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.

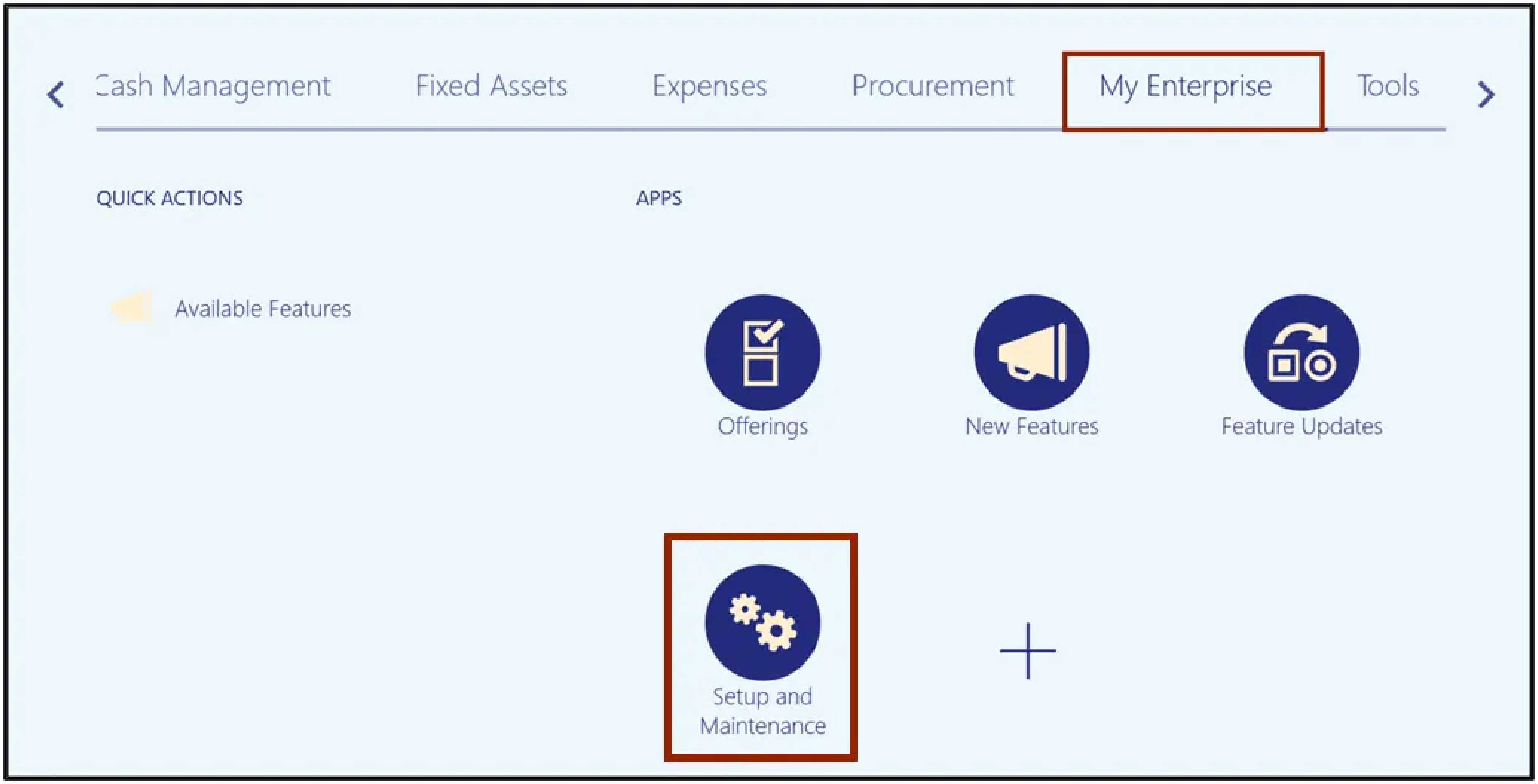
Manage Expense Delegations

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.

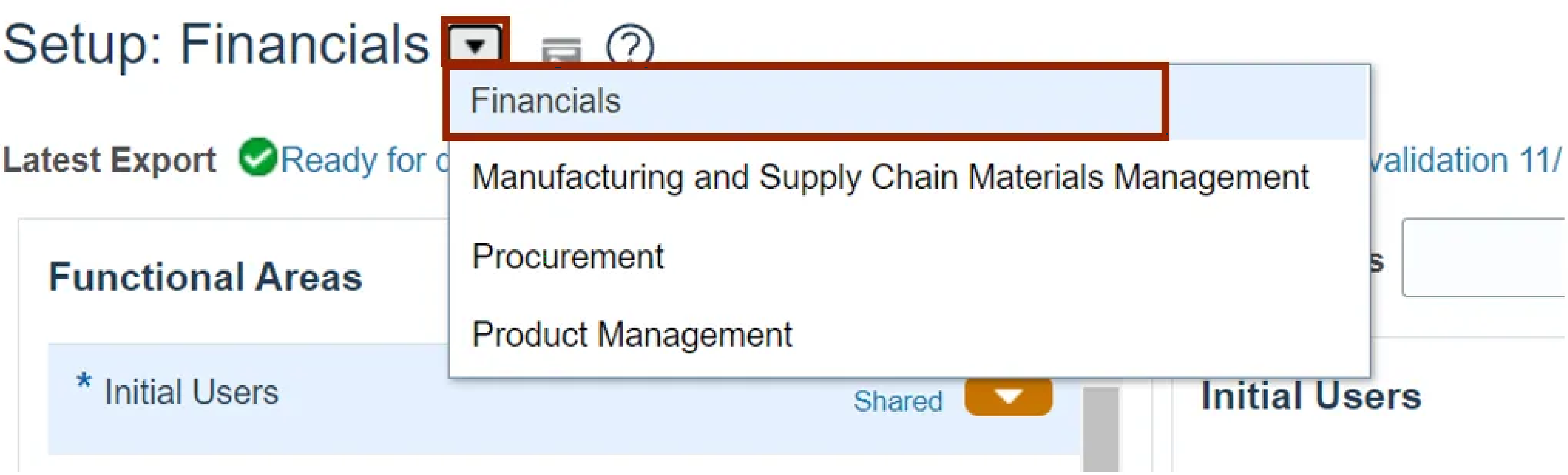
Step 2. On the **Home** page, click the **My Enterprise** tab and click the **Setup and Maintenance** app.

Image



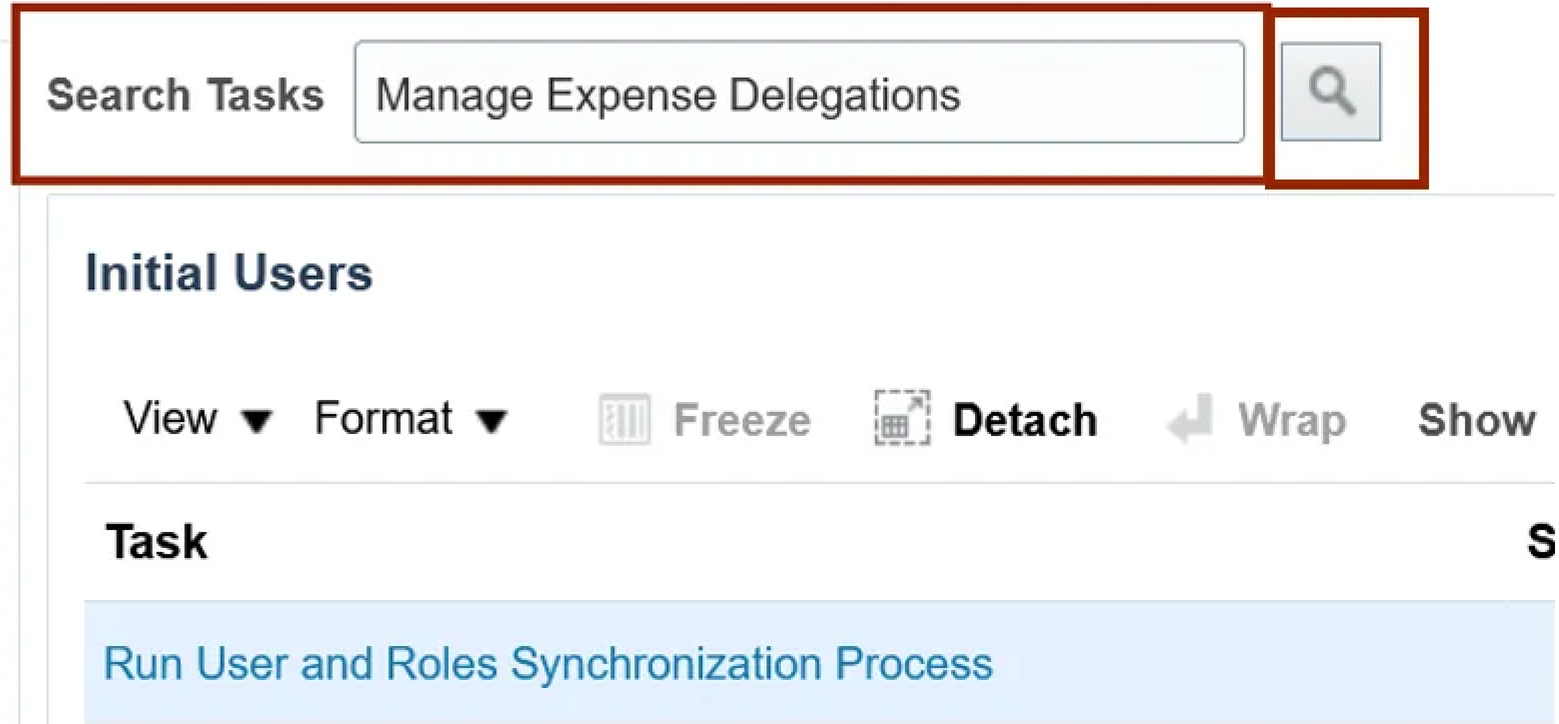
Step 3. On the top left corner of **Setup and Maintenance Page**, click the drop-down choice list icon and select **Financials**.

Image



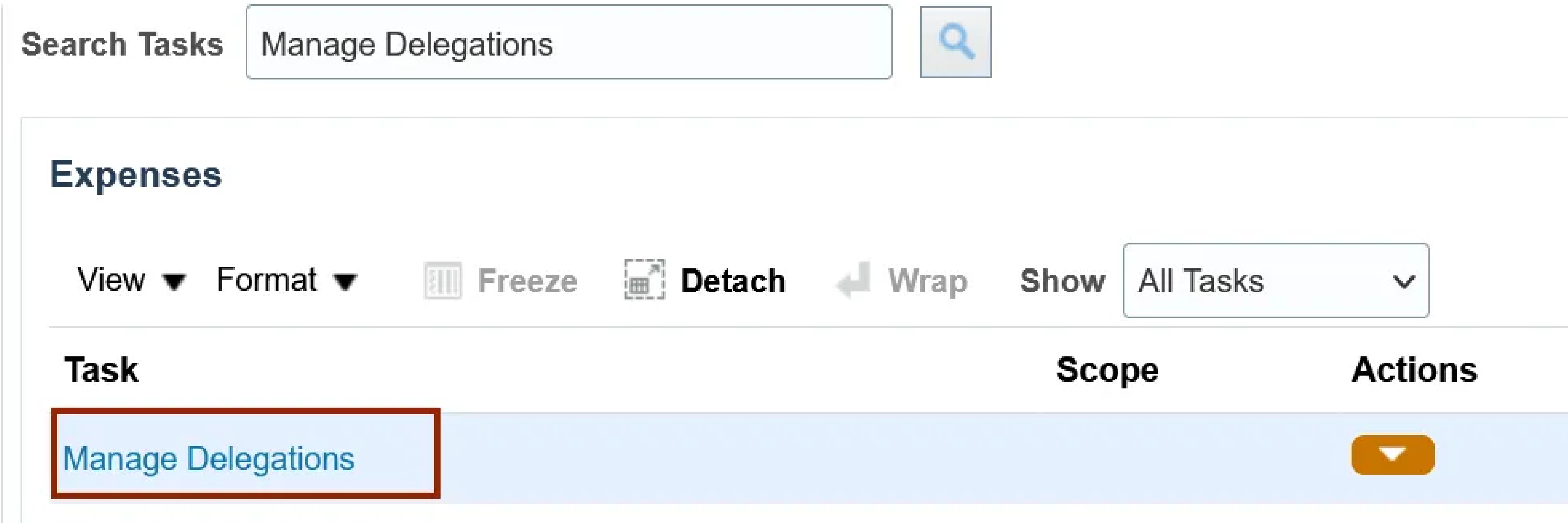
Step 4. Enter **Manage Expense Delegations** in the ***Search Tasks*** field and click the **Search** icon.

Image



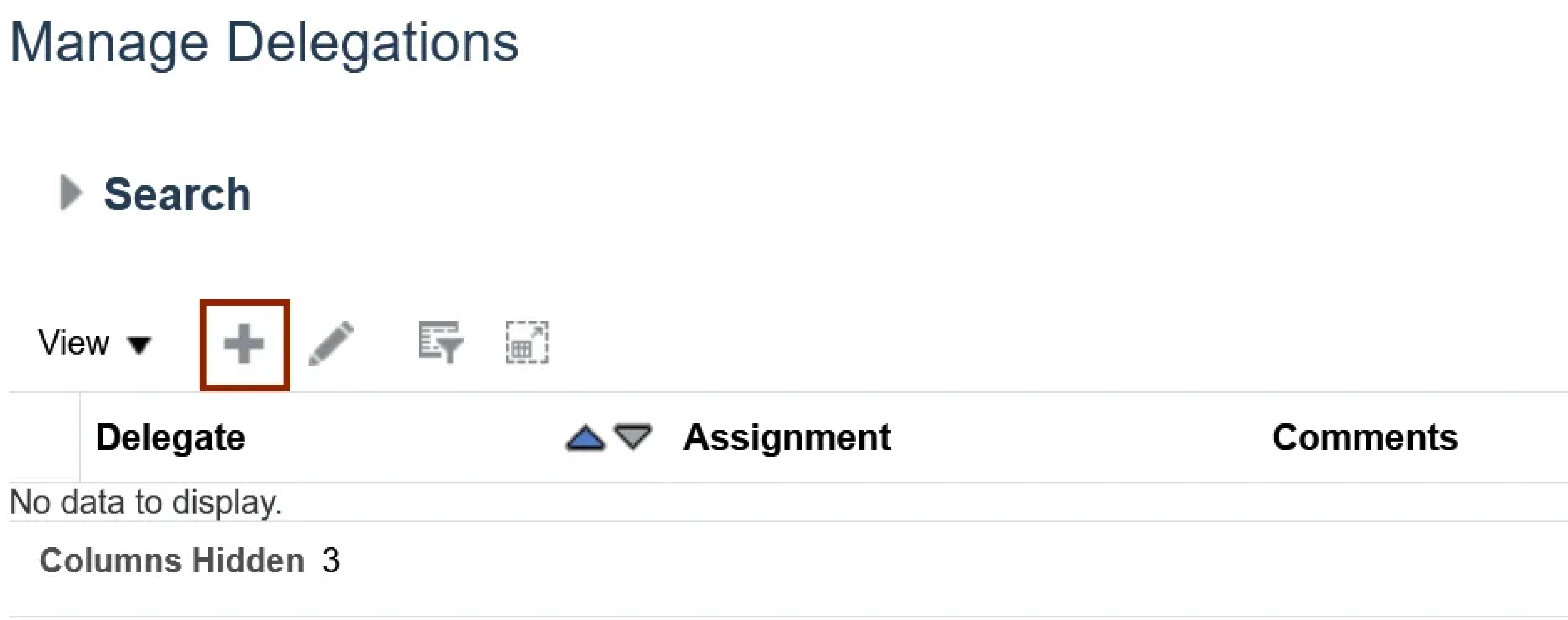
Step 5. In the *Expenses* section, click **Manage Delegations**.

Image



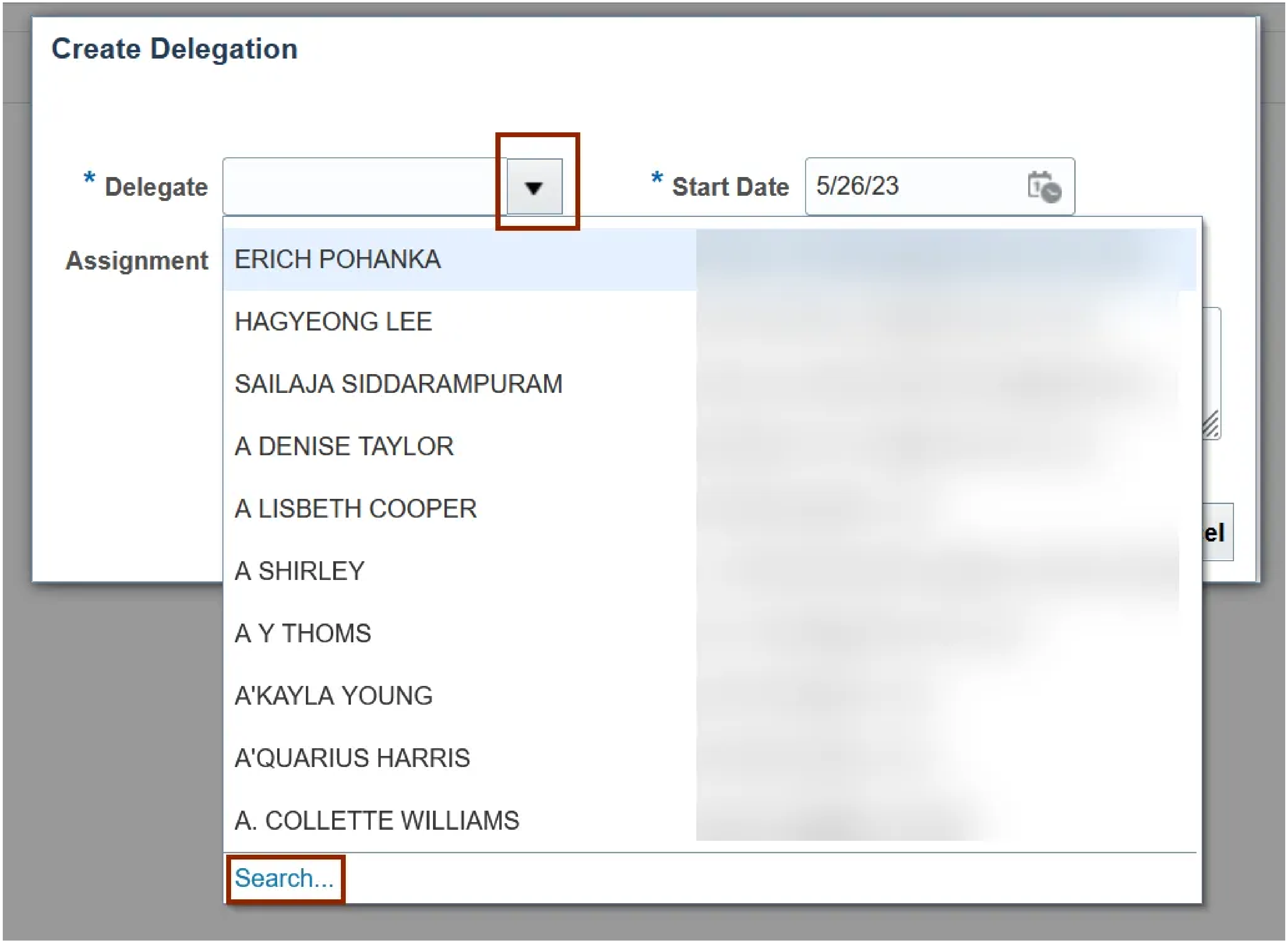
Step 6. Click the **Plus** icon to create a new **Delegation**.

Image



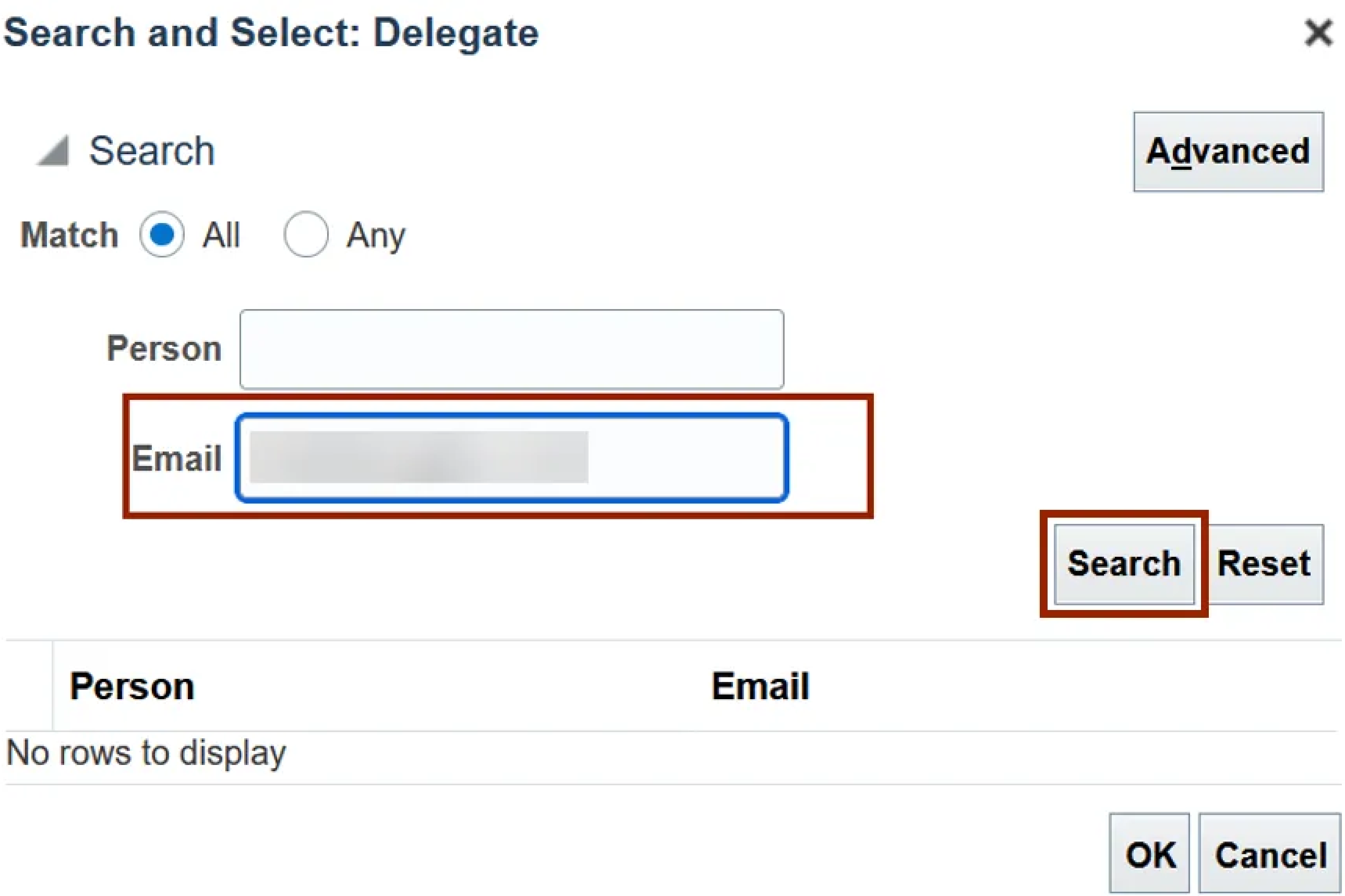
Step 7. On the *Create Delegation* pop-up page, click the drop-down list choice list icon next to the ***Delegate*** field and click **Search** to specify a person who enters expense reports on behalf of others.

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...

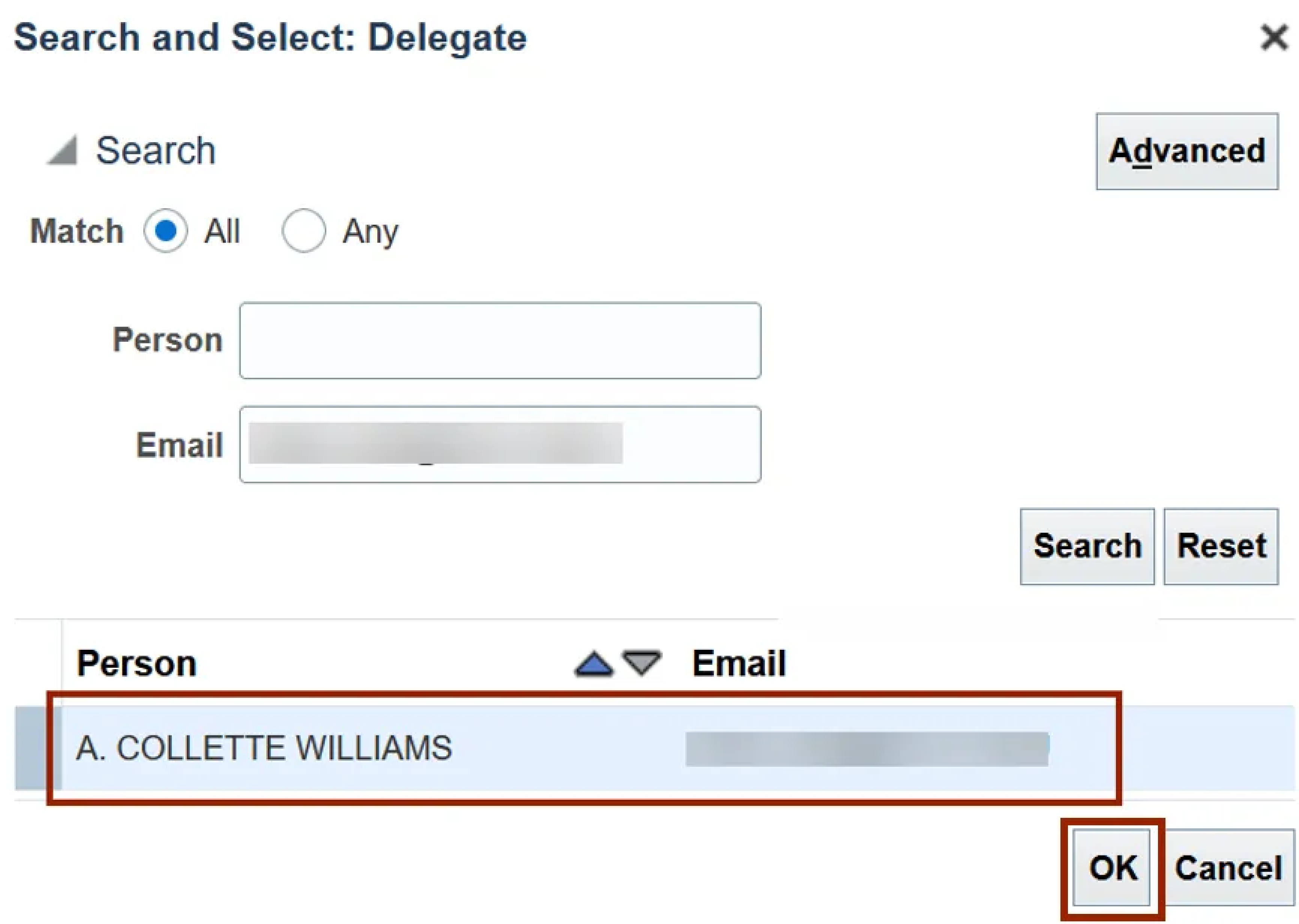
Step 8. On the *Search and Select: Delegate* pop-up, Enter the **Email** of the Delegate in the Email field. Alternatively, you can enter the person’s name in the **Person** field if the email ID is not available and click the **Search** button.

Image



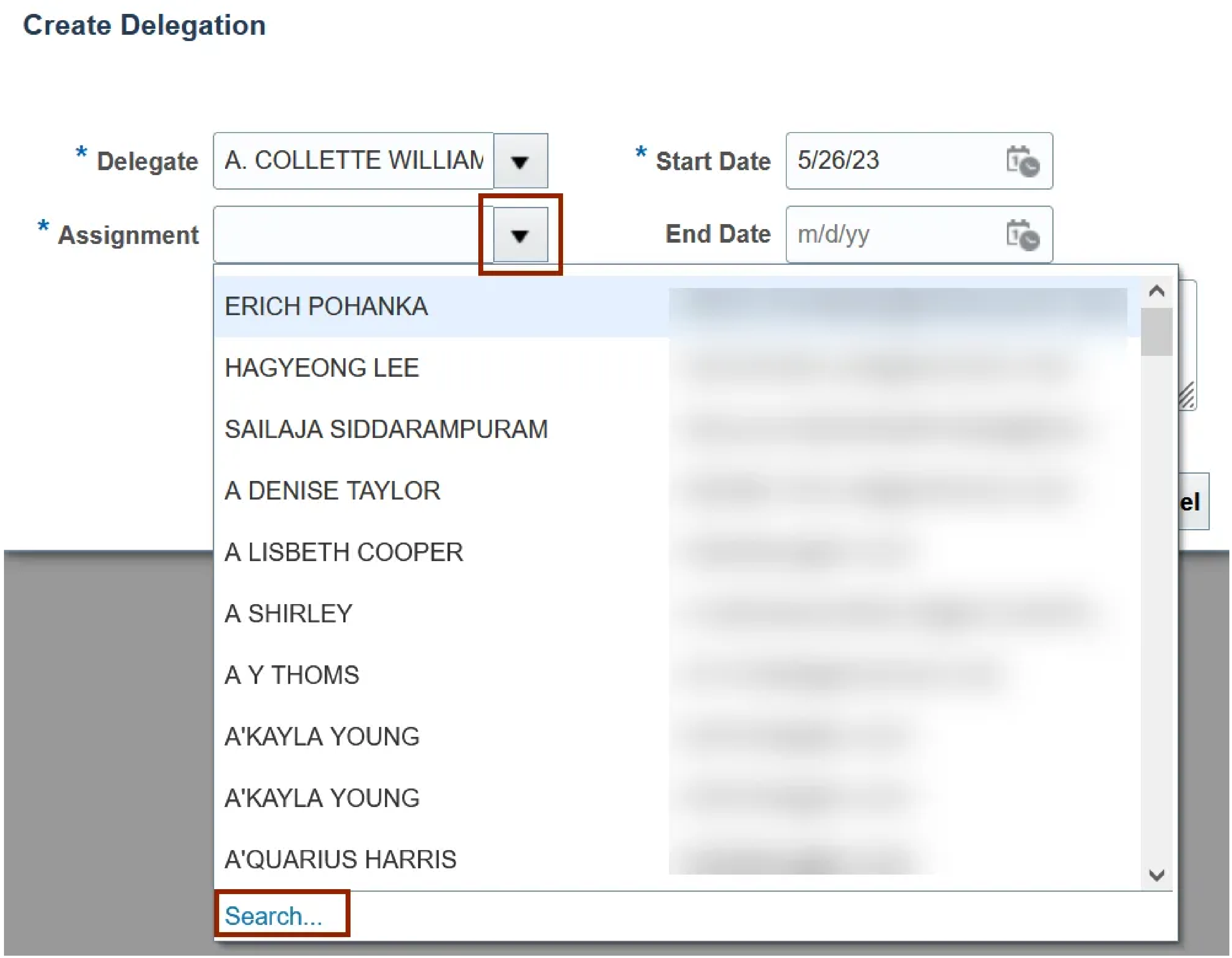
Step 9. Select the **Delegate details** in the ***Person*** column and click the **OK** button.

Image


Search and Select: Delegate
Search
Advanced
Match
All
Any
Person
Email
Search
Reset
Person
Email
A. COLLETTE WILLIAMS
OK
Cancel

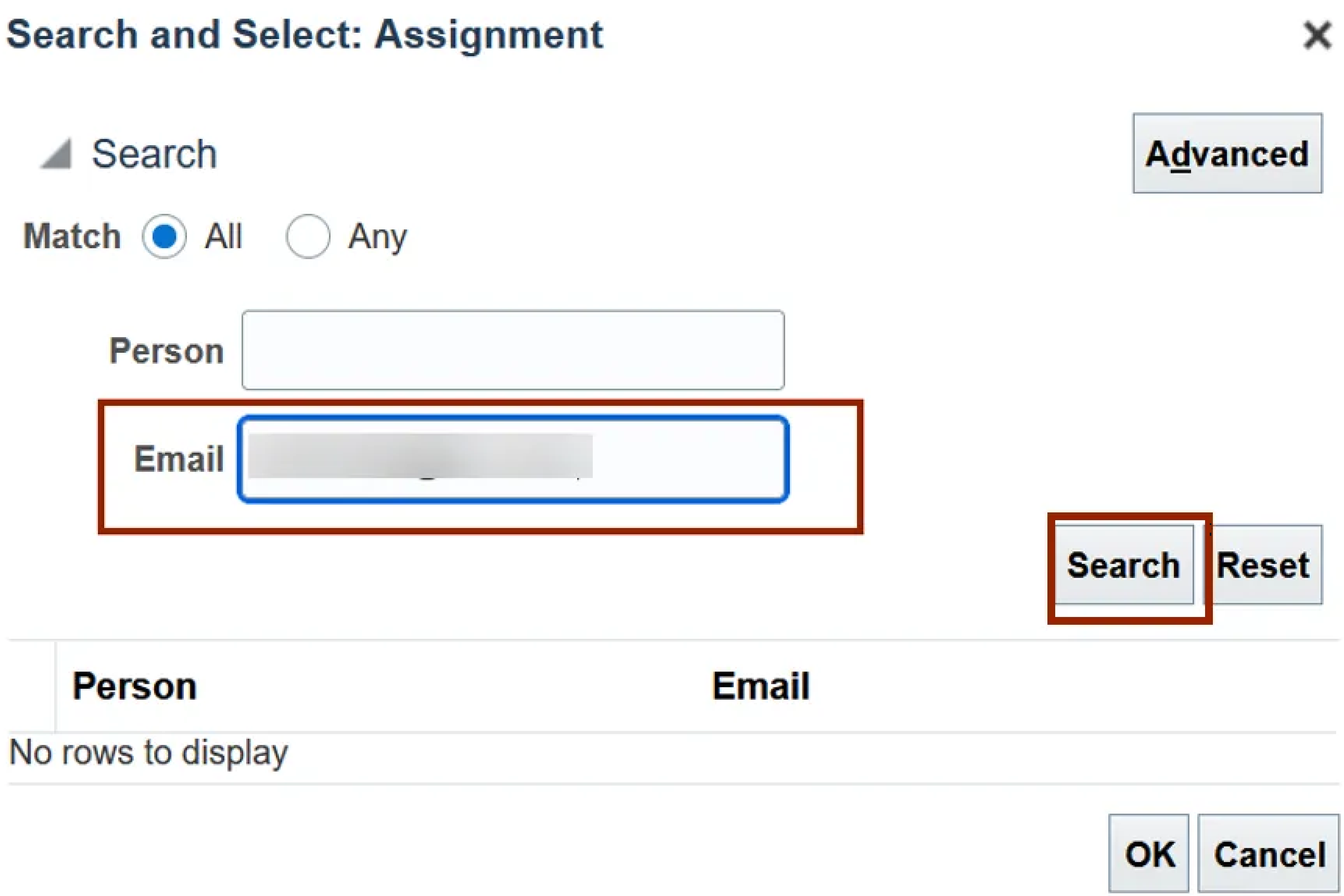
Step 10. The *Create Delegation* pop-up appears, click the drop-down list icon next to the **Assignment** field and click **Search** to specify a person for whom the delegate enters expense reports.

Image


Create Delegation
* Delegate
A. COLLETTE WILLIAN
* 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...
el

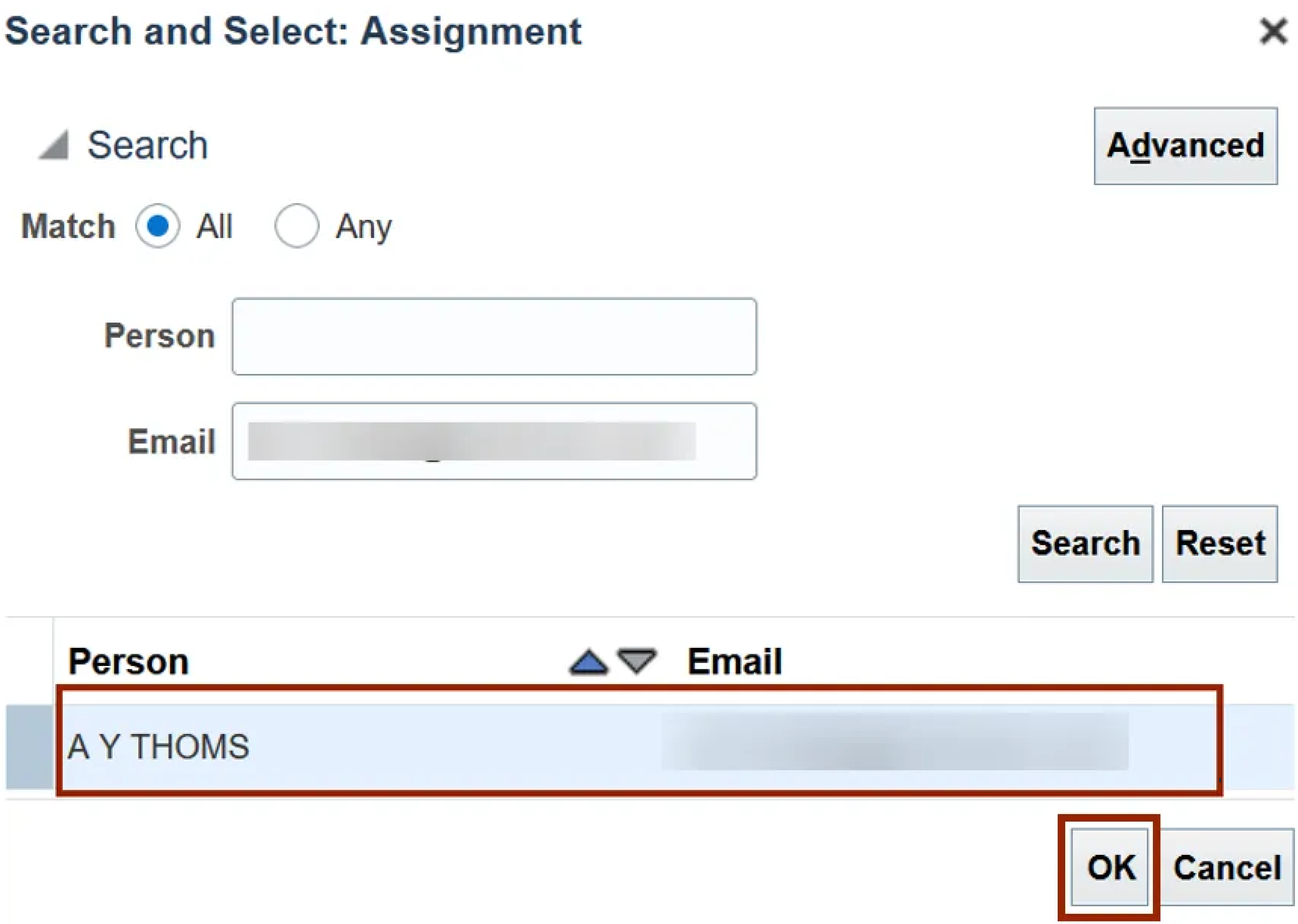
Step 11. On the *Search and Select: Assignment* pop-up page, Enter **Email ID** of the Assigned Person in the ***Email*** field and click the **Search** button. Alternatively, you can enter the person's name in the ***Person*** field if the email ID is not available.

Image



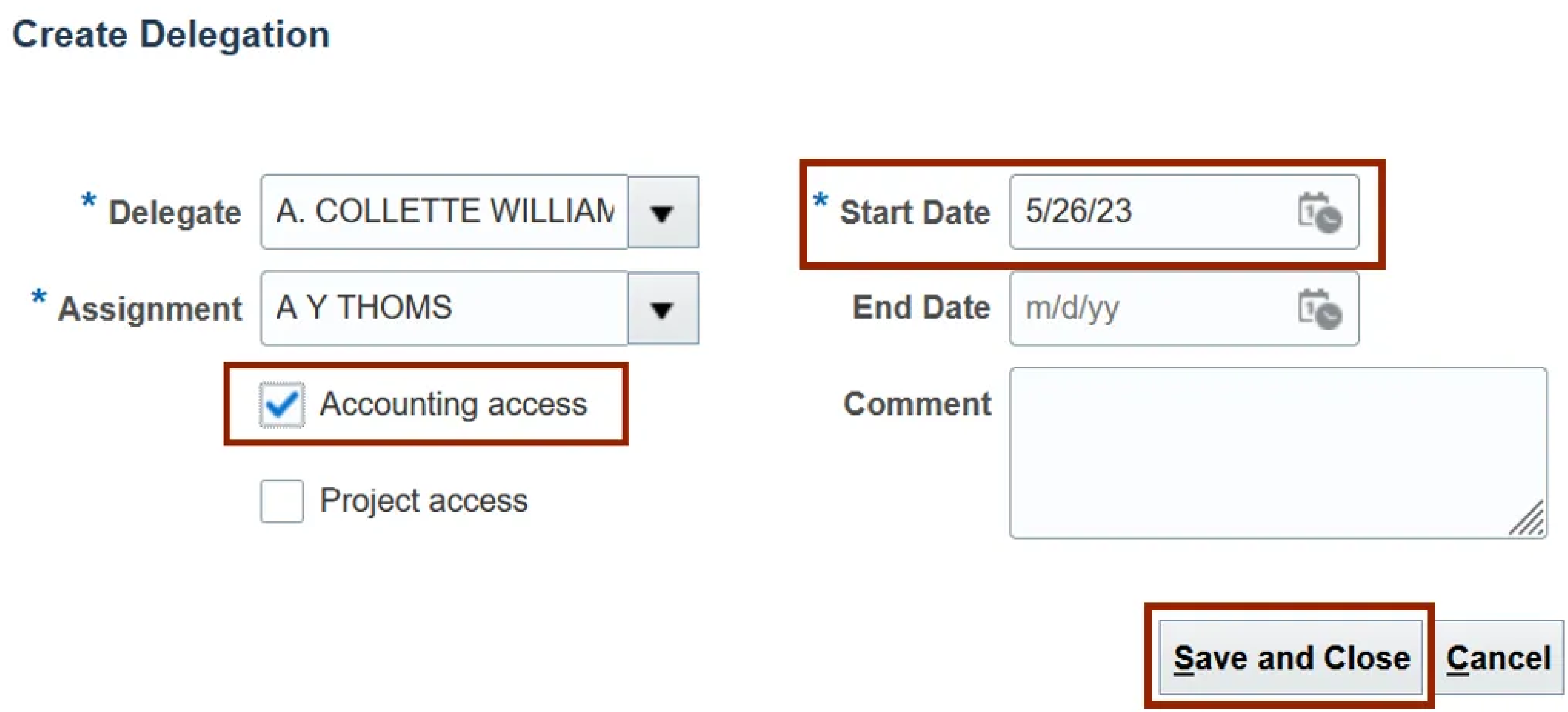
Step 12. Select the **Assignment** details in the ***Person*** column and click the **OK** button.

Image


Search and Select: Assignment
Search
Advanced
Match All Any
Person
Email
Search
Reset
Person
Email
A Y THOMS
OK
Cancel

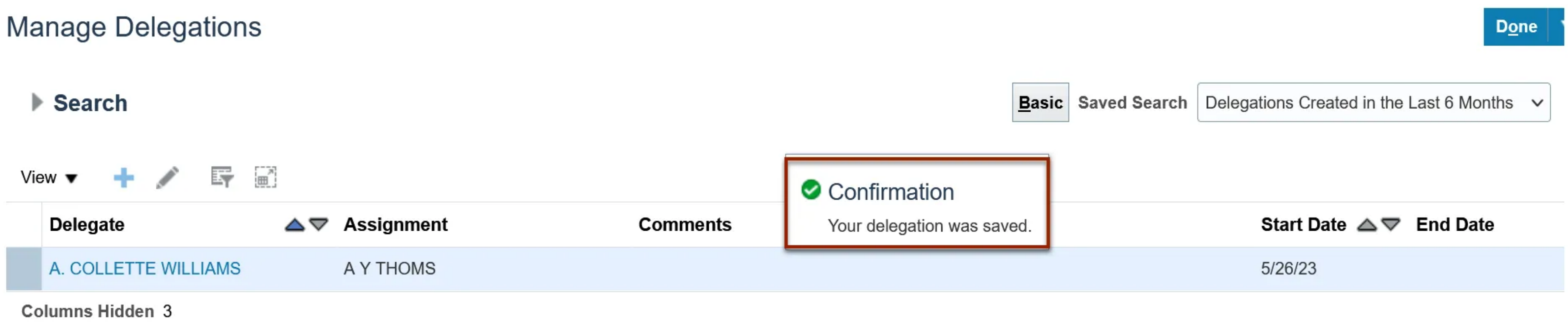
Step 13. Click the **Checkbox** next to **Accounting Access** to allow editing of the charge account details. The date will auto-populate and then click the **Save and Close** button.

Image



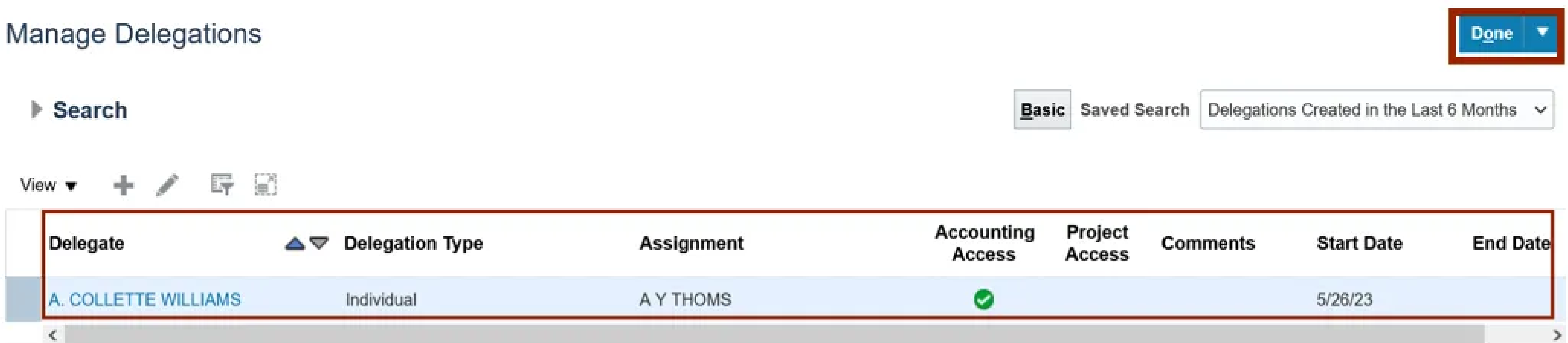
Step 14. A *Confirmation* pop-up page appears.

Image



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

Image



Wrap-Up

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

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