OTBI-07 Results and Output Formats

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to describe some available output formats and other functionalities involving the results of an OTBI report in the North Carolina Financial System (**NCFS**).

Introduction and Overview

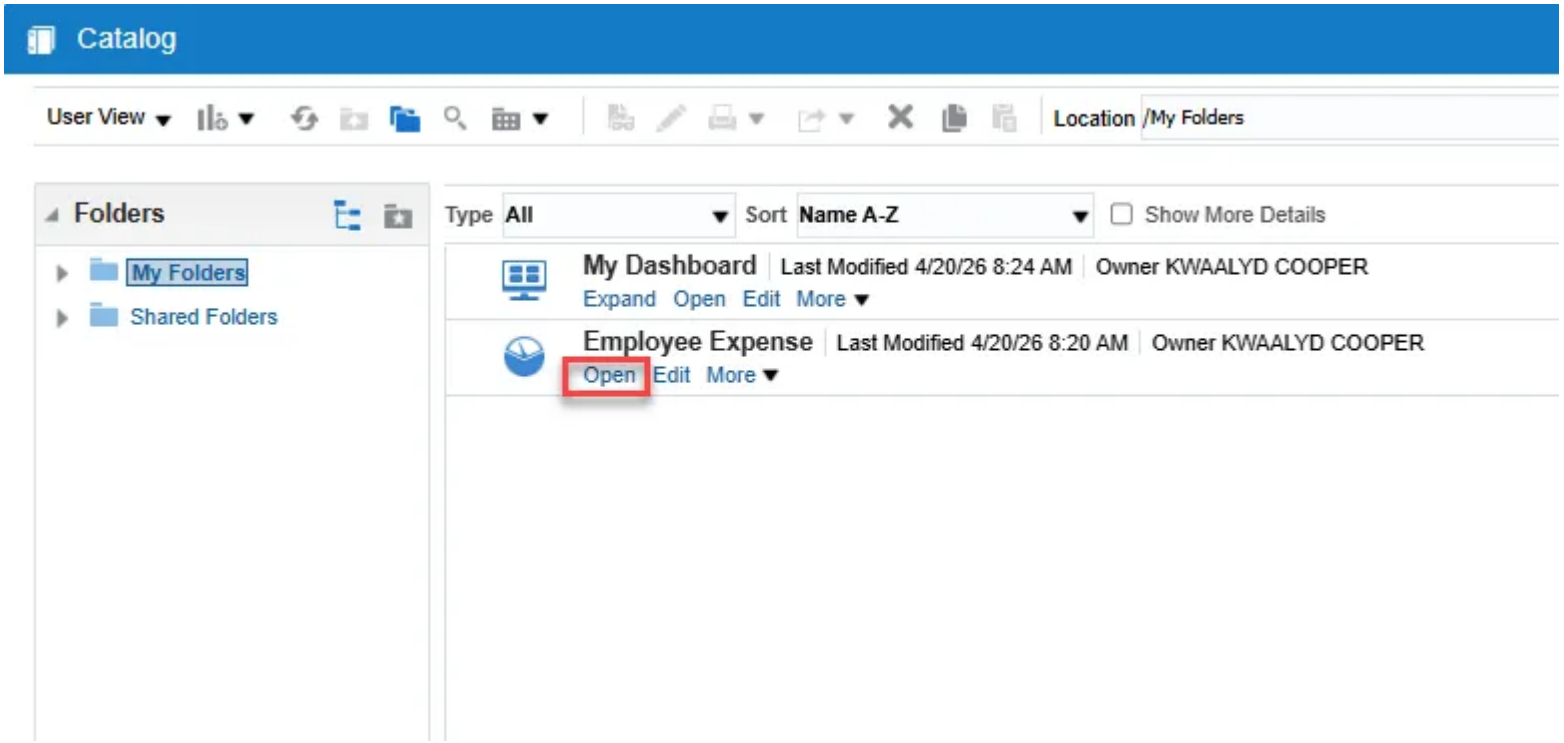
This QRG covers available output options and other functionalities involving the results of an OTBI report.

Process

Please follow the steps below. There are 3 steps to complete this process.

Step 1. Navigate to the Catalog page and choose **Open** under a report to populate results.

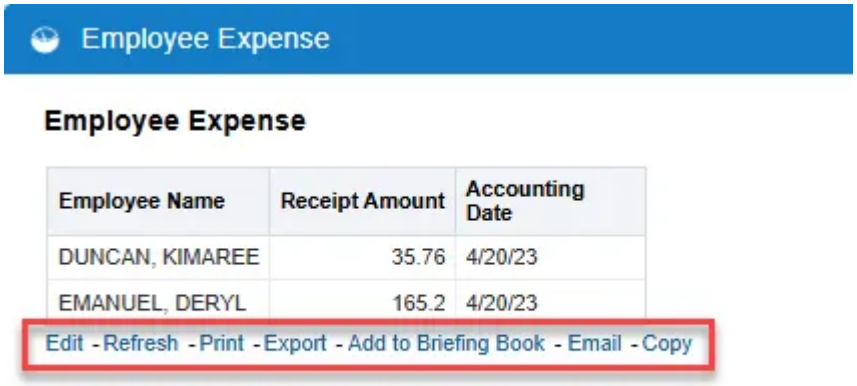
Image



Step 2. Select **prompts** if applicable.

Step 3. The report output page is displayed with link options under the data.

Image

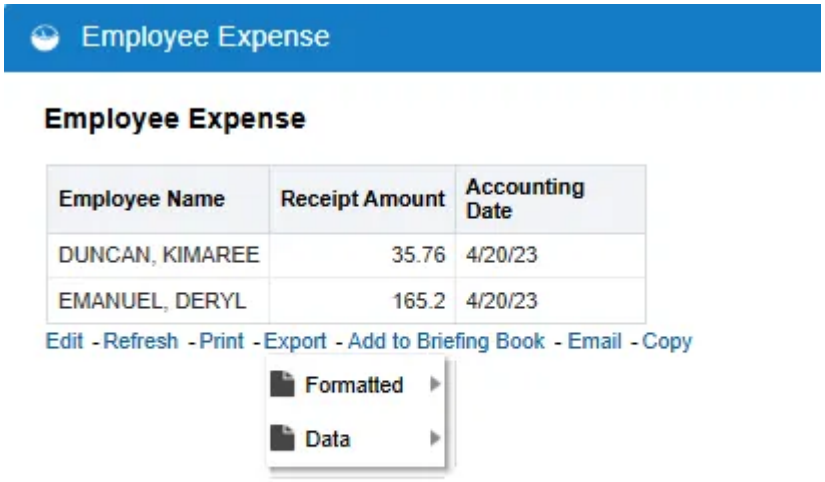


Options

Let’s explore each option.

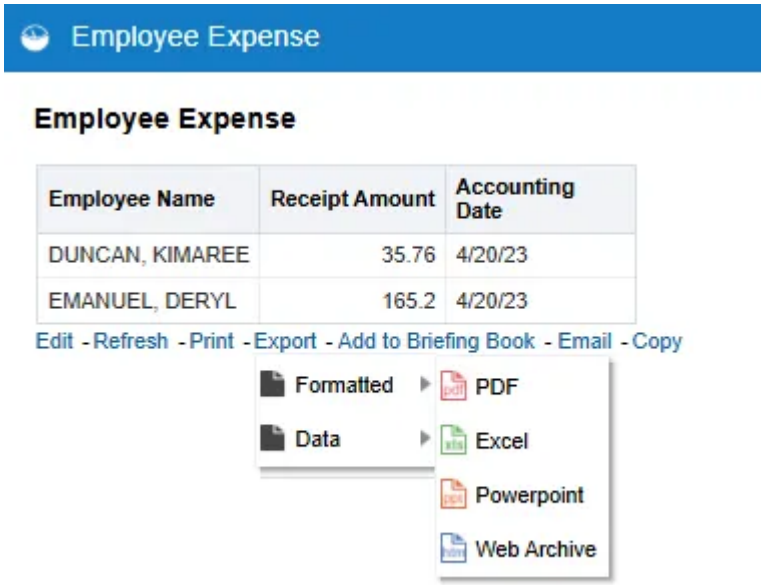
- **Edit** will allow you to edit the report.
- **Refresh** will refresh the data in the results.
- **Print** will print only the first page of the results.
- **Export** offers multiple options for exporting the results:

Image



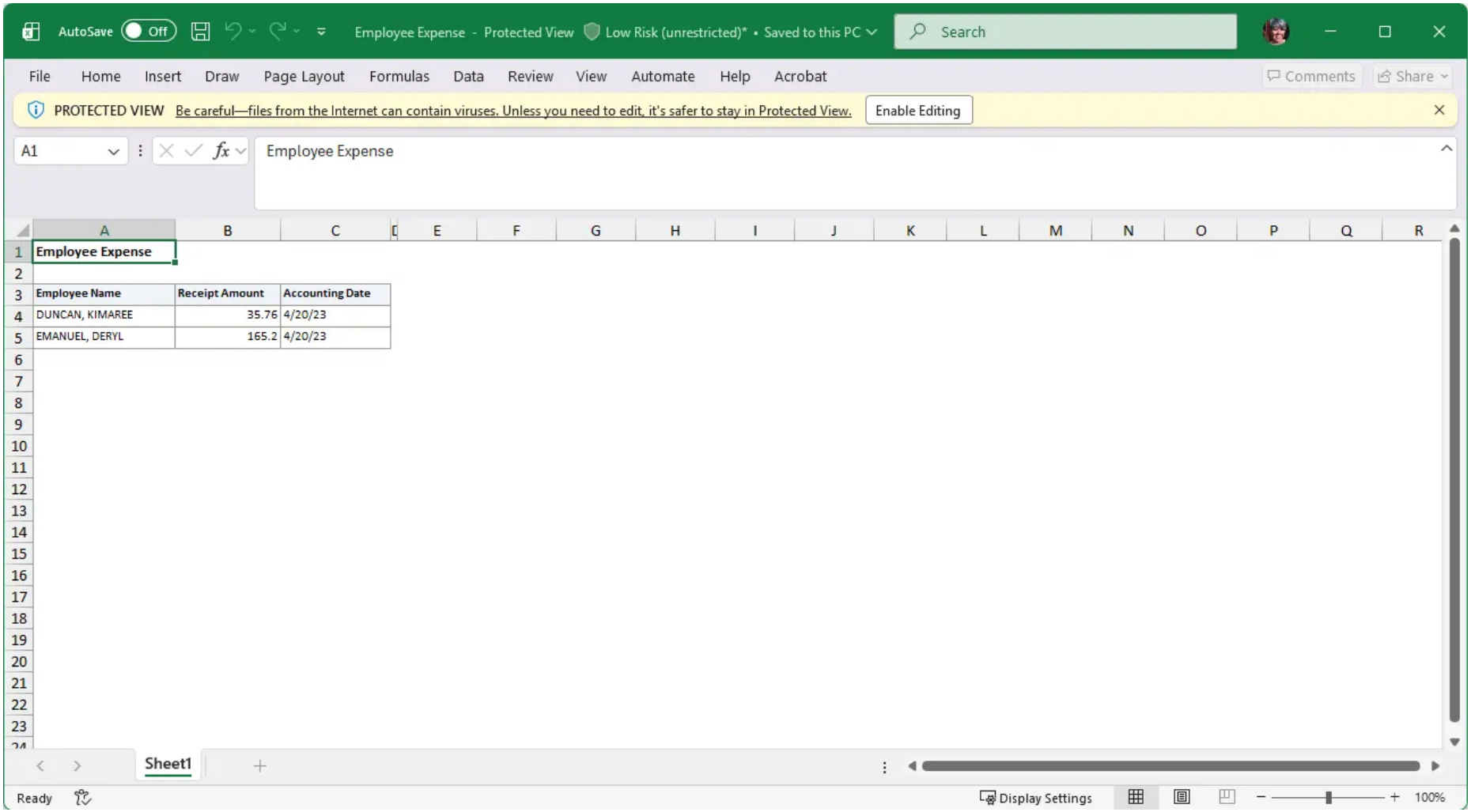
- **Formatted** options include PDF, Excel, PowerPoint, and Web Archive.

Image



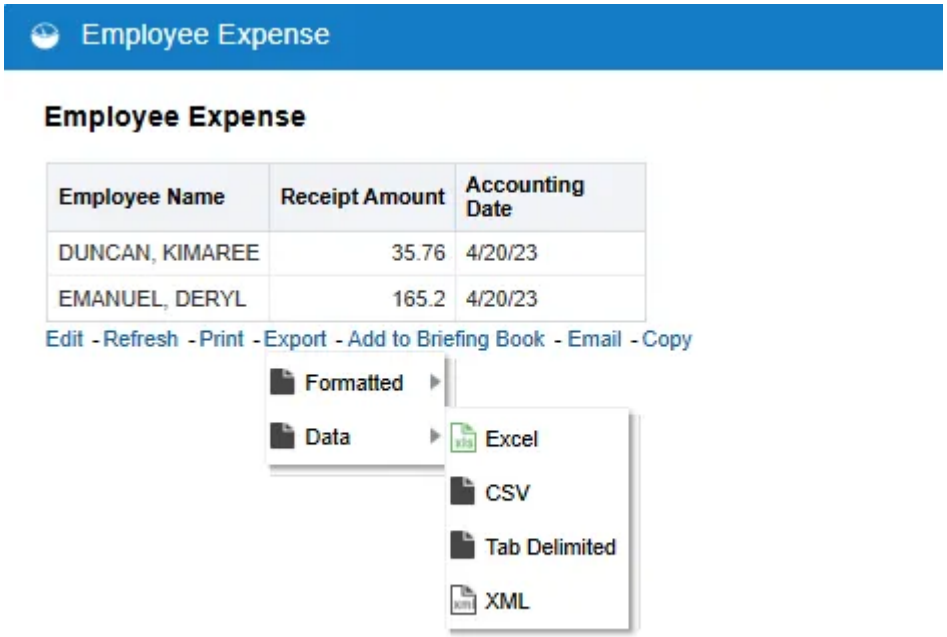
- The Formatted Excel option will result in a spreadsheet that is easy to read.

Image



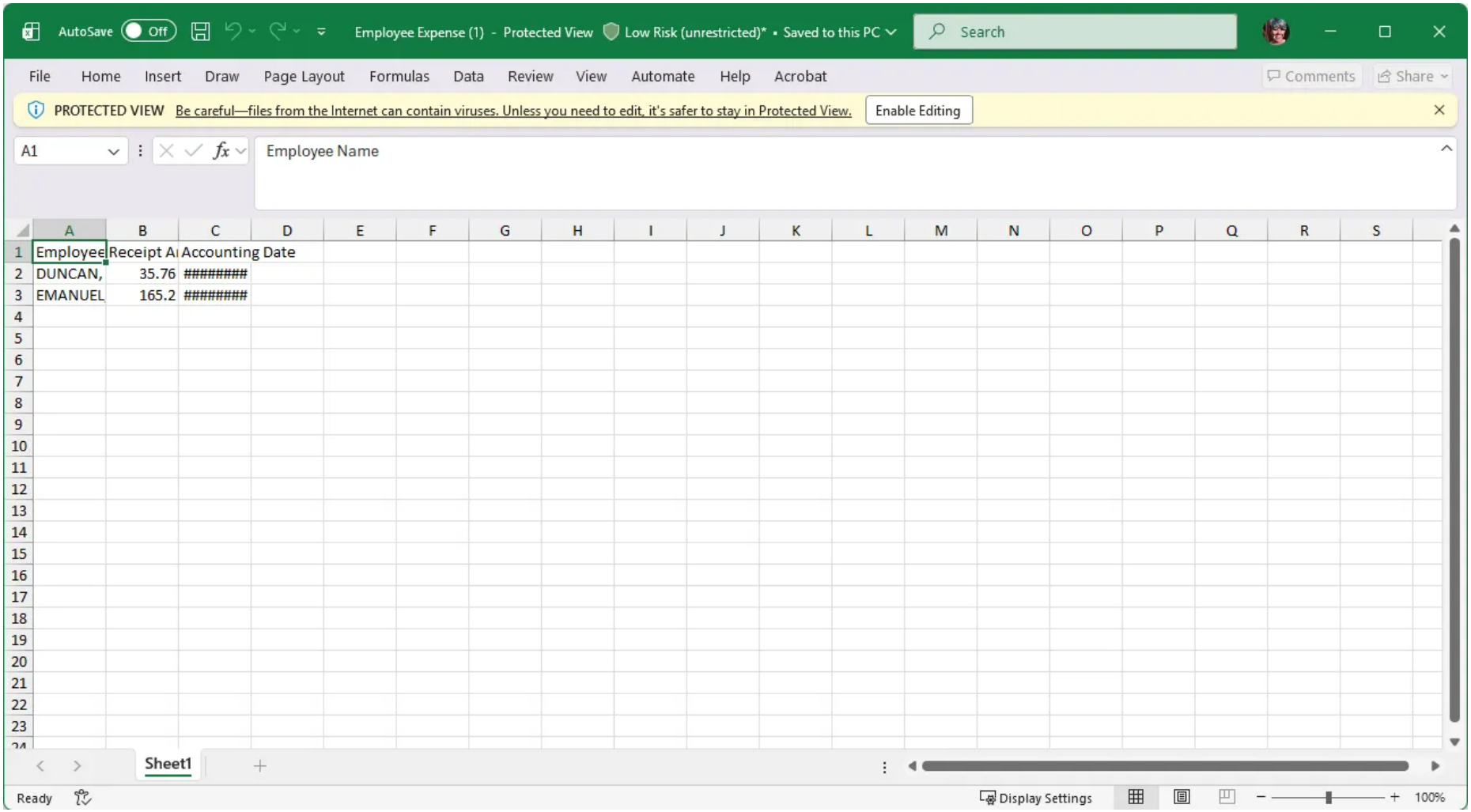
- **Data** options include Excel, CSV, Tab Delimited, and XML.

Image



- The Data Excel option will result in a spreadsheet that contains raw data.

Image



- **Add to Briefing Book** will create a collection of static or updatable snapshots of individual analyses or dashboards.
- **Email** will allow you to send the results via email.
- **Copy** copies the XML version of the report and can be used for importing data.

First Published

Fri, 06/28/2024

Last Updated

Tue, 05/26/2026

Printable PDF