

EX-16 Expense Module Setup - Manage Delegates

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of Expense Module Setup Including Manage Delegates in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of Expense Module Setup Including Delegates in NCFS. This will enable users to edit Expense Report templates to accommodate modifications in Expense Policies.

Expense Module Setup - Manage Delegates

To perform Expense Module Setup – Manage Delegates in NCFS, please follow the steps below. There are 8 steps to complete this process.

Step 1. Follow steps 1-3 above to navigate to the Setup: Financials page.

Step 2. On the **Setup: Financials** page, in the **Search Tasks** section, enter **Manage Delegations** and click the **Search** icon and from the **Task** section, select **Manage Delegations**. The **Manage Delegations** page opens.

Image

Setup: Financials ▼ 🗨️ ? Actions ▼

Latest Export ✔️ Ready for download 1/19/23 9:48 AM Latest Import ✔️ Ready for data validation 11/1/22 4:48 AM

Functional Areas Change Feature Opt In

* Initial Users Shared ▼

* Enterprise Profile Shared ▼

* Legal Structures Shared ▼

* Financial Reporting Structures Shared ▼

* General Ledger ▼

Search Tasks 🔍

Expenses

View ▼ Format ▼ 📄 Freeze 📄 Detach 📄 Wrap Show All Tasks ▼

Task Scope

Manage Delegations

Manage Expense Report Audit Rules

Manage Employee Matching Rules

Step 3. On the **Manage Delegations** page, select the **Delegate** from the list displayed.

In this example, we choose **DAQUILLA LADA**.

Image

Manage Delegations

Done ▼

► Search

Basic Saved Search Delegations Created in the Last 6 Months ▼

View ▼ + ✎ 🗨 📅

Delegate	  Assignment	Comments	Start Date	End Date
DAQUILLA LADA	CLYDE MARTINEZ-RAMIREZ		1/19/23	
DAQUILLA LADA	DAQUILLA STEPHENSON		12/19/22	
DAQUILLA LADA	BETTY ANN MCCRARY		12/9/22	
DAQUILLA LADA	STEFAN BELL		1/19/23	
DAQUILLA LADA	DEBORA HOLT		1/19/23	

Step 4. On the *Delegation: DAQUILLA LADA for Individual CLYDE MARTINEZ-RAMIREZ* pop-up, select the **End Date** by clicking on the **Calendar** icon.

Image

Delegation: DAQUILLA LADA for Individual CLYDE MARTINEZ-RAMIREZ

Delegate DAQUILLA LADA

Start Date 1/19/23

Assignment CLYDE MARTINEZ-RAMIREZ

End Date 6/2/23



☒ Accounting access

☒ Project access

Comment

Save and Close

Cancel

Step 5. Click the **Save and Close** button. You are redirected to the **Manage Delegations** page.

Image

Delegation: DAQUILLA LADA for Individual CLYDE MARTINEZ-RAMIREZ

Delegate	DAQUILLA LADA	Start Date	1/19/23
Assignment	CLYDE MARTINEZ-RAMIREZ	End Date	6/2/23 
	☒ Accounting access	Comment	
	☒ Project access		
		<u>S</u>ave and Close <u>C</u>ancel	

Step 6. On the **Manage Delegations** page, the Delegate **End Date** column is updated. Click the **Add** icon to add a new delegation relationship.

Image

Manage Delegations

Done ▼

► Search

Basic

Saved Search

Delegations Created in the Last 6 Months ▼

View ▼



Delegate	Assignment	Comments	Start Date	End Date
DAQUILLA LADA	CLYDE MARTINEZ-RAMIREZ		1/19/23	6/2/23
DAQUILLA LADA	DAQUILLA STEPHENSON		12/19/22	
DAQUILLA LADA	BETTY ANN MCCRARY		12/9/22	
DAQUILLA LADA	STEFAN BELL		1/19/23	
DAQUILLA LADA	DEBORA HOLT		1/19/23	

Step 7. A *Create Delegation* pop-up appears. Enter the required details in the fields displayed.

In this example, we choose **ERICH ANDERSON** for **Delegate*, **ERICH BITTLE** for **Assignment*, and **6/16/23** for **Start Date*. Select the **Accounting access** checkbox and click the **Save and Close** button.

Image

Create Delegation

* Delegate	ERICH ANDERSON ▼	* Start Date	6/16/23 📅
* Assignment	ERICH BITTLE ▼	End Date	m/d/yy 📅
☒ Accounting access		Comment	
☐ Project access			
		<u>Save and Close</u> <u>Cancel</u>	

Step 8. On the **Manage Delegations** page, a *Confirmation* pop-up appears. Click the **Done** button. You are redirected to the **Setup: Financials** page.

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
ERICH ANDERSON	ERICH BITTLE		6/16/23	
DAQUILLA LADA	CLYDE MARTINEZ-RAMIREZ		1/19/23	6/2/23
DAQUILLA LADA	DAQUILLA STEPHENSON		12/19/22	
DAQUILLA LADA	STEFAN BELL		1/19/23	

Wrap-Up

Setup an Expense Module, including Manage Delegates, in NCFS using the steps above.

Additional Resources

- Virtual Instructor Led Training (vILT)
 - [EX 100: Expense Reports & Cash Advances](#)

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