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1 BA ANALYTICS ROLE

From the menu items, select the FlinU BA Enquiries Role.

**Note:** If users have access to more than 3 roles, the FlinU BA Enquiries Role may be found in All Roles.

![Image of the menu items with FlinU BA Enquiries and All Roles highlighted.]

2 HOW TO RUN AN ENQUIRY

1. Select the Analytics Enquiries tab in the role.

2. You will see a list of enquiries from your Home Folder, and other folders that you have access to. Click on a line to run an enquiry.

![Image of the Analytics Enquiries tab with a list of enquiries and folder addresses.]
3. There are 3 buttons on the upper right corner: Download, Refresh, Settings.

Further instructions for Enquiry’s Settings are provided in the next section Creating a New Enquiry.

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**Note:** Click on the back Arrow on the upper left corner to return to Enquiries list.

<table>
<thead>
<tr>
<th>Period Balances - CON0229</th>
<th>Download as Excel</th>
<th>Refresh</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1200 - Res...</strong></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>1700 - Oth...</strong></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>3000 - Sal...</strong></td>
<td>(4,700,090,37)</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>3200 - No...</strong></td>
<td>(500,000,37)</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>(7,939,999.26)</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>106,313.66</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3  CREATING A NEW ENQUIRY

1. Select **Add** to create a new Enquiry.

2. Select **Table Enquiry** or **Cross Tab Enquiry**.

3.1  CREATING TABLE ENQUIRY

1. Select **Add Table Enquiry**

2. Add Enquiry Name in **Description** box, then click **OK**.
3. Click on the **Data Source** icon on the left side bar, then click on **Add**, then **Analyser**.

4. Choose the correct **Analyser** under the **Description column** that you wish to use as the Data Source for your enquiry. The number of data sources you see depends on the roles you have in CiAnywhere.
5. Depending on the Analyser, you might need to select **Chart Name**, then click **OK**.

6. Click on the **Magnifier** icon on the side bar, then click **Edit** to amend the criteria.
7. Click on the + icon to add a new criteria item, then click on the ⋯ on the right side to set the Criteria.

8. Once you have set the Criteria, click OK.
9. To swap the criteria connection between **And/Or**, click on the circle icon.
10. Click on the **Table** icon on the side bar and then click **Add** to add columns to the enquiry.

The next section will instruct on how to add **Display**, **Sum**, and **Calculation** columns.
3.1.1 DISPLAY COLUMNS

1. Click on **Add from fields**.

2. Select the columns you want to display. A tick will display next to those items selected.

3. Then click **Add Based on Field Name**.

4. Click **OK** on the pop-up box.
5. Some columns are not visible by default. The Preview area will show the expected result.

6. To make the other columns visible, select all columns, then click on More >> Edit Formatting.

7. Make sure the Default Display and Visible boxes are ticked, then click OK.
8. **Refresh** the **Preview** to see the update.

### 3.1.2 SUM COLUMNS

1. Click on **Add**, then select **Sum**.
2. Fill in the **required fields**, then click on **Save**.

Note: You will need to scroll down to see all required fields.
<table>
<thead>
<tr>
<th>Column</th>
<th>Data Type</th>
<th>Decimal</th>
<th>Max Length</th>
<th>1.4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Decimal Places</td>
<td>2</td>
</tr>
<tr>
<td>Criteria</td>
<td></td>
<td></td>
<td>No criteria defined.</td>
<td></td>
</tr>
<tr>
<td>Formatting</td>
<td></td>
<td></td>
<td>Visible</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Freeze</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Width</td>
<td>100</td>
<td>Decide the default column width</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Format</td>
<td>#,##0.00-#,##0.00</td>
<td>Select the required format</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary Type</td>
<td>Sum (Sum)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description Column Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description Format</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colour Source</td>
<td>Select column colour if required</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3.2 CREATING CROSS TAB ENQUIRY

1. Click on Add, then select Cross Tab Enquiry.

2. Add Enquiry Name in Description box, then click OK.

3. Click on the Data Source icon on the left side bar. Click Add >> Analyser.
4. Choose the correct Analyser under the Description column that you wish to use as the Data Source for your enquiry. The number of data sources you see depends on the roles you have in CiAnywhere.

![Select Data Source](image)

**Notes:**
- **Description (Column)**: The Description column contains the names of the available analysers. Each analyser represents a different data source for your enquiry.
- **Product**: The Product column indicates the type of data sources available, such as 'Financials', 'Stakeholder Management', 'Enterprise Asset Management', etc.
- **Functional Group Description**: This column describes the purpose or context of the data sources, such as 'Financial System Administration' or 'Project Management'.

5. Depending on the Analyser, you might need to select Chart Name, then click OK.

![Add Analyser Data Source](image)

**Notes:**
- **Data Source Name**: This is where you enter the name of the data source you have chosen.
- **Chart Name**: This field is used to select the specific data chart you wish to use from the chosen data source.
- **Enable commitments**: This option is available for some analysers and enables the setting of commitments based on the data provided.

![Buttons](image)

**Buttons:**
- **OK**: Click OK to confirm your selection and proceed.
- **Cancel**: Click Cancel if you wish to discard your changes and start over.

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6. Click on the **Magnifier** icon on the side bar to edit the criteria.

![Magnifier icon](image)

7. Click on the **+** icon to add a new criteria item, then click on the **•••** on the right side to set the Criteria.

![Add criteria](image)

8. Once you have set the Criteria, click **OK**.

![Criteria settings](image)
9. To swap the criteria connection between And/Or, click on the circle icon.

10. Click on the Table icon on the side bar and then click Add to add columns to the enquiry.

Note: Make sure you add all required columns as the data, row and column fields will be selected from these Columns.
11. Click on the **Column Dimensions** icon on the side bar and click **Add** to add column fields.

12. Select the **column fields** you wish to add. A tick will display next to those items selected. Then click **Add**.
13. Click on the **Row Dimensions** icon on the side bar to add row fields.

14. Select the **Column Names** you wish to add. A tick will display next to those items selected. Then click Add.
15. Click on the icon the side bar to add data value.

16. Select the **Column Names** you wish to add. A tick will display next to those items selected. Then click **Add**.

17. Click **Run** on the upper left corner to execute the enquiry.
4 SETTING UP VARIABLE TO ENQUIRIES

4.1 CREATING VARIABLE

1. Go to the Variables {x} tab, then click + Add.

2. Fill in the Name, Description for the variable.
   Name field cannot contain any space.
   Choose Alphanumeric for Type field.

   Variable can be set for Period, Cost Centre, College Level, etc.
   The example below is named as YEAR, and it will represent the Ledger Name.

   The Value field will be the default value for the variable whenever you run the enquiry.

   If you want the Enquiry to automatically stay up-to-date on the latest ledger, we will show you how to use System Variable. To access System Variable, click on the {x} icon in the Value field.
In this example, we want the variable to be the latest GLA ledger. At the moment, 23GLA is the latest GL Actual ledger, so we will type 23GLA in the search box, then Enter. Select FLIN_ACTUAL_LDG_GL.

Now, the system variable has been assigned the variable Year value. Click Save.
4.2 ASSIGNING VARIABLE TO CRITERIA

Remove the previous value, then click on the icon `{x}`.

Select the variable we just set up earlier.
4.3 ENABLING PARAMETER TO ACCESS VARIABLE FROM ENQUIRY DISPLAY SCREEN

This step will allow you to edit the variable from the enquiry display screen. You only need to switch it on once per enquiry.
Go to Preferences tab at the bottom of the page. Then click Edit.
Tick **Enable Parameters**, then click **Save**.

When you run the enquiry, you will see [#] icon on the top right corner of the screen. Click on the icon, you will see the default value that was set earlier.
5 ACTIONS

When you want to click on a Project/Account and want to view the associated transactions/commitments with that Project/Account, you can use the actions tab.

Make sure you have the Account column added to your column list.

Click on the Actions Tab and add an Action ‘Launch Transaction’.
Select the ‘Apply Action on row dimension. Make sure you select the ‘Selected Row Dimensions’ and the corresponding field that you want the action to be applied to and click on the ‘Save’ button.
Run the enquiry.

Click on the Account to access the transactions.
When there are multiple rows with same details, you can consolidate those rows using consolidation function.

TEST

In Enquiry setting, go to Consolidation tab, click Edit.
Click on +Add new row, then select the field that you want to use for the consolidation. In this example, we will choose Project. Then click Save.

When you run the enquiry, you will see all the lines with the same project code are now merged into one.
NOTE: BE MINDFUL OF THE OTHER COLUMNS WHEN YOU USE CONSOLIDATION.

If your enquiry has additional columns such as Account as in the below example. A project can be associated with many account codes.

If the consolidation is based on Project code, the enquiry will ignore the multiple account codes and display only 1 account code.

7 COLUMN DESCRIPTION

For some fields such as Project, Cost Centre, Account, etc. are displayed in codes.

You might want to add description right next to the code for easy understanding.
The following instructions will display the description for Project code only. You can repeat the process for other columns.

In Enquiry setting > Columns tab, add Project Description in the enquiry columns.
Go to Project column.

Columns

Define the list of columns accessible by this query.

1 - 6 of 6 records.

1. PB → Project Description
2. PB → Cost Centre/Project Description
3. PB → Project Description 2
4. PB → Cost Centre/Project Description 2
5. OK
6. PB → Project Description

Add based on Field Name

Select Fields

One or more fields from the specified data sources can be added to this query.

- PB → Project Description
- PB → Cost Centre/Project Description
- PB → Project Description 2
- PB → Cost Centre/Project Description 2

Confirm Action

3 selected items will be added based on Field Names. Are you sure?

OK
Scroll down to the bottom of the page, find Description Column Name field. Select Project Description in the drop-down.

Then select Code – Description in Description Format.

Then Save.

When you run the enquiry, the project column now has description displayed right next to the project code.

8 SHARING AN ENQUIRY

8.1 SHARING THE ORIGINAL ENQUIRY

Note: This sharing method will give others access to your enquiry. Any updates you make will be visible to these users.

1. Click on an enquiry you want to share, then click the down arrow on the upper left corner. Then click Share.
2. Type in the **User ID** of the person you wish to share the enquiry with.
Select the applicable **Access Level (Read Only/Edit/Admin)** you wish to allow the person you are sharing the enquiry with, then click **OK** to start sharing.

**Note:** Admin access will allow the recipient to delete the original enquiry. So **Read Only** and **Edit** access are strongly recommended.

The next steps are for the **Recipient**.
3. The recipient needs to navigate to their Analytics Enquiries tab.
   
   **Note:** If the recipient does not have access to FlinU BA Enquiries, please submit a request to Service One.


5. Click on the .Shared folder to view the shared enquiries stored within the applicable folder.
8.1.1 CREATING A COPY OF A SHARED ENQUIRY

You can create a copy of a shared enquiry, the copied enquiry will yours to edit without affecting the original.

Click on the **down arrow**, and select **Copy**.

Rename the Copied Enquiry as you want, then click **OK**.
8.2 SHARING AN EXPORT FILE OF AN ENQUIRY

Note: This sharing method creates a copy of an enquiry that can be sent to others to import into their enquiry list. The receiver will have their own version of the enquiry, and can make change to the enquiry without affecting the original version.

1. Click on the enquiry you want to share, then click the down arrow on the upper left corner. Click Share. The enquiry will be automatically downloaded to your device’s Downloads folder.

2. Send the file to the person you want to share with.

   Note: The next steps are for the Recipient.
3. The recipient needs to navigate to their **Analytics Enquiries** tab.  
   **Note:** If the recipient does not have access to FlinU BA Enquiries, please submit a request to Service One.

4. Click on **Add >> Import**, then click on the + icon to import an enquiry.
5. The downloaded enquiry should be in your device’s **Downloads** folder. **Select** the enquiry file then click on **Open**.

6. Change the name of the file, if required, in the **Description** box. Keep the **Folder** as the default location.