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

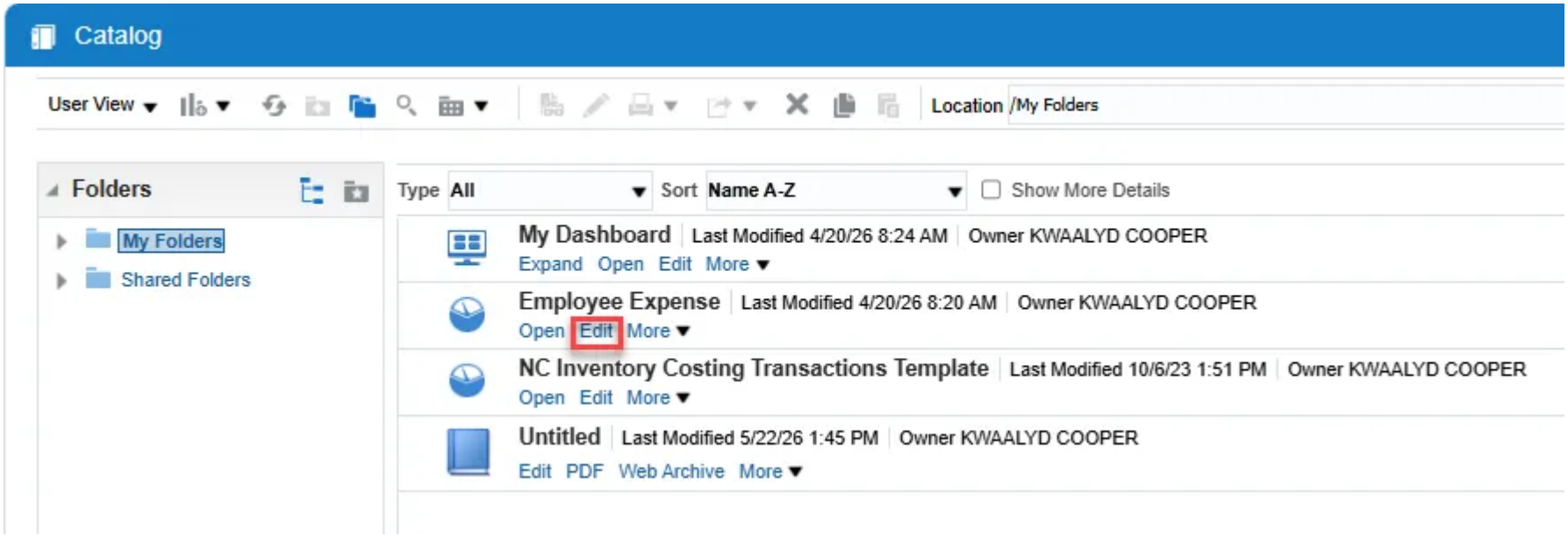
This QRG covers the process of sorting a column in an OTBI report.

Process

Please follow the steps below. There are 8 steps to complete this process.

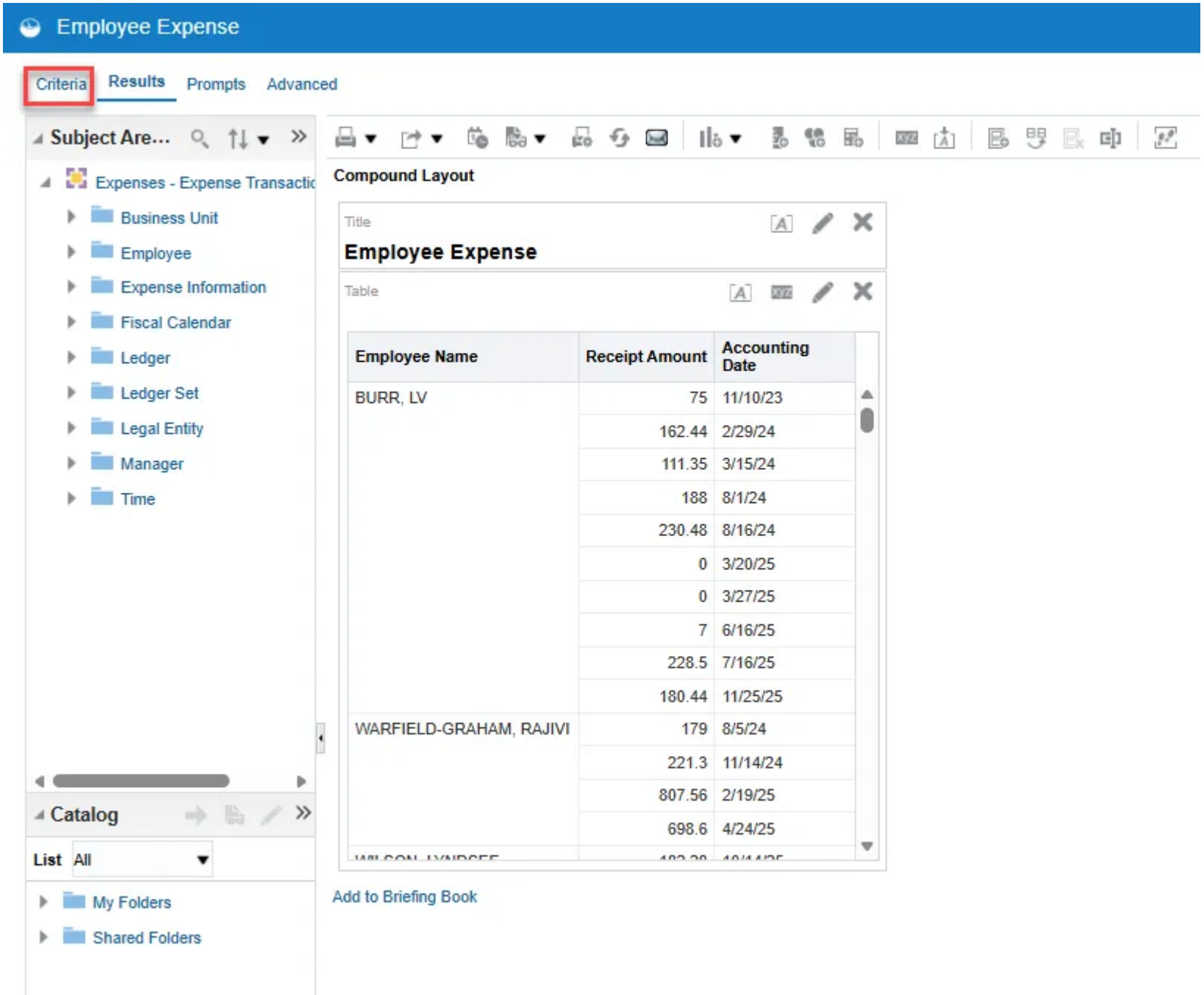
Step 1. Navigate to the report you wish to work with and choose **Edit** under the report name.

Image



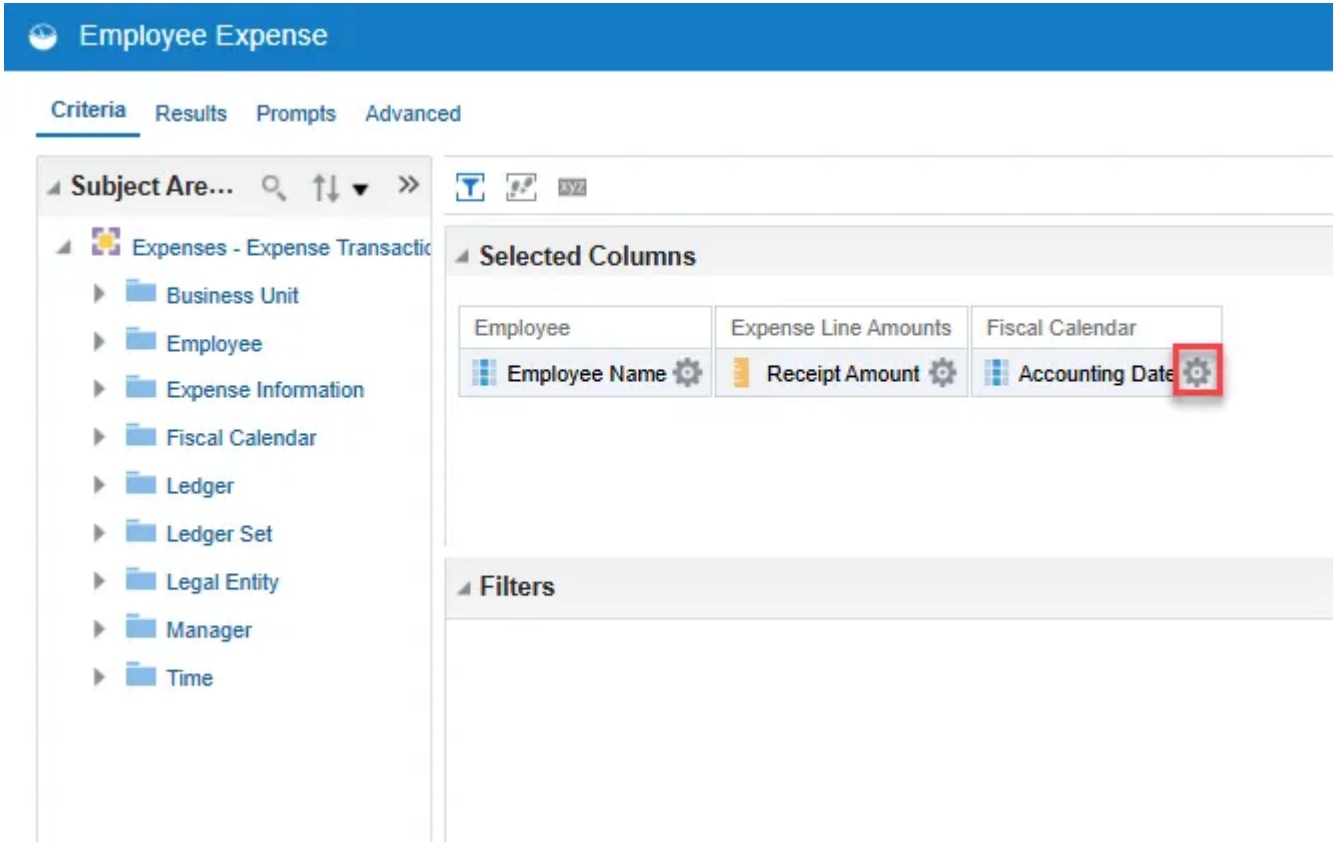
Step 2. Select the **Criteria** tab.

Image


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
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
Add to Briefing Book

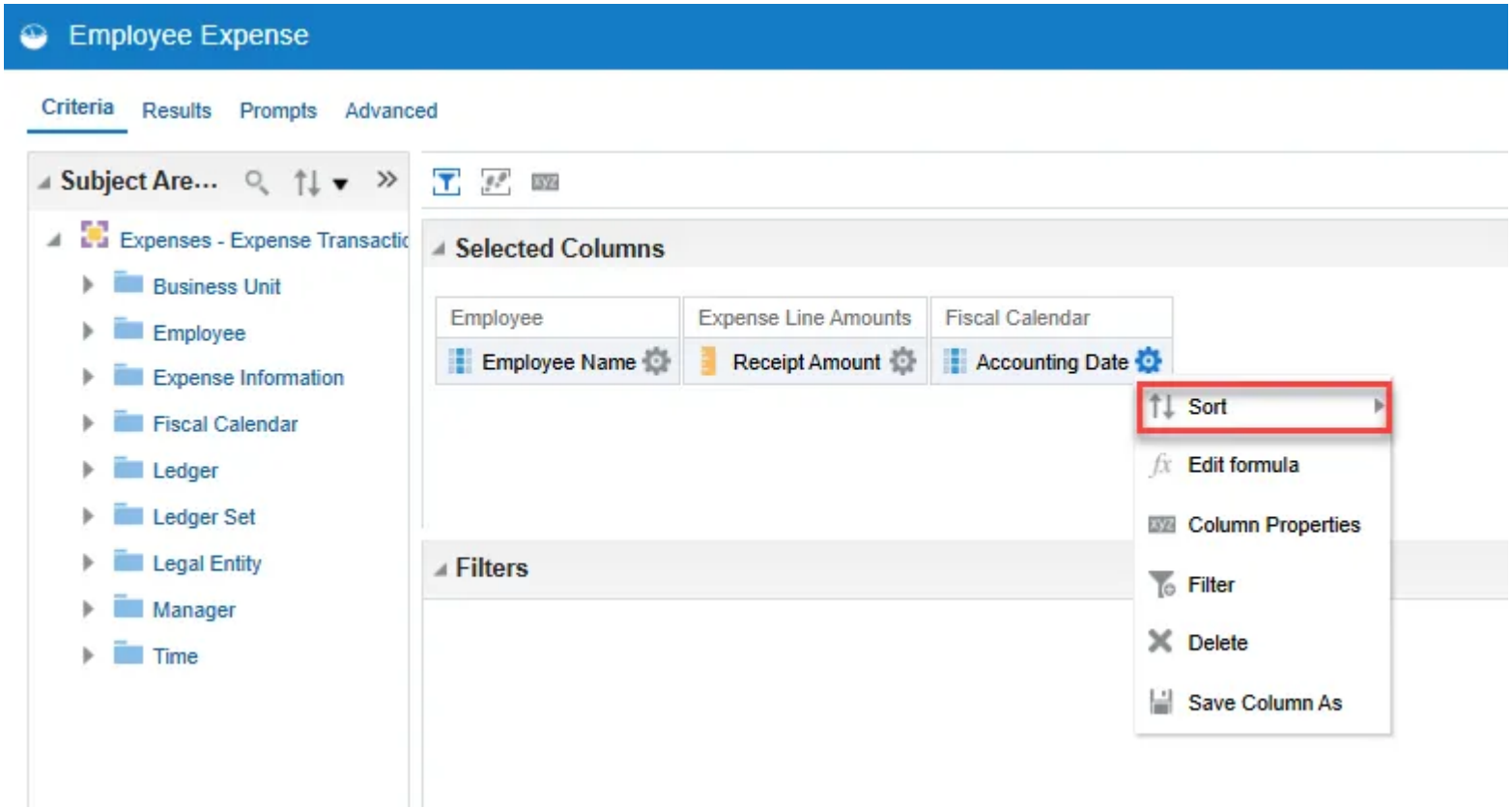
Step 3. Select the **Gear** icon within the column you want to work with.

Image



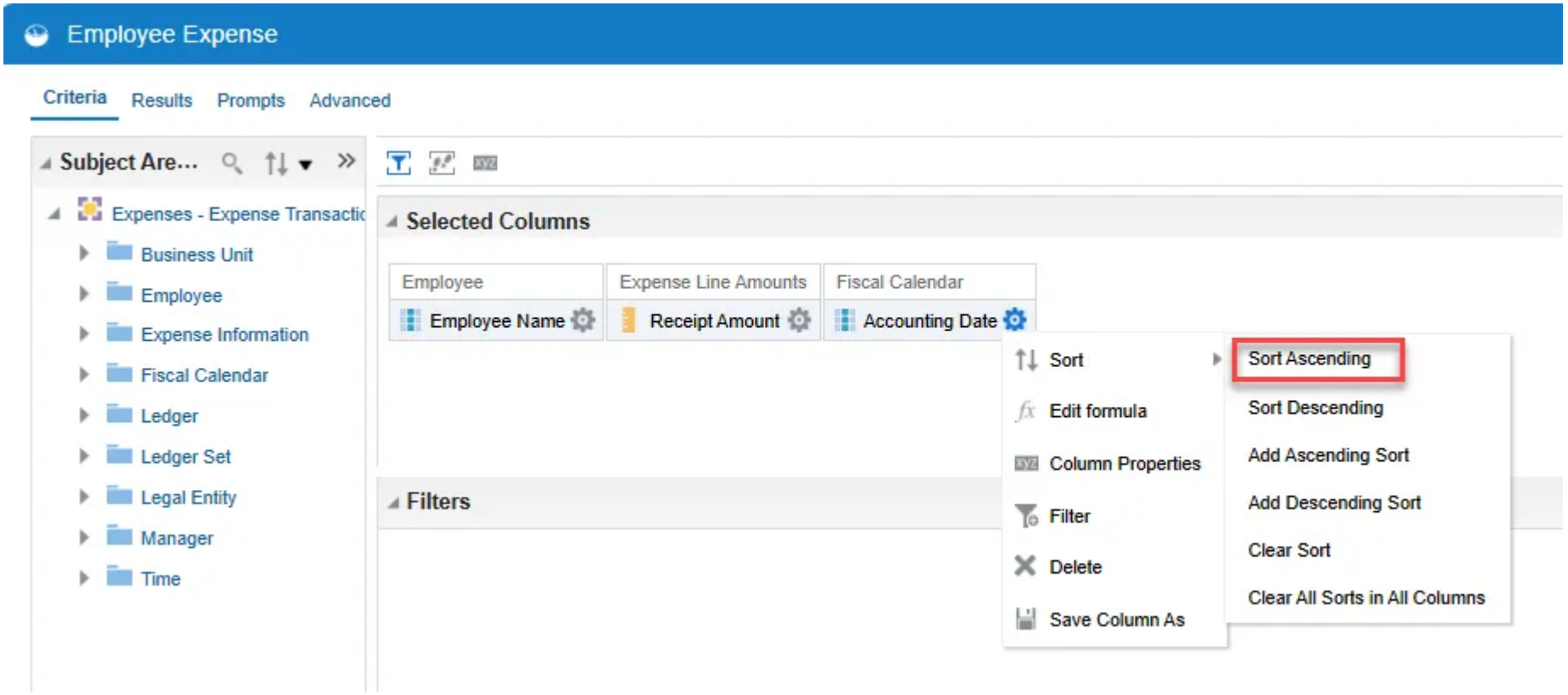
Step 4. Choose **Sort** from the drop-down menu.

Image



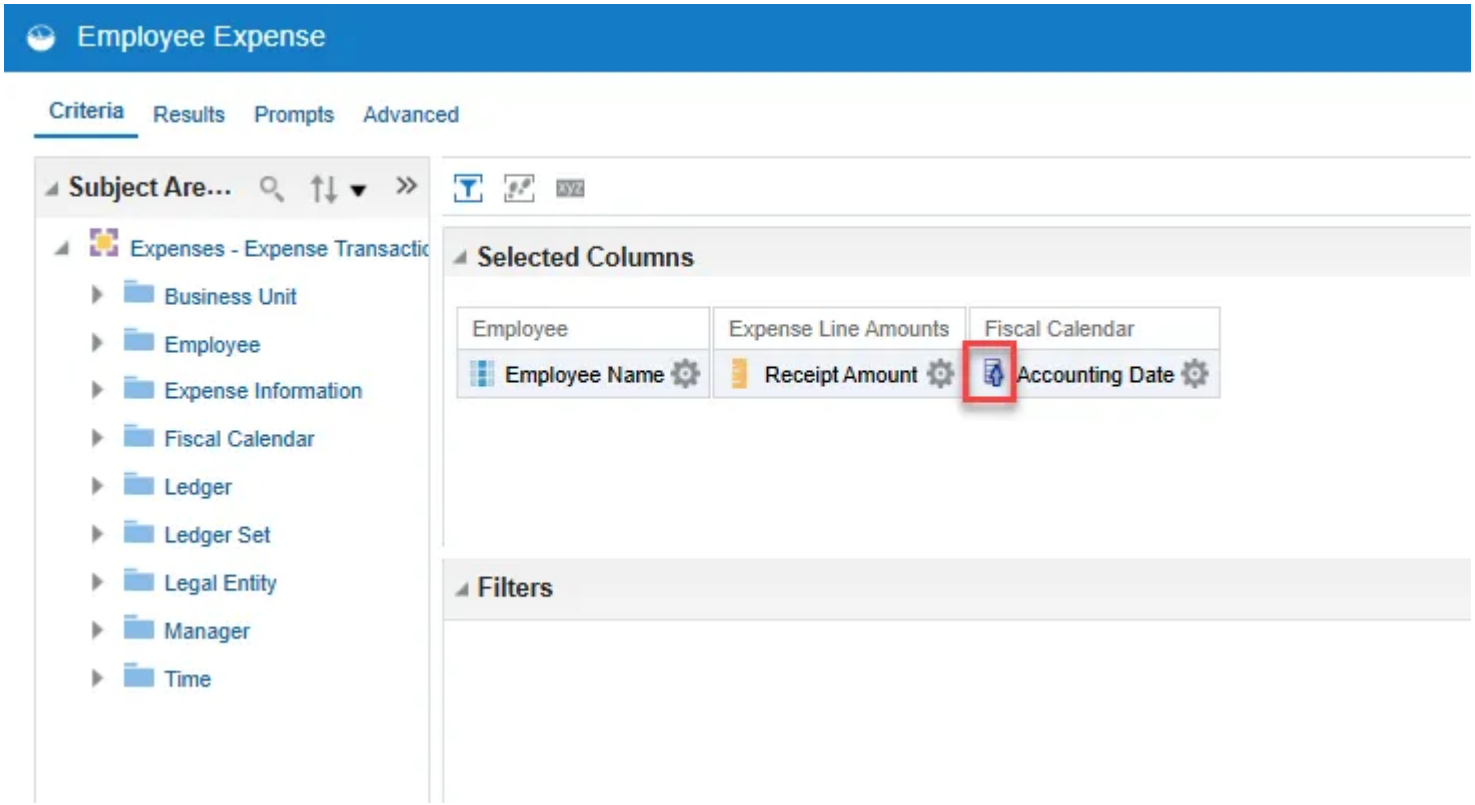
Step 5. Select your sorting choice from the pop-out menu.

Image



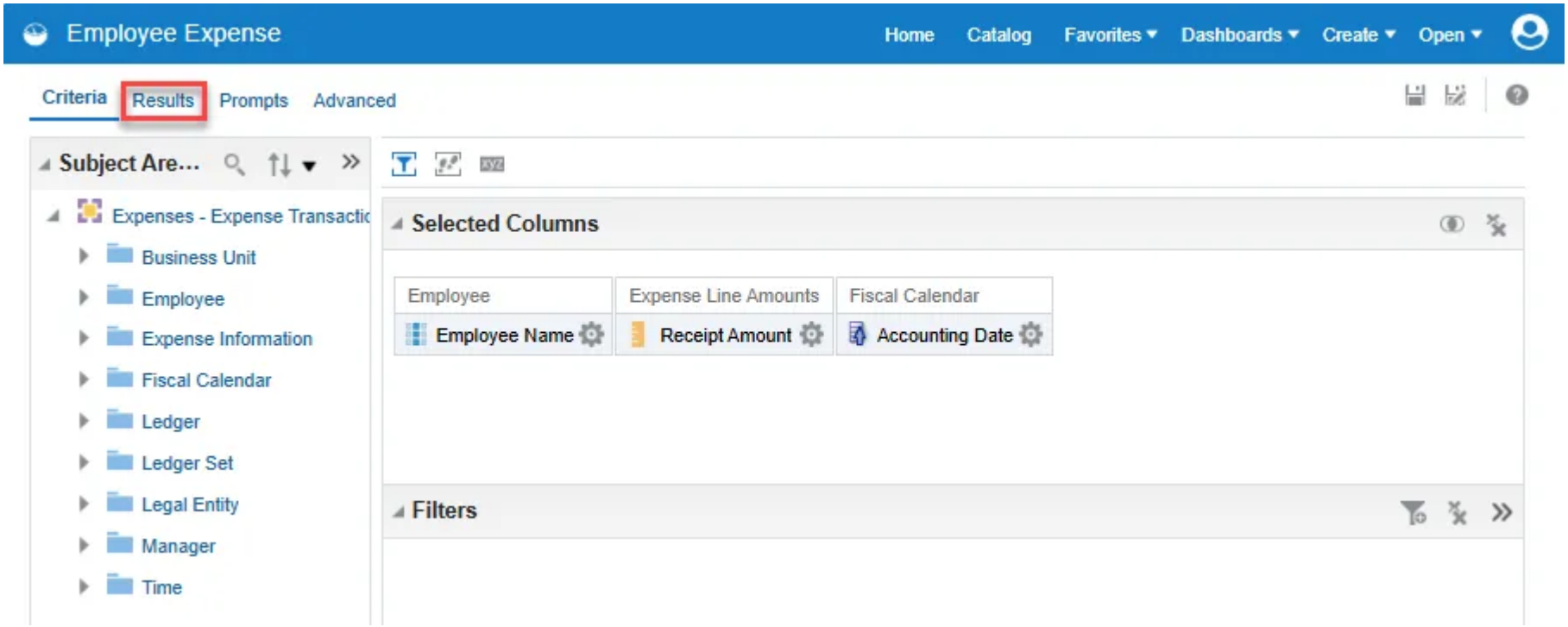
Step 6. The **Sort** icon will appear within the column.

Image



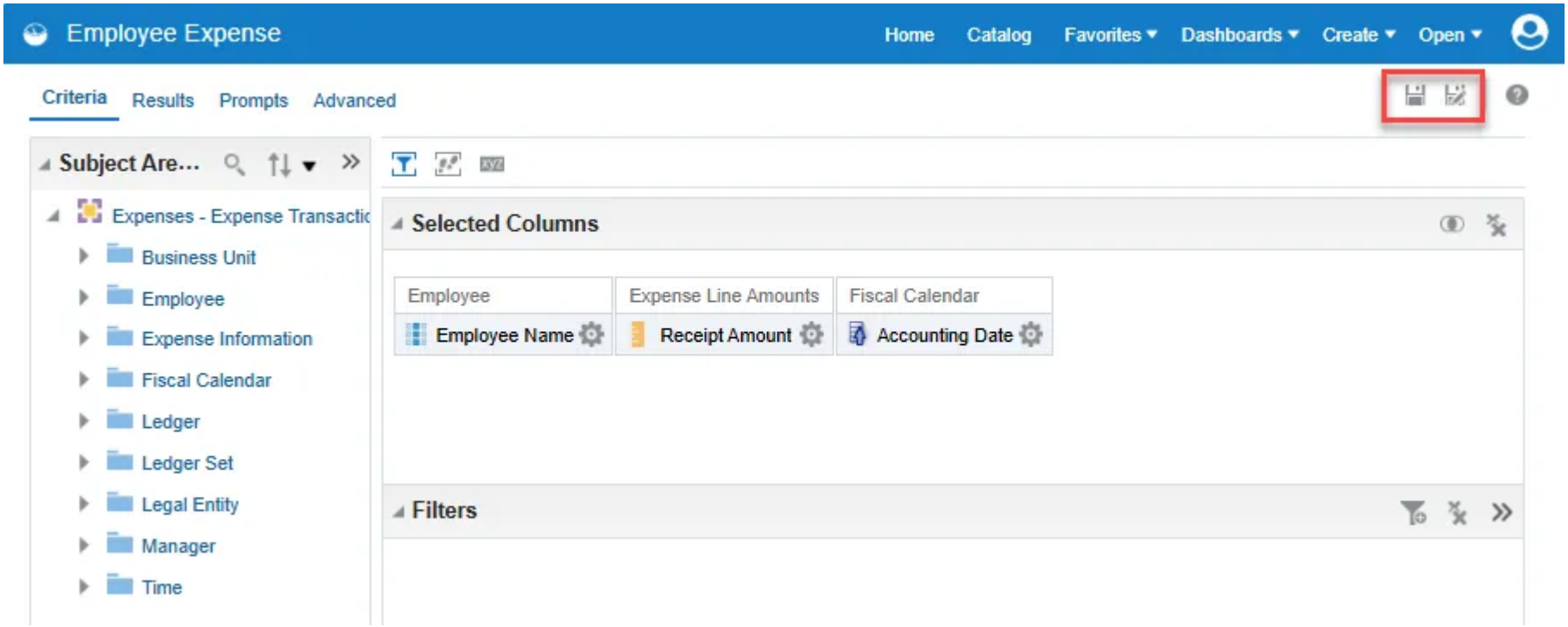
Step 7. Check your sort by choosing the **Results** tab.

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



First Published

Fri, 06/28/2024

Last Updated

Wed, 07/01/2026

Printable PDF