

OTBI-03 Formatting Columns

Purpose

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

Introduction and Overview

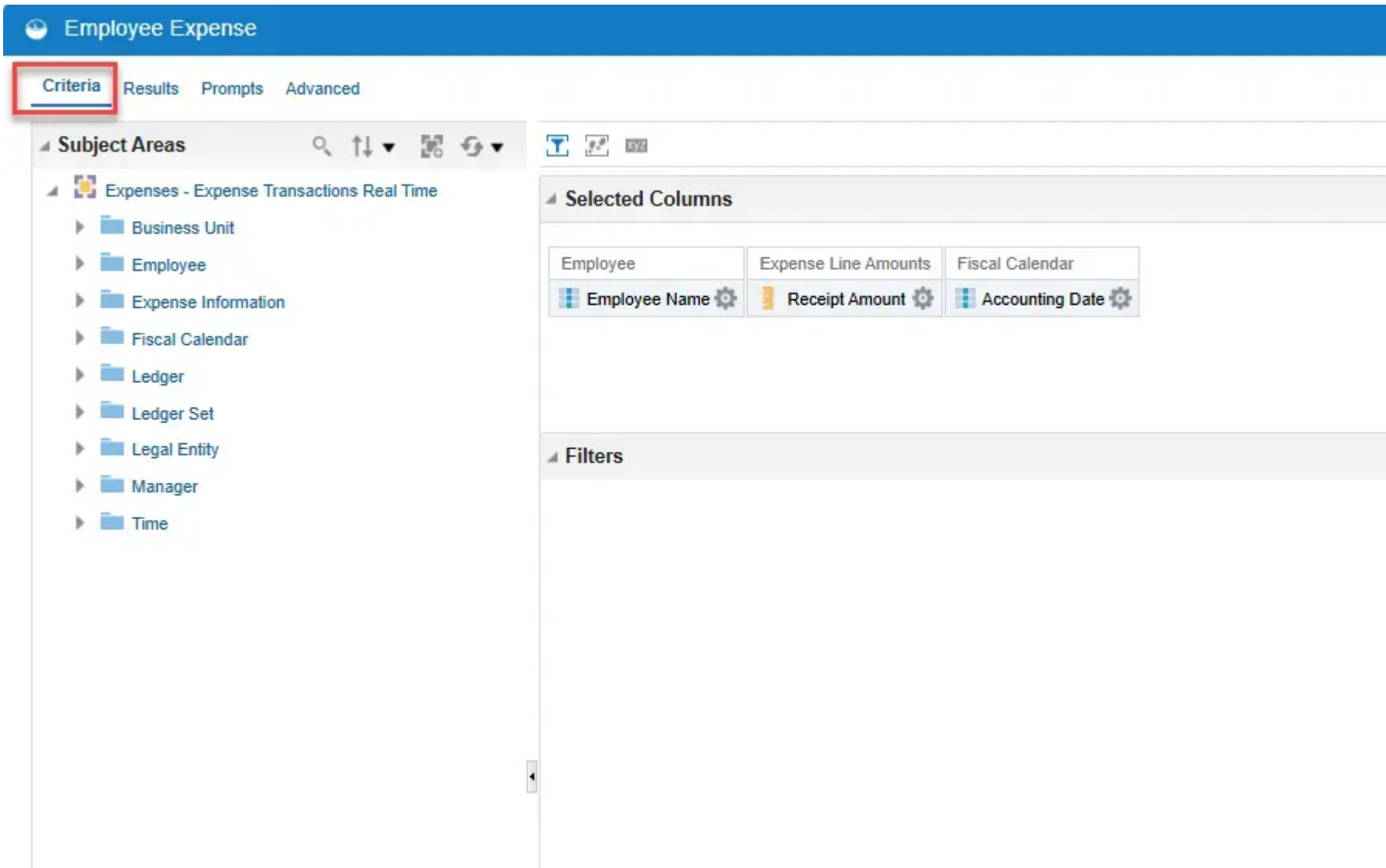
This QRG covers the process of formatting columns on an OTBI report – including renaming columns and formatting data.

Process

To Format Columns, please follow the steps below. There are 10 steps to complete this process.

Step 1. Navigate to the **Criteria tab** of the OTBI report you wish to work with.

Image



Step 2. Select the gear icon in a chosen column and choose **Column Properties** from the drop-down menu.

Image

Employee Expense

CriteriaResultsPromptsAdvanced

Subject Areas

Account Name

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

Expense Last Updated By Username

Selected Columns

Employee	Expense Line Amounts	Expense Line Details	Fiscal Calendar
Employee Name	Receipt Amount	Category	Accounting Date

Sort

Edit formula

Column Properties

Filter

Delete

Save Column As

Filters

Step 3. On the Column Format tab choose the **Custom Headings** box to edit the column name.

Image

Column Properties

Style | **Column Format** | Data Format | Conditional Format | Interaction | Write Back

Headings ☐ Hide

Folder Heading: Fiscal Calendar

Column Heading: Accounting Date

☒ Custom Headings

☐ Contains HTML/JavaScript/CSS Markup

Value Suppression

XX	XXXX	XX	XXXX
	XXXX	XX	XXXX
	XXXX	XX	XXXX
XX	XXXX	XX	XXXX
	XXXX	XX	XXXX

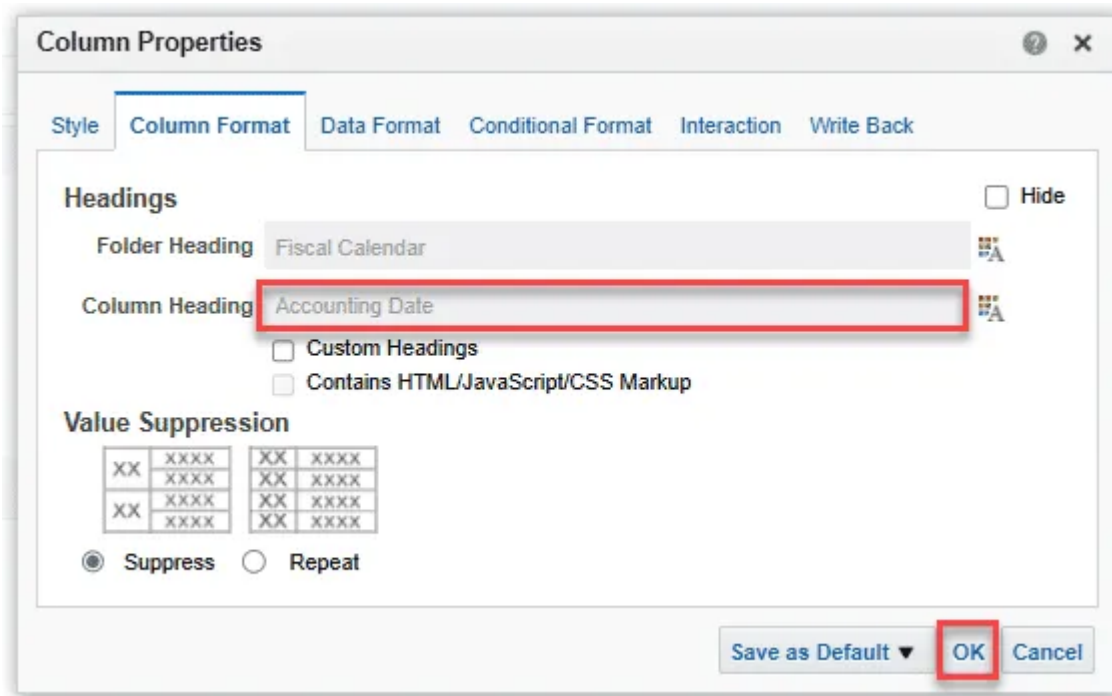
☒ Suppress ☐ Repeat

Save as Default ▼ OK Cancel

Step 4. Add the new column name to the Column Heading field and choose the **OK** button.

Note: You can also save this new column name as Default.

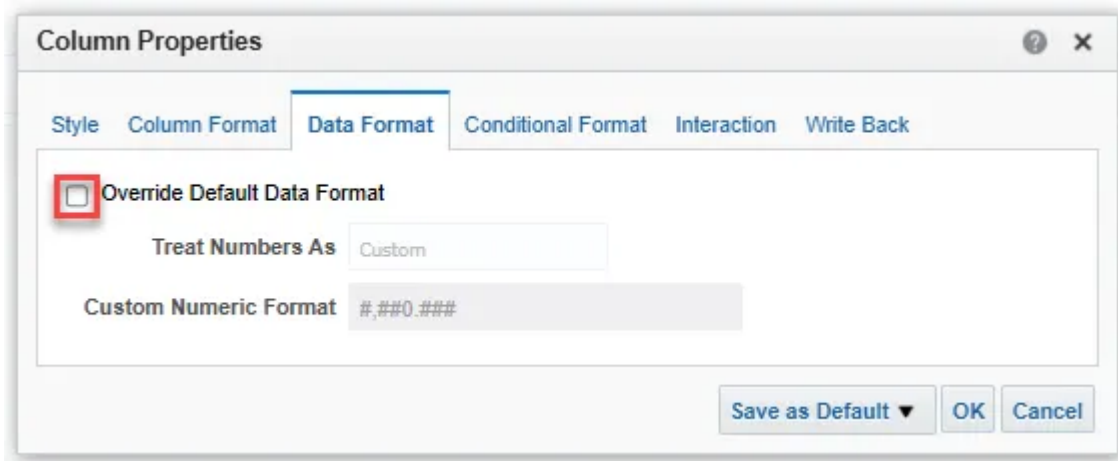
Image



Step 5. On the Data Format tab choose the **Override Default Data Format** checkbox to change the format of the data in a chosen column.

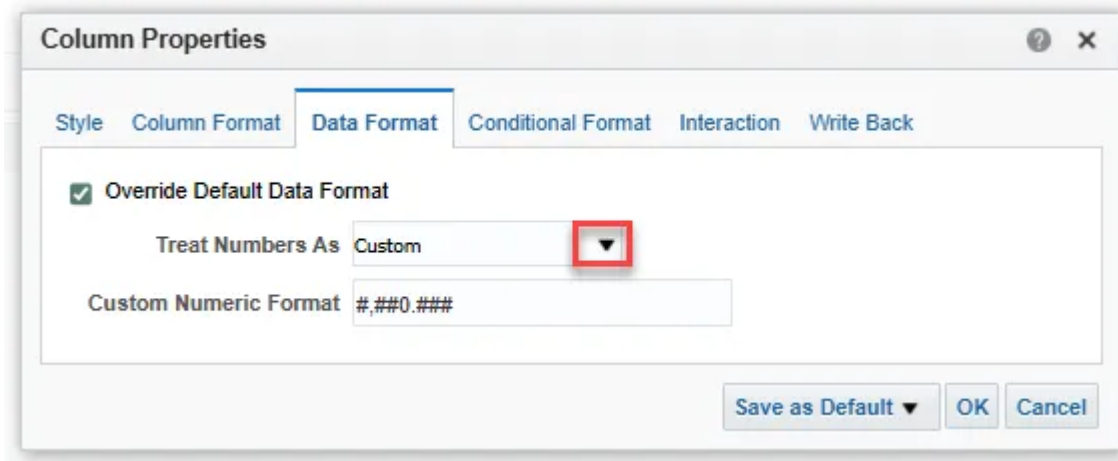
Note: The options on this tab depend on the column chosen.

Image



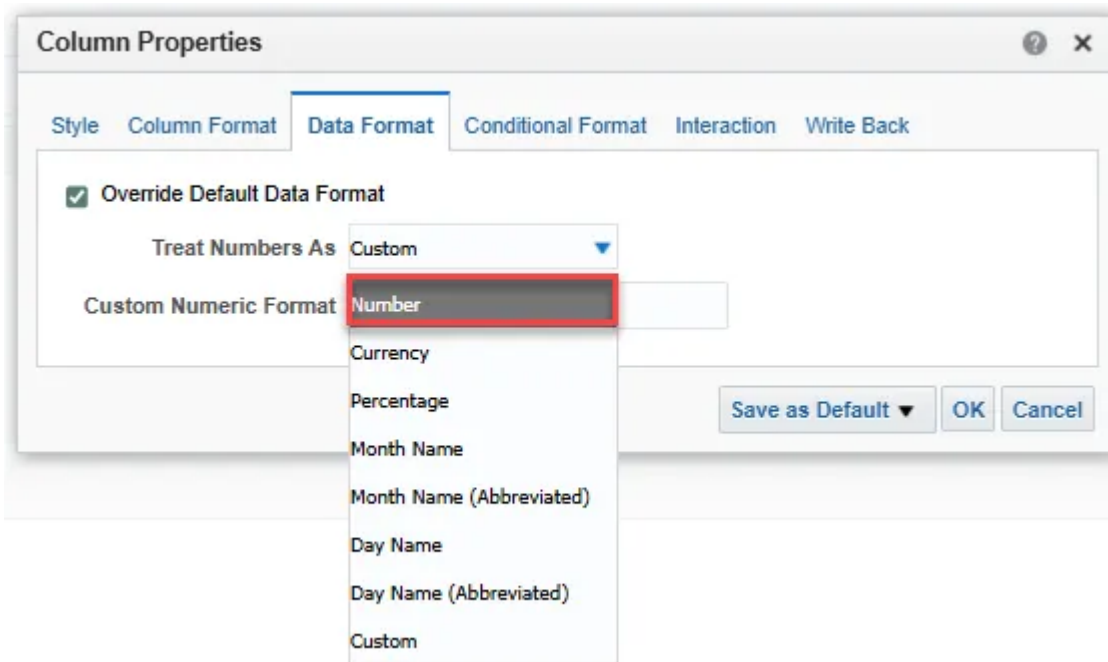
Step 6. In this example, the number of decimals shown in a monetary amount will be adjusted. Access the drop-down menu in the **Treat Numbers As** field.

Image



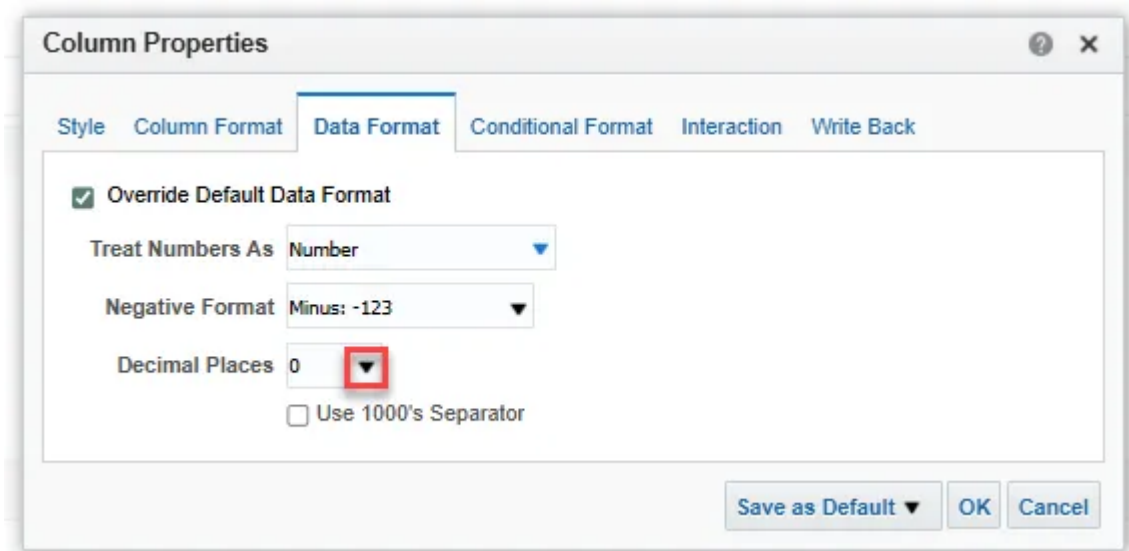
Step 7. Choose **Number** from the drop-down menu.

Image



Step 8. Choose the drop-down menu in the **Decimal Places** field.

Image



Step 9. For this example, choose **2** from the drop-down menu.

Image

Column Properties

?

×

Style

Column Format

Data Format

Conditional Format

Interaction

Write Back

☒ Override Default Data Format

Treat Numbers As

Number

▼

Negative Format

Minus: -123

▼

Decimal Places

0

▼

0

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

up to 1

up to 2

up to 3

up to 4

00's Separator

Save as Default

▼

OK

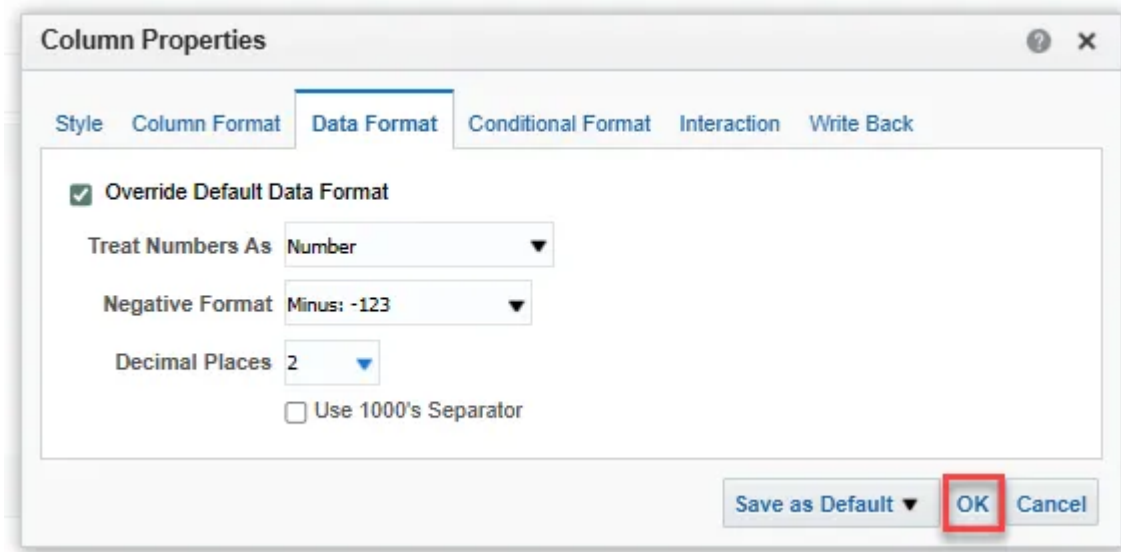
Cancel

Add Filters Here

Step 10. Choose **OK**.

Note: This format change can be saved as a default setting.

Image



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