

OTBI-02 Adding, Removing, and Rearranging Columns

Purpose

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

Introduction and Overview

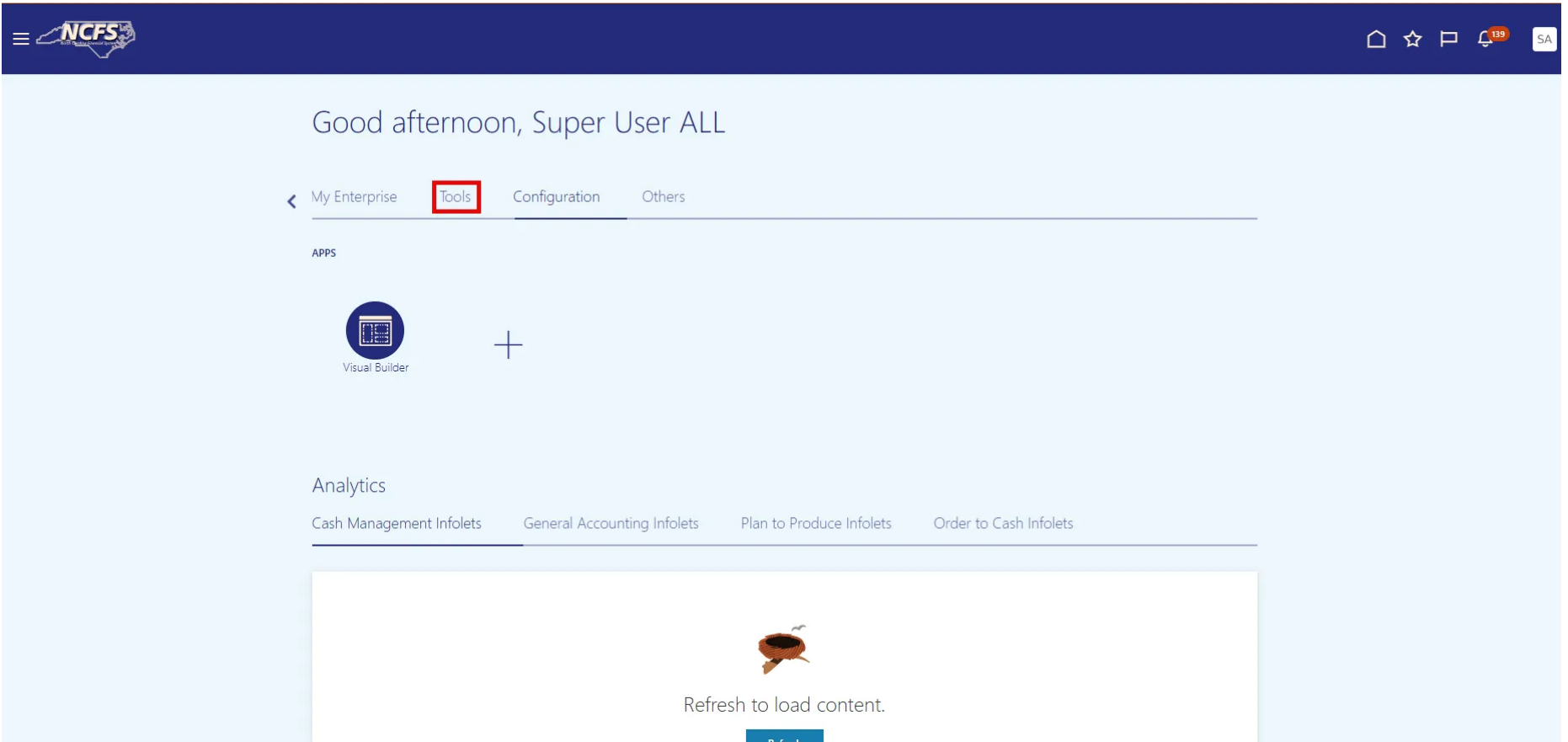
This QRG covers the process of customizing the columns of an OTBI report which gives users flexibility in the reporting process.

Process

To Add, Remove or Rearrange Columns, please follow the steps below. There are 8 steps to complete this process.

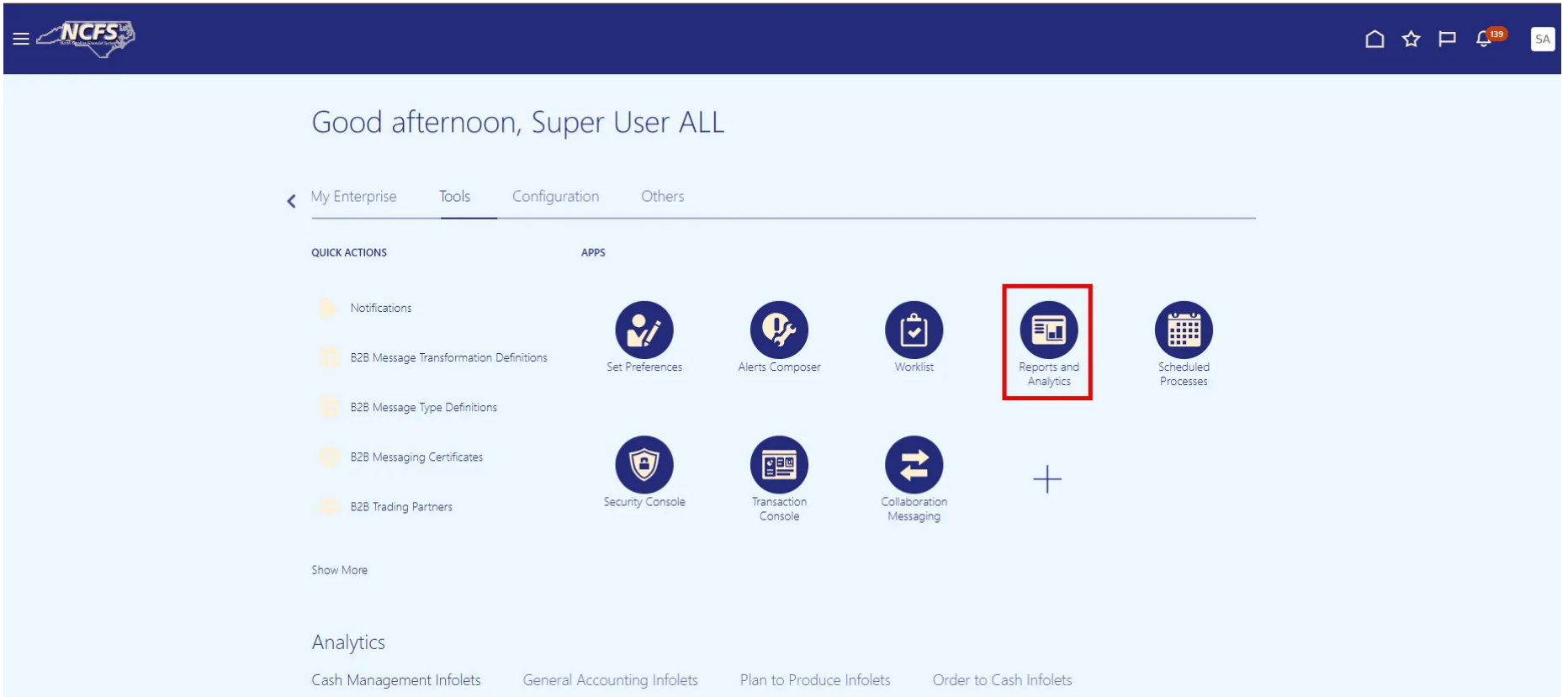
Step 1. On the NCFS home page, choose the **Tools** tab.

Image



Step 2. Choose the **Reports and Analytics** app.

Image



Step 3. On the Reports and Analytics screen, choose the **Browse Catalog** button.

Image









Reports and Analytics

Browse Catalog

All Folders
 Filter
 All types
 Favorites
 Clear Filters

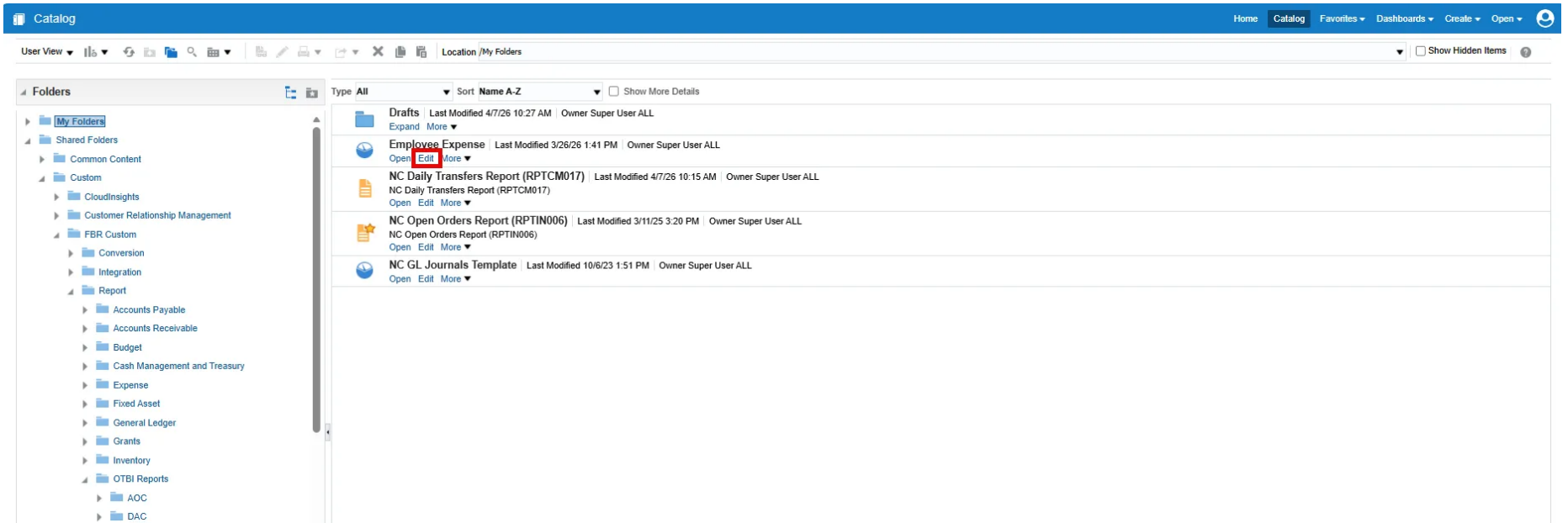
Create

Sort By Last Updated Date

  NC Prepayment Register Report (RPTAP001).xdo /shared/Custom/FBR Custom/Report/Accounts Payable/NC Prepayment Register Report (RPTAP001)	Created By STATIEW KIRBY Last Updated By 10/5/23 3:47 AM	...
NC Prepayment Register Report (RPTAP001)		
  NC Asset Adjustments by Agencies Report (RPTFA014).xdo /shared/Custom/FBR Custom/Report/Fixed Asset/NC Asset Adjustments by Agencies Report (RPTFA014)	Created By STATIEW KIRBY Last Updated By 10/5/23 3:49 AM	...
NC Asset Adjustments by Agencies Report (RPTFA014)		
  NC Payment Register Report (RPTAP006).xdo /shared/Custom/FBR Custom/Report/Accounts Payable/NC Payment Register Report (RPTAP006)	Created By STATIEW KIRBY Last Updated By 10/5/23 3:50 AM	...
NC Payment Register Report (RPTAP006)		
  NC Agency Journal Import Errors Report (RPTRTR170).xdo /shared/Custom/FBR Custom/Report/General Ledger/NC Agency Journal Import Errors Report (RPTRTR170)	Created By STATIEW KIRBY Last Updated By 10/5/23 3:54 AM	...
NC Agency Journal Import Errors Report (RPTRTR170)		
  NC Cash Receipts Disbursements and Balance by Budget Fund (704) Report (RPTRTR015).xdo /shared/Custom/FBR Custom/Report/General Ledger/NC Cash Receipts Disbursements and Balance by Budget Fund (704) Report (RPTRTR015)	Created By STATIEW KIRBY Last Updated By 2/12/24 4:37 AM	...
NC Cash Receipts Disbursements and Balance by Budget Fund (704) Report (RPTRTR015)		

Step 4. On the Catalog page, select **Edit** under the report you wish to customize.

Image



Step 5. Select the **Criteria** tab.

Image

Employee Expense

Criteria

Results

Prompts

Advanced

Subject Areas

Expenses - Expense Transactions Real Time

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 6. To add a column to the report, simply drag and drop to the **Selected Columns** area or double-click any available data element nested under the folders.

Image

Employee Expense

Criteria Results Prompts Advanced

Subject Areas

Account Name
Account Number
Arrival City
Average Mileage Rate
Corporate Card Transaction
Credit Card Number
Customer Account Number
Departure City
Description
Distance
Distance Unit
Driver Name
End Date
Expense Category
Expense Class
Expense Created By
Expense Created By Username
Expense Creation Date
Expense Creation Method
Expense ID
Expense Last Updated By
Expense Last Updated By Username



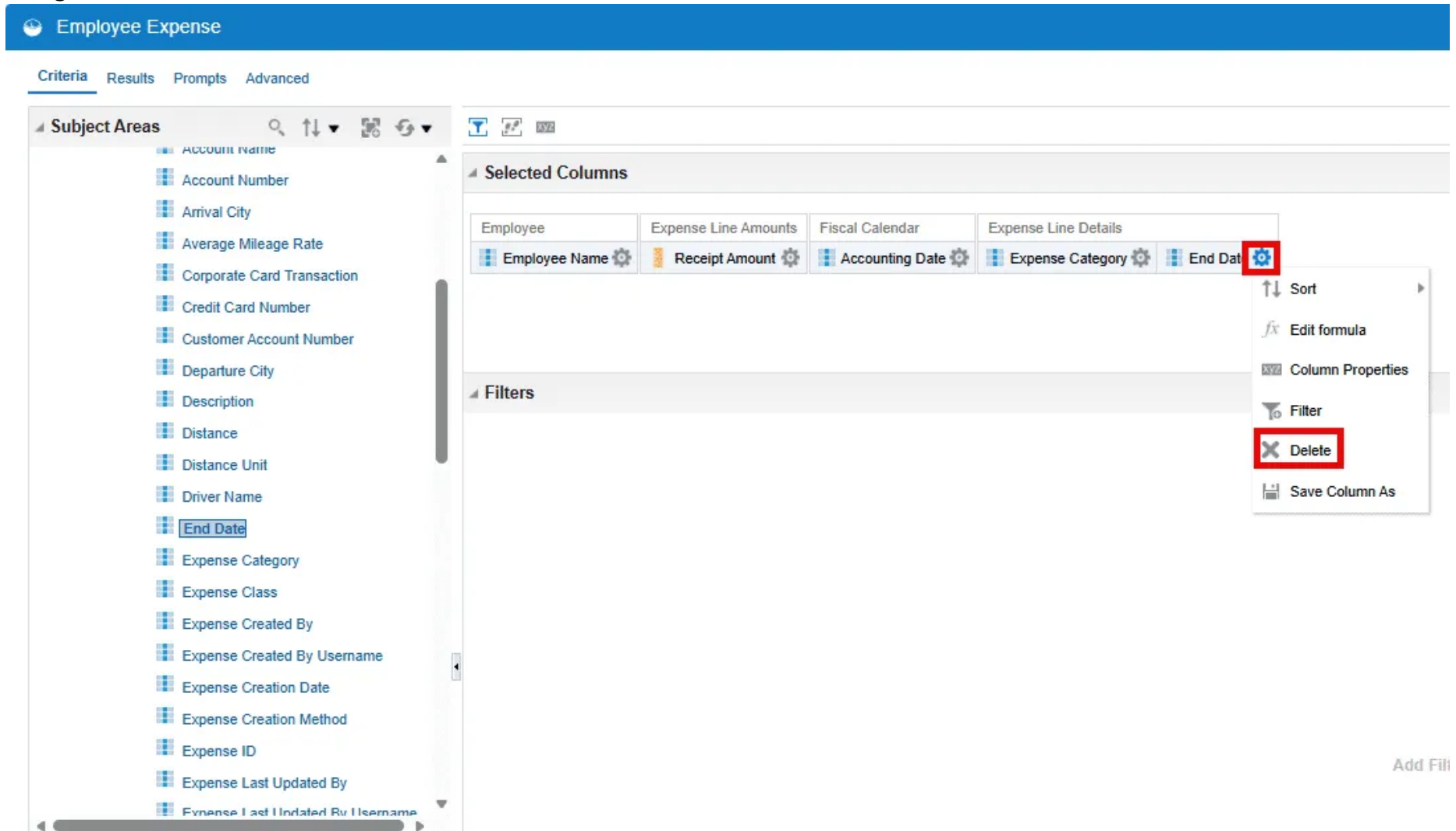
Selected Columns

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

Filters

Step 7. To delete a column, select the gear icon within the chosen column and choose **Delete** from the drop-down menu.

Image



Step 8. To rearrange (reorder) columns, drag the column to the desired location.

Image

Subject Areas

- Account Name
- Account Number
- Arrival City
- Average Mileage Rate
- Corporate Card Transaction
- Credit Card Number
- Customer Account Number
- Departure City
- Description
- Distance
- Distance Unit
- Driver Name
- End Date
- Expense Category
- Expense Class
- Expense Created By
- Expense Created By Username
- Expense Creation Date
- Expense Creation Method
- Expense ID
- Expense Last Updated By
- Expense Last Updated By Username

Selected Columns

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

Filters

First Published

Fri, 06/28/2024

Last Updated

Thu, 05/07/2026

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