OTBI-03 Formatting Columns

Purpose

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

Introduction and Overview

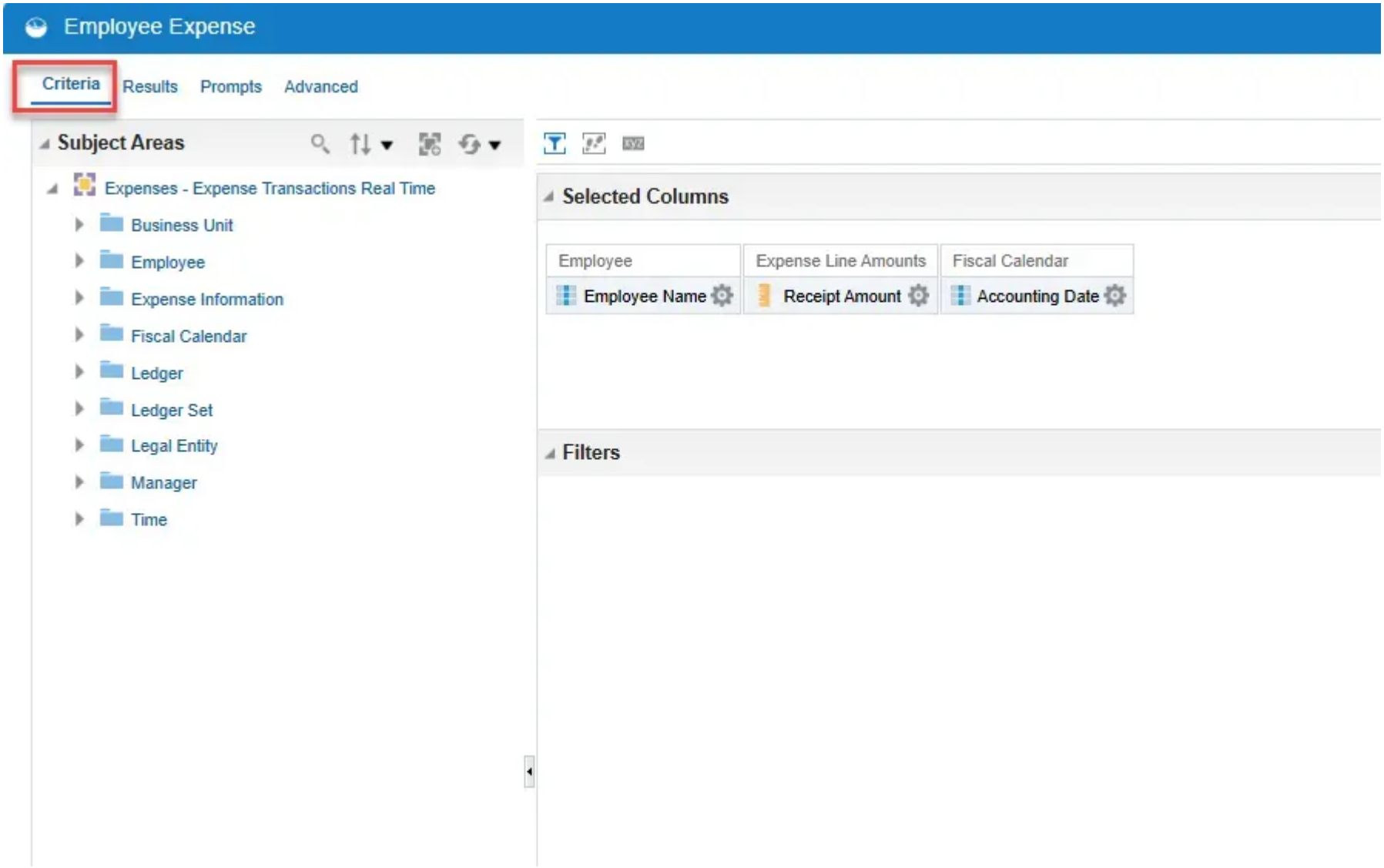
This QRG covers the process of formatting columns on an OTBI report – including renaming columns and formatting data.

Process

To Format Columns, please follow the steps below. There are 10 steps to complete this process.

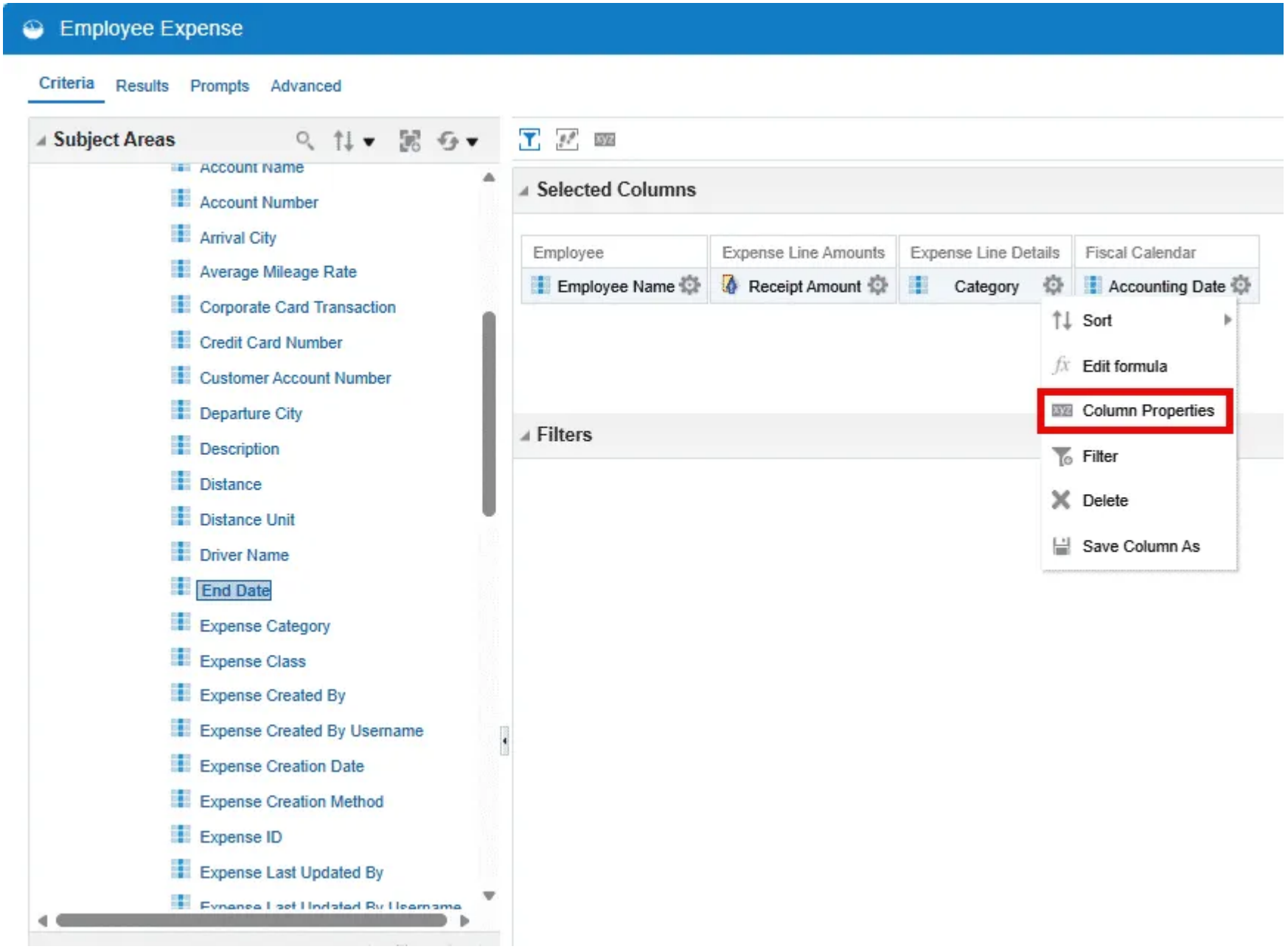
Step 1. Navigate to the **Criteria tab** of the OTBI report you wish to work with.

Image



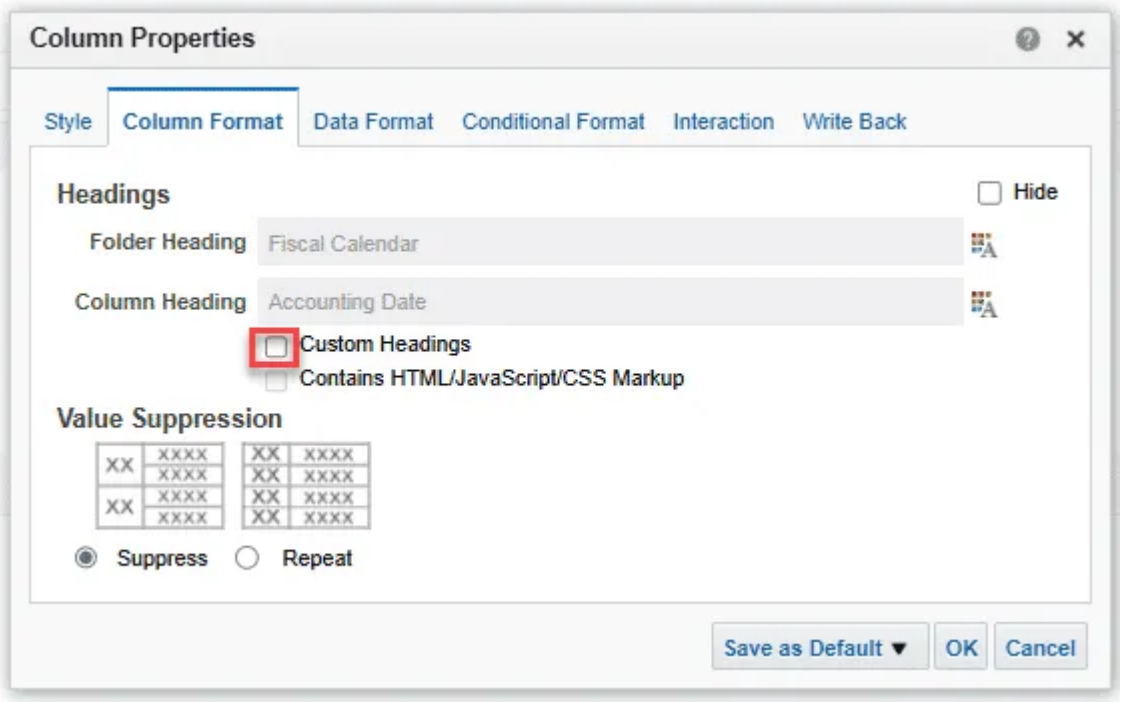
Step 2. Select the gear icon in a chosen column and choose **Column Properties** from the drop-down menu.

Image



Step 3. On the Column Format tab choose the **Custom Headings** box to edit the column name.

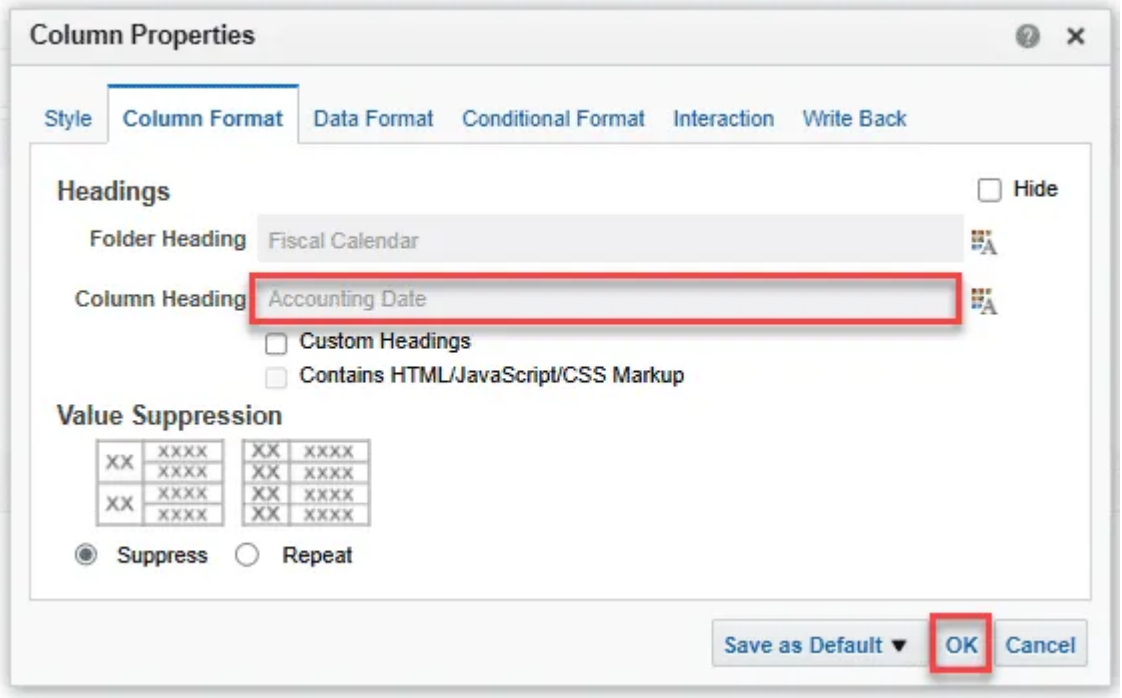
Image



Step 4. Add the new column name to the Column Heading field and choose the **OK** button.

Note: You can also save this new column name as Default.

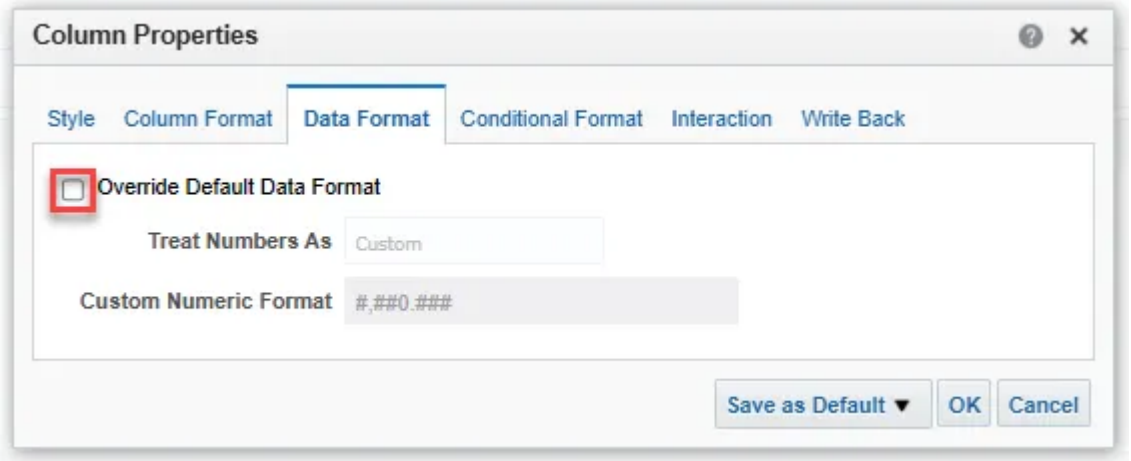
Image



Step 5. On the Data Format tab choose the **Override Default Data Format** checkbox to change the format of the data in a chosen column.

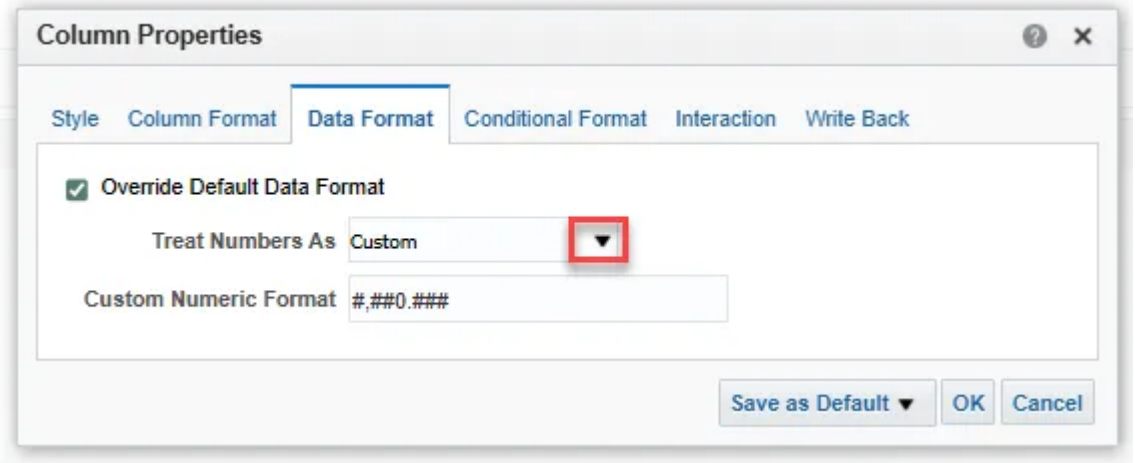
Note: The options on this tab depend on the column chosen.

Image



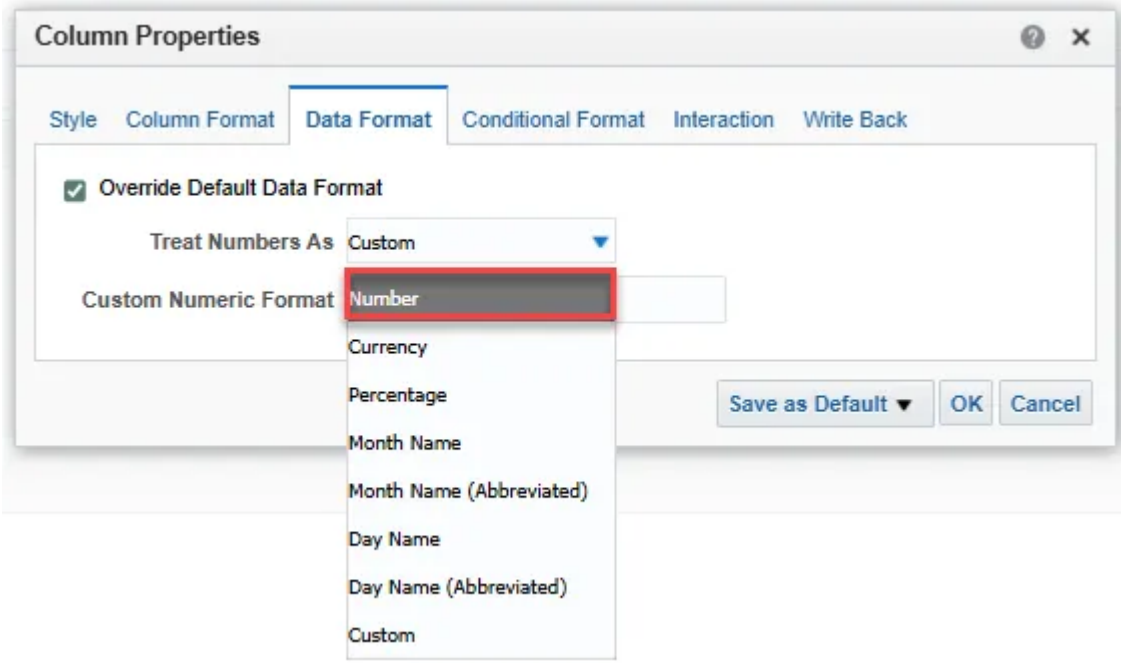
Step 6. In this example, the number of decimals shown in a monetary amount will be adjusted. Access the drop-down menu in the **Treat Numbers As** field.

Image



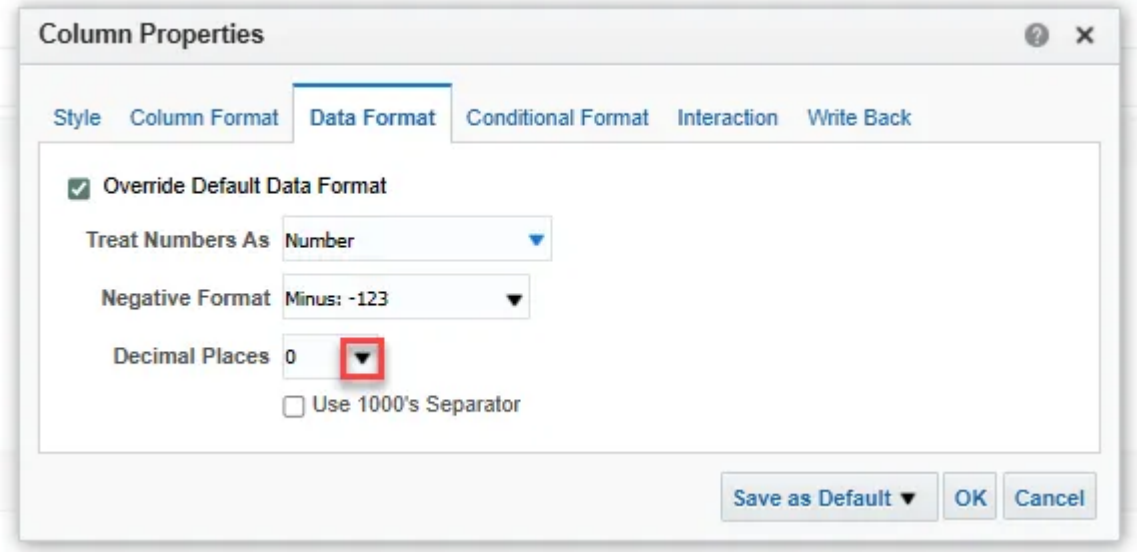
Step 7. Choose **Number** from the drop-down menu.

Image



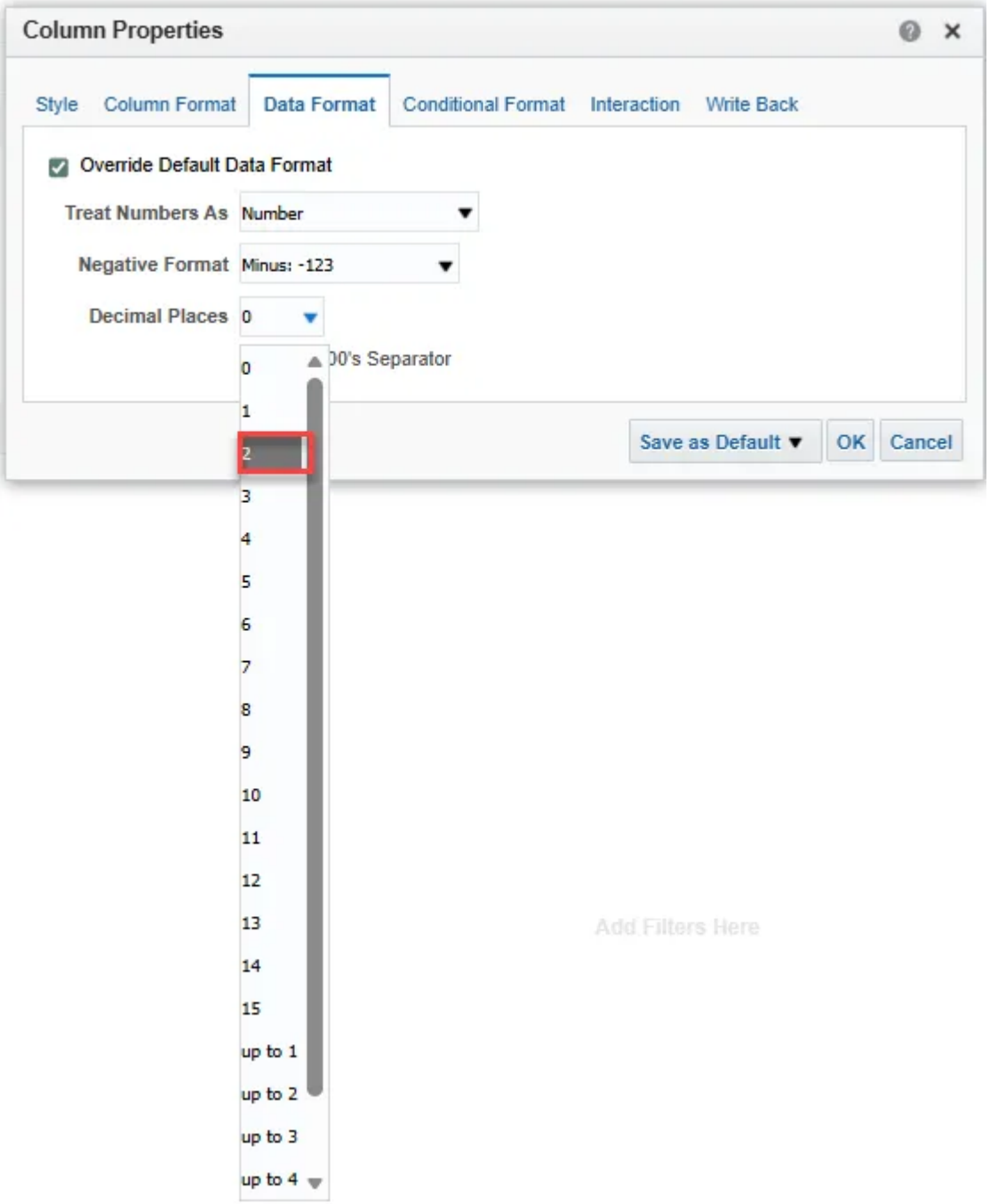
Step 8. Choose the drop-down menu in the **Decimal Places** field.

Image



Step 9. For this example, choose **2** from the drop-down menu.

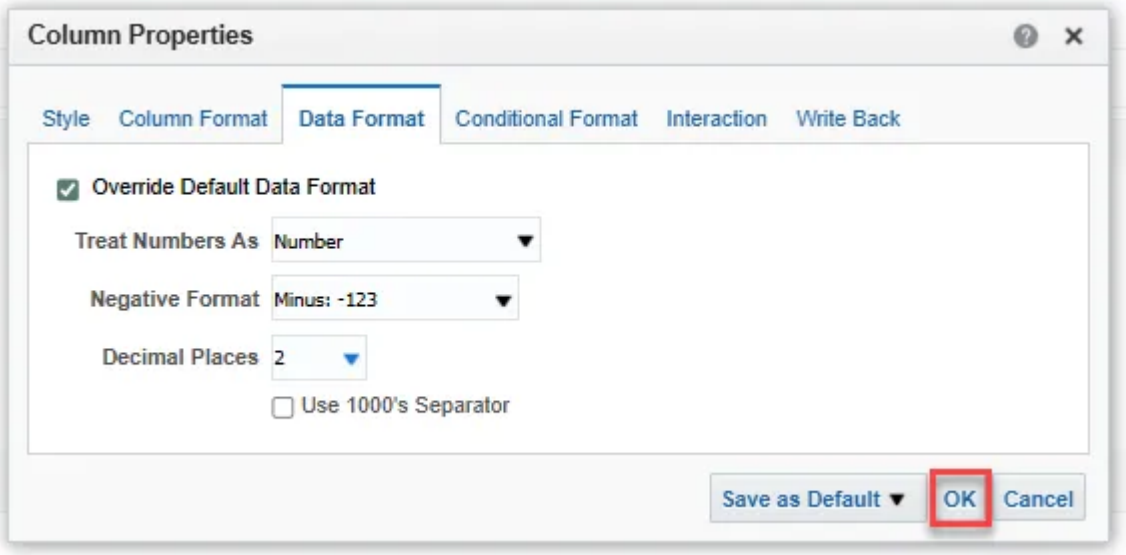
Image


Column Properties
Style
Column Format
Data Format
Conditional Format
Interaction
Write Back
Override Default Data Format
Treat Numbers As
Number
Negative Format
Minus: -123
Decimal Places
0
00's Separator
Save as Default
OK
Cancel
0
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
up to 1
up to 2
up to 3
up to 4
Add Filters Here

Step 10. Choose **OK**.

Note: This format change can be saved as a default setting.

Image



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