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.

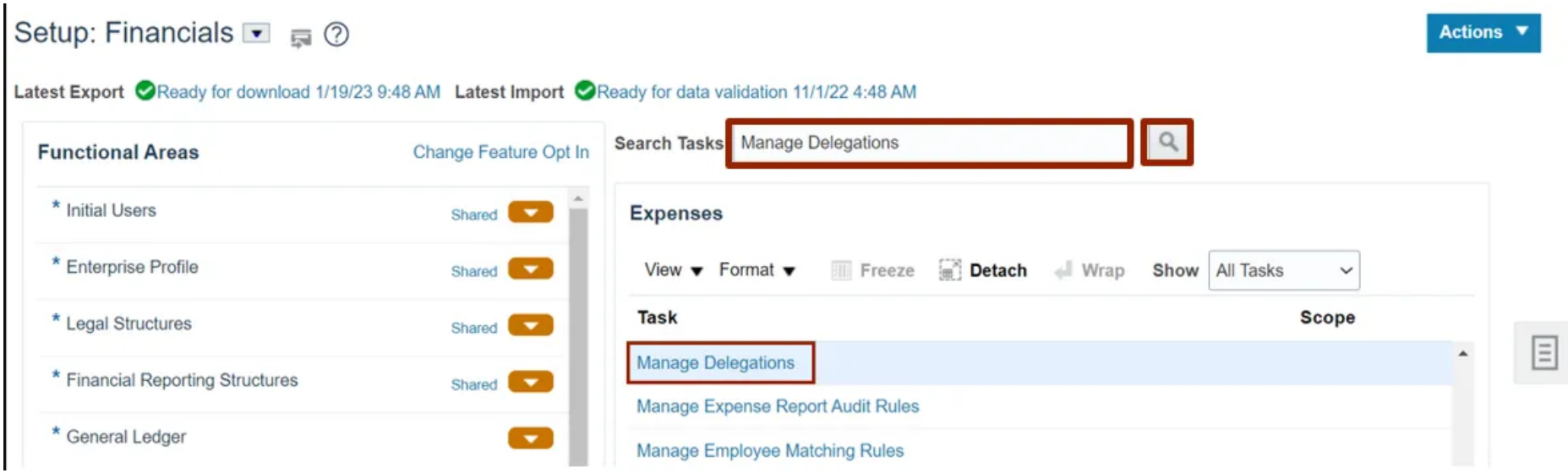
Expense Module Setup – Manage Delegates

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.

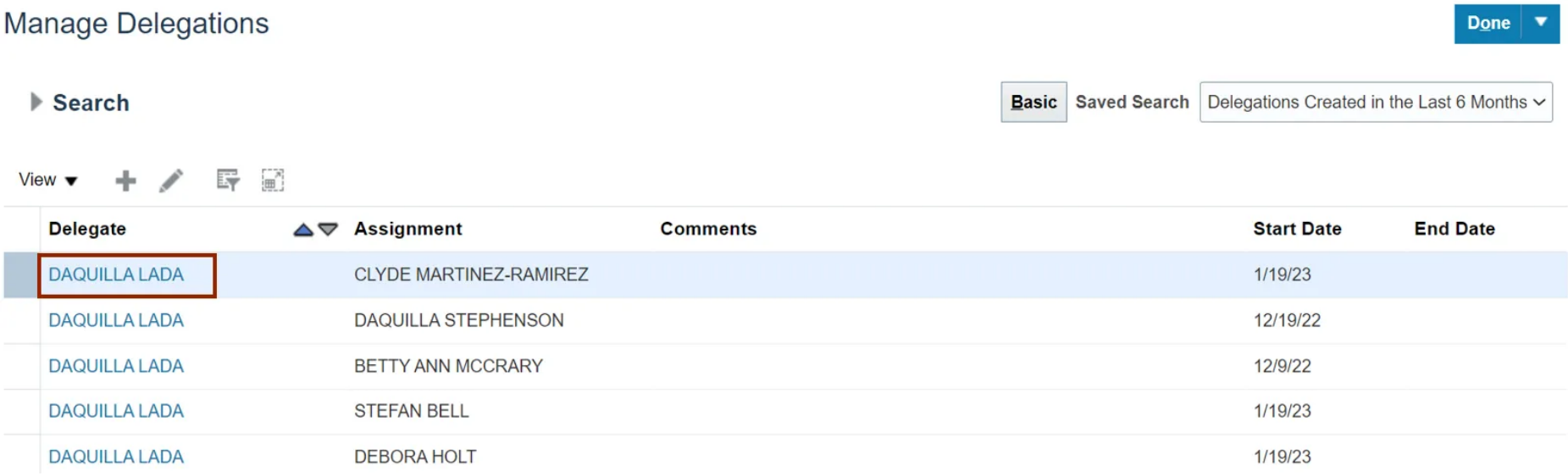
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Step 3. On the **Manage Delegations** page, select the **Delegate** from the list displayed.

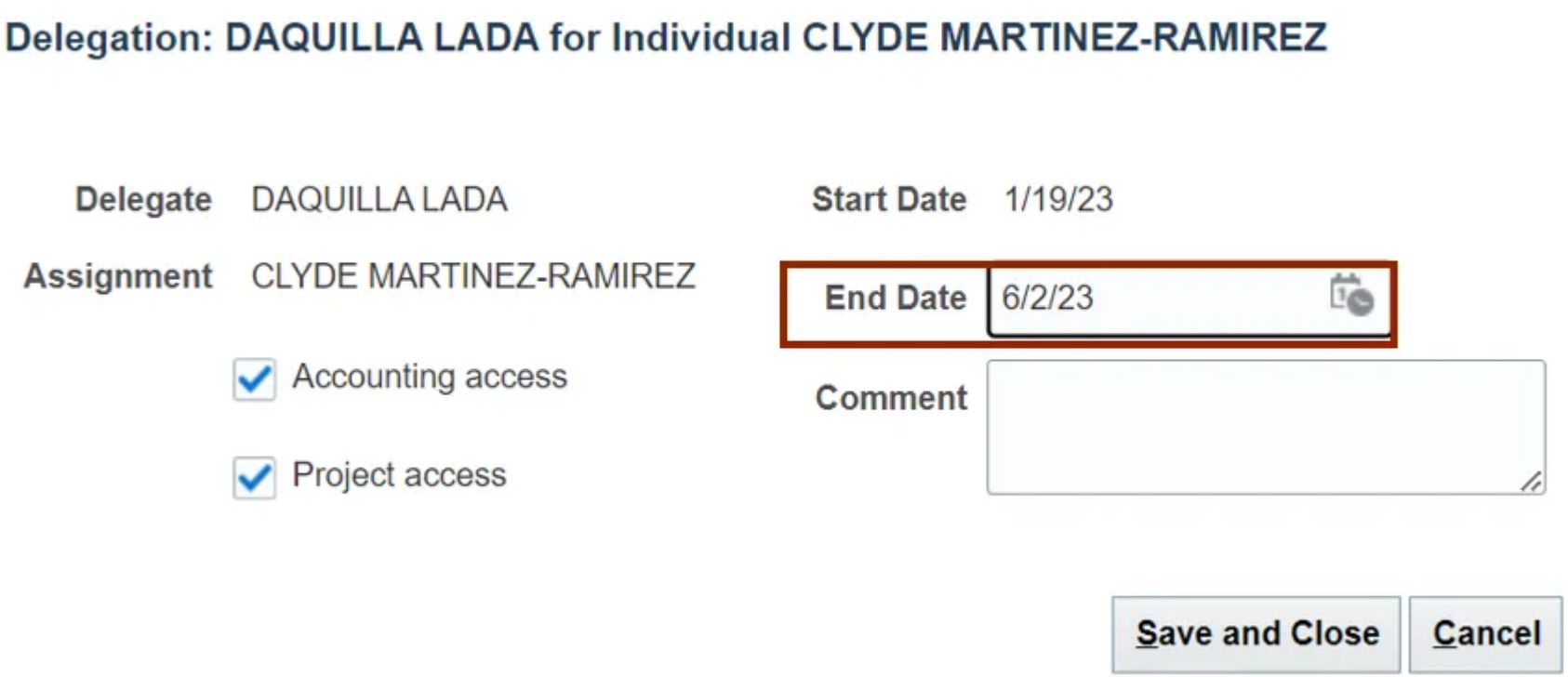
In this example, we choose **DAQUILLA LADA**.

Image



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



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

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

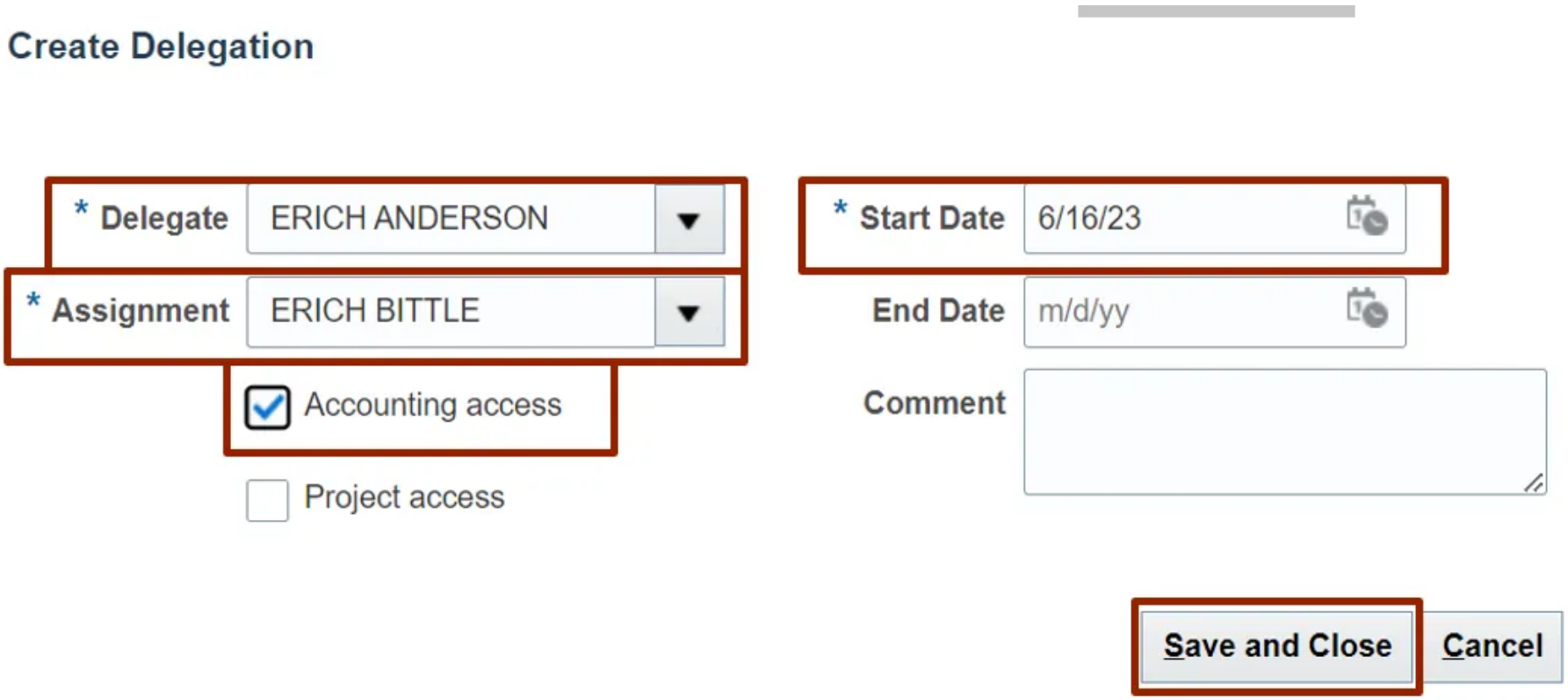
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Step 7. A *Create Delegation* pop-up appears. Enter the required details in the fields displayed.

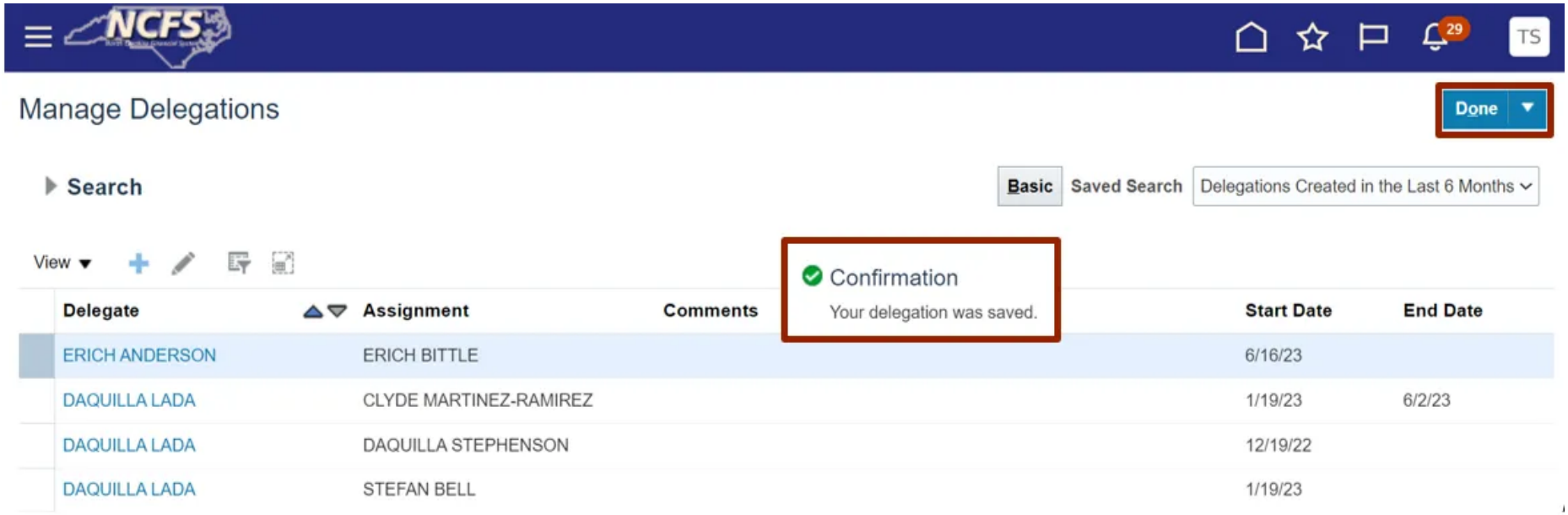
In this example, we choose **ERICH ANDERSON** for ***Delegate***, **ERICH BITTLE** for ***Assignment***, and **6/16/23** for ***Start Date***. Select the **Accounting access** checkbox and click the **Save and Close** button.

Image



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



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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