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.

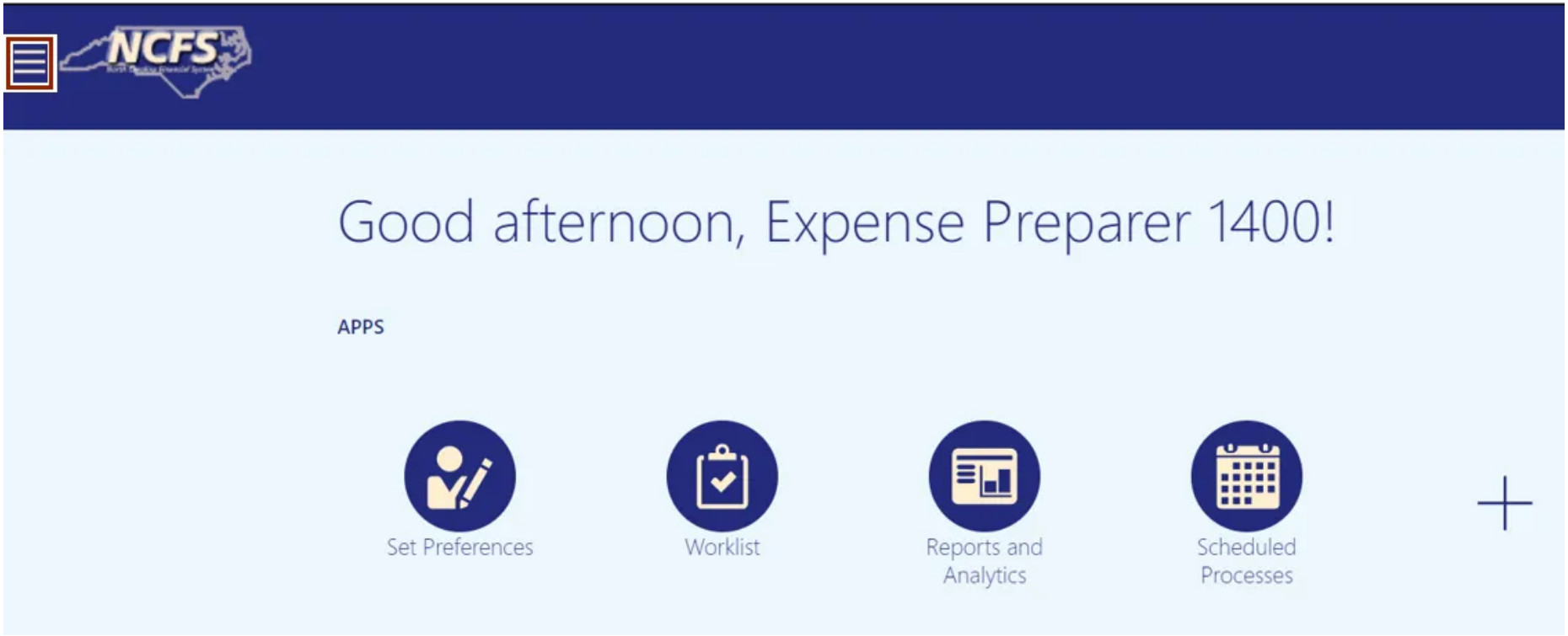
Advanced Search Feature in Expense Module

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.

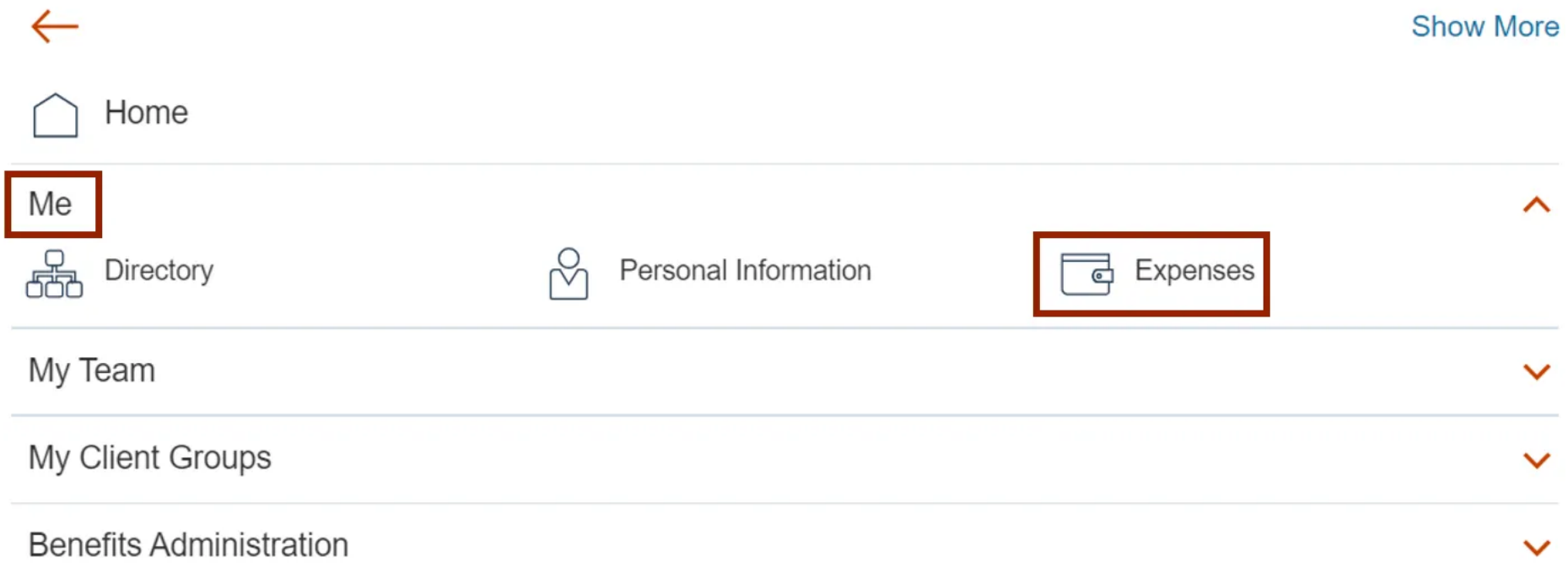
Step 2. Click the **Navigator** icon on the top left on the **Home** Page.

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

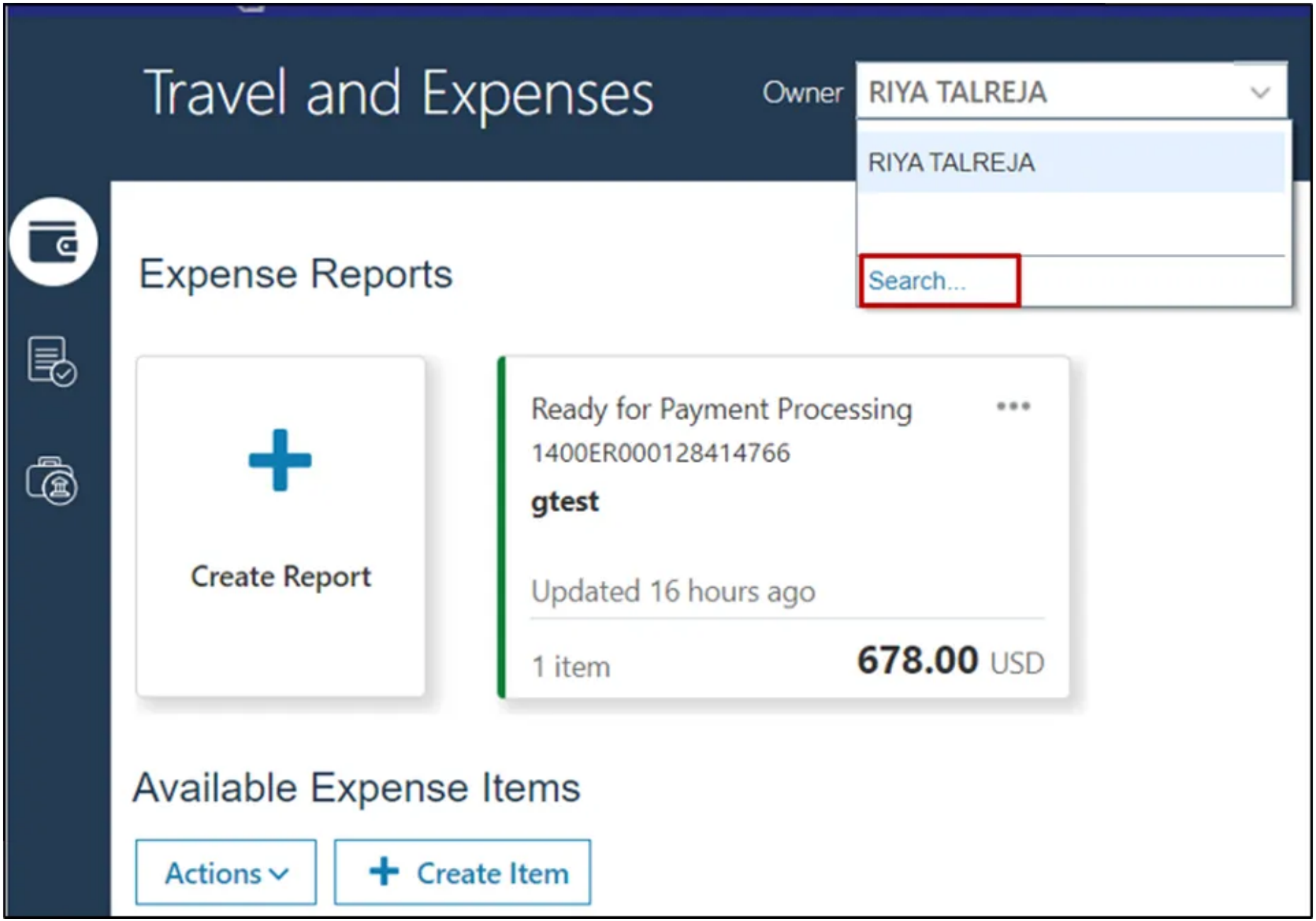
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Step 4. If you are an employee delegate, you can choose the employee for whom you would like to manage expenses from the ***Owner*** drop-down choice list.

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

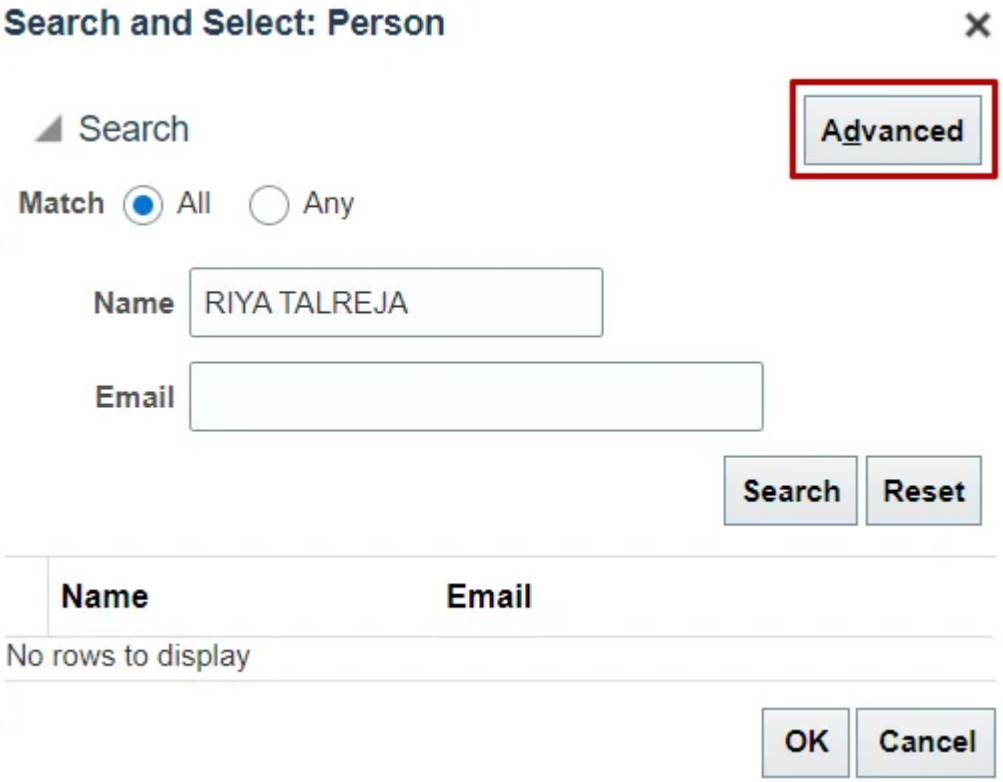
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Travel and Expenses
Owner
RIYA TALREJA
RIYA TALREJA
Search...
Expense Reports
Create Report
Ready for Payment Processing
1400ER000128414766
gtest
Updated 16 hours ago
1 item
678.00 USD
Available Expense Items
Actions
Create Item

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.

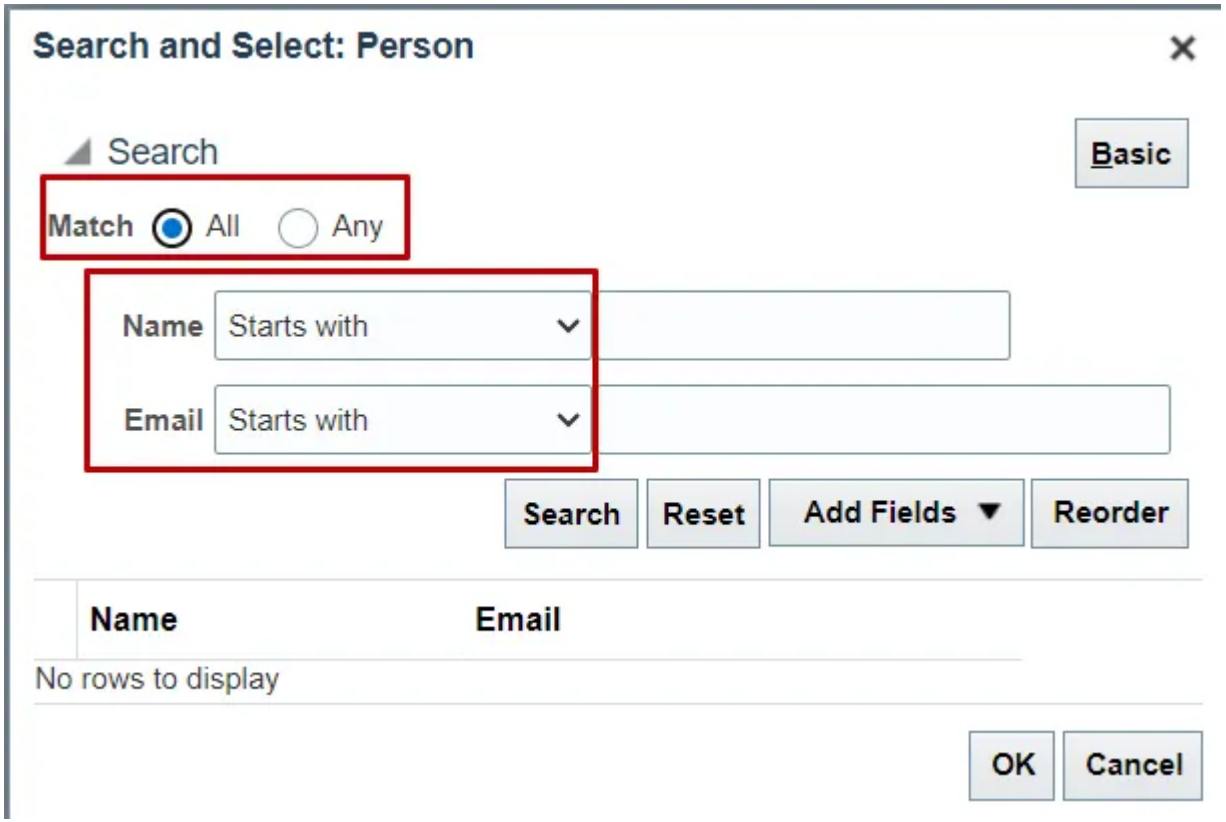
In this example, we will click on the **Advanced** button.

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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

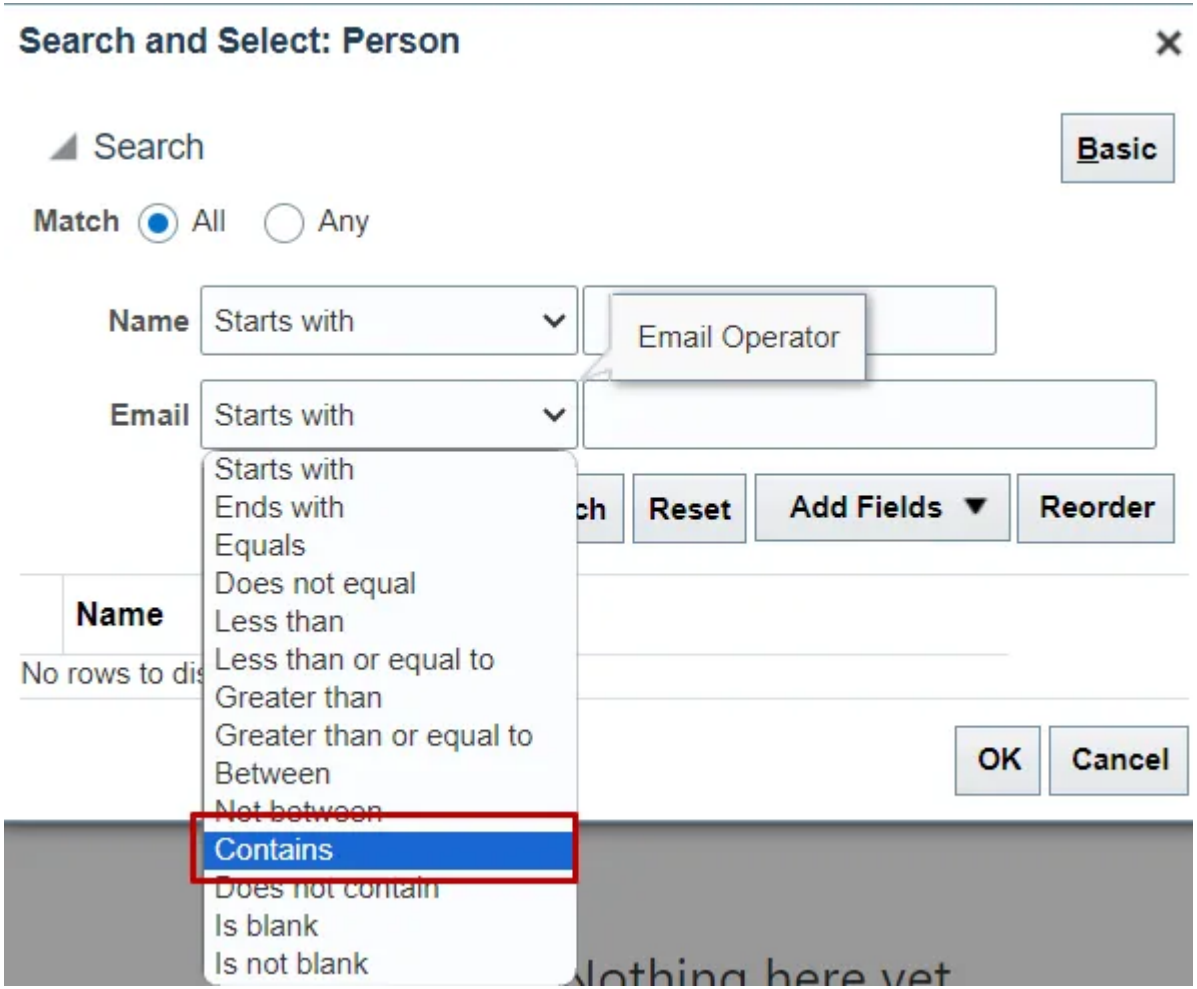


Step 7. You can use either of the fields or a combination to search for your person.

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**.

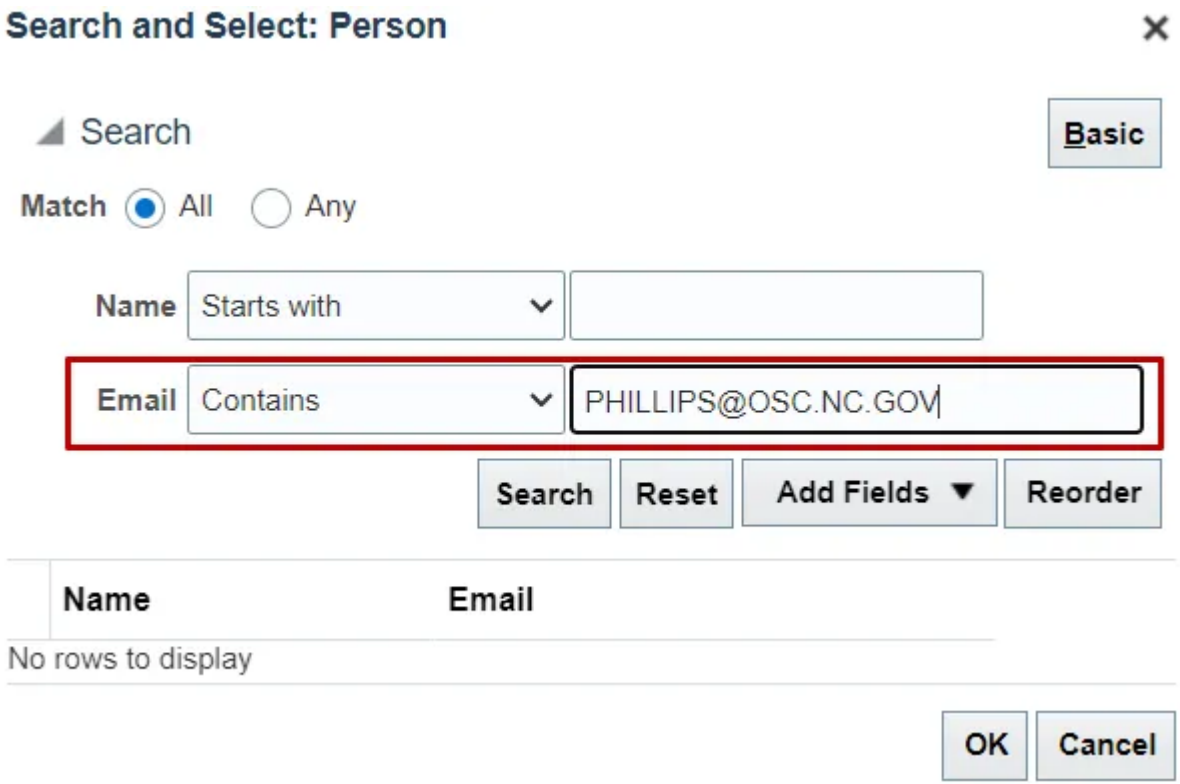
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Step 8. Now enter the search criteria in all CAPs.

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

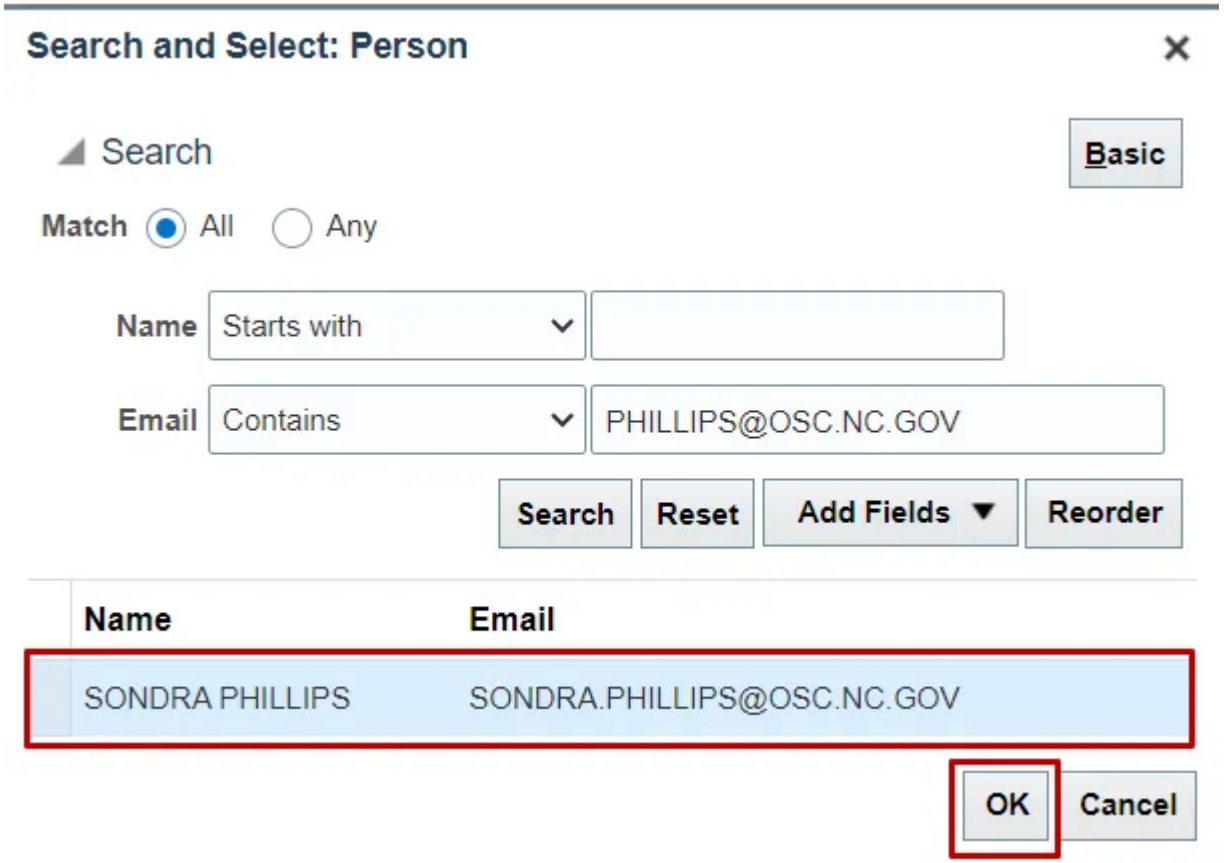
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Step 9. The person you are looking for will be displayed. If there is more than one Phillips, the list will be displayed, and you can choose the correct person from the list.

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

Image



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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