OTBI-01 How to Build an OTBI Report From a Shell

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to build an OTBI report from a shell in the North Carolina Financial System (**NCFS**).

Introduction and Overview

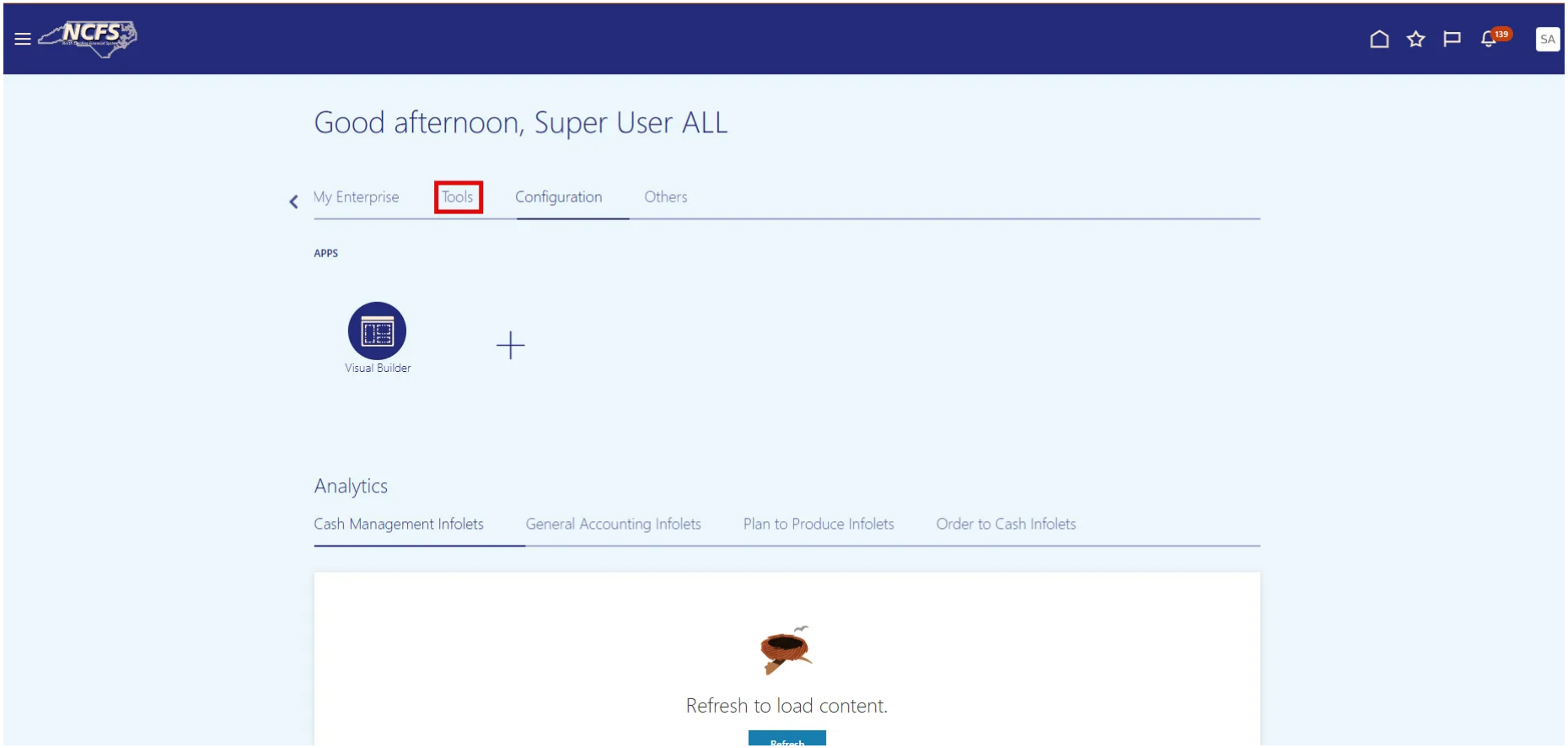
This QRG covers the process of building an OTBI report from a shell which gives users the flexibility to customize the reporting process.

Process

To Build an OTBI Report from a Shell, please follow the steps below. There are 8 steps to complete this process.

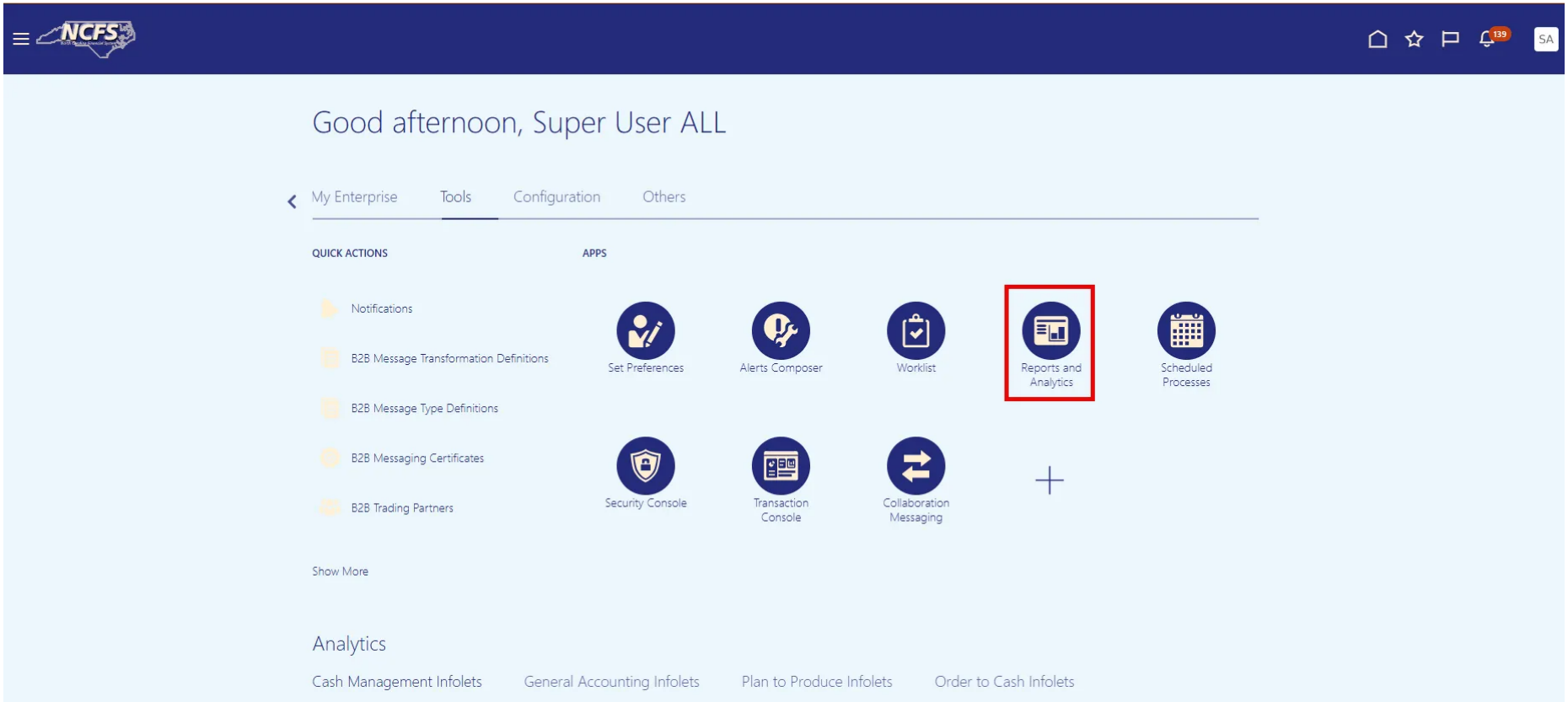
Step 1. On the NCFS home page, choose the **Tools** tab.

Image



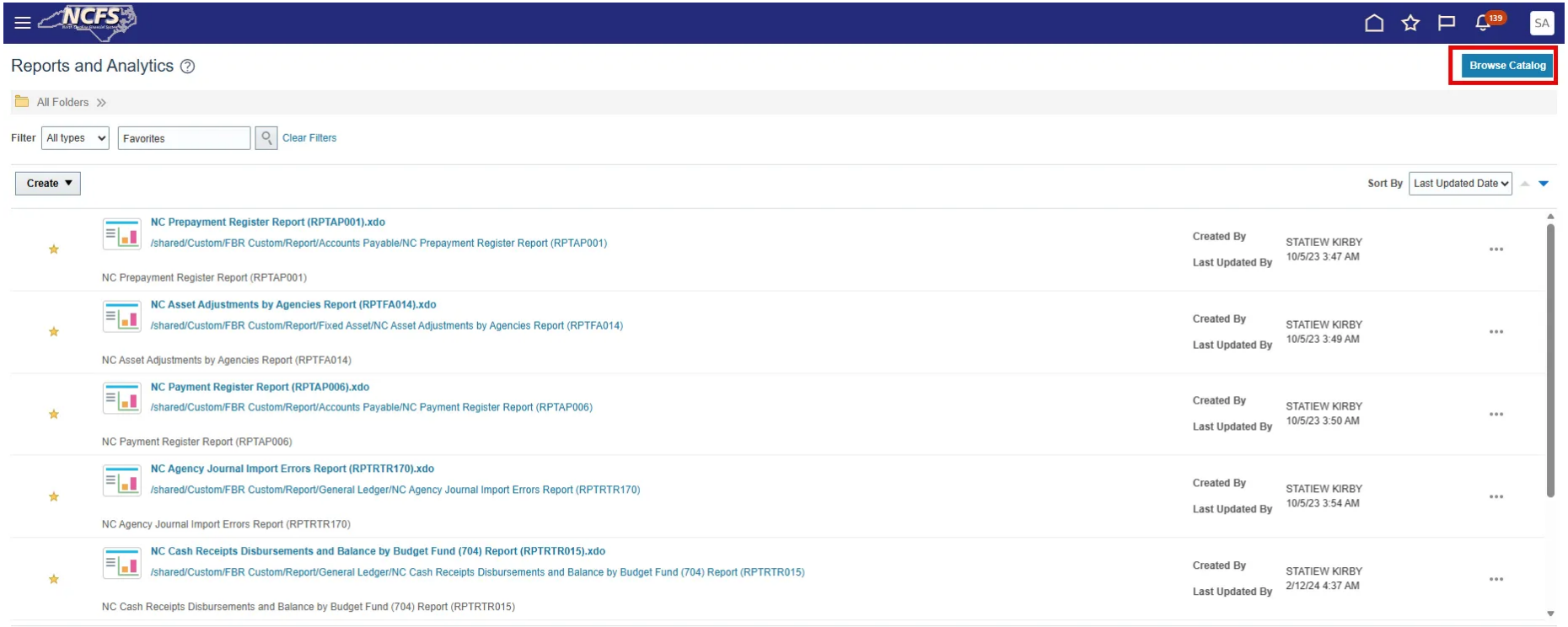
Step 2. Choose the **Reports and Analytics** app.

Image



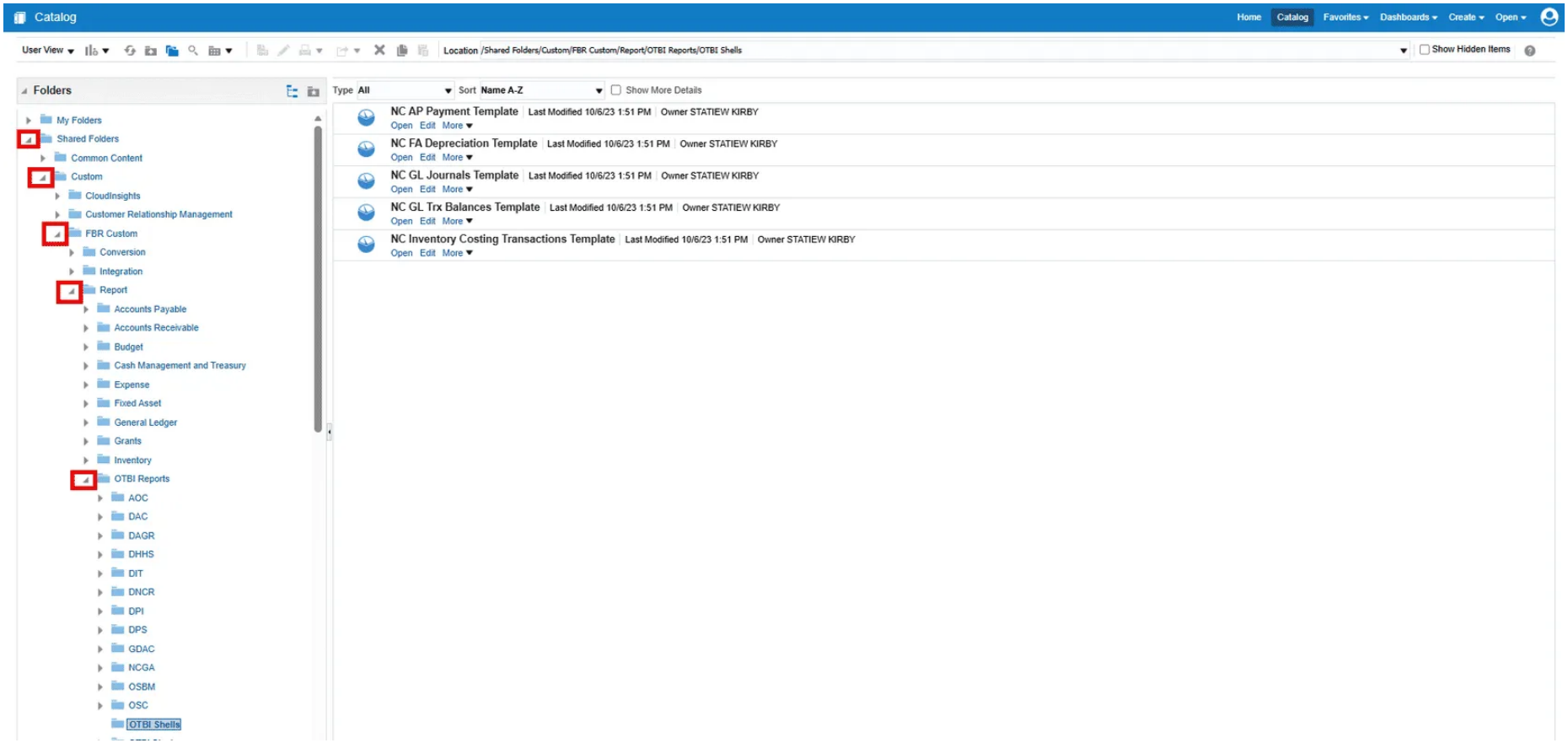
Step 3. On the Reports and Analytics screen, choose the **Browse Catalog** button.

Image



Step 4. On the Catalog page, navigate to the **OTBI Shells** folder or to your agency's folder nested under **Shared Folders**.

Image

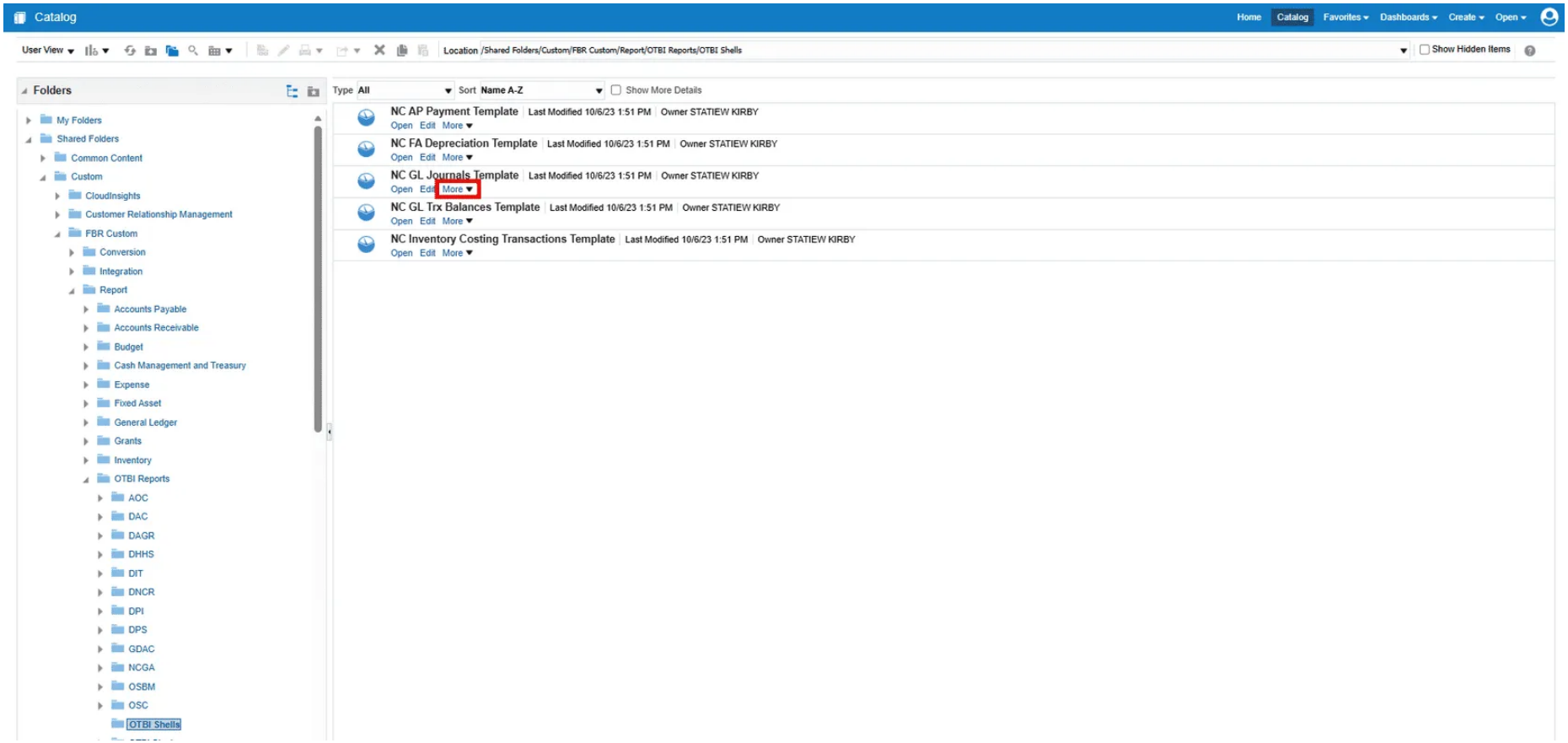


Note: You will only see the OTBI Shells folder and your agency's folder under OTBI Reports.

Step 5. Choose **More** under the analysis template you want to copy.

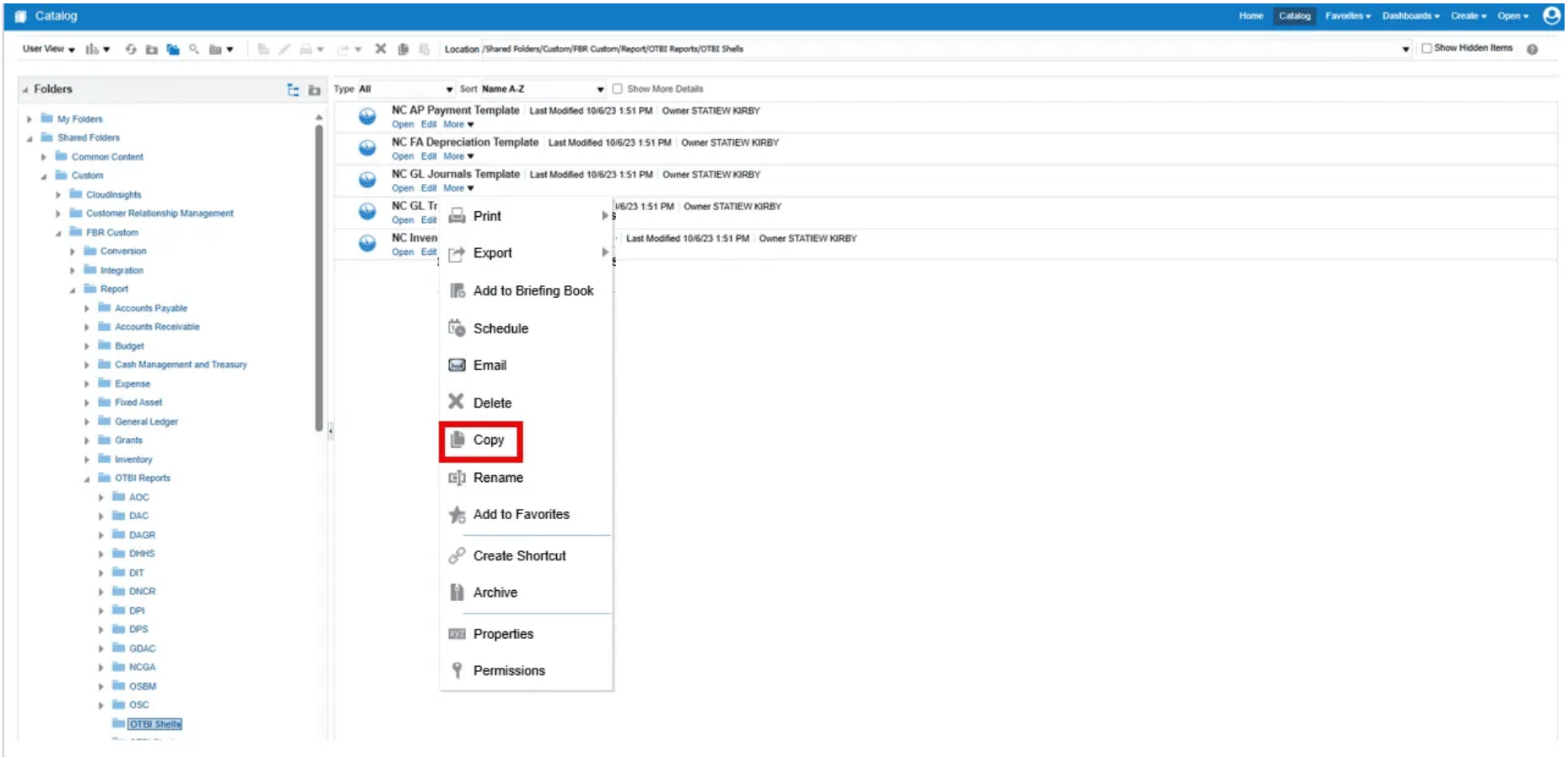
Remember: It is imperative to copy a shell instead of opening it and generating a report.

Image



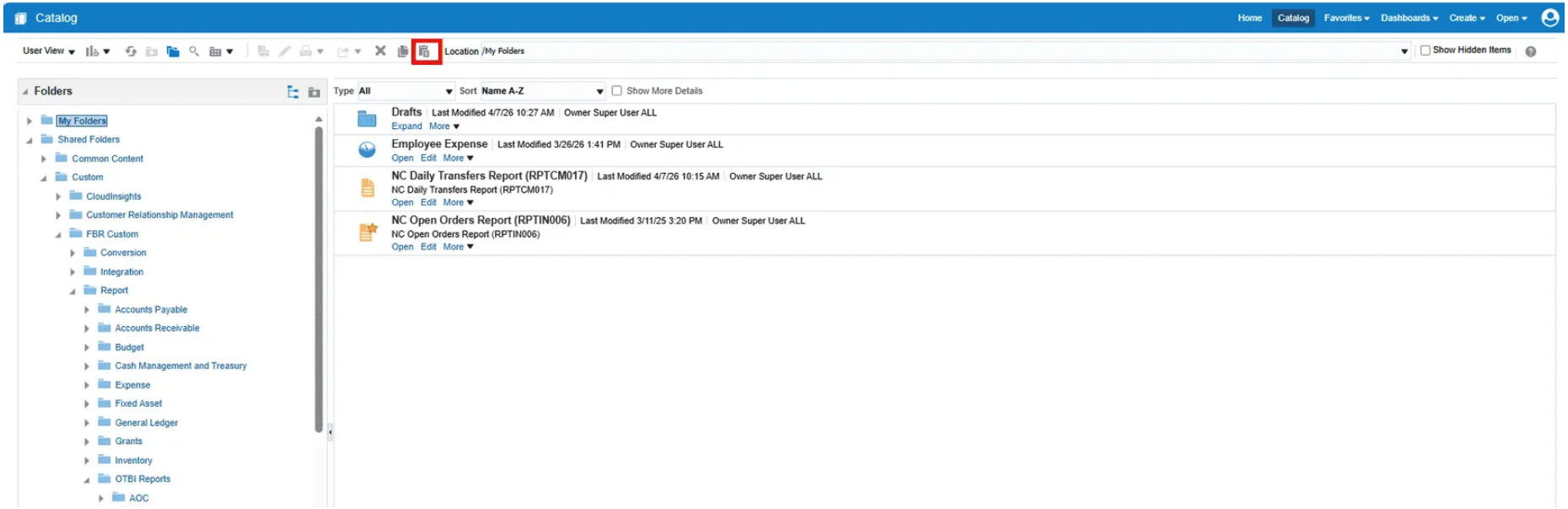
Step 6. Choose **Copy** from the dropdown menu to copy the analysis.

Image



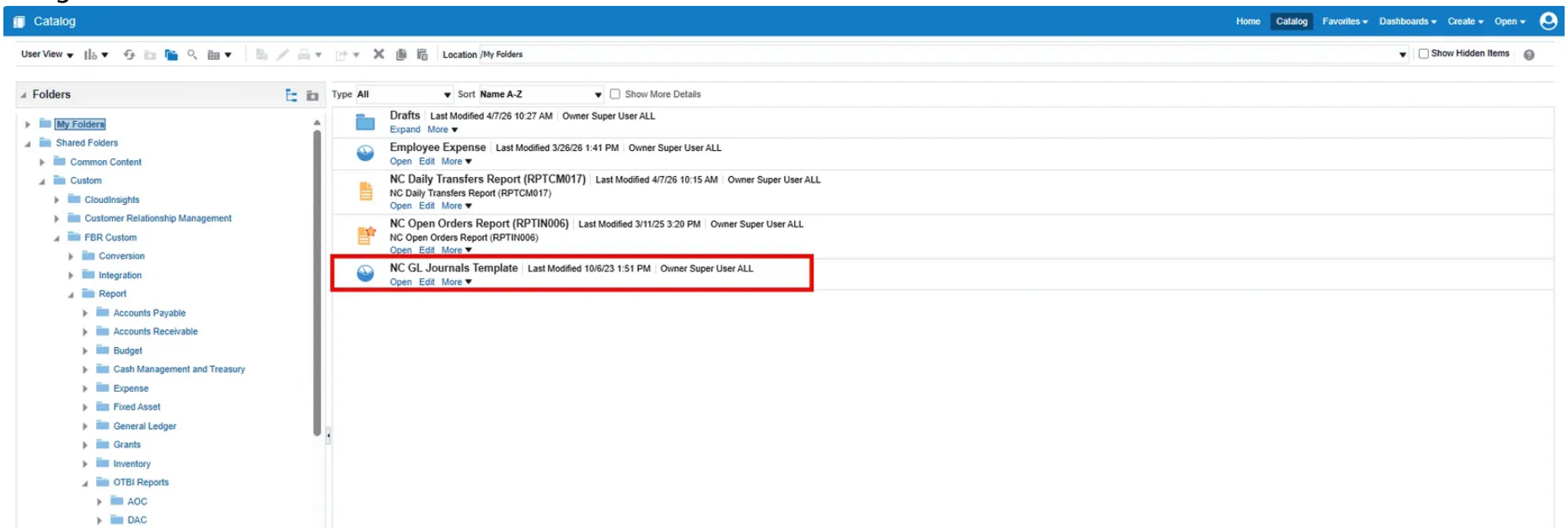
Step 7. Select **My Folders** and choose the **Paste** button to add the copied analysis to your folder.

Image



Step 8. The copied shell will appear among your saved reports and can be used to generate a report.

Image



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