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

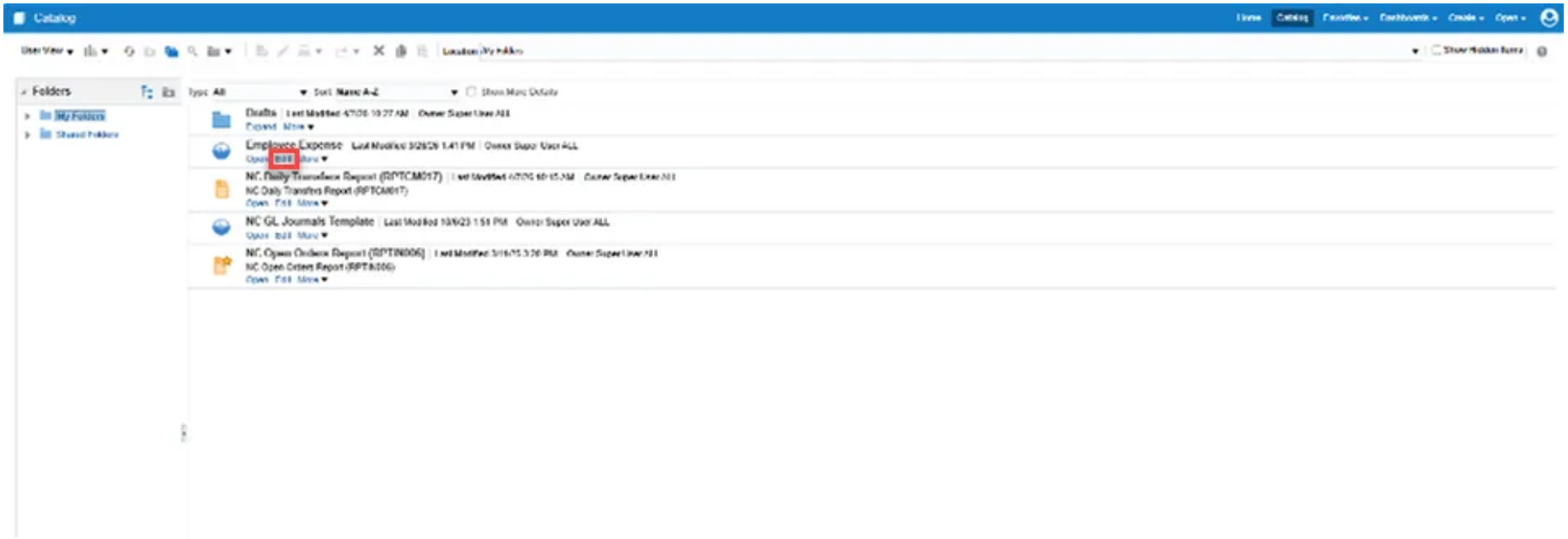
This QRG covers the process of adding prompts/parameters to an OTBI report.

Process

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

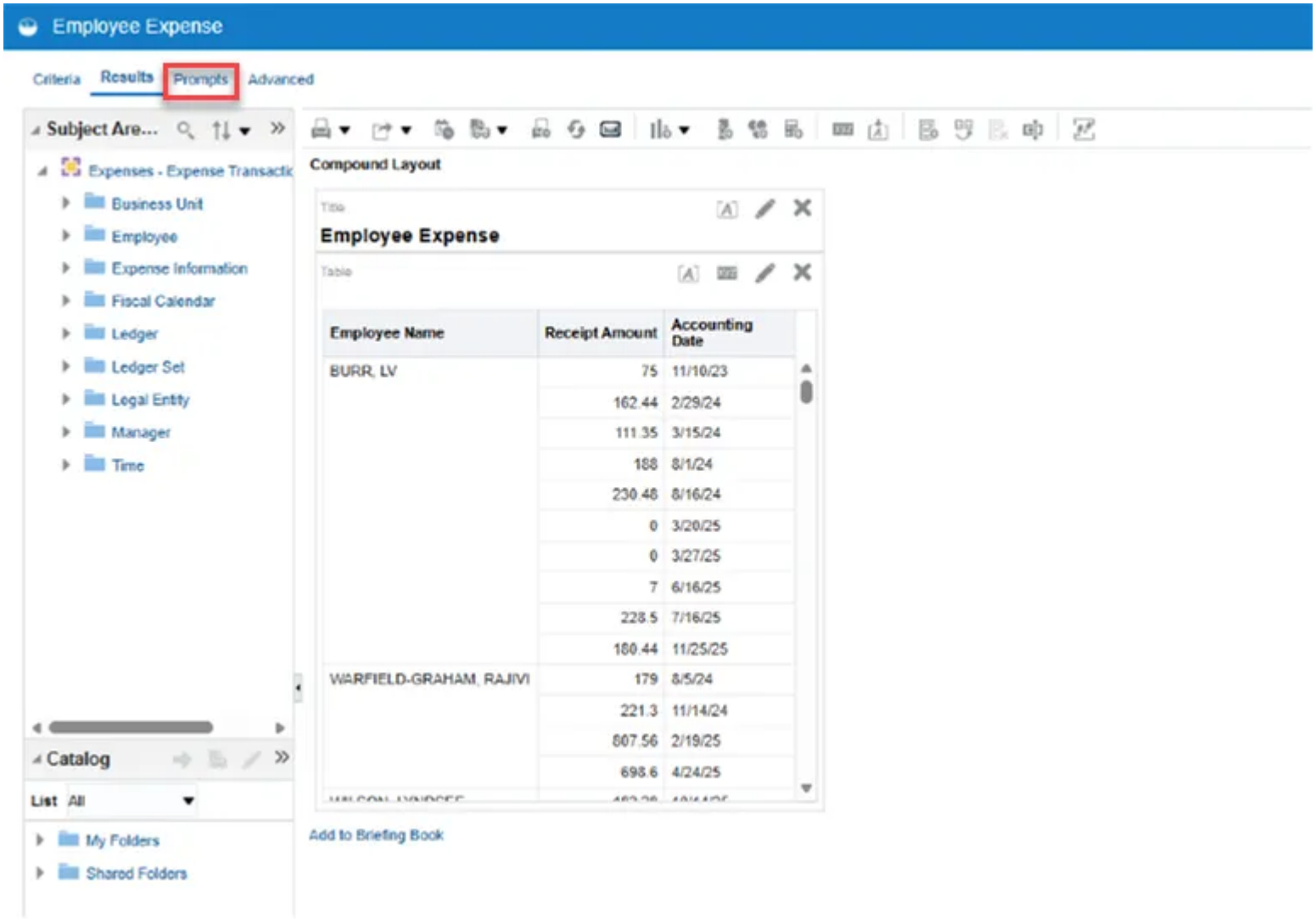
Step 1. Navigate to the report you wish to work with and choose **Edit** under the report name.

Image



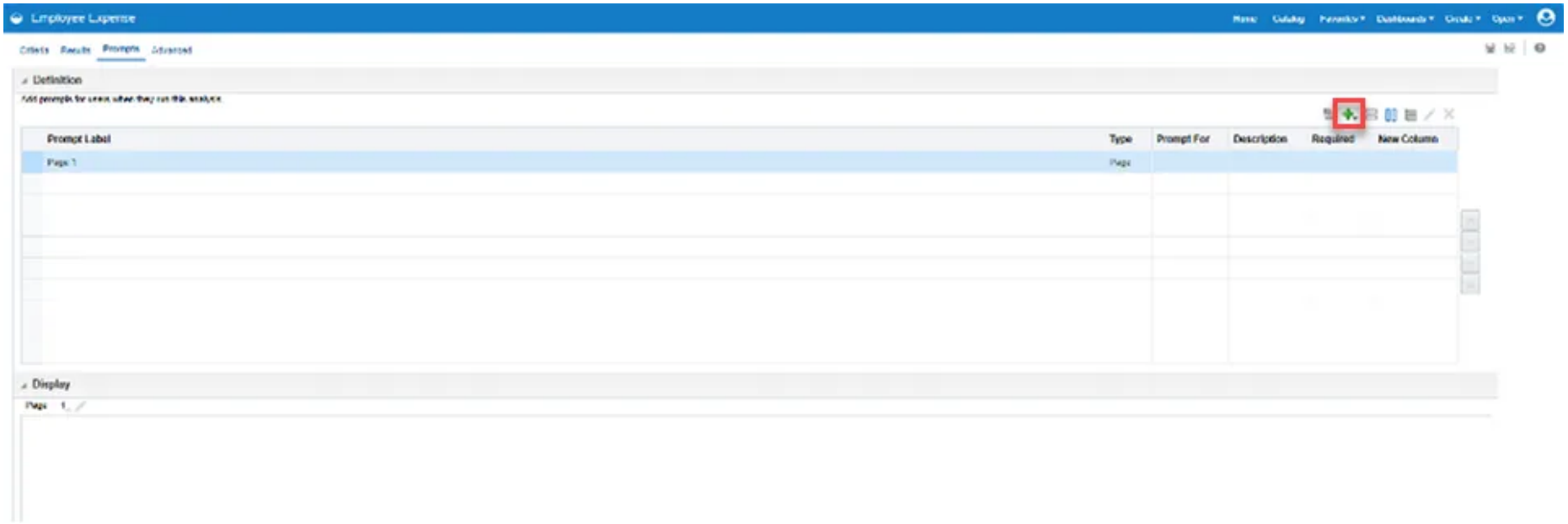
Step 2. Select the **Prompts** tab.

Image



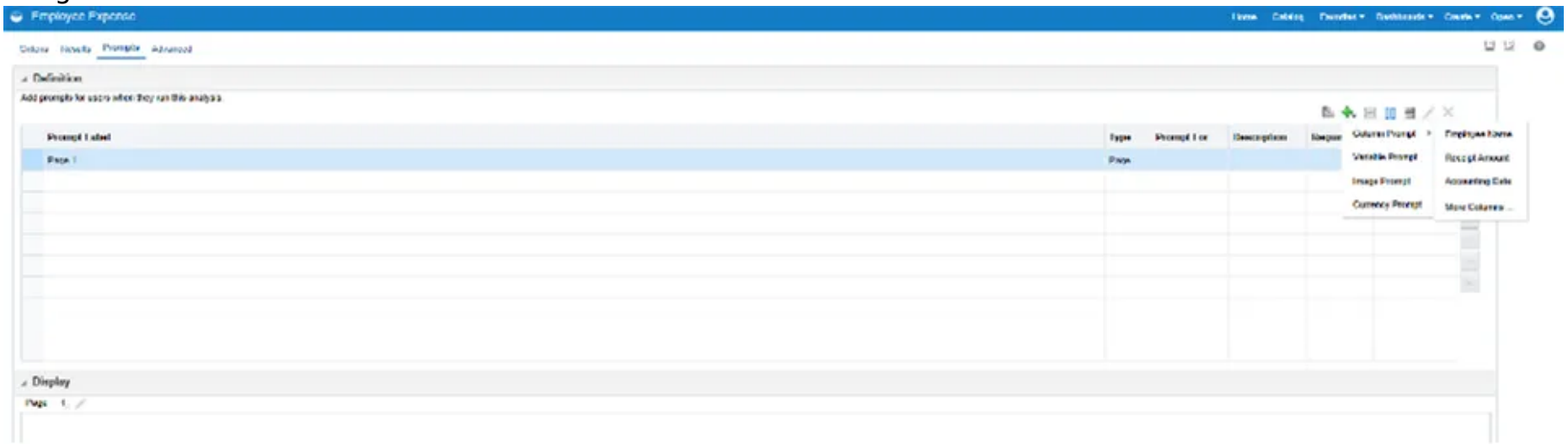
Step 3. Select the **Add Prompt** icon. It looks like a plus sign.

Image



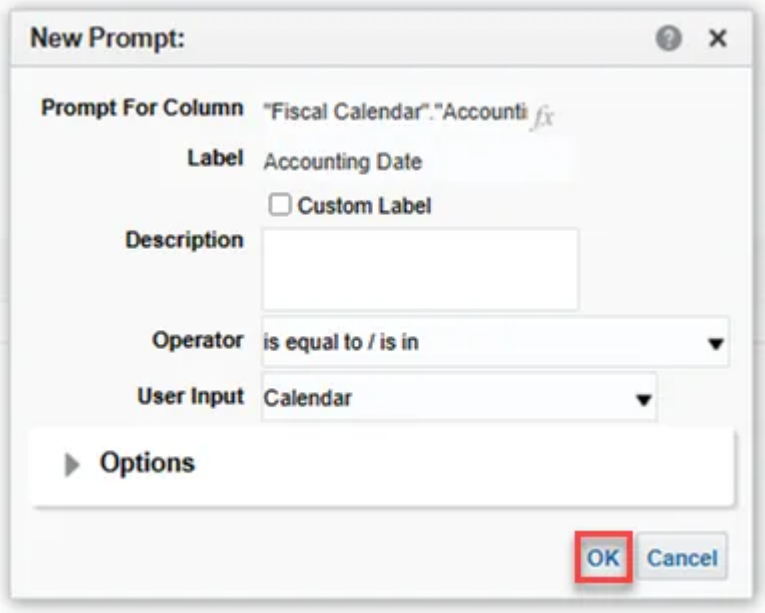
Step 4. Hover over **Column Prompt** from the drop-down menu to produce a pop-out menu. Then, choose the column you want to turn into a parameter.

Image



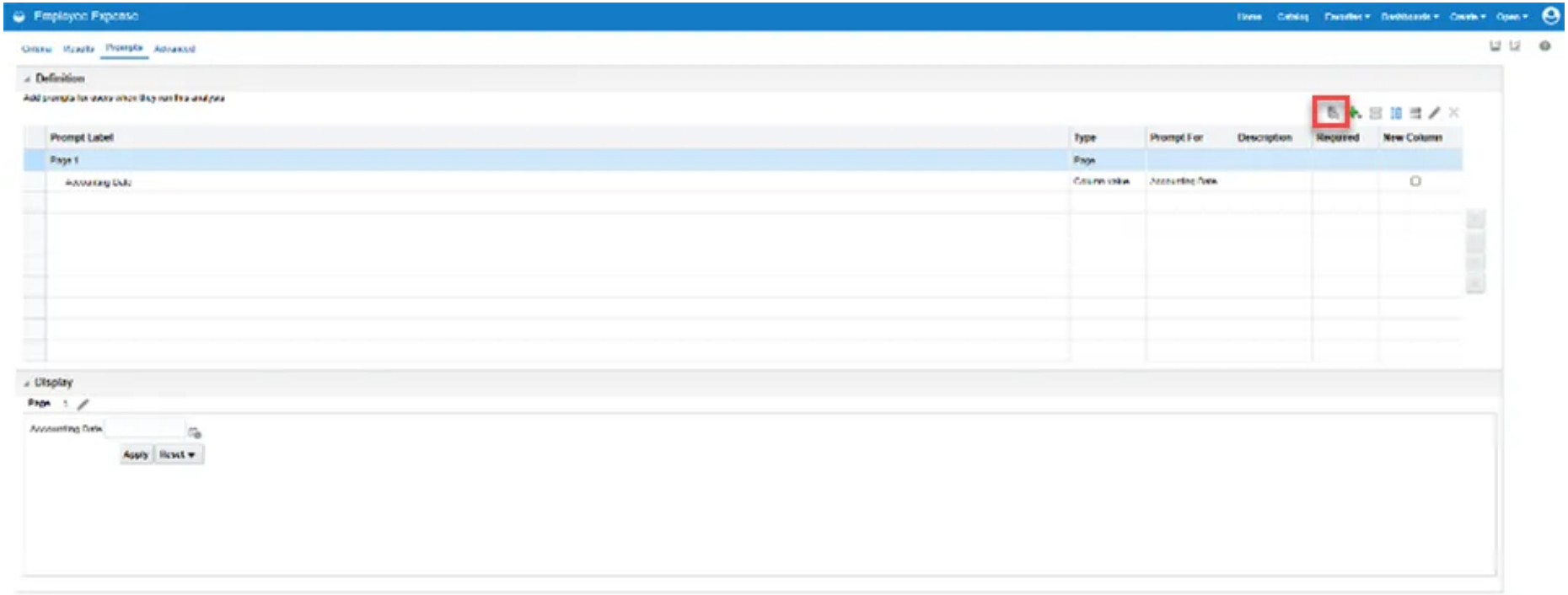
Step 5. The New Prompt pop-up will default to “**is equal to/is in**” for the Operator field. You can change the Operator field to meet your specific needs. Click **OK**.

Image



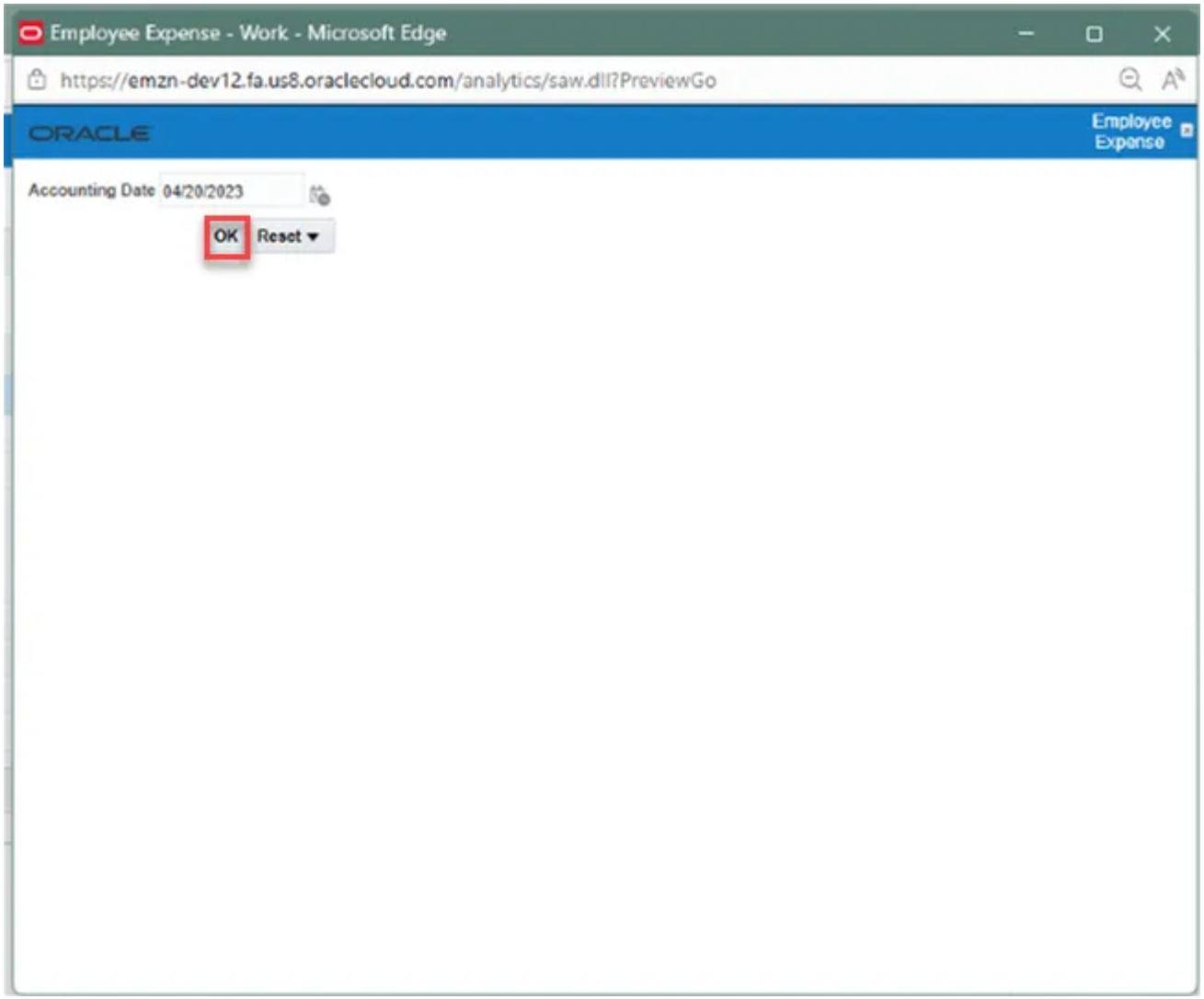
Step 6. The new prompt will appear in the Display section. You can choose the **Preview** button to preview the prompt.

Image



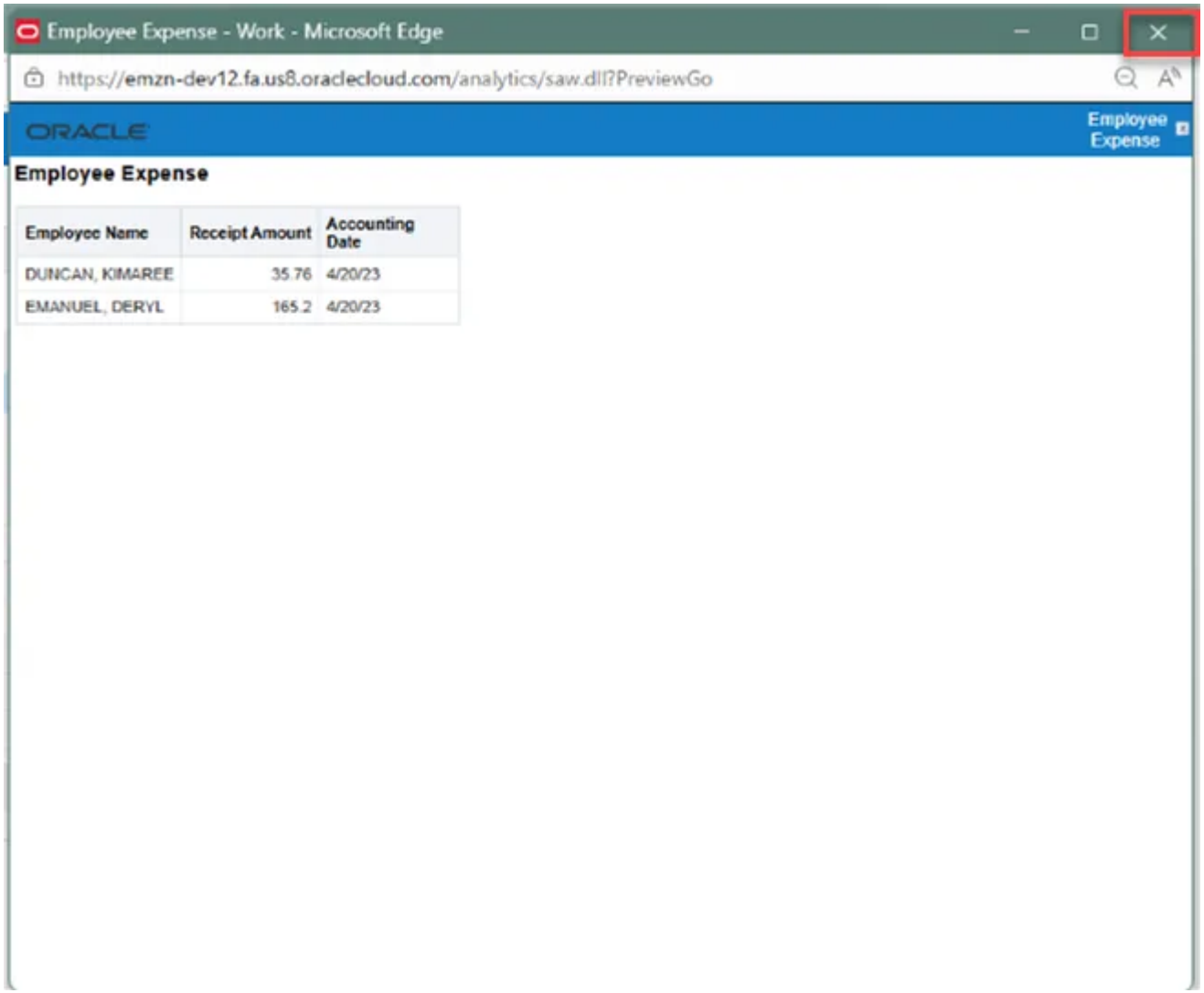
Step 7. If you choose to preview the prompt, you can fulfill the prompt requirements and choose **OK** to see the results.

Image



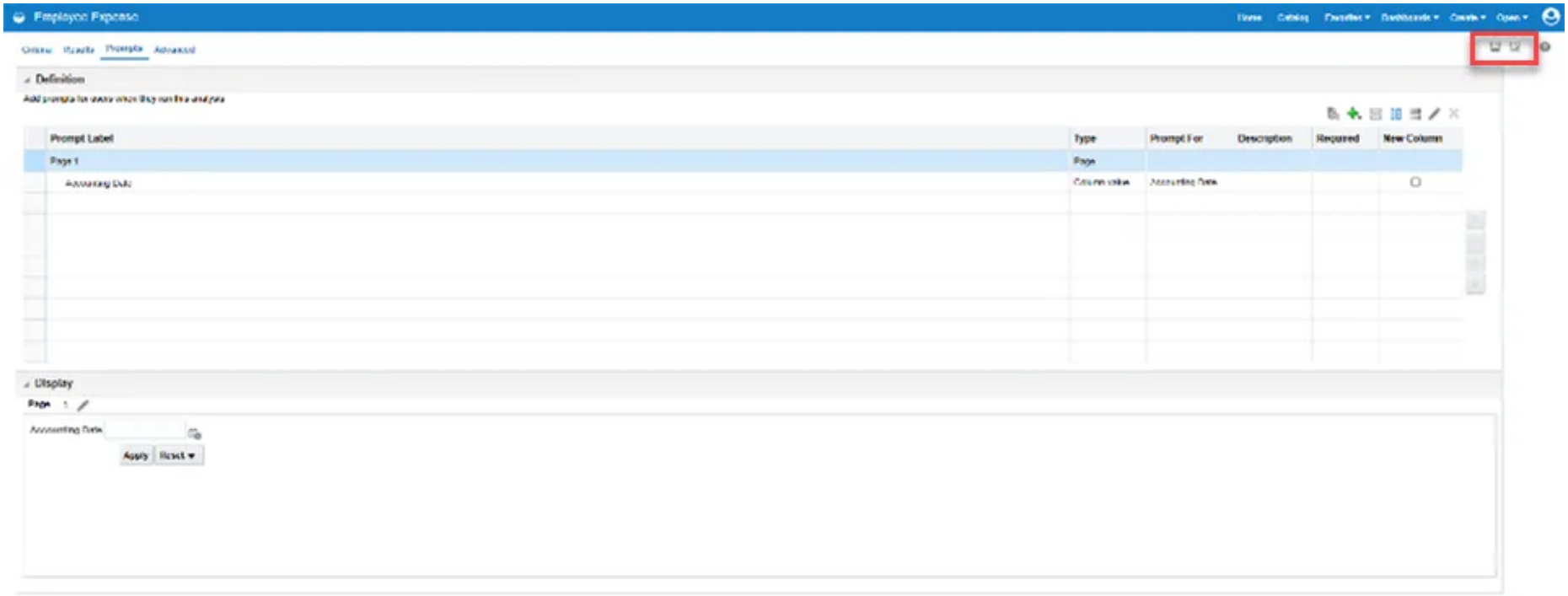
Step 8. A quick preview of the data will populate. Select the **X** in the upper right of the pop-up to close the preview.

Image



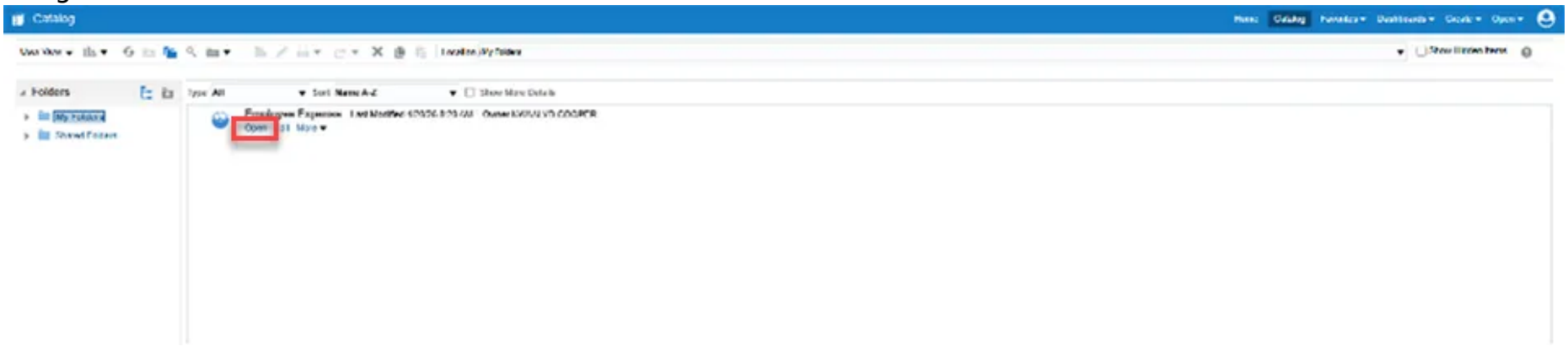
Step 9. When you are satisfied with the prompts created, remember to use the **Save or Save As** button to save the analysis.

Image



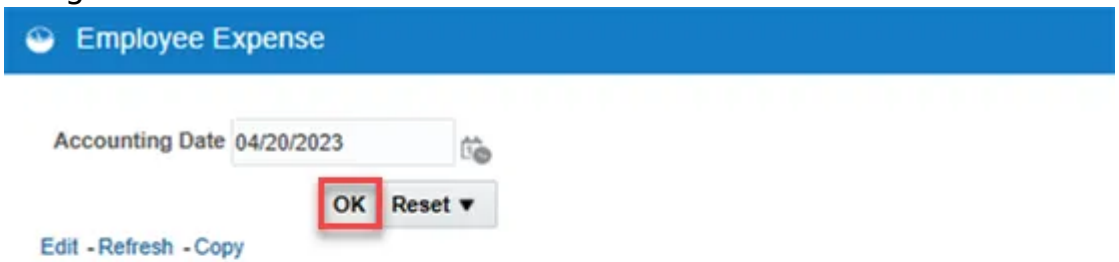
Step 10. Navigate back to the **Catalog** page. Choose **Open** under the saved analysis.

Image



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

Image



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