

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

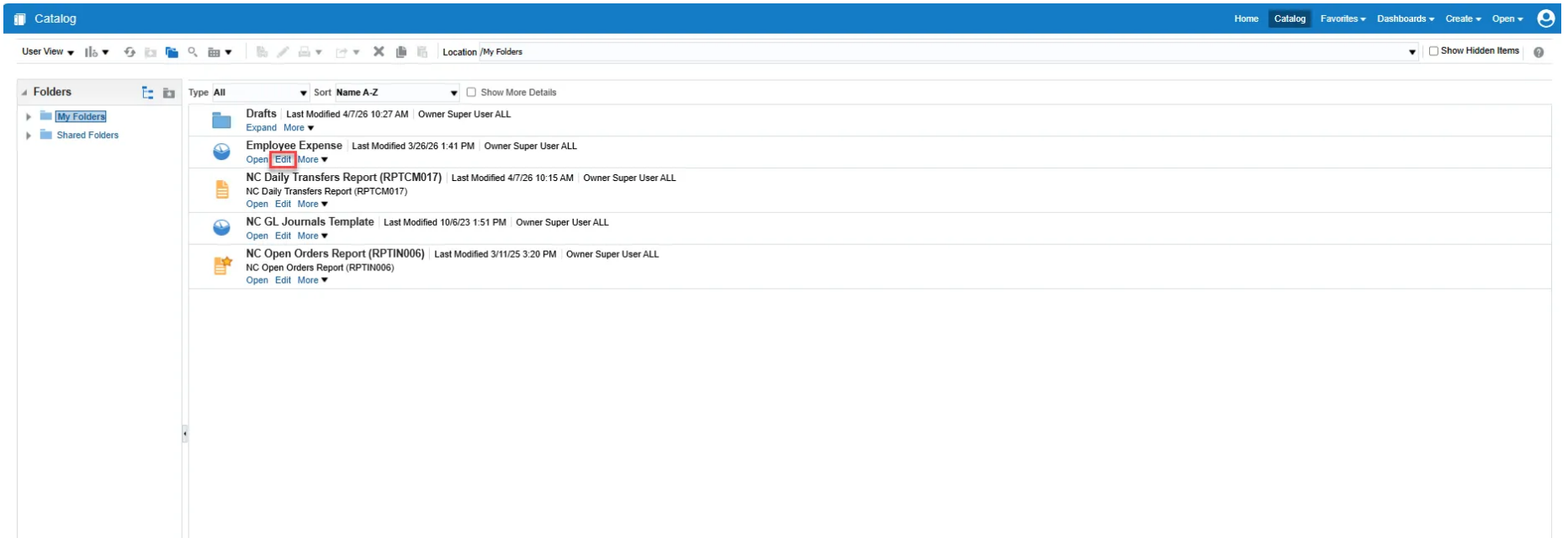
This QRG covers the process of applying a filter to an OTBI report.

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 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

Employee Expense		
Accounting Date	Employee Name	Receipt Amount
11/29/21	BREWER, LYNDY	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
8/6/22	0600.1, Expense Preparer	668
8/7/22	0600.1, Expense Preparer	668
8/8/22	0600.1, Expense Preparer	668

Add to Briefing Book

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

Image

The screenshot displays the 'Employee Expense' interface. At the top, there is a blue header bar with the title 'Employee Expense'. Below the header, there are four tabs: 'Criteria', 'Results', 'Prompts', and 'Advanced'. The 'Criteria' tab is currently selected. On the left side, there is a tree view under the heading 'Subject Area...'. The tree view shows a hierarchy starting with 'Expenses - Expense Transaction', which is expanded to show several sub-items: 'Business Unit', 'Employee', 'Expense Information', 'Fiscal Calendar', 'Ledger', 'Ledger Set', 'Legal Entity', 'Manager', and 'Time'. On the right side, there is a section titled 'Selected Columns'. This section contains a table with three columns: 'Employee', 'Expense Line Amounts', and 'Fiscal Calendar'. Below these columns, there are three rows of data: 'Employee Name', 'Receipt Amount', and 'Accounting Date'. Each row has a gear icon to its right. The gear icon for 'Accounting Date' is highlighted with a red square. Below the 'Selected Columns' section, there is a section titled 'Filters'.

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

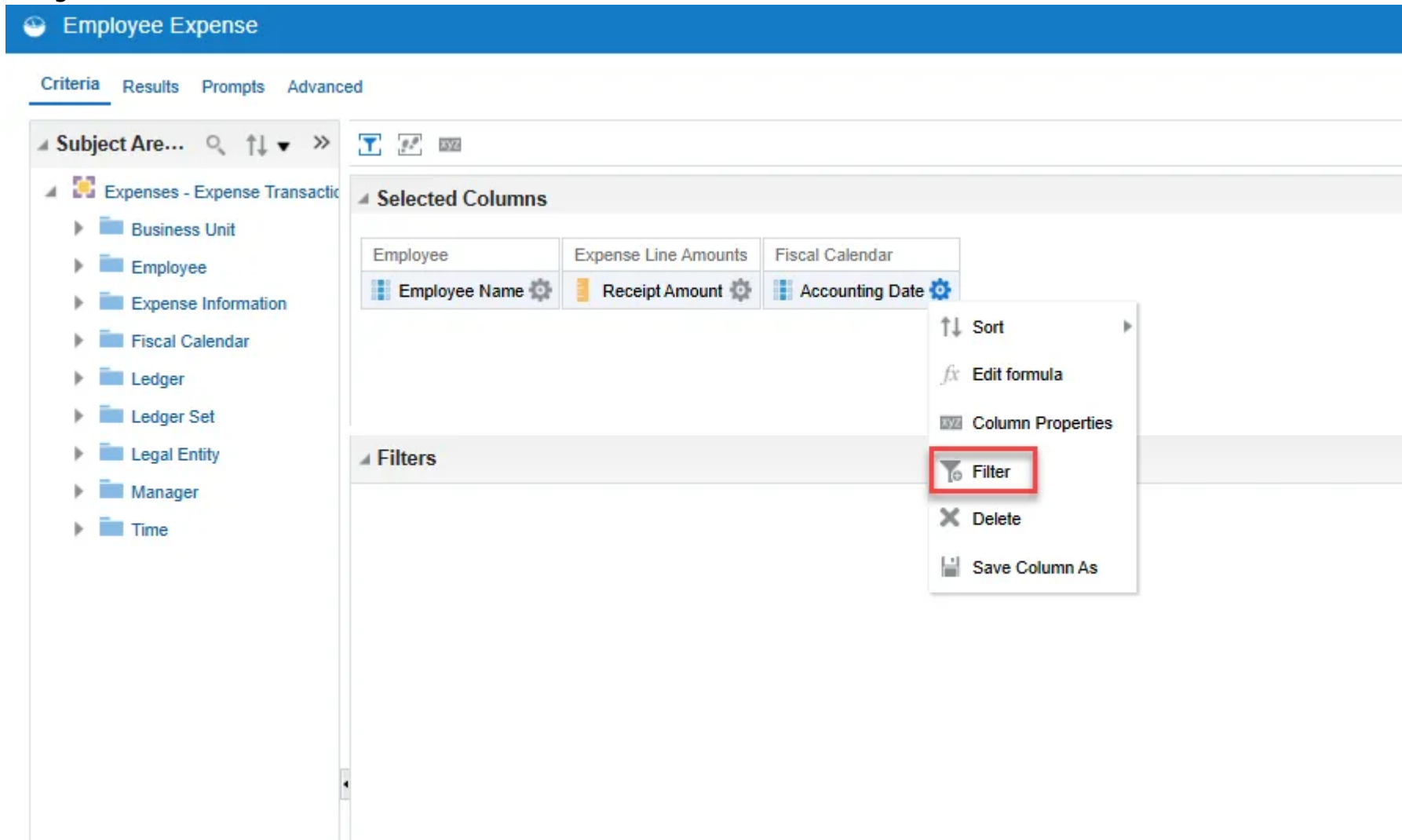
Selected Columns

Employee	Expense Line Amounts	Fiscal Calendar
Employee Name ⚙️	Receipt Amount ⚙️	Accounting Date ⚙️

Filters

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**.

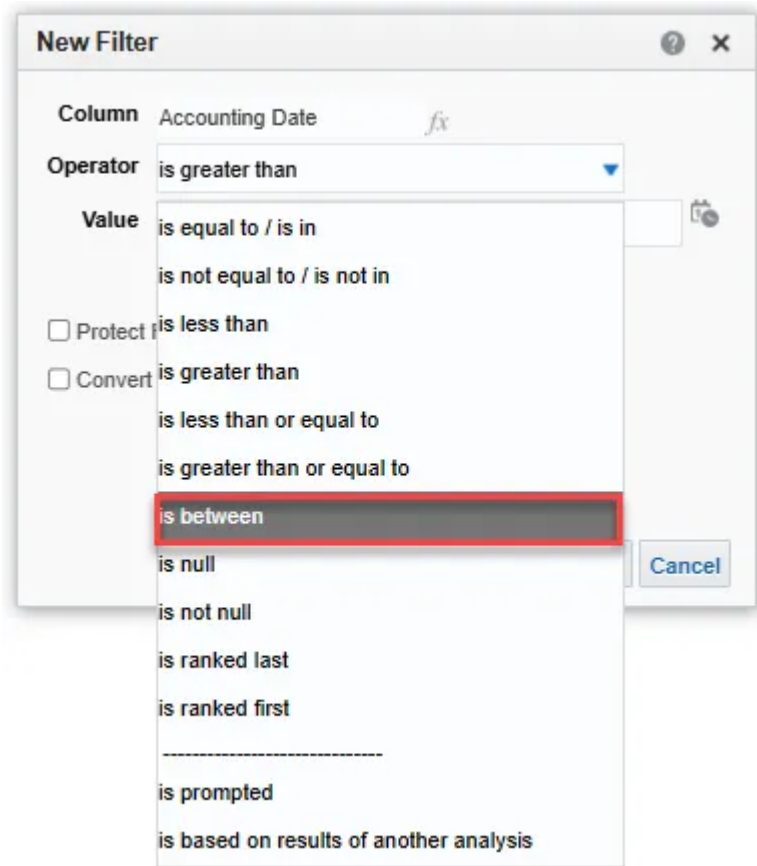
Image

The image shows a 'New Filter' dialog box with the following fields and controls:

- Column:** Accounting Date
- Operator:** is equal to / is in (highlighted with a red box)
- Value:** (empty text field)
- Buttons:** Add More Options (with a small downward arrow), Clear All
- Checkboxes:** ☐ Protect Filter, ☐ Convert this filter to SQL
- Bottom Buttons:** OK, Cancel

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

New Filter

Column Accounting Date *fx*

Operator is between ▼

Value 01/01/2023

Value 01/31/2023

[Add More Options](#) ▼ [Clear All](#)

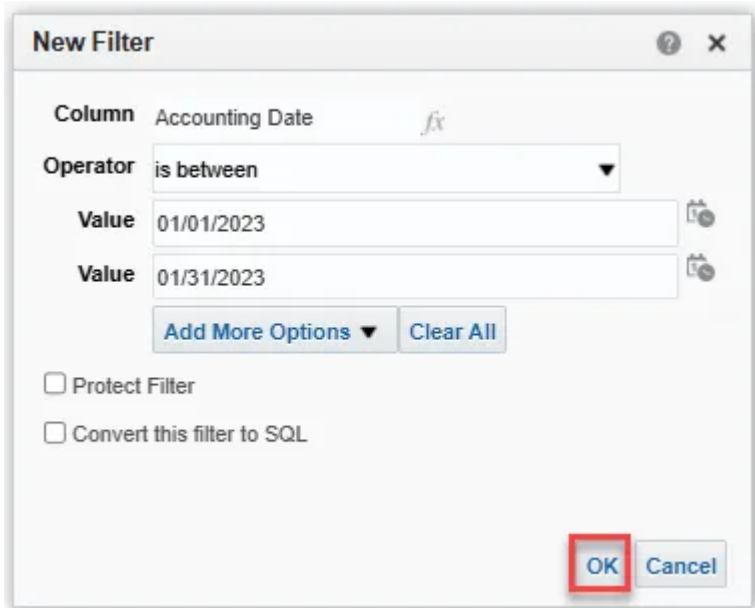
☐ Protect Filter

☐ Convert this filter to SQL

[OK](#) [Cancel](#)

Step 8. Select **OK**.

Image



New Filter

Column Accounting Date *fx*

Operator is between ▼

Value 01/01/2023

Value 01/31/2023

Add More Options ▼ Clear All

☐ Protect Filter

☐ Convert this filter to SQL

OK Cancel

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

Employee Expense

CriteriaResultsPromptsAdvanced

Subject Are...

Expenses - Expense Transaction

Business Unit

Employee

Expense Information

Fiscal Calendar

Ledger

Ledger Set

Legal Entity

Manager

Time

Selected Columns

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

Filters

Accounting Date is between 01/01/2023 and 01/31/2023

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

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

Selected Columns

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

Filters

Accounting Date is between 01/01/2023 and 01/31/2023

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

Employee Expense

HomeCatalogFavoritesDashboardsCreateOpen

CriteriaResultsPromptsAdvanced

Subject Area...

Expenses - Expense Transaction

Business UnitEmployeeExpense InformationFiscal CalendarLedgerLedger SetLegal EntityManagerTime

Catalog

ListAll

My FoldersShared Folders

Compound Layout

TitleEmployee Expense

Table

Accounting Date	Employee Name	Receipt Amount
1/2/23	0600.1, Expense Preparer	600
	GHEE, HALSTON	23.58
1/9/23	0600.1, Expense Preparer	600
	CONSTANTINO, TAIJAE	0
1/10/23	0600.1, Expense Preparer	600
1/11/23	0600.1, Expense Preparer	600
1/12/23	0600.1, Expense Preparer	600
1/13/23	0600.1, Expense Preparer	600
	BURTON-WALSH, KATERINA	19.06
1/14/23	0600.1, Expense Preparer	600
1/15/23	0600.1, Expense Preparer	600
1/17/23	HARRIS, KRIS ANNE	100.87
	STEPHENS, TASHEIMA	777.49
1/18/23	TURNER, MONTRICE	59.8

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