

EX-10 Manage Expense Delegations

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.

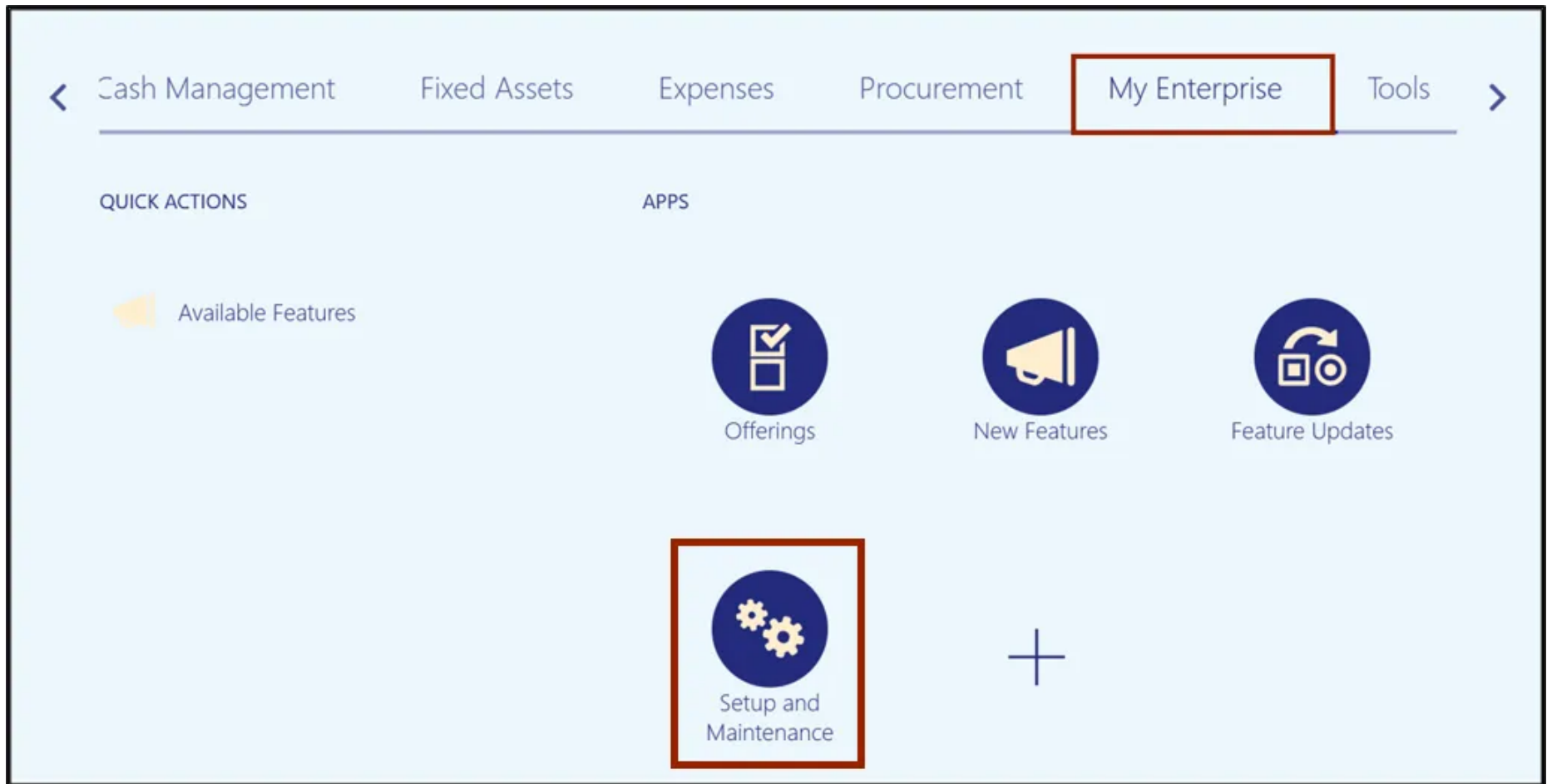
Manage Expense Delegations

To Manage Expense Delegations in the NCFS, please follow the steps below. There are 15 steps to complete this process.

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

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

Image



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

Image

Setup: Financials

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Functional Areas

* Initial Users

Shared

Initial Users

Financials

Manufacturing and Supply Chain Materials Management

Procurement

Product Management

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

Image

Search Tasks

Manage Expense Delegations



Initial Users

View ▼ Format ▼  Freeze  Detach  Wrap Show

Task	S
Run User and Roles Synchronization Process	

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

Image

Search Tasks 

Expenses

View ▼ Format ▼  Freeze  Detach  Wrap Show ▼

Task	Scope	Actions
Manage Delegations		

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

Image

Manage Delegations

► Search

View ▼



Delegate



Assignment

Comments

No data to display.

Columns Hidden 3

Step 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.

Image

Create Delegation

* Delegate



* Start Date

5/26/23



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

Search...

Step 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.

Image

Search and Select: Delegate



Search

Advanced

Match ☒ All ☐ Any

Person

Email

Search Reset

Person	Email
No rows to display	

OK Cancel

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

Image

Search and Select: Delegate



Search

Advanced

Match ☒ All ☐ Any

Person

Email

Search

Reset

Person



Email

A. COLLETTE WILLIAMS

OK

Cancel

Step 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.

Image

Create Delegation

* Delegate

A. COLLETTE WILLIAM



* Start Date

5/26/23



* Assignment



End Date

m/d/yy



ERICH POHANKA

HAGYEONG LEE

SAILAJA SIDDARAMPURAM

A DENISE TAYLOR

A LISBETH COOPER

A SHIRLEY

A Y THOMS

A'KAYLA YOUNG

A'KAYLA YOUNG

A'QUARIUS HARRIS

Search...

Step 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.

Image

Search and Select: Assignment



Search

Advanced

Match ☒ All ☐ Any

Person

Email

Search

Reset

Person

Email

No rows to display

OK

Cancel

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

Image

Search and Select: Assignment



▲ Search

Advanced

Match ☒ All ☐ Any

Person

Email

Search

Reset

Person



Email

A Y THOMS

OK

Cancel

Step 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.

Image

Create Delegation

* Delegate	A. COLLETTE WILLIAM ▼	* Start Date	5/26/23 
* Assignment	A Y THOMS ▼	End Date	m/d/yy 
	☒ Accounting access	Comment	
	☐ Project access		
		<u>S</u>ave and Close <u>C</u>ancel	

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

Image

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

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

Image

Manage Delegations

[Done](#)

► Search

Basic

Saved Search

Delegations Created in the Last 6 Months ▼

View ▼ + ✎ 📄 📊

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.

First Published

Thu, 07/27/2023

Last Updated

Wed, 08/13/2025

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