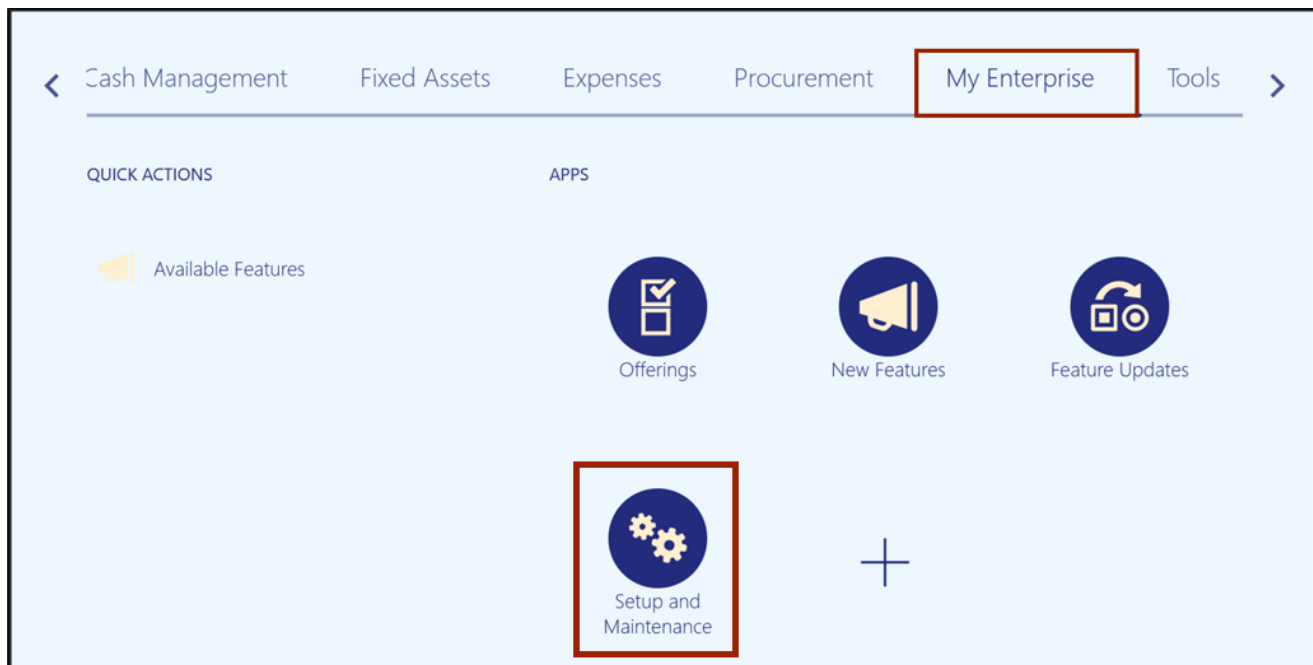
Introduction and Overview

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

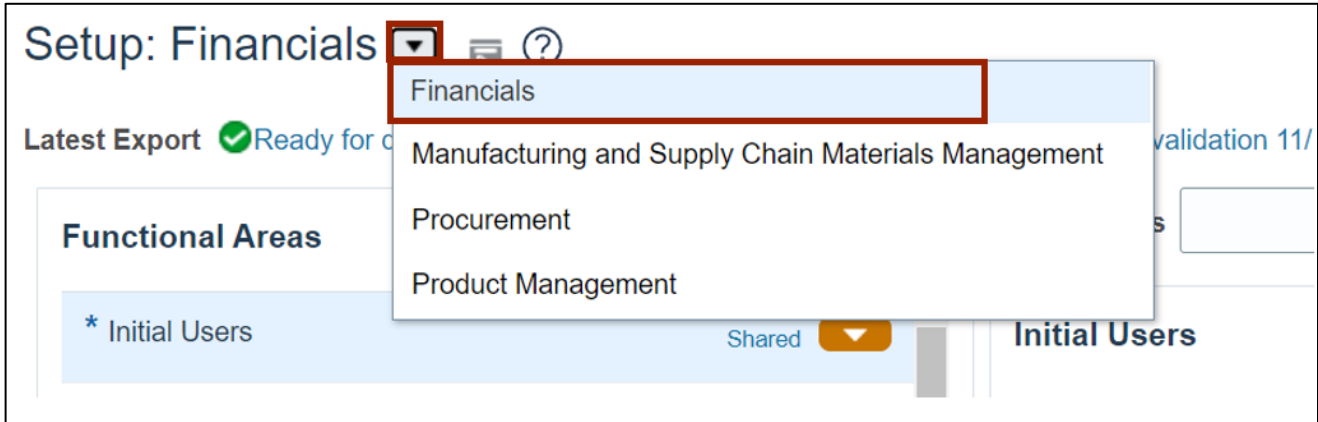
Manage Expense Delegations

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

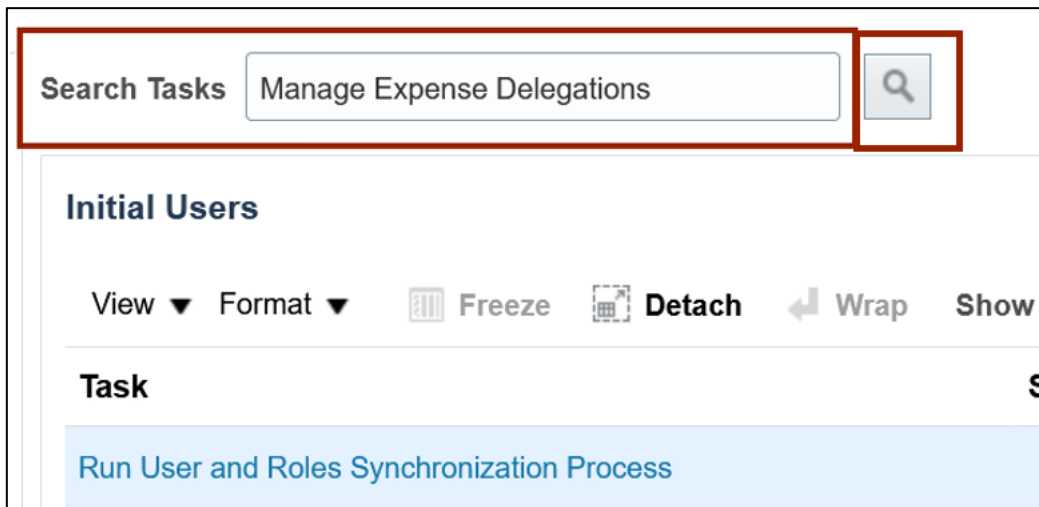
1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **My Enterprise** tab and click the **Setup and Maintenance** app.




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**.

Search Tasks 

Expenses





View ▼ Format ▼  Freeze  Detach  Wrap Show ▼

Task	Scope	Actions
Manage Delegations		

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

Manage Delegations

► Search

View ▼    

Delegate	Assignment	Comments
No data to display.		
Columns Hidden 3		

- 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.

Create Delegation

* Delegate ▼

* Start Date

Assignment

- ERICH POHANKA
- HAGYEONG LEE
- SAILAJA SIDDARAMPURAM
- A DENISE TAYLOR
- A LISBETH COOPER
- A SHIRLEY
- A Y THOMS
- A'KAYLA YOUNG
- A'QUARIUS HARRIS
- A. COLLETTE WILLIAMS

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.

Search and Select: Delegate [X]

▲ Search [Advanced]

Match All Any

Person

Email

[Search] [Reset]

Person	Email
No rows to display	

[OK] [Cancel]

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

Search and Select: Delegate [X]

▲ Search [Advanced]

Match All Any


Person

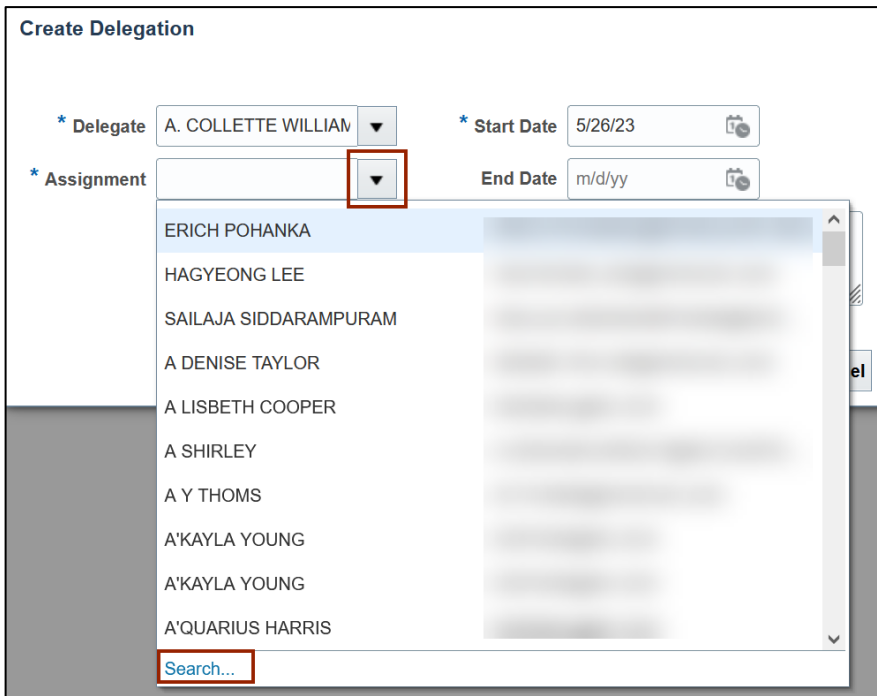
Email

[Search] [Reset]

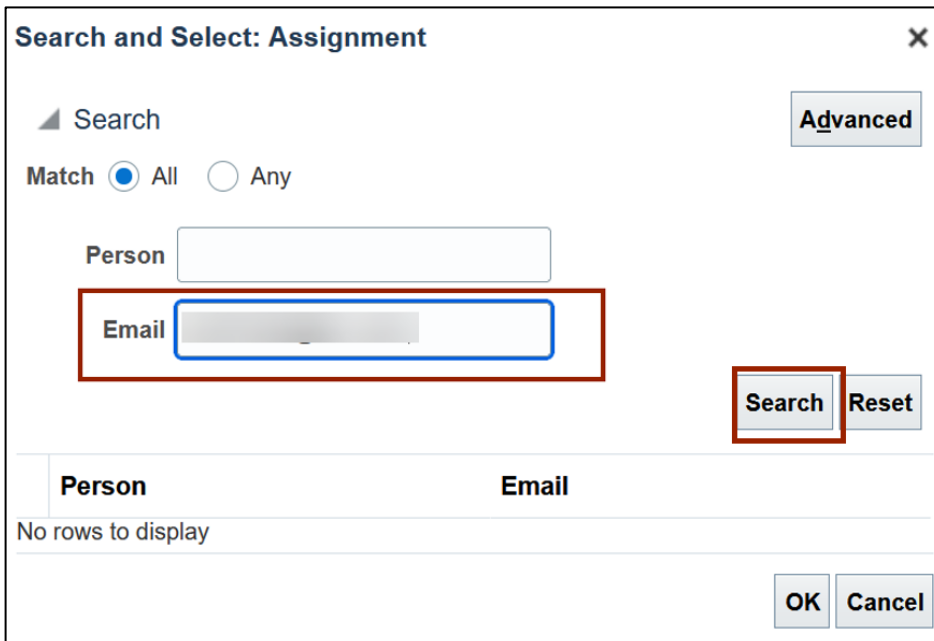
Person	Email
A. COLLETTE WILLIAMS	<input type="text"/>

[OK] [Cancel]

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.

Search and Select: Assignment ✕

▲ Search Advanced

Match All Any

Person

Email

Search Reset

Person ▲▼ Email

A Y THOMS	<input type="text"/>
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OK Cancel

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.

Create Delegation

* Delegate ▼

* Assignment ▼

Accounting access

Project access

* Start Date

End Date

Comment

Save and Close Cancel

14. A Confirmation pop-up page appears.

Manage Delegations Done

Search Basic Saved Search Delegations Created in the Last 6 Months

View Confirmation
Your delegation was saved.

Delegate	Assignment	Comments	Start Date	End Date
A. COLLETTE WILLIAMS	A Y THOMS		5/26/23	

Columns Hidden 3

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

Manage Delegations Done

Search Basic Saved Search Delegations Created in the Last 6 Months

View Done

Delegate	Delegation Type	Assignment	Accounting Access	Project Access	Comments	Start Date	End Date
A. COLLETTE WILLIAMS	Individual	A Y THOMS	✓			5/26/23	

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

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