OTBI-02 Adding, Removing, and Rearranging Columns

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to add, remove, and rearrange columns of an OTBI report in the North Carolina Financial System (**NCFS**).

Introduction and Overview

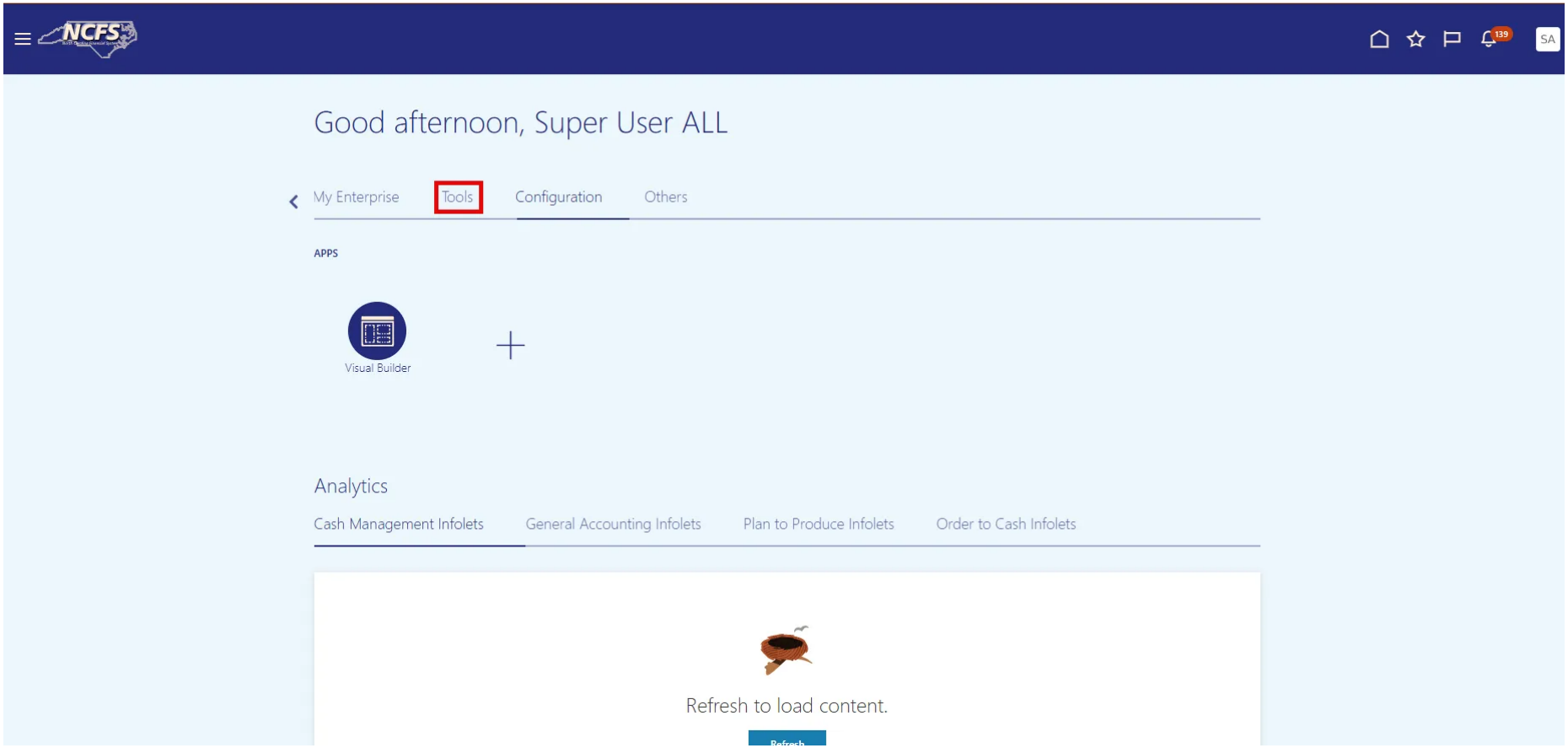
This QRG covers the process of customizing the columns of an OTBI report which gives users flexibility in the reporting process.

Process

To Add, Remove or Rearrange Columns, please follow the steps below. There are 8 steps to complete this process.

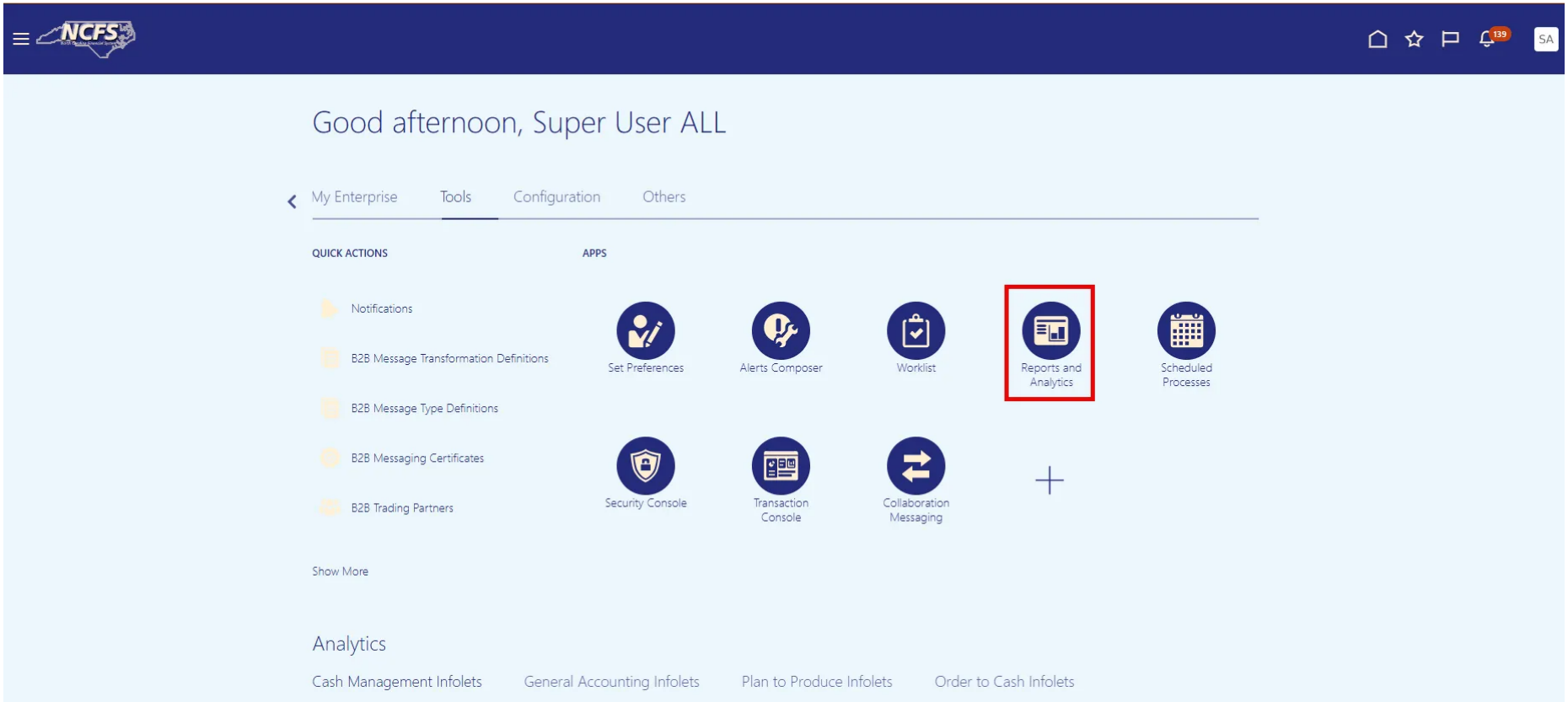
Step 1. On the NCFS home page, choose the **Tools** tab.

Image



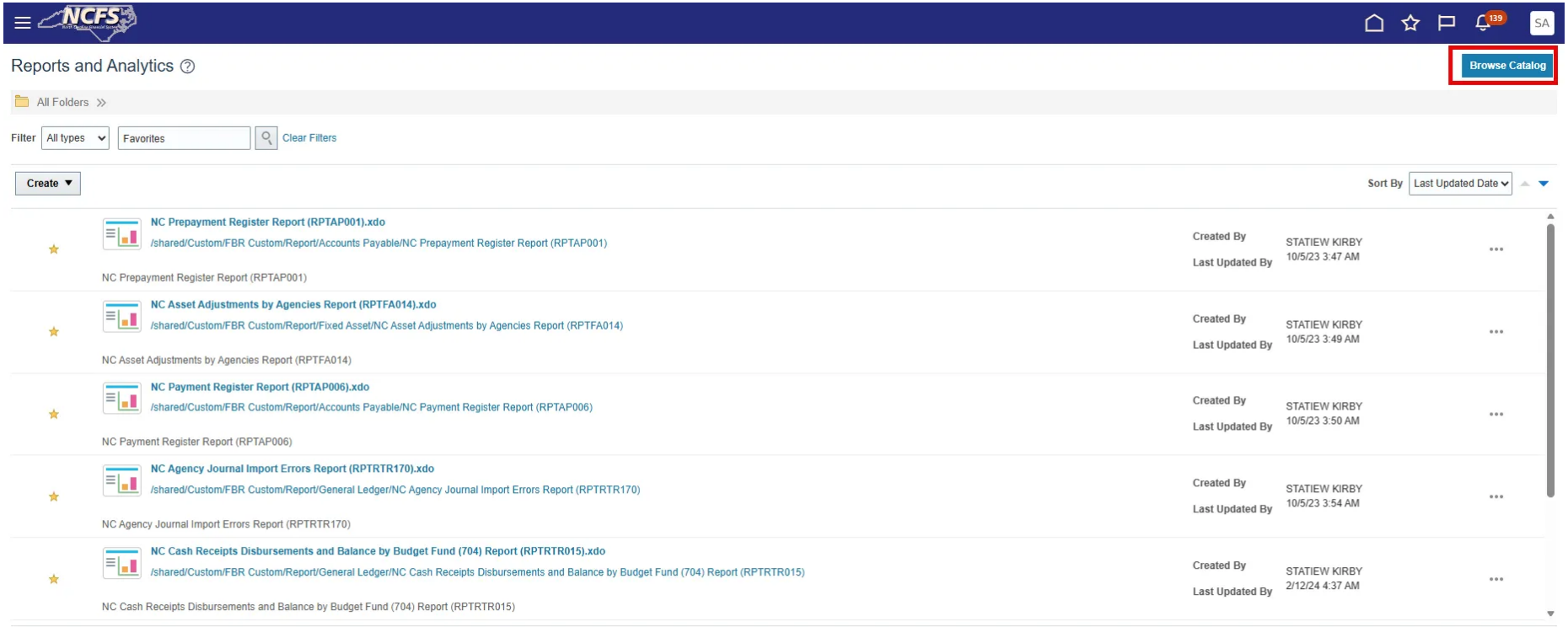
Step 2. Choose the **Reports and Analytics** app.

Image



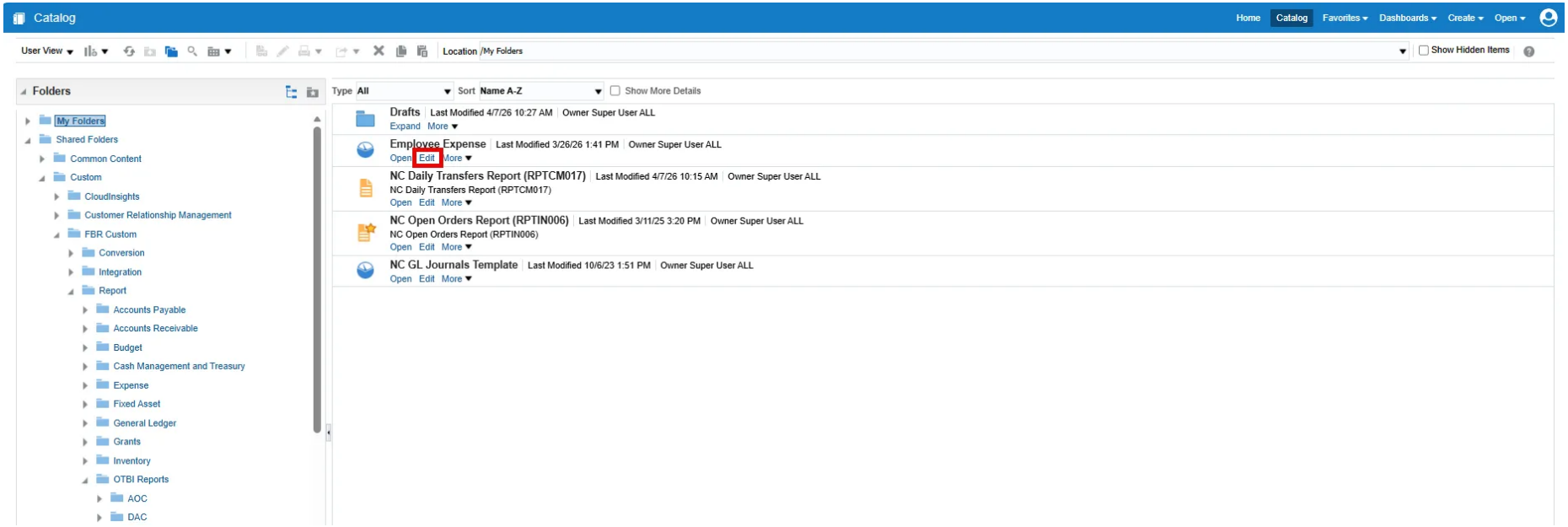
Step 3. On the Reports and Analytics screen, choose the **Browse Catalog** button.

Image



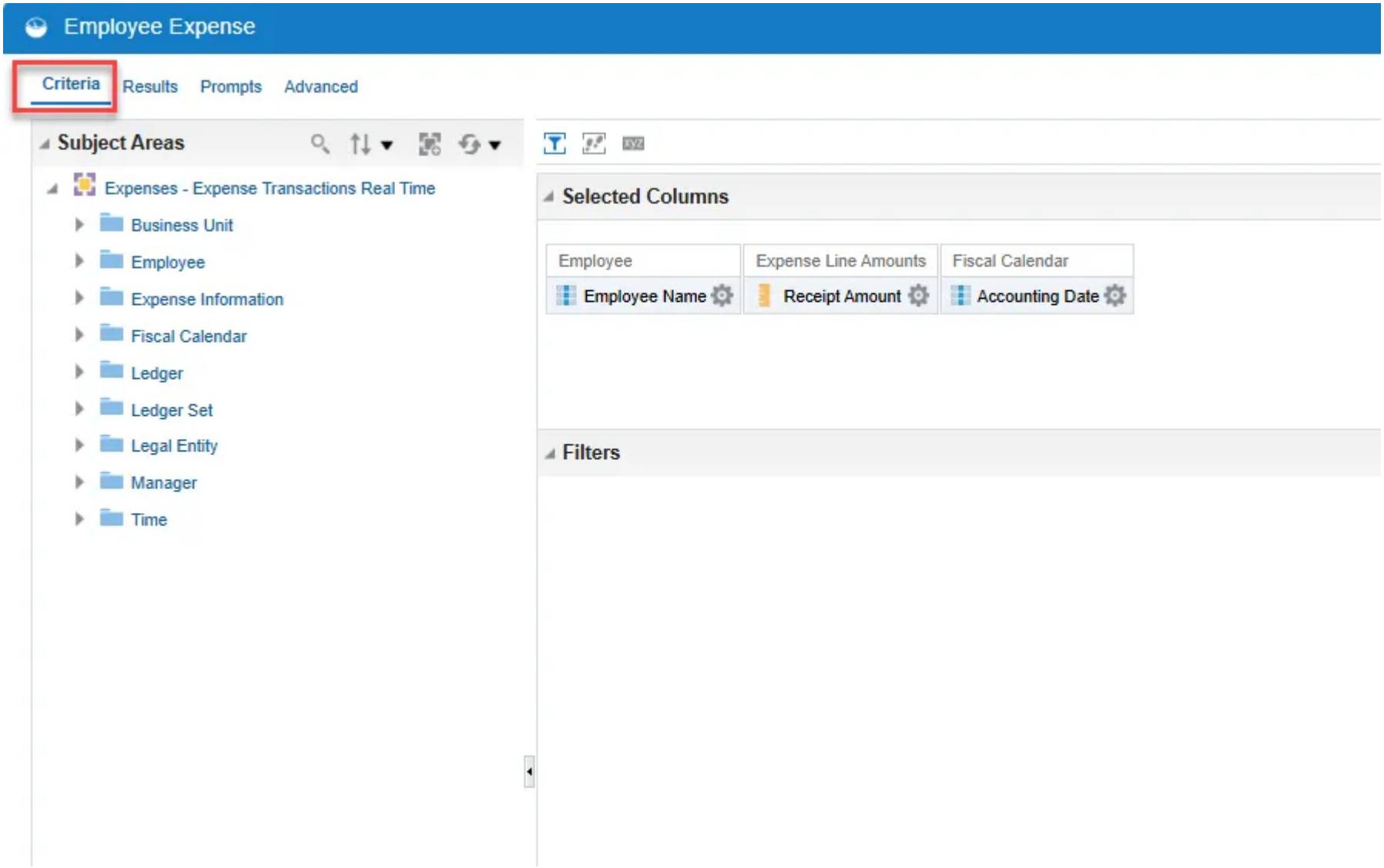
Step 4. On the Catalog page, select **Edit** under the report you wish to customize.

Image



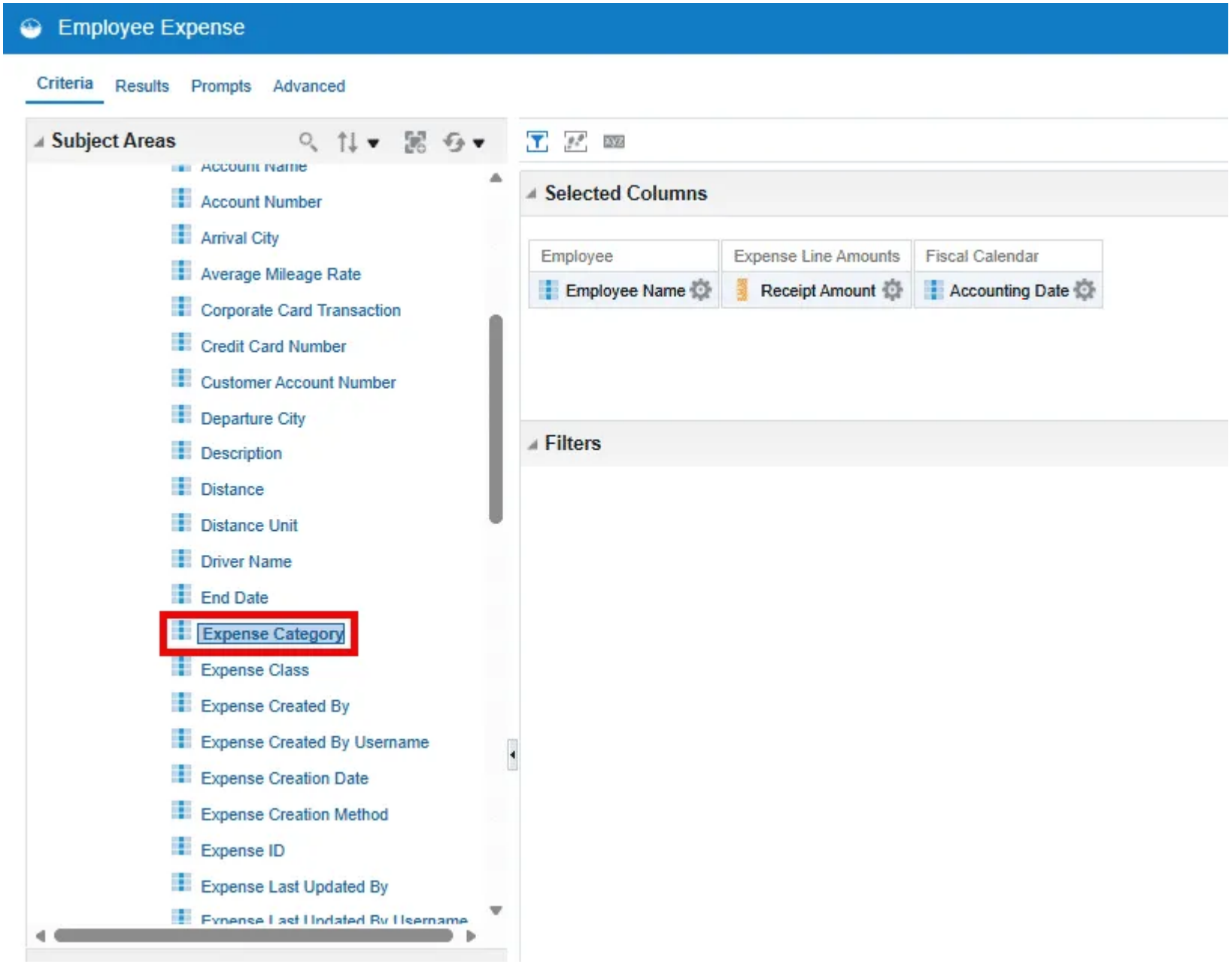
Step 5. Select the **Criteria** tab.

Image



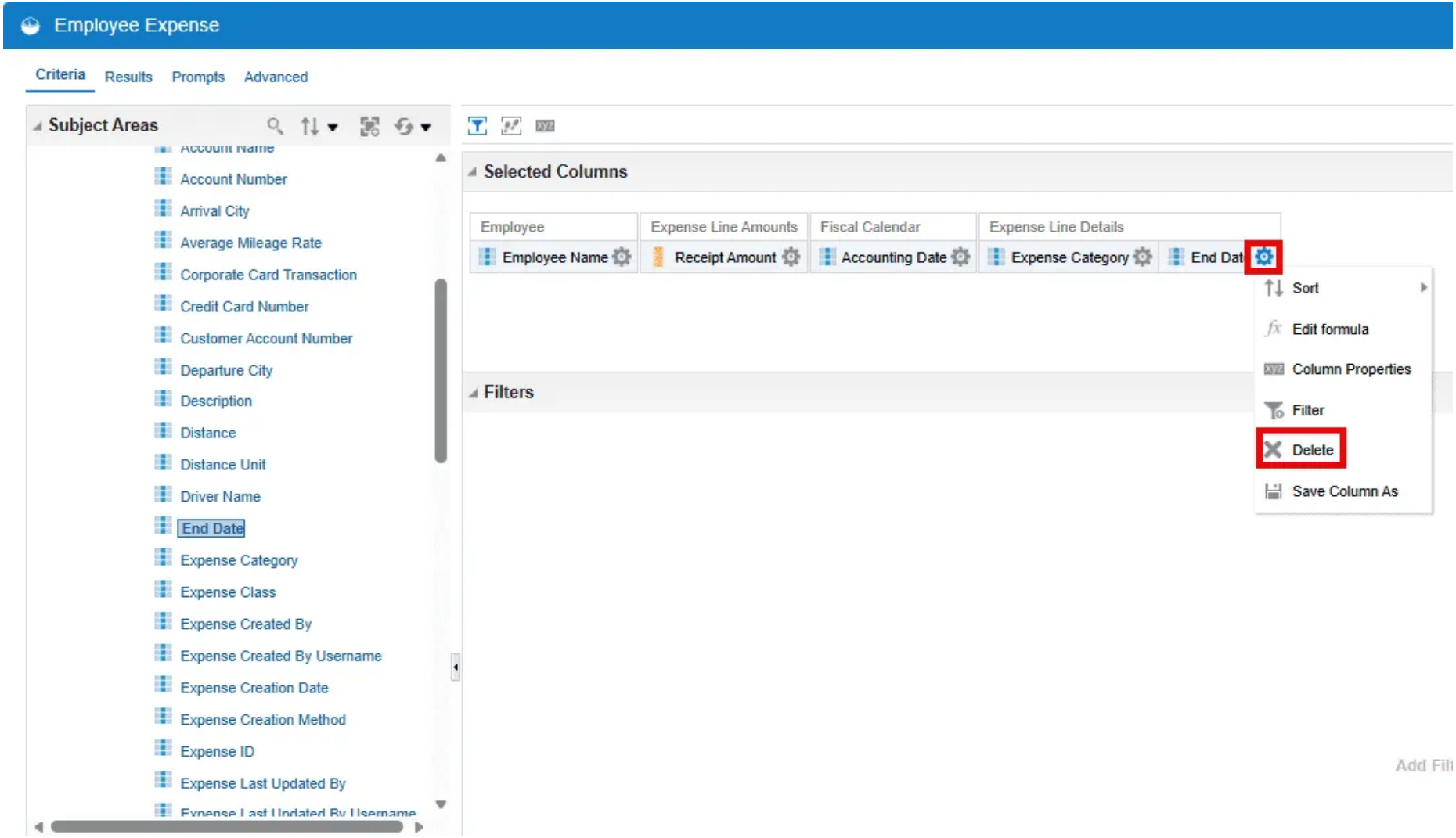
Step 6. To add a column to the report, simply drag and drop to the **Selected Columns** area or double-click any available data element nested under the folders.

Image


Employee Expense
Criteria
Results
Prompts
Advanced
Subject Areas
Account Number
Arrival City
Average Mileage Rate
Corporate Card Transaction
Credit Card Number
Customer Account Number
Departure City
Description
Distance
Distance Unit
Driver Name
End Date
Expense Category
Expense Class
Expense Created By
Expense Created By Username
Expense Creation Date
Expense Creation Method
Expense ID
Expense Last Updated By
Selected Columns
Employee
Expense Line Amounts
Fiscal Calendar
Employee Name
Receipt Amount
Accounting Date
Filters

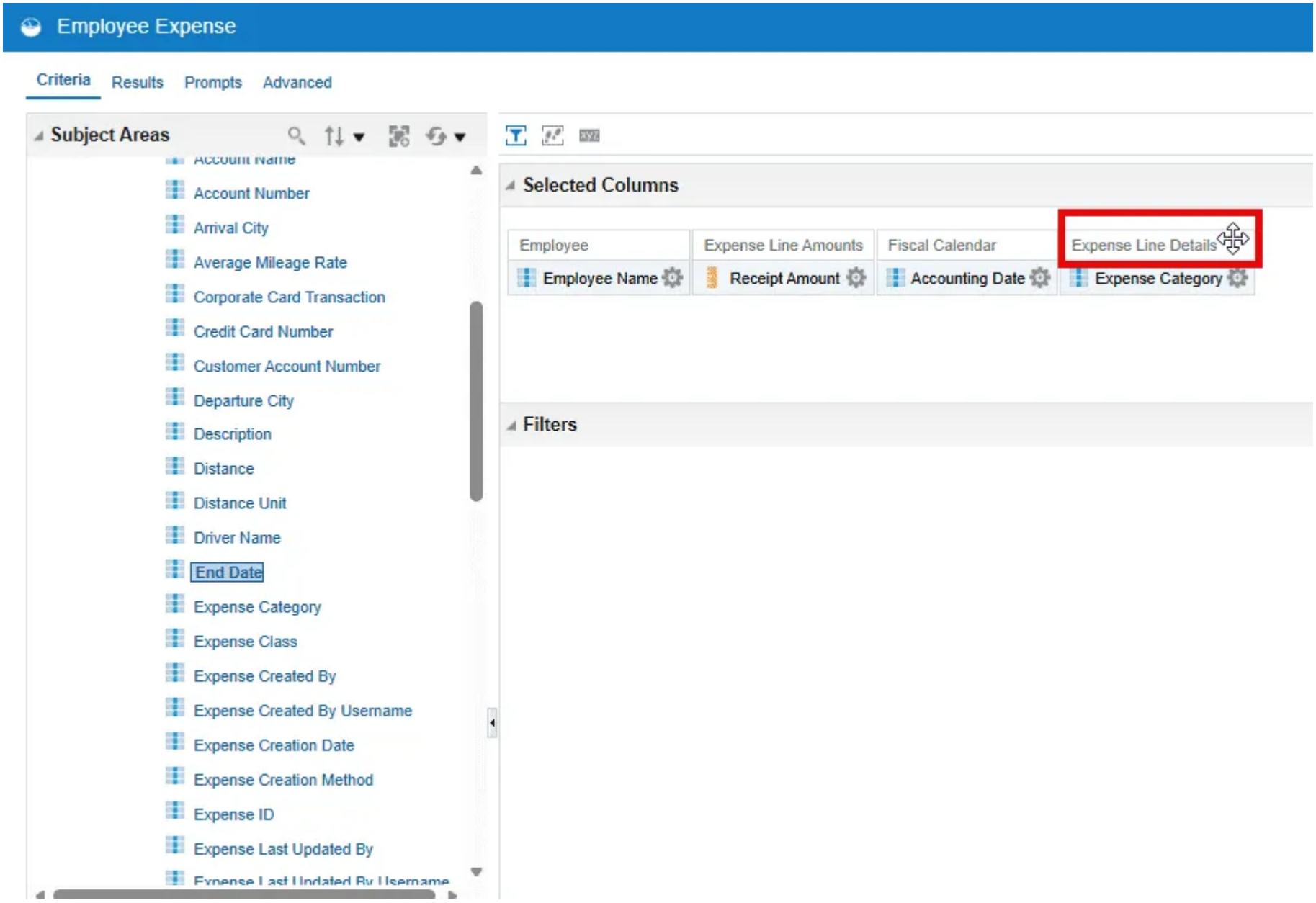
Step 7. To delete a column, select the gear icon within the chosen column and choose **Delete** from the drop-down menu.

Image



Step 8. To rearrange (reorder) columns, drag the column to the desired location.

Image



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