

OTBI-06 Sorting

Purpose

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

Introduction and Overview

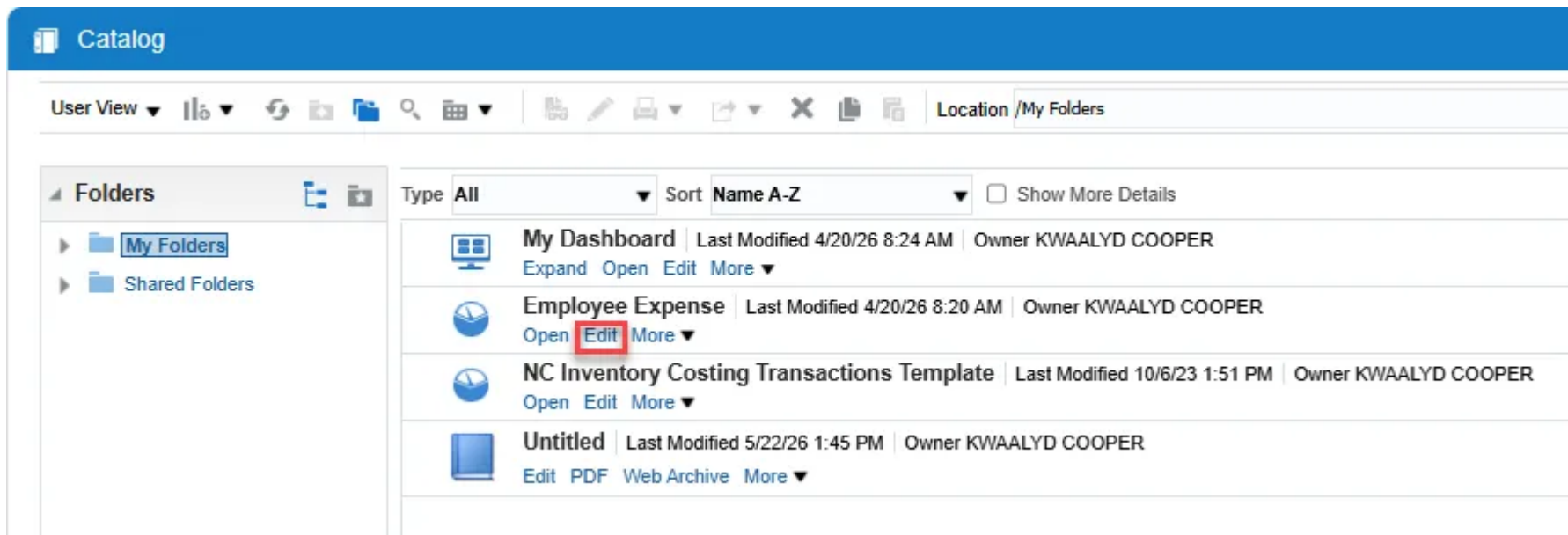
This QRG covers the process of sorting a column in an OTBI report.

Process

Please follow the steps below. There are 8 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 **Criteria** tab.

Image

Criteria

Results

Prompts

Advanced

▲ Subject Are...



Expenses - Expense Transaction

► Business Unit

► Employee

► Expense Information

► Fiscal Calendar

► **Ledger**

- ▶ **Ledger Set**

► Legal Entity

► **Manager**

►  Time

▲ Catalog

List All

All

All

My Folders

Shared Folders

Compound Layout

 $[A^-]$ 

Employee Expense

[A]

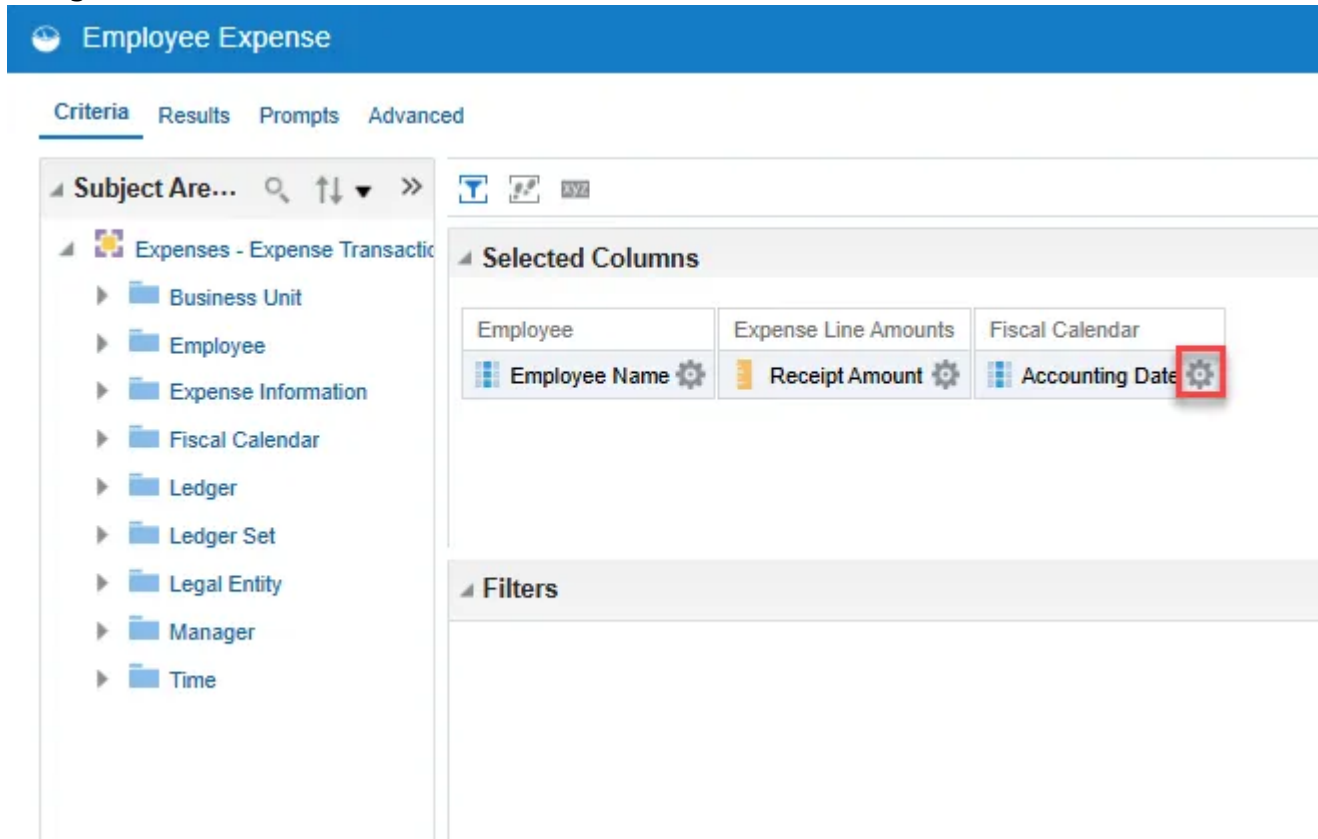


Employee Name	Receipt Amount	Accounting Date
BURR, LV	75	11/10/23
	162.44	2/29/24
	111.35	3/15/24
	188	8/1/24
	230.48	8/16/24
	0	3/20/25
	0	3/27/25
	7	6/16/25
	228.5	7/16/25
	180.44	11/25/25
WARFIELD-GRAHAM, RAJIVI	179	8/5/24
	221.3	11/14/24
	807.56	2/19/25
	698.6	4/24/25
WILSON, VANDER	102.28	10/14/25

[Add to Briefing Book](#)

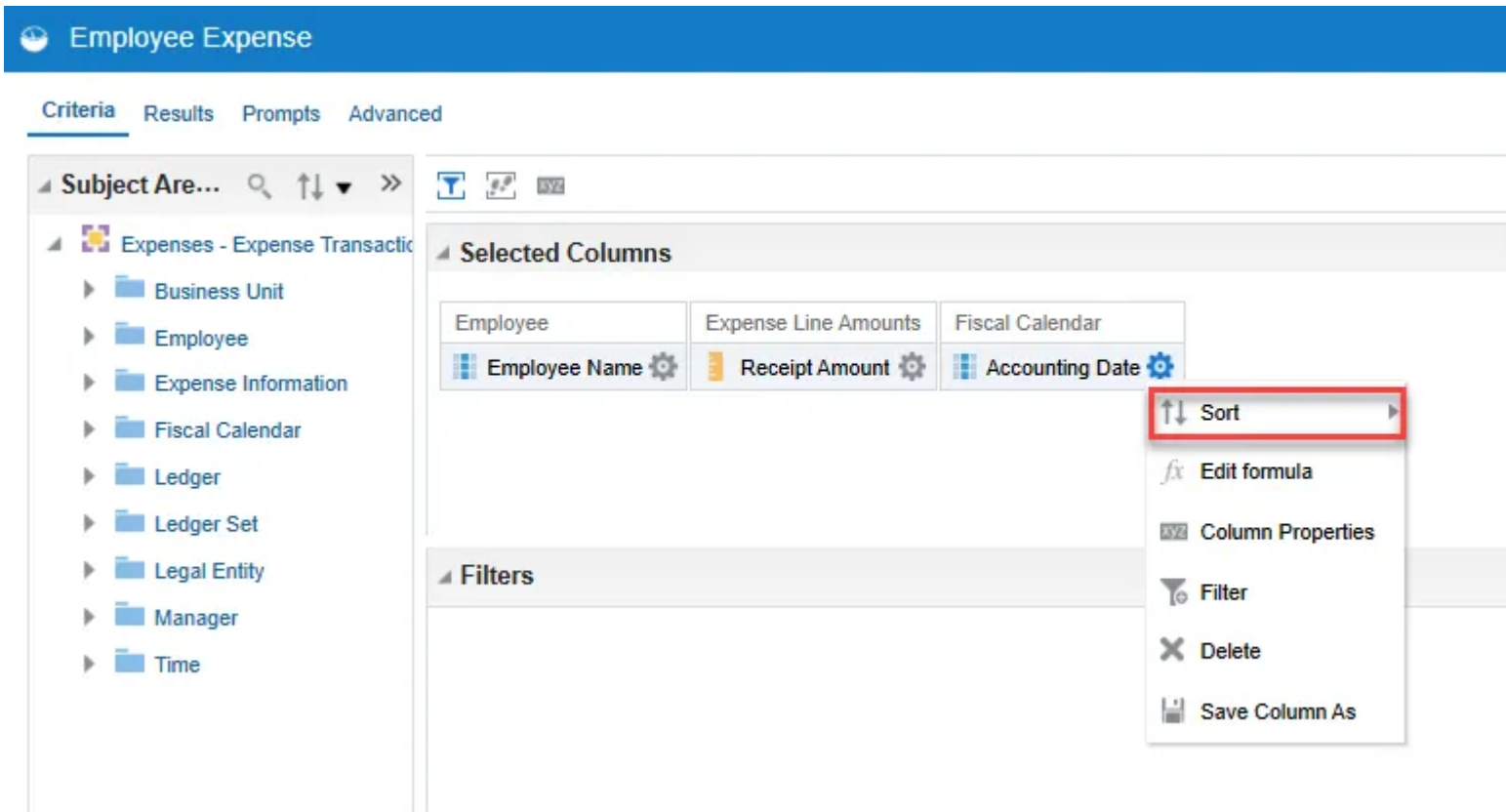
Step 3. Select the **Gear** icon within the column you want to work with.

Image



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

Image



Step 5. Select your sorting choice from the pop-out menu.

Image

Employee Expense

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Selected Columns

Employee

Expense Line Amounts

Fiscal Calendar

Employee Name

Receipt Amount

Accounting Date

Filters

Sort

Edit formula

Column Properties

Filter

Delete

Save Column As

Sort Ascending

Sort Descending

Add Ascending Sort

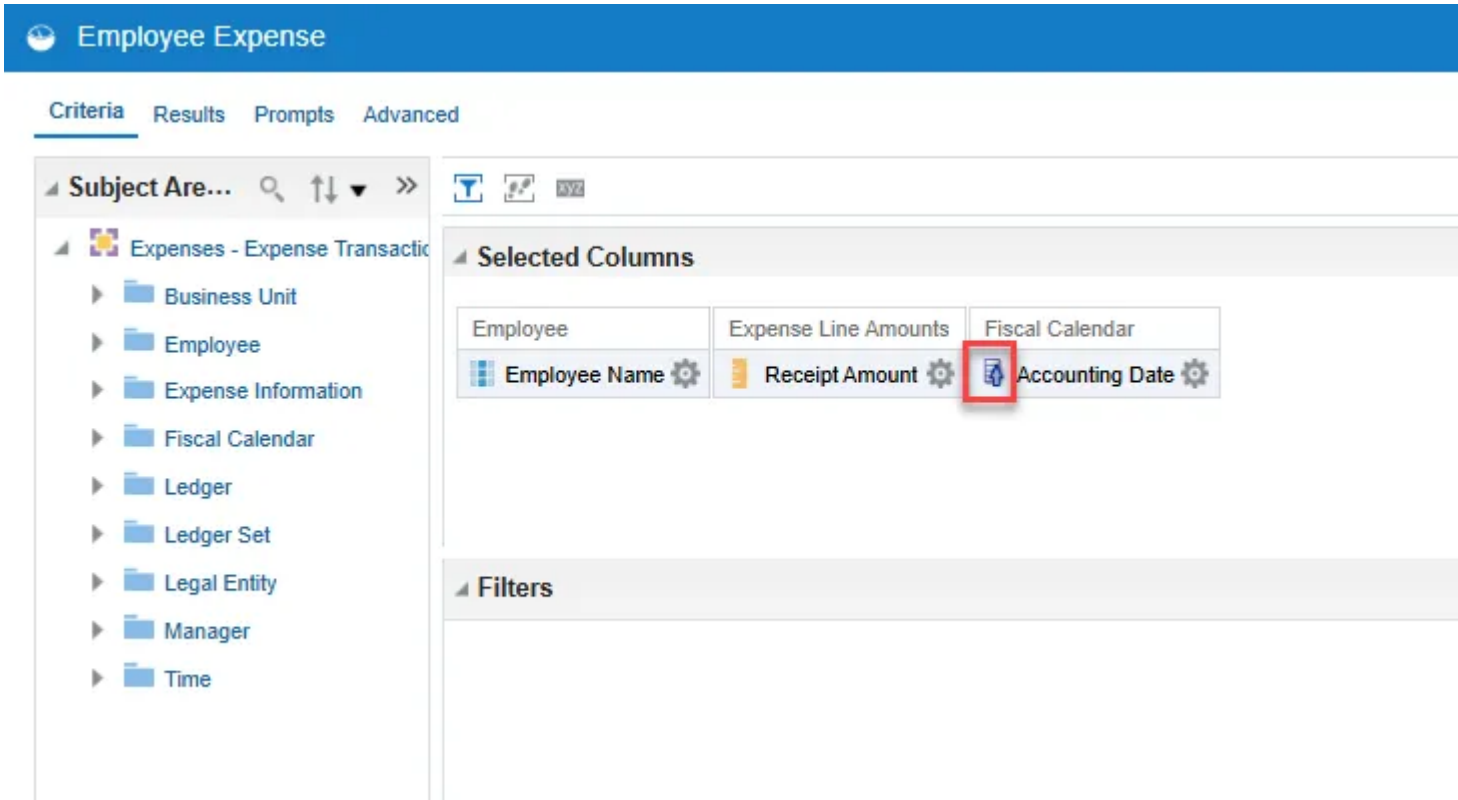
Add Descending Sort

Clear Sort

Clear All Sorts in All Columns

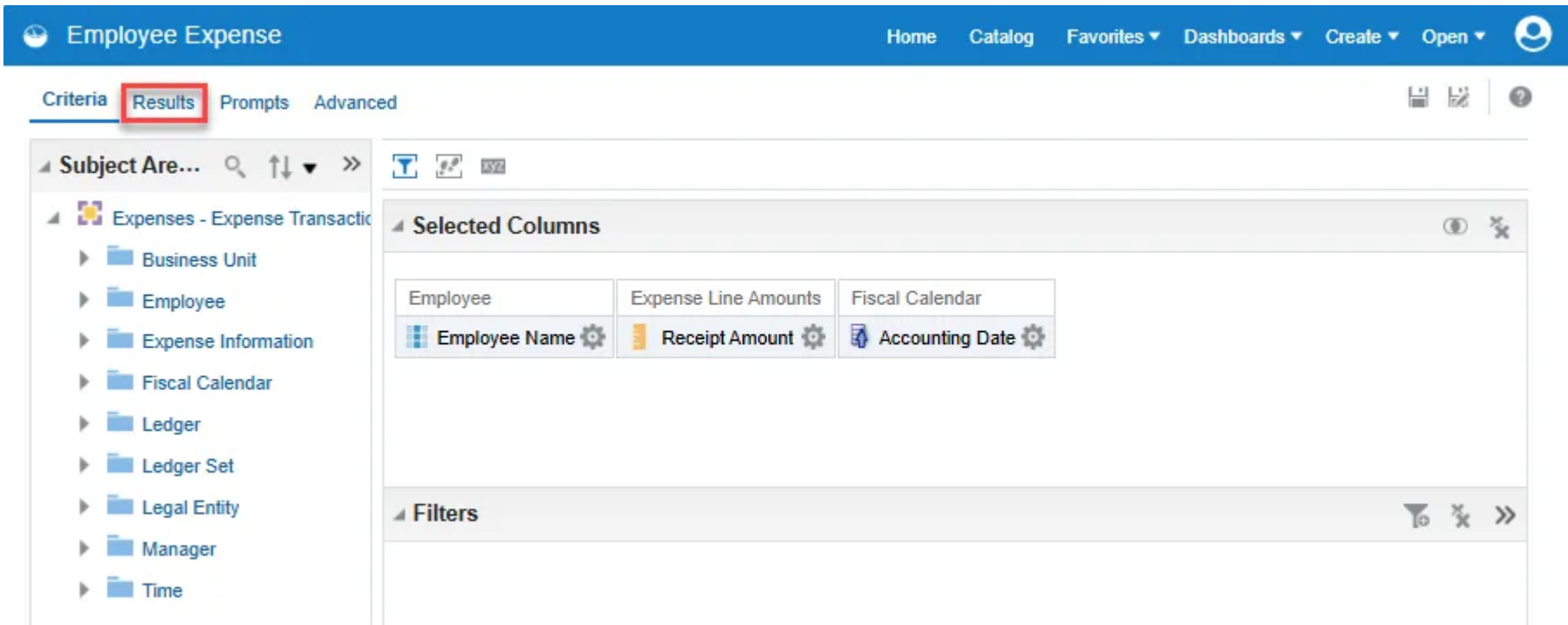
Step 6. The **Sort** icon will appear within the column.

Image



Step 7. Check your sort by choosing the **Results** tab.

Image



Step 8. If you want to keep the sort on the report for future use, be sure to select **Save or Save As**.

Image

Employee Expense

HomeCatalogFavorites ▾Dashboards ▾Create ▾Open ▾

CriteriaResultsPromptsAdvanced

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Filters

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