

OTBI-04 Prompts or Parameters

Purpose

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

Introduction and Overview

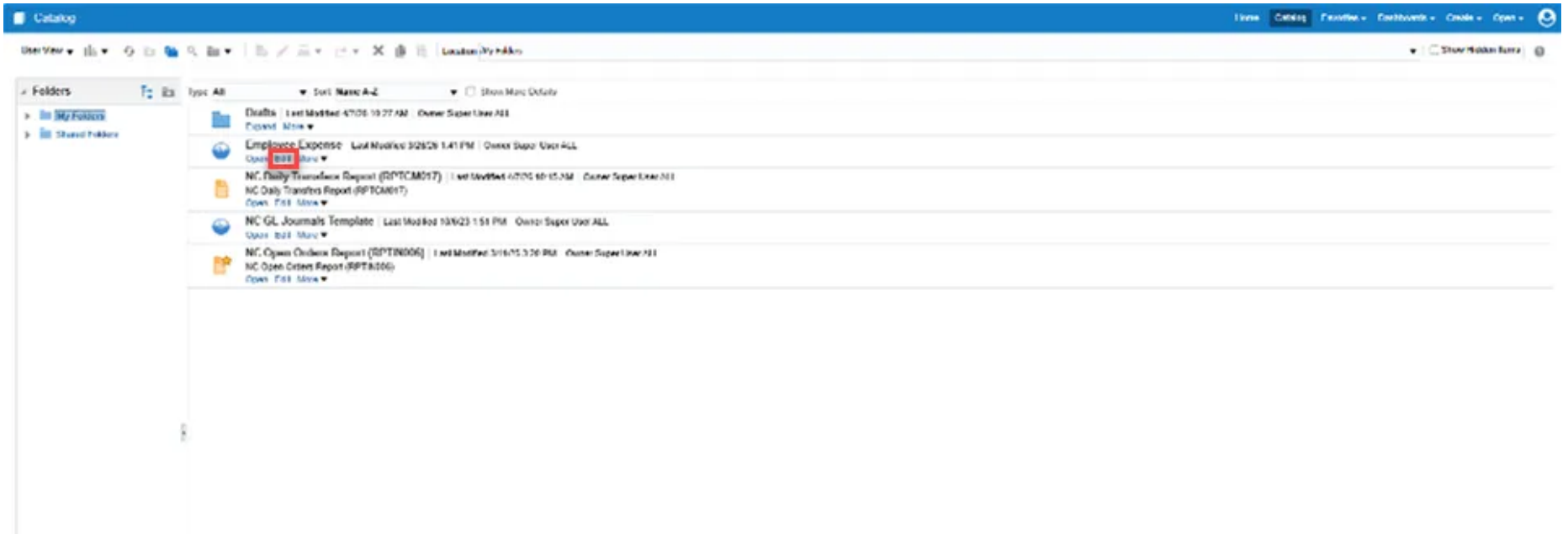
This QRG covers the process of adding prompts/parameters to an OTBI report.

Process

Please follow the steps below. There are 11 steps to complete this process.

Step 1. Navigate to the report you wish to work with and choose **Edit** under the report name.

Image



Step 2. Select the **Prompts** tab.

Image

Employee Expense

Criteria Results Prompts Advanced

Subject Area...

Expenses - Expense Transaction

Business Unit

Employee

Expense Information

Fiscal Calendar

Ledger

Ledger Set

Legal Entity

Manager

Time

Catalog

List All

My Folders

Shared Folders

Compound Layout

Title

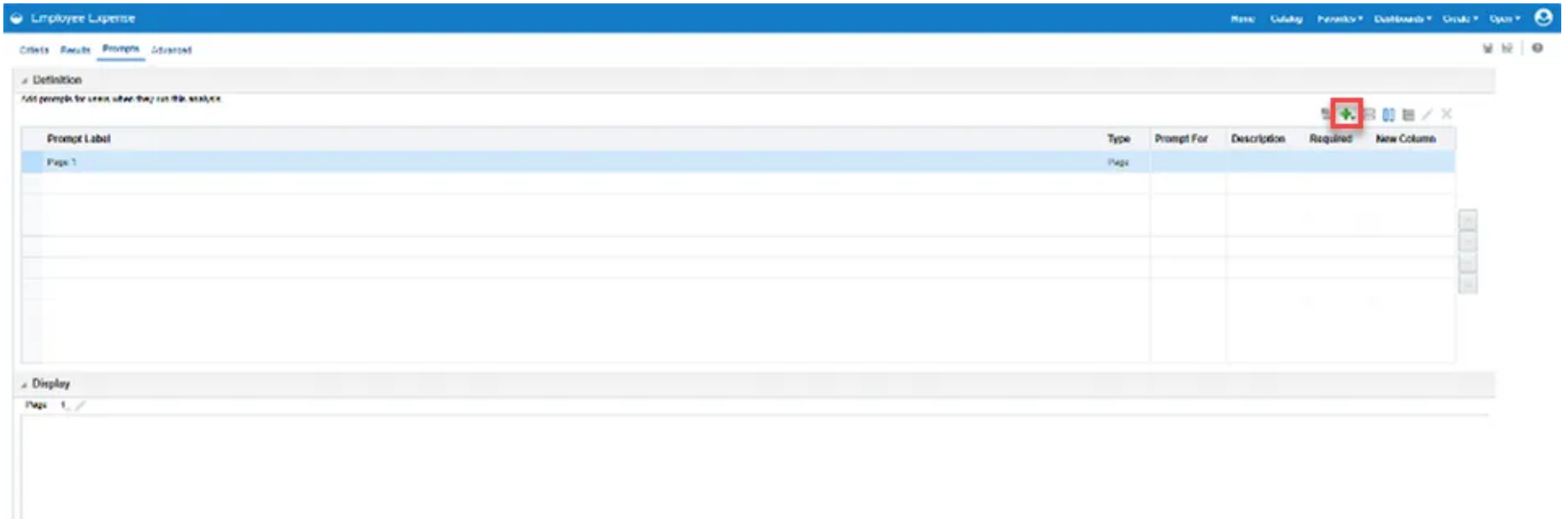
Employee Expense

Table

Employee Name	Receipt Amount	Accounting Date
BURR, LV	75	11/10/23
	162.44	2/29/24
	111.35	3/15/24
	188	8/1/24
	230.48	8/16/24
	0	3/20/25
	0	3/27/25
	7	6/16/25
	228.5	7/16/25
	180.44	11/25/25
WARFIELD-GRAHAM, RAJIVI	179	8/5/24
	221.3	11/14/24
	807.56	2/19/25
MUSCALI, MADHUC	698.6	4/24/25
	489.28	4/24/25

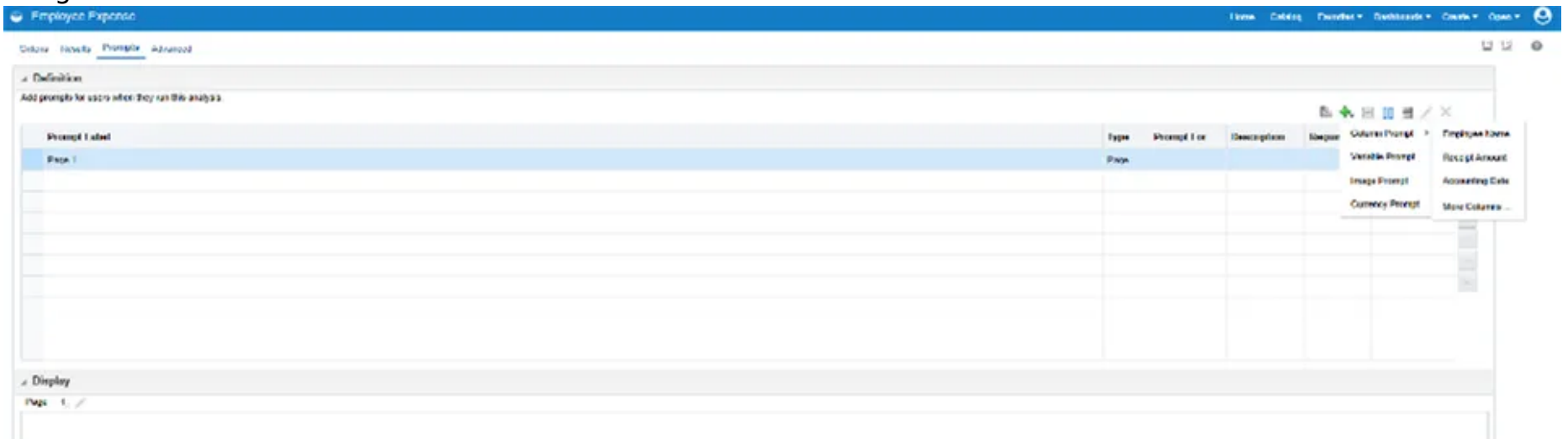
Step 3. Select the **Add Prompt** icon. It looks like a plus sign.

Image



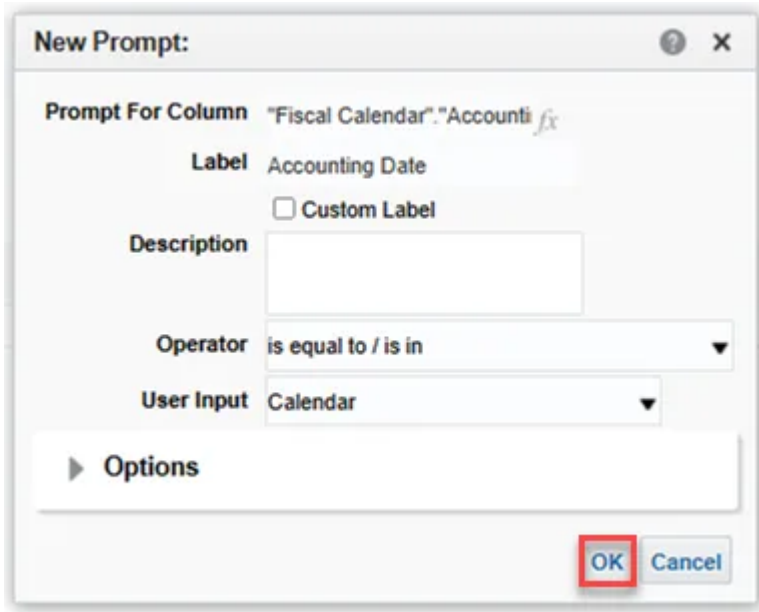
Step 4. Hover over **Column Prompt** from the drop-down menu to produce a pop-out menu. Then, choose the column you want to turn into a parameter.

Image



Step 5. The New Prompt pop-up will default to “**is equal to/is in**” for the Operator field. You can change the Operator field to meet your specific needs. Click **OK**.

Image



New Prompt:

Prompt For Column "Fiscal Calendar": "Accounti" $\frac{f}{x}$

Label Accounting Date

☐ Custom Label

Description

Operator is equal to / is in

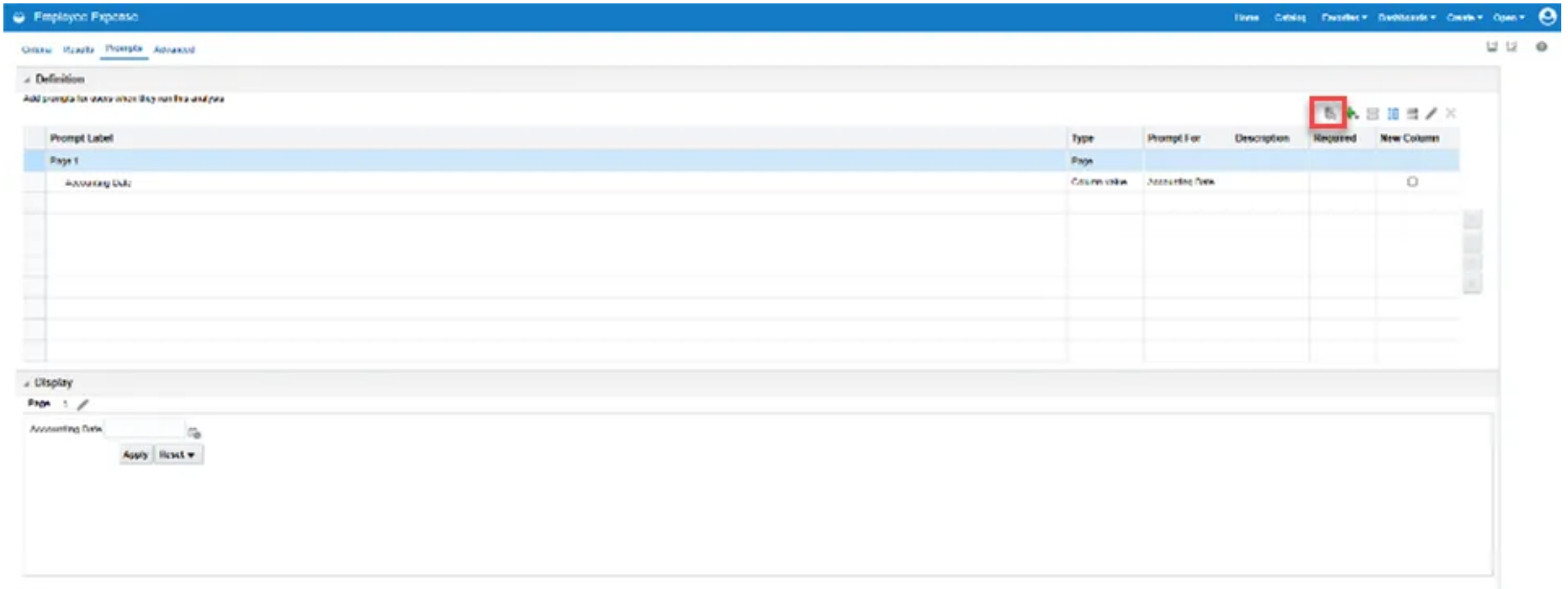
User Input Calendar

► Options

OK Cancel

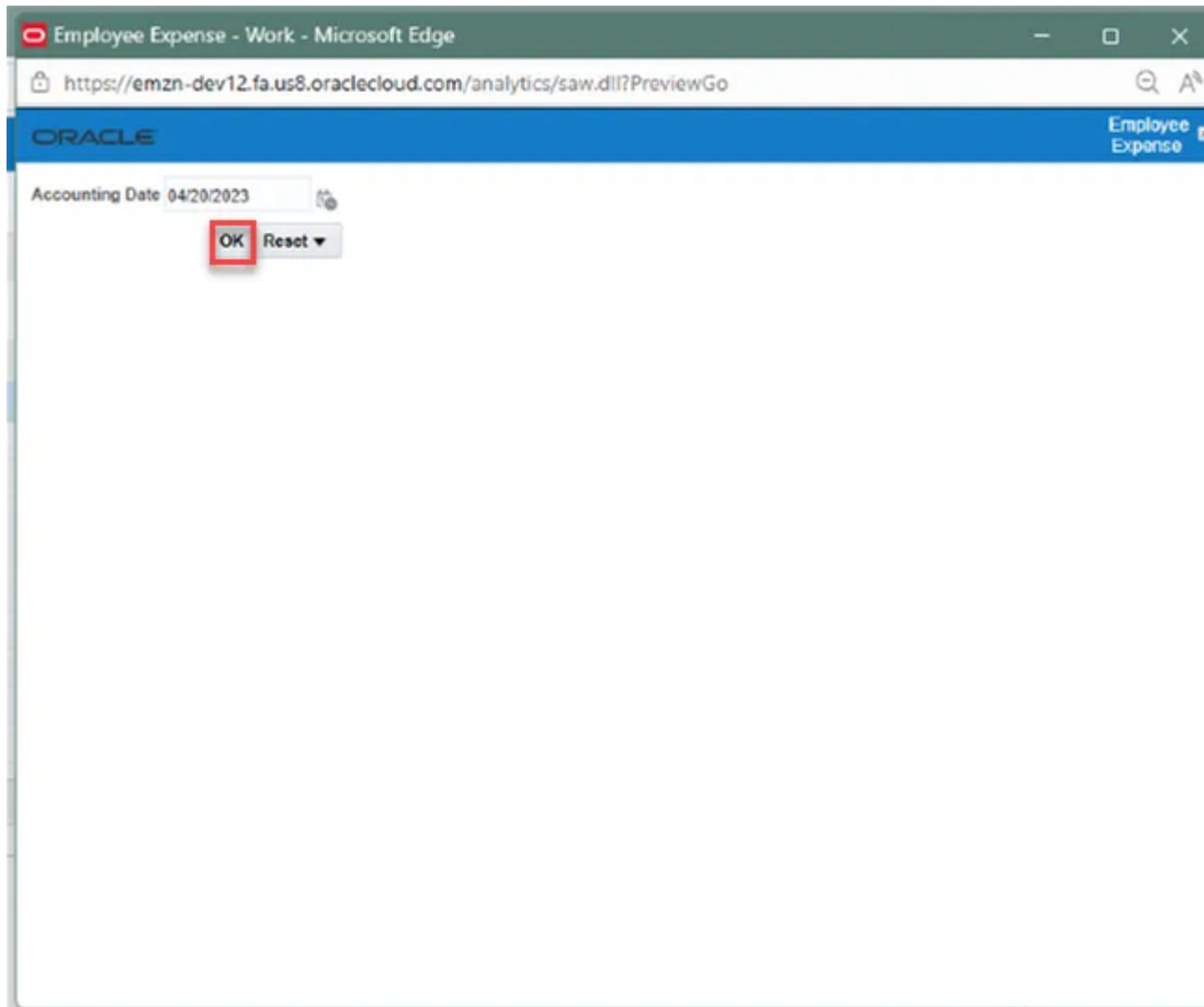
Step 6. The new prompt will appear in the Display section. You can choose the **Preview** button to preview the prompt.

Image



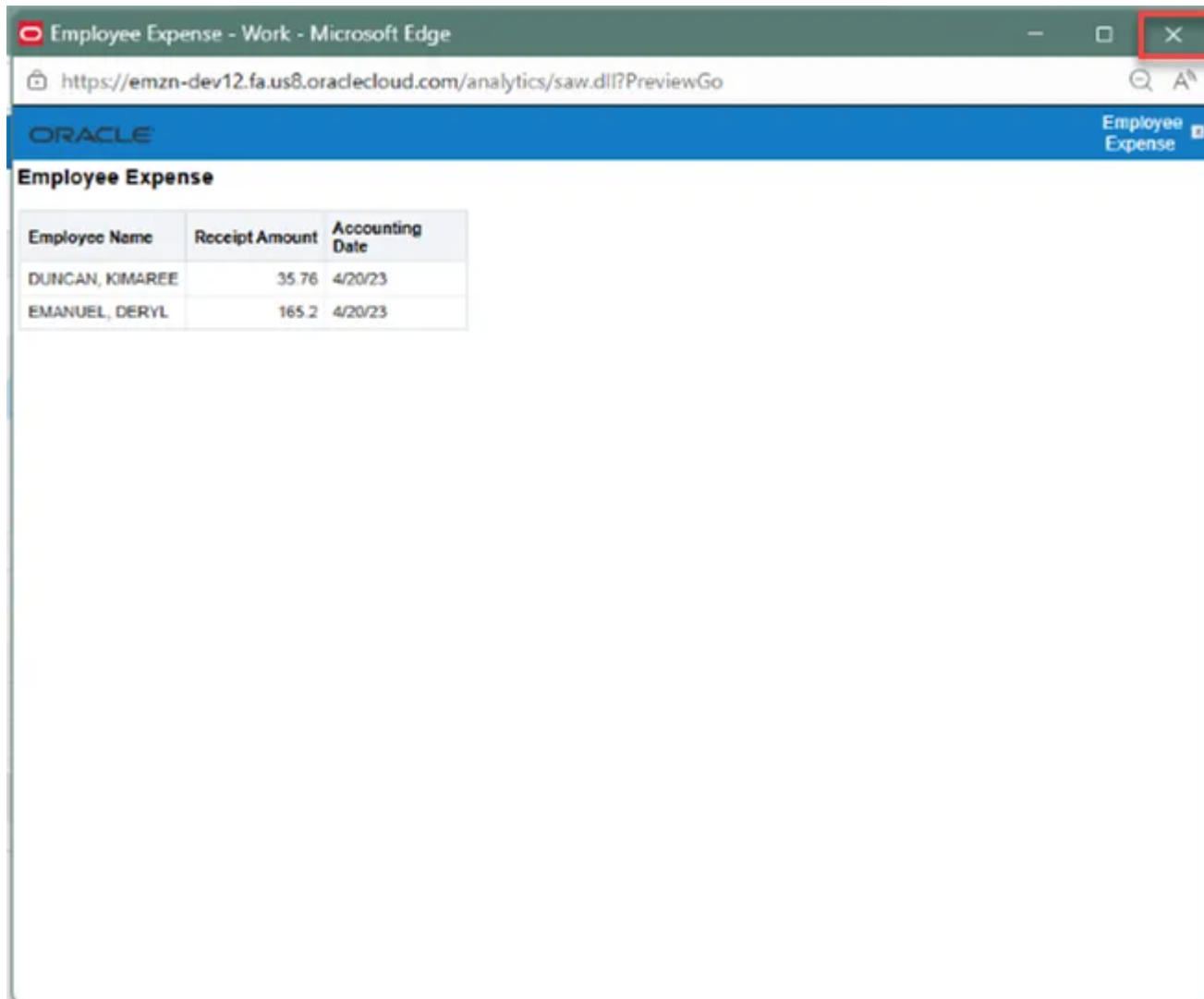
Step 7. If you choose to preview the prompt, you can fulfill the prompt requirements and choose **OK** to see the results.

Image



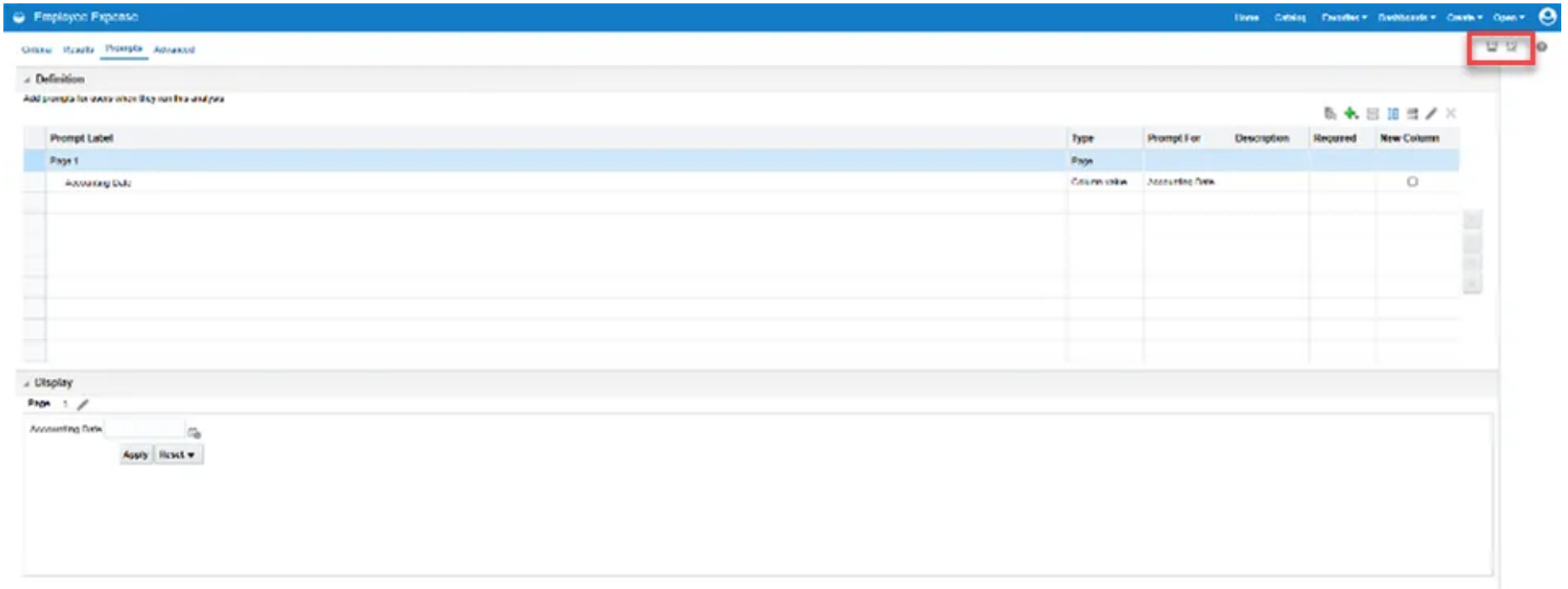
Step 8. A quick preview of the data will populate. Select the **X** in the upper right of the pop-up to close the preview.

Image



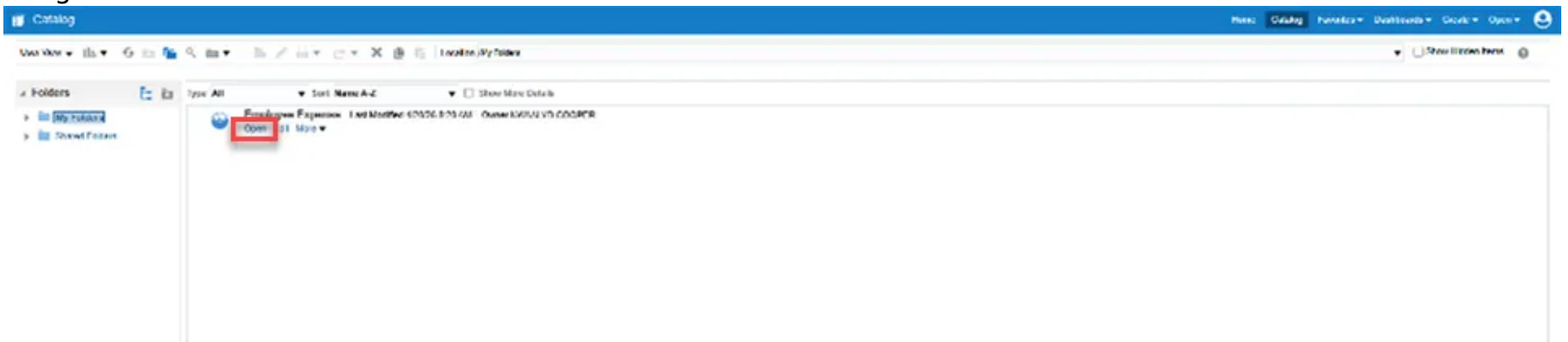
Step 9. When you are satisfied with the prompts created, remember to use the **Save or Save As** button to save the analysis.

Image



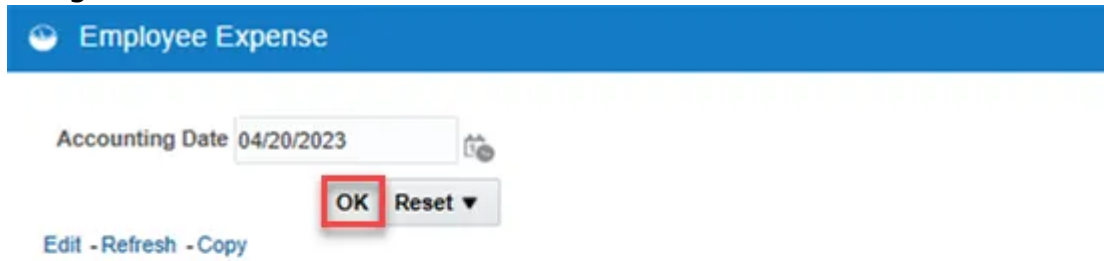
Step 10. Navigate back to the **Catalog** page. Choose **Open** under the saved analysis.

Image



Step 11. Fulfill the prompt requirements and choose **OK**.

Image



The image shows the top portion of a web application interface. At the top is a solid blue horizontal bar containing a white circular icon with a clock-like symbol and the text "Employee Expense". Below this bar, on a light gray background, is a date selection area. It includes the text "Accounting Date" followed by a white input box containing "04/20/2023" and a small calendar icon to its right. Below the input box are two buttons: "OK" and "Reset" with a downward arrow. The "OK" button is highlighted with a red rectangular border. At the bottom left of this section, the text "Edit - Refresh - Copy" is displayed in a small, blue, sans-serif font.

First Published

Fri, 06/28/2024

Last Updated

Tue, 06/30/2026

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