OTBI-05 Filters

Purpose

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

Introduction and Overview

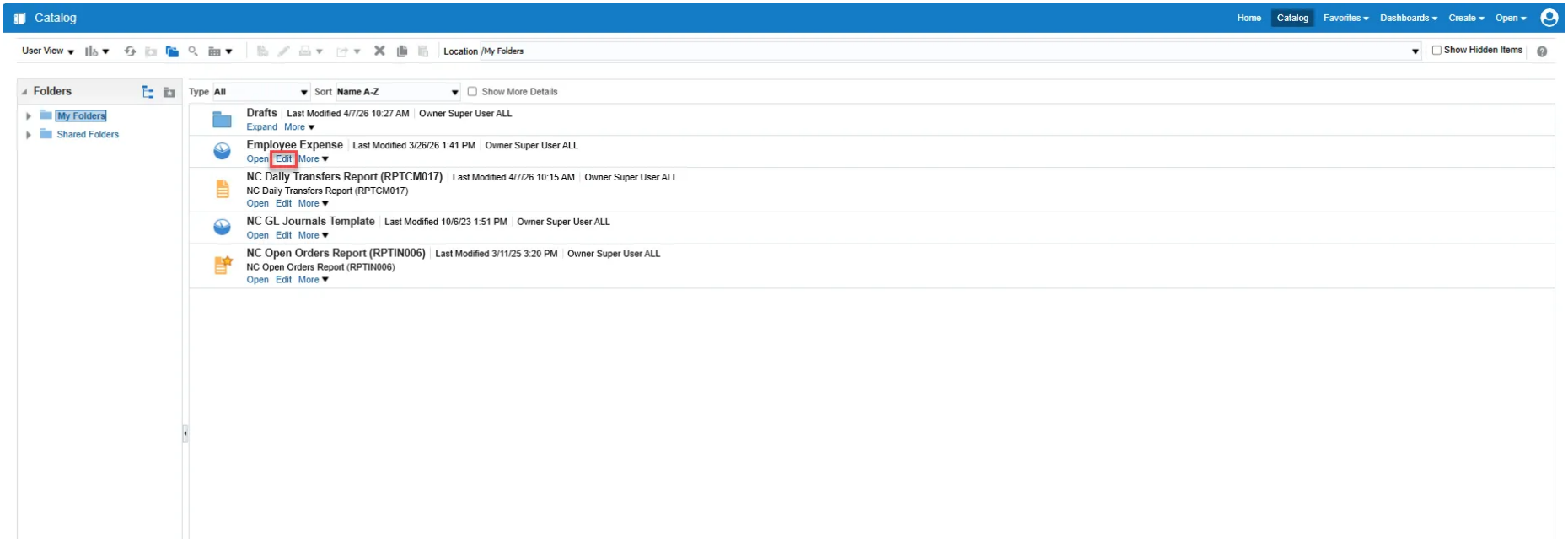
This QRG covers the process of applying a filter to an OTBI report.

Process

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

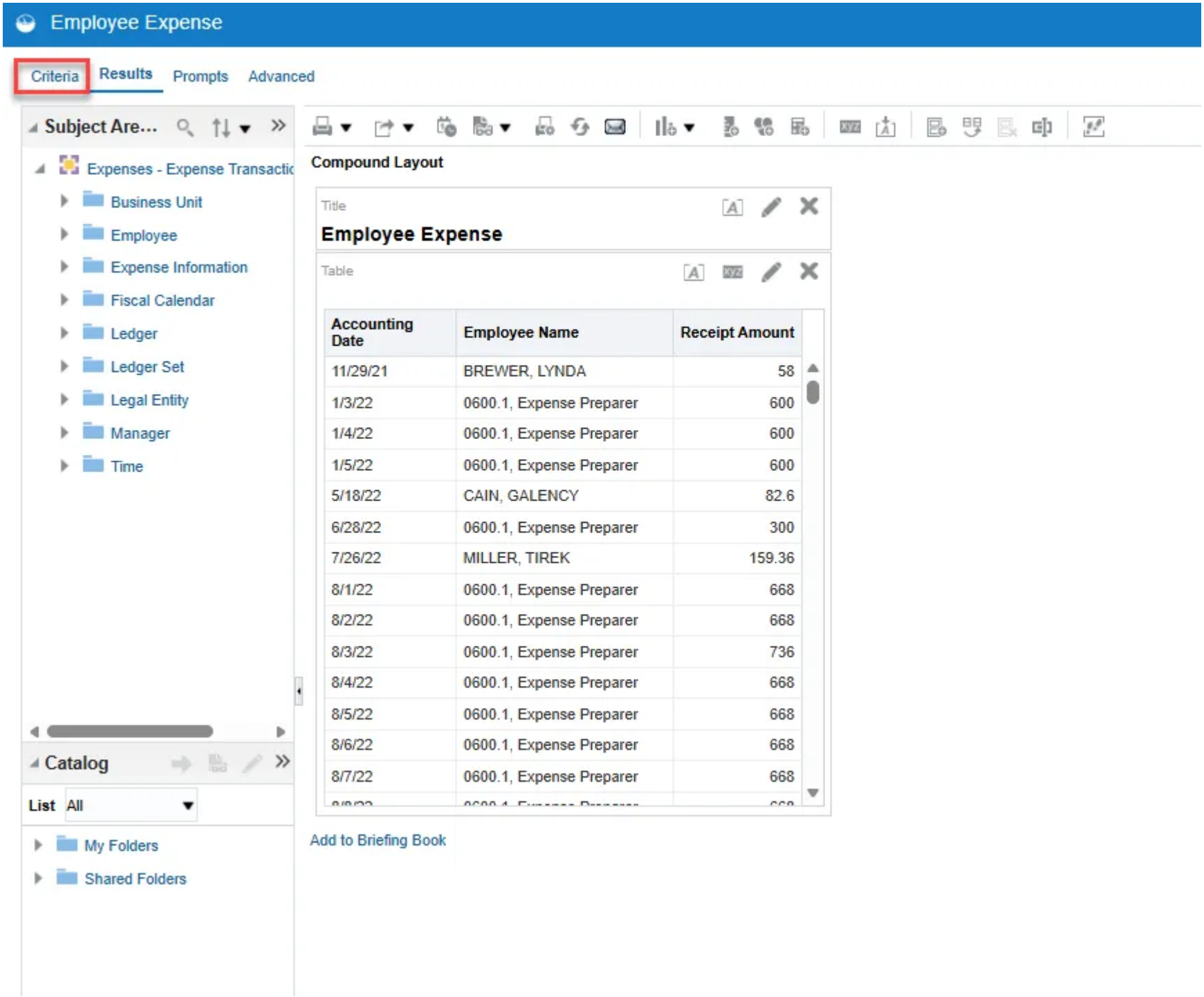
Step 1. Navigate to the Catalog page and choose **Edit** under a report.

Image



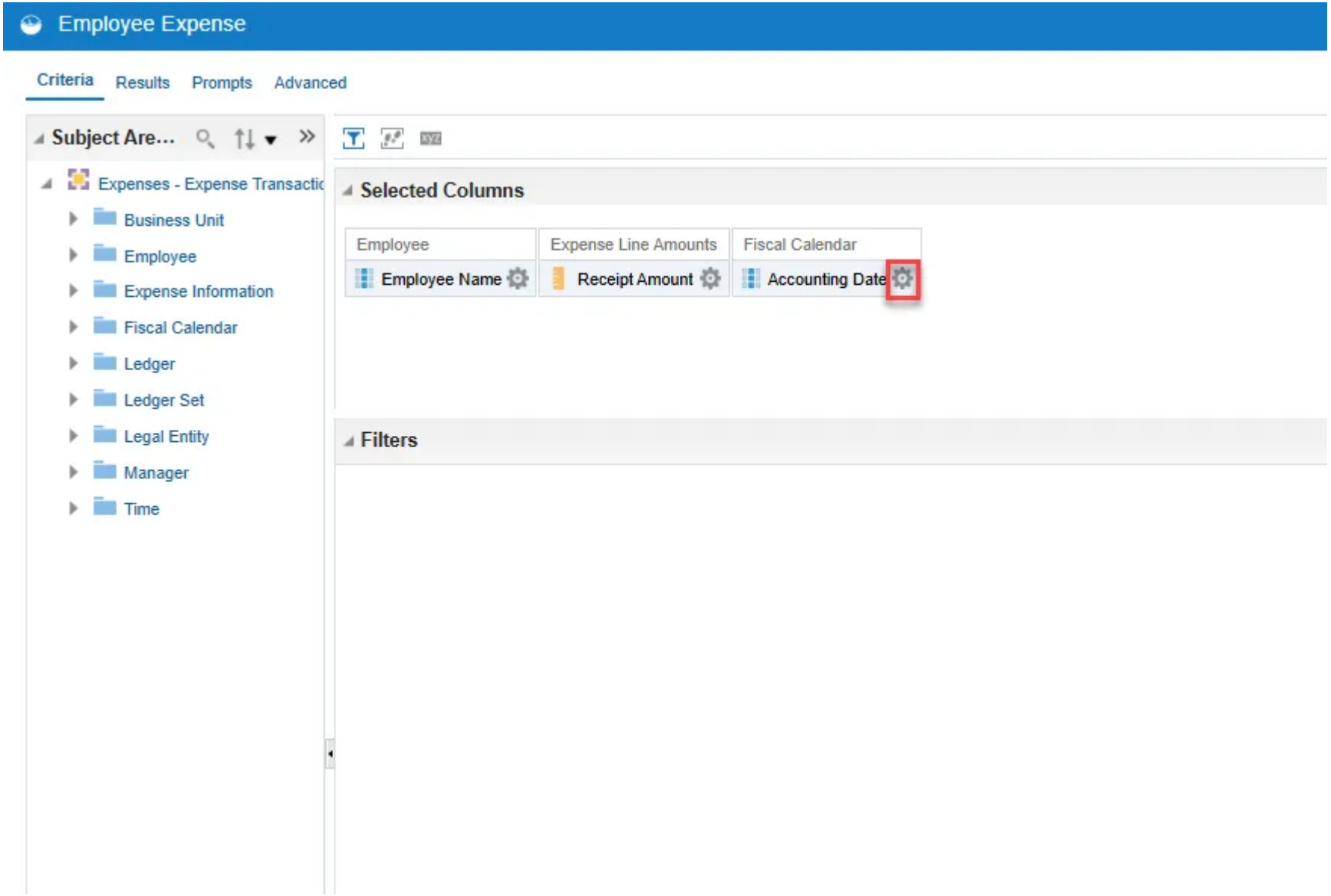
Step 2. Select the **Criteria** tab.

Image


Employee Expense
Criteria
Results
Prompts
Advanced
Subject Are...
Expenses - Expense Transactic
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
Accounting Date
Employee Name
Receipt Amount
11/29/21 BREWER, LYNDA 58
1/3/22 0600.1, Expense Preparer 600
1/4/22 0600.1, Expense Preparer 600
1/5/22 0600.1, Expense Preparer 600
5/18/22 CAIN, GALENCY 82.6
6/28/22 0600.1, Expense Preparer 300
7/26/22 MILLER, TIREK 159.36
8/1/22 0600.1, Expense Preparer 668
8/2/22 0600.1, Expense Preparer 668
8/3/22 0600.1, Expense Preparer 736
8/4/22 0600.1, Expense Preparer 668
8/5/22 0600.1, Expense Preparer 668
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8/7/22 0600.1, Expense Preparer 668
Add to Briefing Book

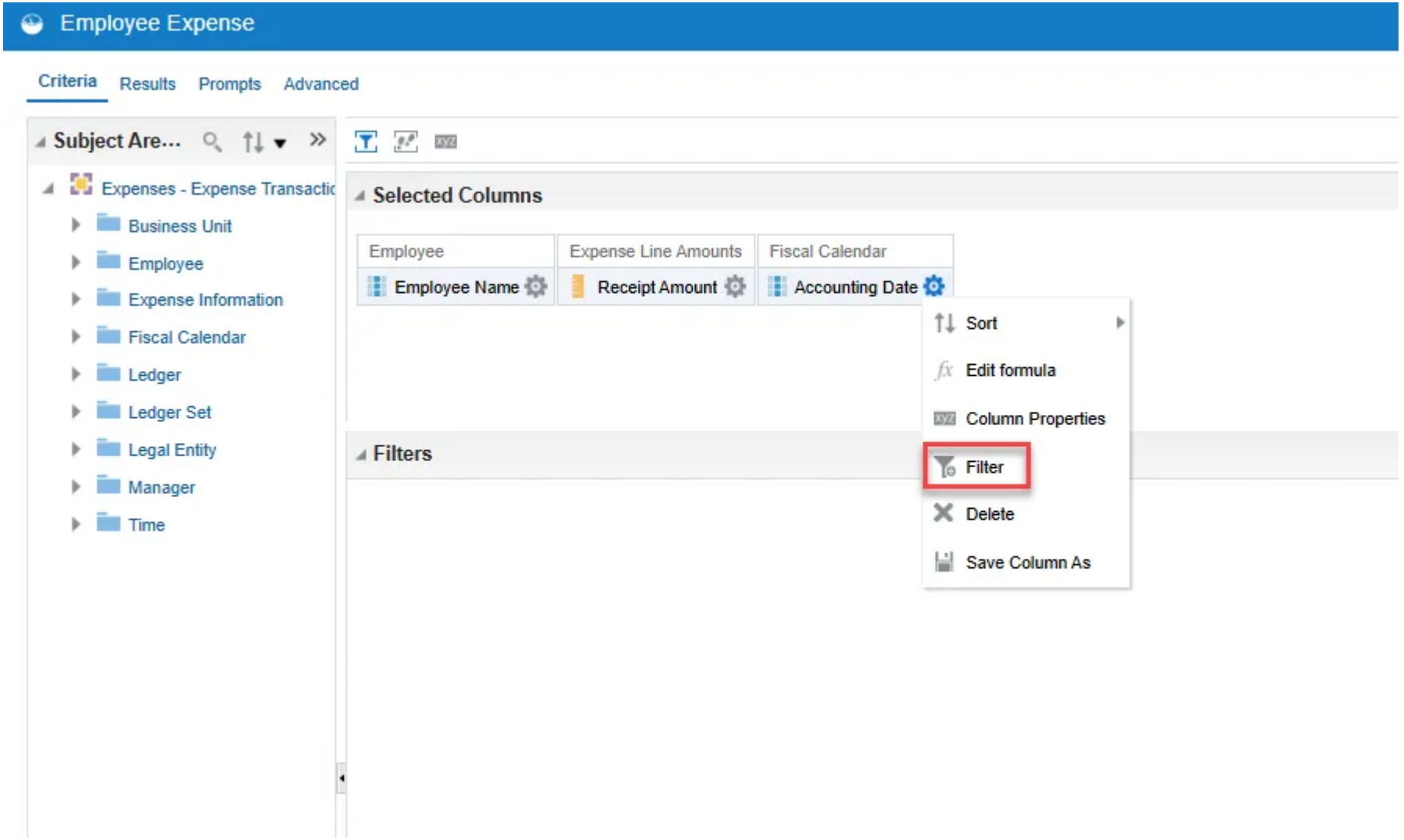
Step 3. Select the **Gear** icon in a column.

Image



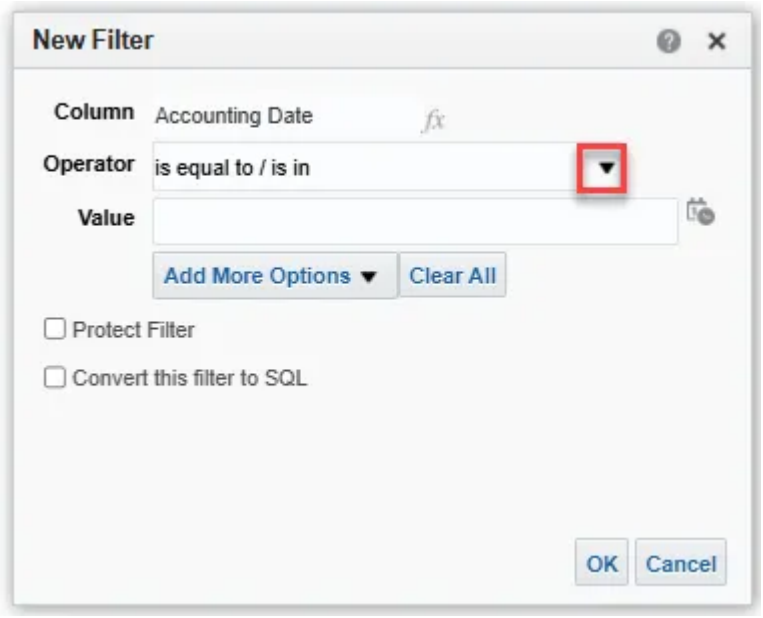
Step 4. Choose **Filter** from the drop-down menu.

Image



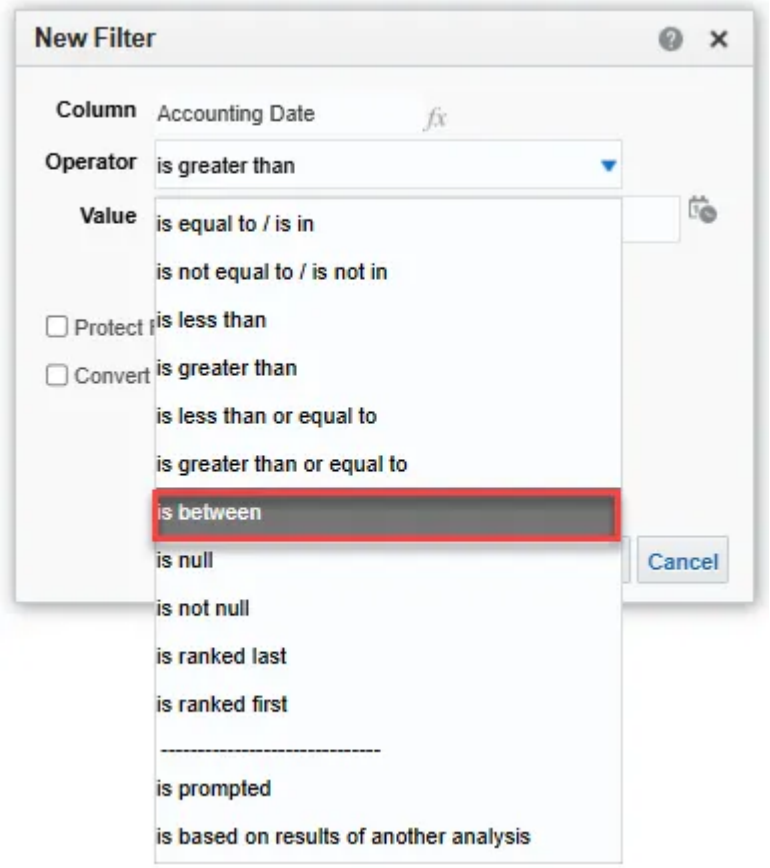
Step 5. The New Filter pop-up will default to "**is equal to / is in**" for the Operator field. Choose the **drop-down arrow** at the end of the field to change the **Operator**.

Image



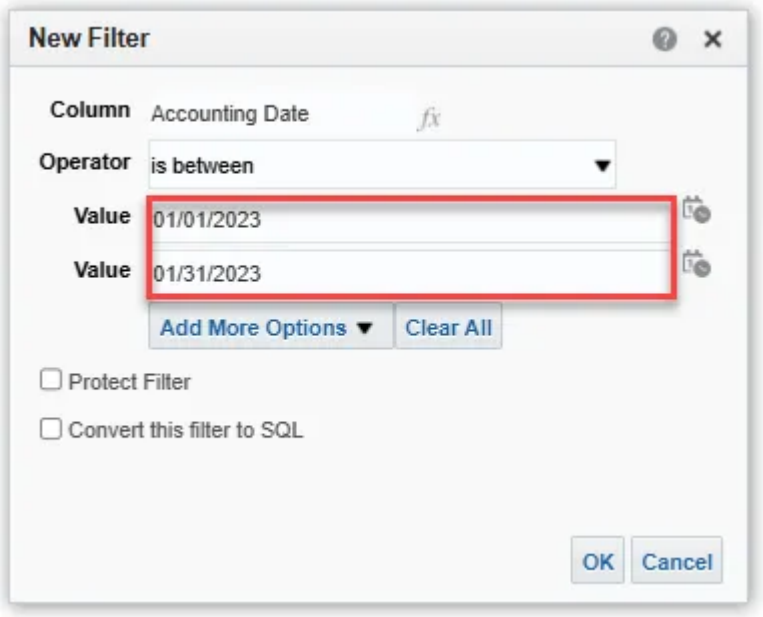
Step 6. Operator options will appear in the drop-down menu. In this example, **is between** will be chosen.

Image



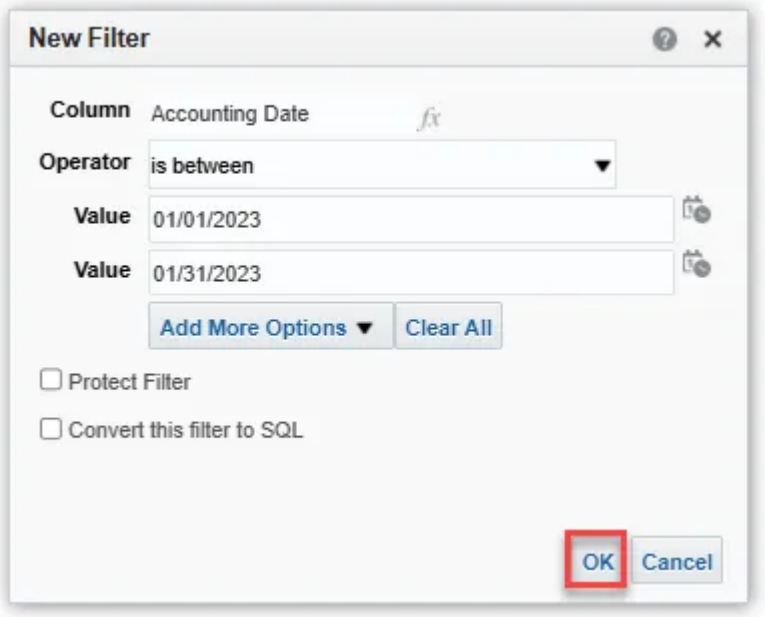
Step 7. In production, you would populate the **Value** fields to reflect a period of time. A longer period of time will take longer to populate data in the report. It is recommended to filter by as short a period of time as possible to expedite the analysis. In this example, the dates have been populated to represent one month of data.

Image



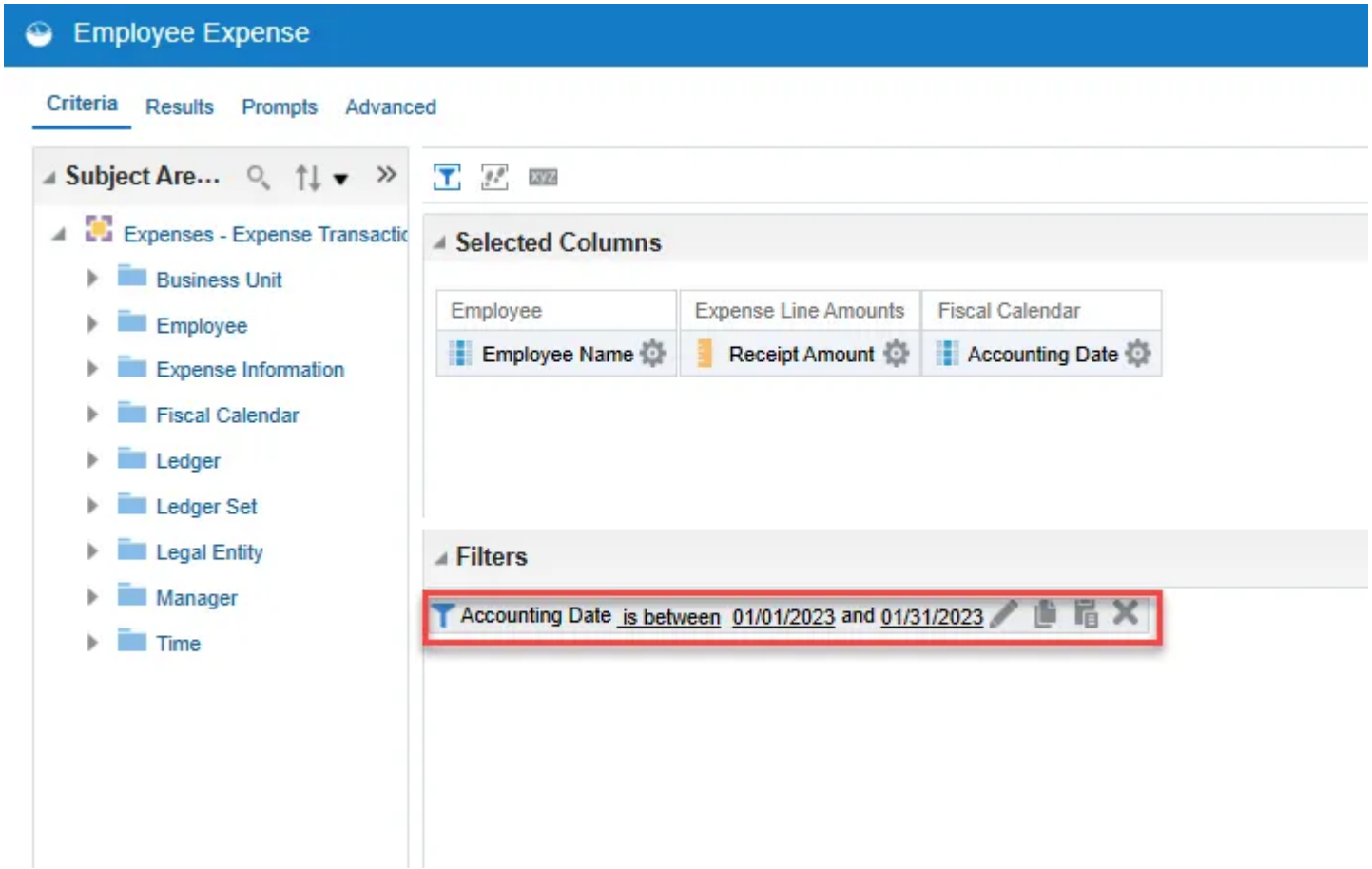
Step 8. Select **OK**.

Image



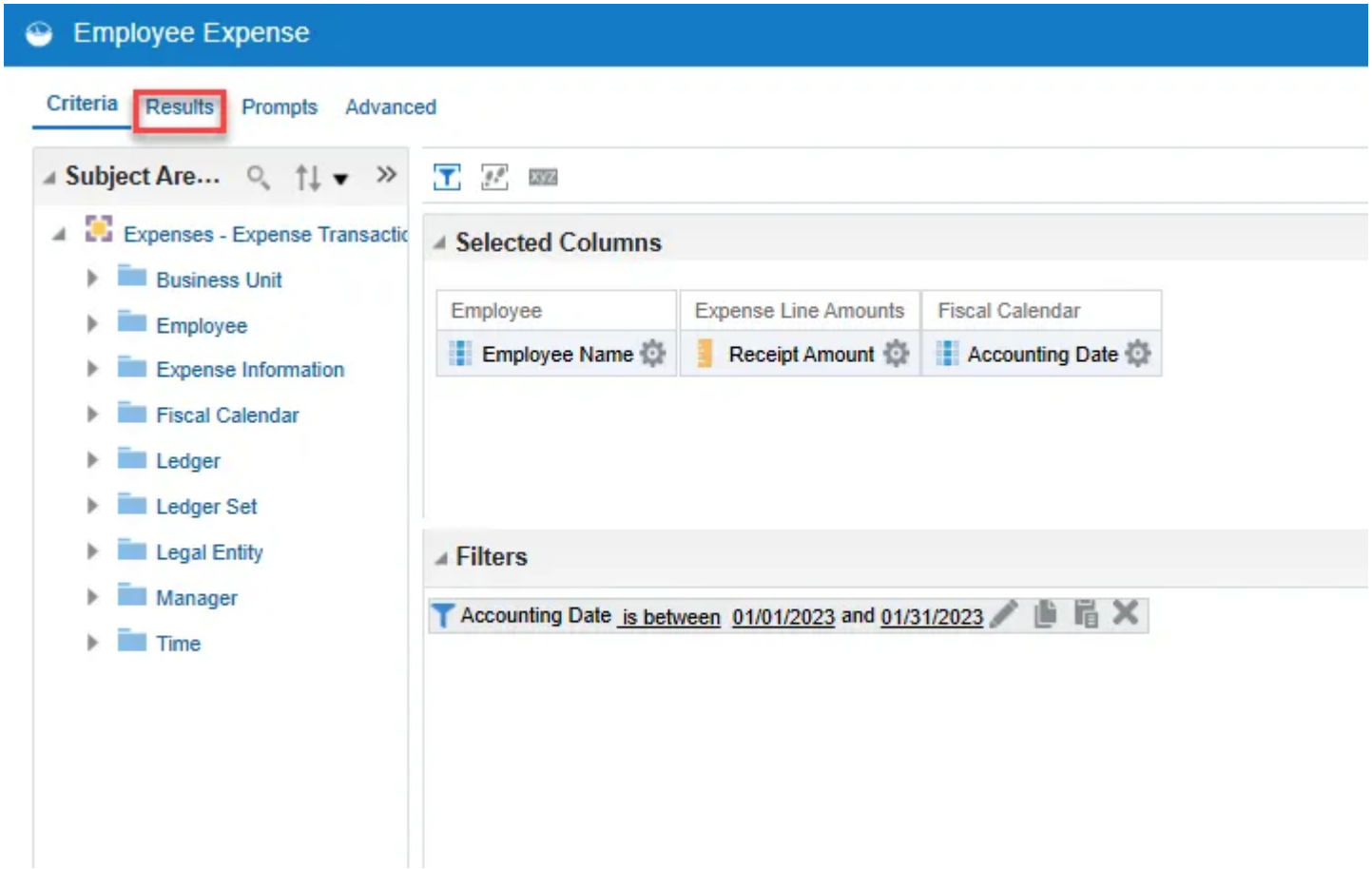
Step 9. The newly applied filter will populate in the **Filters** section. If you hover over it, you can choose **Edit (pencil)** or **Delete (X)**. You can also proceed to add more filters if needed.

Image



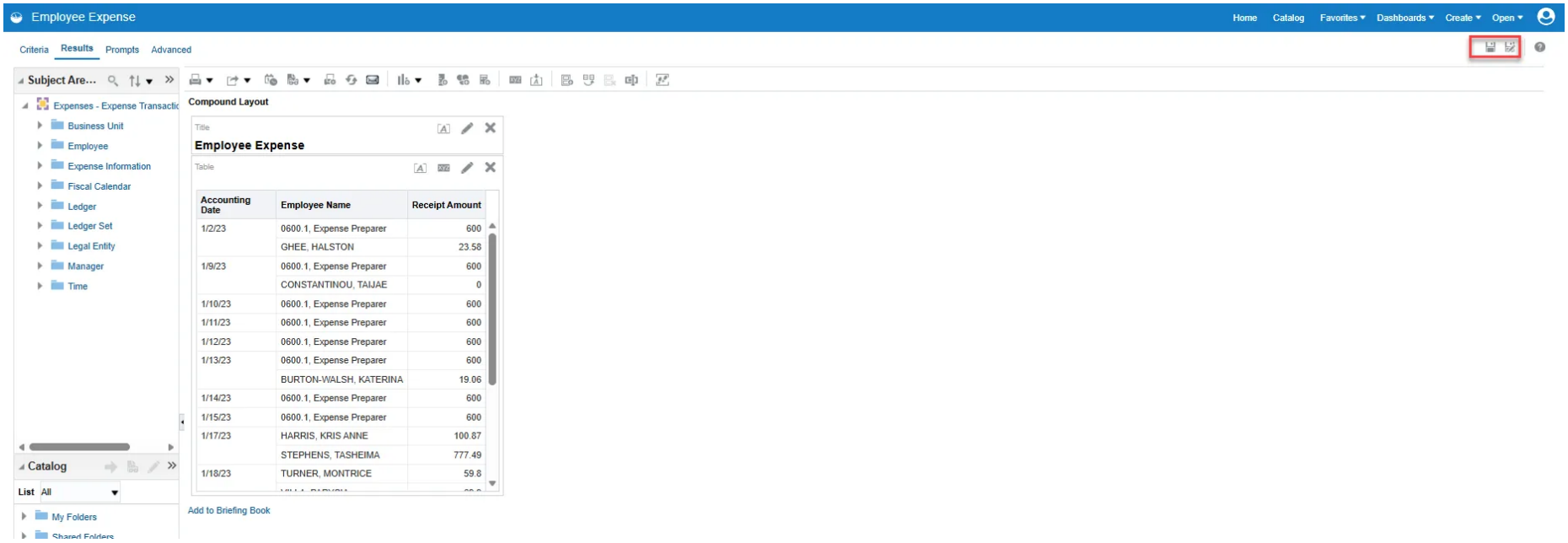
Step 10. Select the **Results** tab to generate the analysis.

Image



Step 11. The report will populate the filtered data. Remember to use the **Save** or **Save As** button to save a copy of your data.

Image



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