

EX-17 Advanced Search Feature in Expense Module

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to use the Advanced Search Feature in Expense Module in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of using advanced search feature in expense module.

Advanced Search Feature in Expense Module

To use the advanced search feature in expense module, in the NCFS, please follow the steps below. There are 9 steps to complete this process.

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

Step 2. Click the **Navigator** icon on the top left on the **Home** Page.

Image

Good afternoon, Expense Preparer 1400!

APPS



Set Preferences



Worklist



Reports and
Analytics



Scheduled
Processes



Step 3. Click the **Me** tab to expand it. Then, click the **Expenses** button. The **Expense Reports** Dashboard opens.

Image



Show More



Home

Me



Directory



Personal Information



Expenses

My Team



My Client Groups



Benefits Administration



Step 4. If you are an employee delegate, you can choose the employee for whom you would like to manage expenses from the **Owner** drop-down choice list.

In this example, we choose **Search** function to explore the advanced search functionality.

Image

Travel and Expenses

Owner

RIYA TALREJA



RIYA TALREJA

Search...



Expense Reports



Create Report

Ready for Payment Processing



1400ER000128414766

gtest

Updated 16 hours ago

1 item

678.00 USD



Available Expense Items

Actions ▾

+ Create Item

Step 5. Search and Select window will be displayed. Basic search feature will be displayed. You can use the basic features to search for a person.

In this example, we will click on the **Advanced** button.

Image

Search and Select: Person X

Search

Match ☒ All ☐ Any

Name RIYA TALREJA

Email

Search Reset

Name	Email
No rows to display	

OK Cancel

Step 6. On the Advanced search window, you can match **All** or **Any** search criteria you enter. You can use the dropdown options on both the search fields to change the operator value. To start with, delete the value in the name field.

Image

Search and Select: Person

×

Search

Basic

Match ☒ All ☐ Any

Name Starts with ▼

Email Starts with ▼

Search

Reset

Add Fields ▼

Reorder

Name

Email

No rows to display

OK

Cancel

Step 7. You can use either of the fields or a combination to search for your person.

In this example, we will use the Email field. There are multiple options you can choose from, we will choose **Contains** from the dropdown list.

Note: **Please enter your search criteria in all CAPs.**

Image

Search and Select: Person ✕

Search Basic

Match ☒ All ☐ Any

Name Starts with

Email Starts with

Name

No rows to display

Nothing here yet

- Starts with
- Ends with
- Equals
- Does not equal
- Less than
- Less than or equal to
- Greater than
- Greater than or equal to
- Between
- ~~Not between~~
- Contains**
- Does not contain
- Is blank
- Is not blank

Step 8. Now enter the search criteria in all CAPs.

In this example, we will enter PHILLIPS@OSC.NC.GOV. Click the **Search** button.

Image

Search and Select: Person



Search

Basic

Match ☒ All ☐ Any

Name

Starts with



Email

Contains



PHILLIPS@OSC.NC.GOV

Search

Reset

Add Fields ▼

Reorder

Name

Email

No rows to display

OK

Cancel

Step 9. The person you are looking for will be displayed. If there is more than one Phillips, the list will be displayed, and you can choose the correct person from the list.

Select the row of the person you are looking for, that will highlight the row, click **OK**.

Image

Search and Select: Person

×

▲ Search

Basic

Match ☒ All ☐ Any

Name

Starts with ▼

Email

Contains ▼

PHILLIPS@OSC.NC.GOV

Search

Reset

Add Fields ▼

Reorder

Name	Email
SONDRA PHILLIPS	SONDRA.PHILLIPS@OSC.NC.GOV

OK

Cancel

Proceed with the expense report entry for the selected person.

Wrap-Up

NCFS users can search for the person using advanced search feature while entering expenses on behalf of others using the steps above.

Additional Resources

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

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