



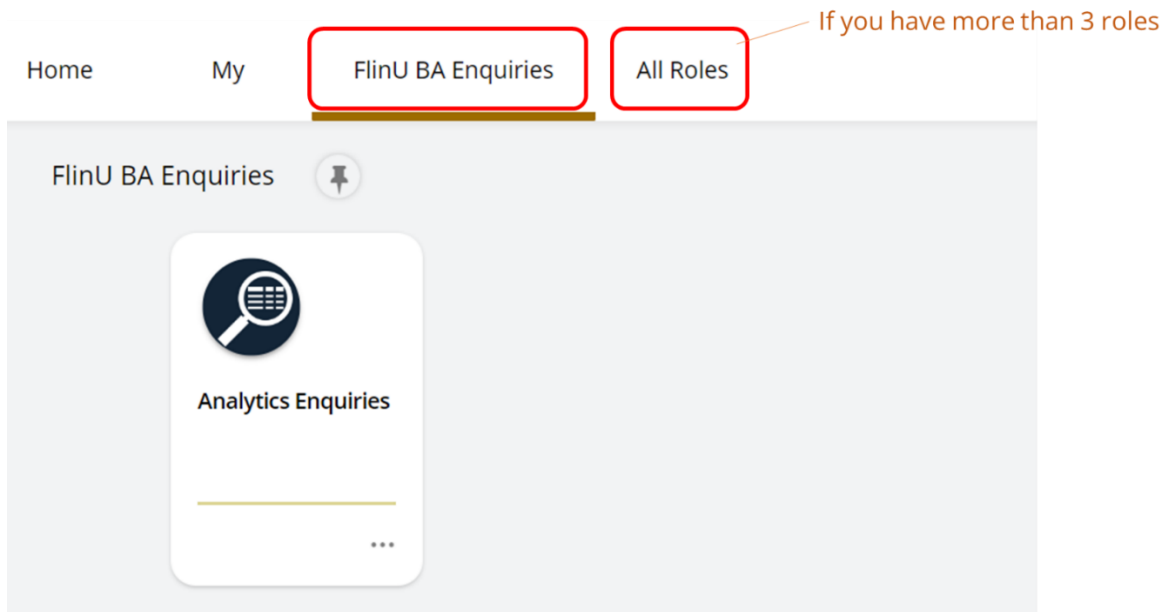
Contents

- 1 **BA Analytics Role**..... 2
- 2 **How to Run an Enquiry** 2
- 3 **Creating a New Enquiry** 4
 - 3.1 **Creating Table Enquiry** 4
 - 3.1.1 **Display columns**..... 10
 - 3.1.2 **Sum Columns**..... 12
 - 3.2 **Creating Cross Tab Enquiry** 15
- 4 **Setting up variable to enquiries** 22
 - 4.1 **Creating variable** 22
 - 4.2 **Assigning Variable to Criteria** 24
 - 4.3 **Enabling Parameter to access Variable from Enquiry display screen**..... 25
- 5 **Actions**..... 27
- 6 **Consolidation** 30
- 7 **Column Description**..... 32
- 8 **Sharing an Enquiry**..... 34
 - 8.1 **Sharing the original enquiry**..... 34
 - 8.1.1 **Creating a copy of a shared enquiry** 37
 - 8.2 **Sharing an export file of an enquiry** 38

1 BA ANALYTICS ROLE

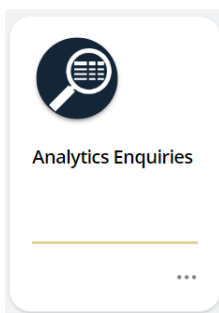
From the menu items, select the **FlinU BA Enquiries** Role.

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

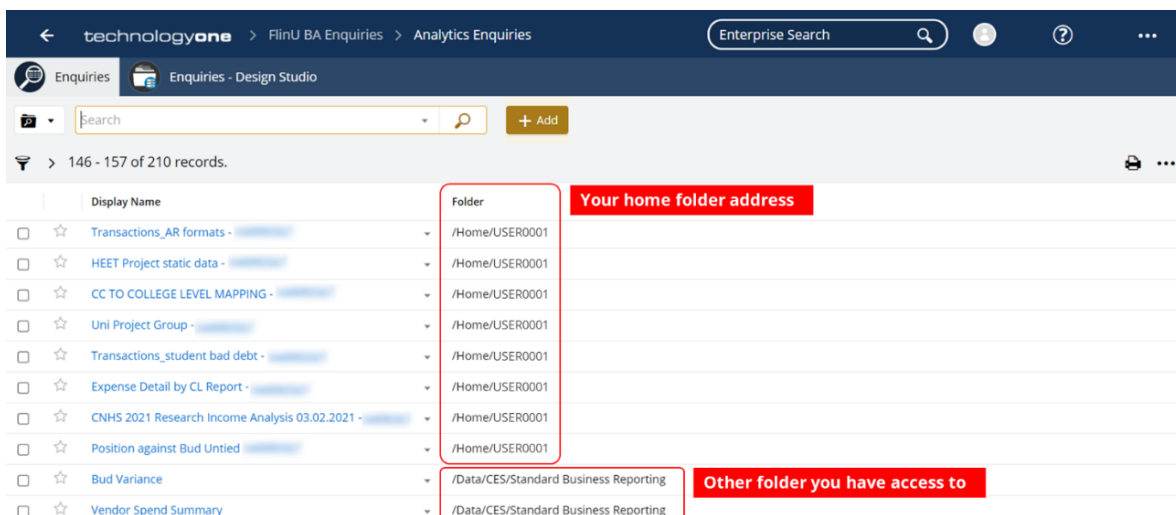


2 HOW TO RUN AN ENQUIRY

1. Select the **Analytics Enquiries** tab in the role.

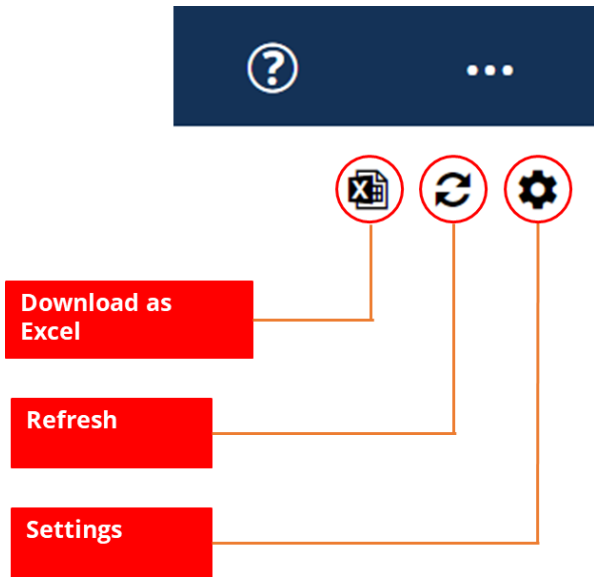


2. You will see a list of enquiries from your Home Folder, and other folders that you have access to. Click on a line to run an enquiry.



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](#).



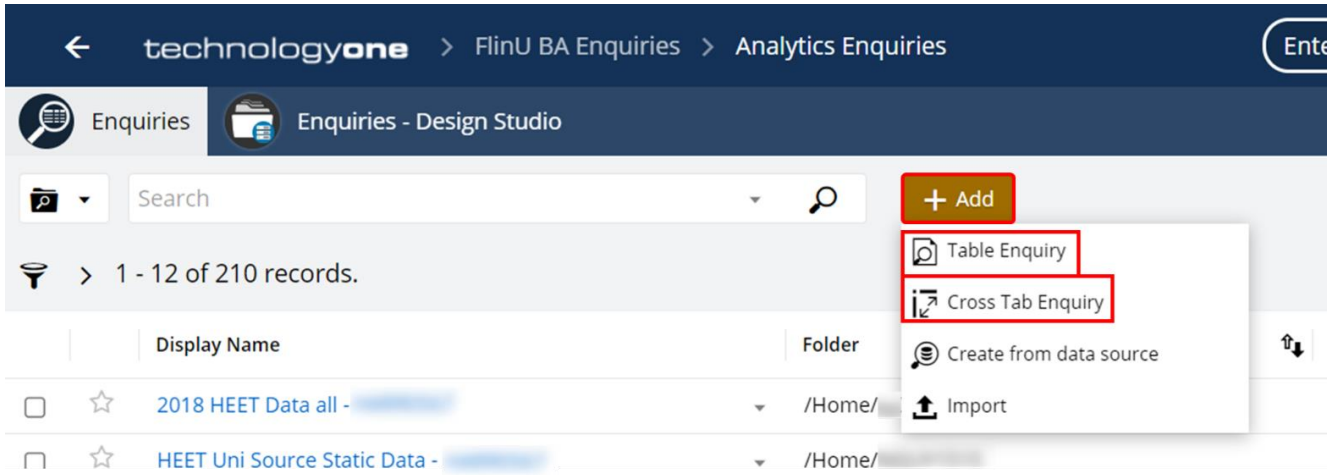
Note: Click on the back **Arrow** on the upper left corner to return to Enquiries list.

The screenshot shows the 'Period Balances' page in the technologyone system. The page header includes a back arrow icon (circled in red), the 'technologyone' logo, the page title 'Period Balances - CONN0229', and an 'Enterprise Search' field. Below the header, the page title 'Period Balances - CONN0229' is displayed. A table with the following columns is shown: '1200 - Res...', '1700 - Oth...', '3000 - Sal...', '3200 - No...', and 'Total'. The table contains six rows of data. On the right side, three icons are circled in red: a spreadsheet icon, a refresh icon, and a settings icon. Lines connect these icons to three red boxes labeled 'Download as Excel', 'Refresh', and 'Settings' respectively. A back arrow icon is circled in red in the top left corner of the page header.

	1200 - Res...	1700 - Oth...	3000 - Sal...	3200 - No...	Total
1200 - Res...	0.00	0.00	0.00	(30,869.20)	(30,869.20)
1700 - Oth...	0.00	0.00	0.00	463,957.30	463,957.30
3000 - Sal...	(4,700,000.37)	0.00	0.00	4,424,734.20	(275,266.17)
3200 - No...	(500,000.37)	0.00	0.00	469,613.47	(30,386.90)
Total	(7,399,999.26)	(2,695,025.04)	0.00	0.00	(10,095,024.30)
106,313.66	0.00	106,313.66	0.00	0.00	106,313.66

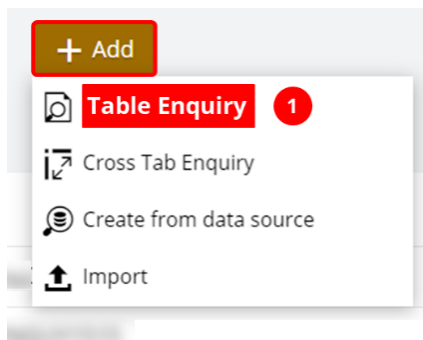
3 CREATING A NEW ENQUIRY

1. Select **Add** to create a new Enquiry.
2. Select **Table Enquiry** or **Cross Tab Enquiry**.

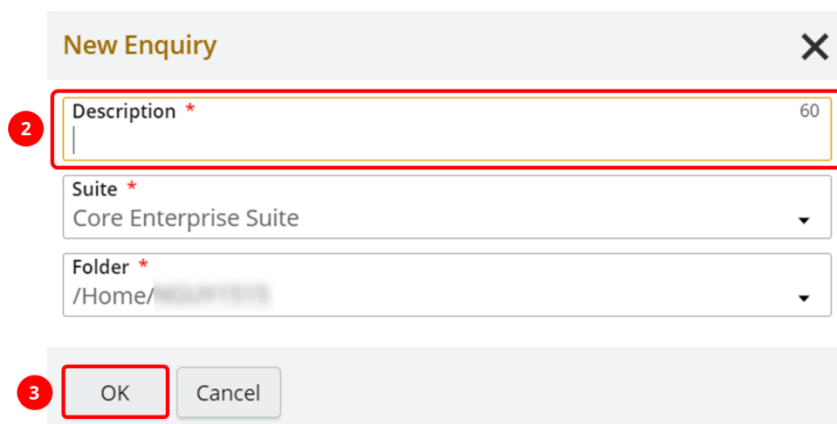


3.1 CREATING TABLE ENQUIRY

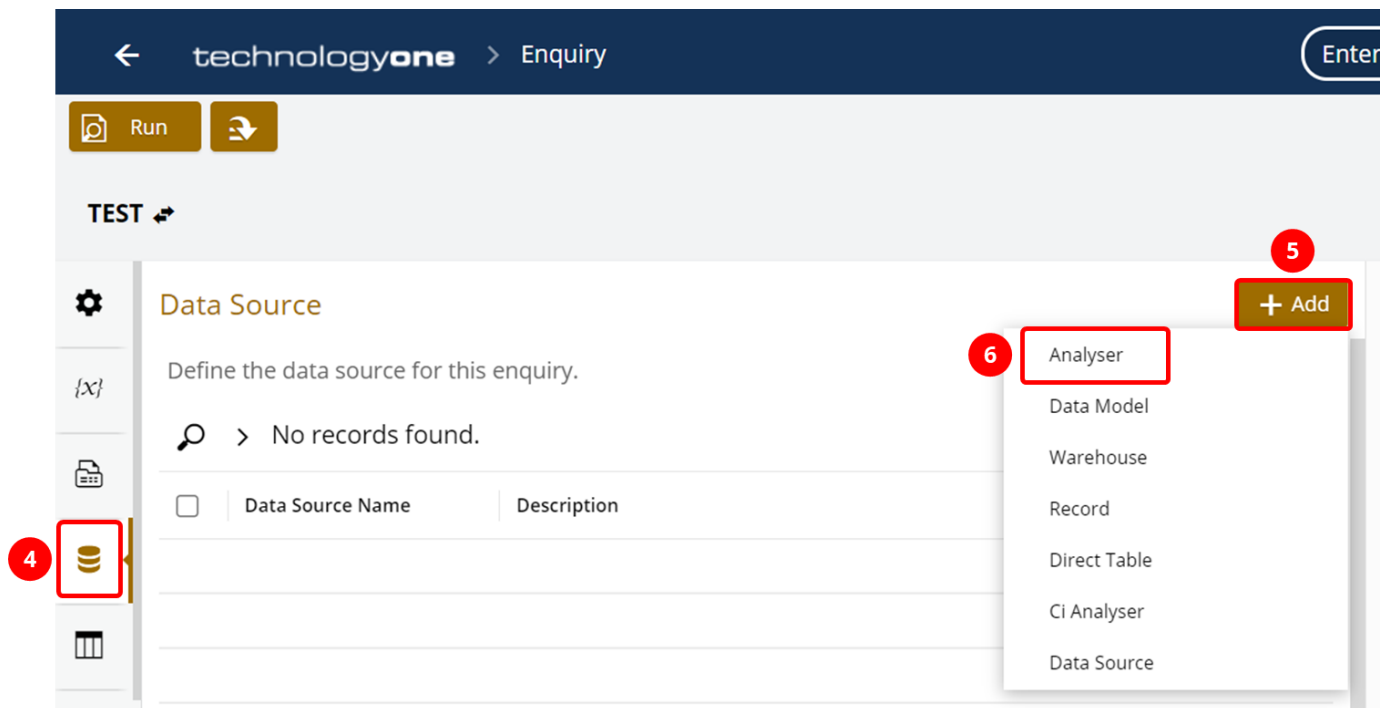
1. Select **Add Table Enquiry**



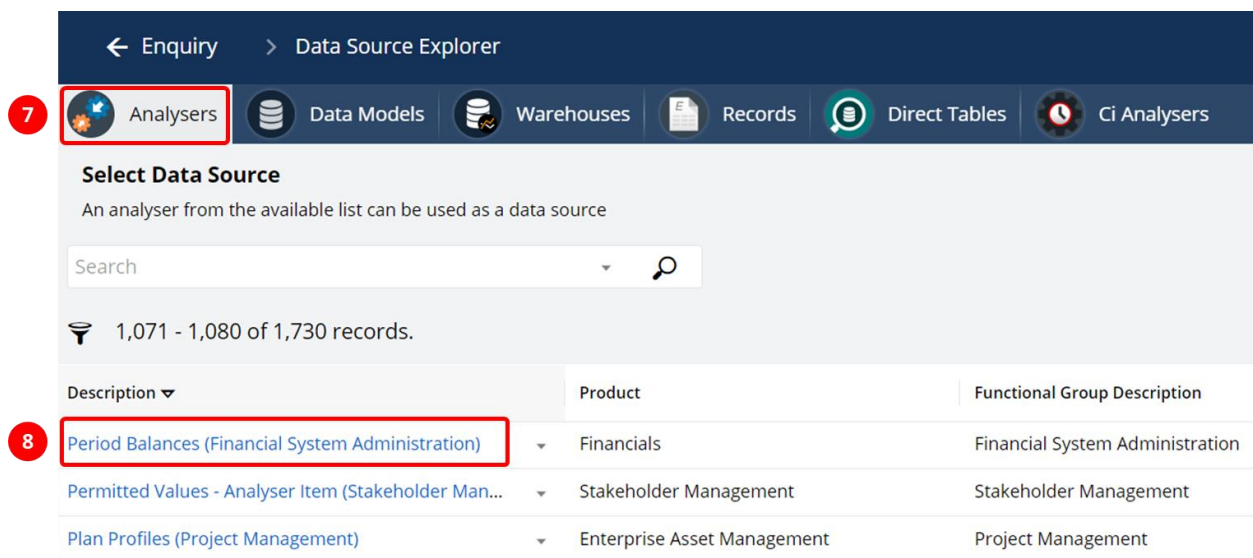
2. Add Enquiry Name in **Description** box, then click **OK**.



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**.

Add Analyser Data Source ✕

^ **General**

Data Source Name *
PB

Data Source
Period Balances (Financial System Administration)

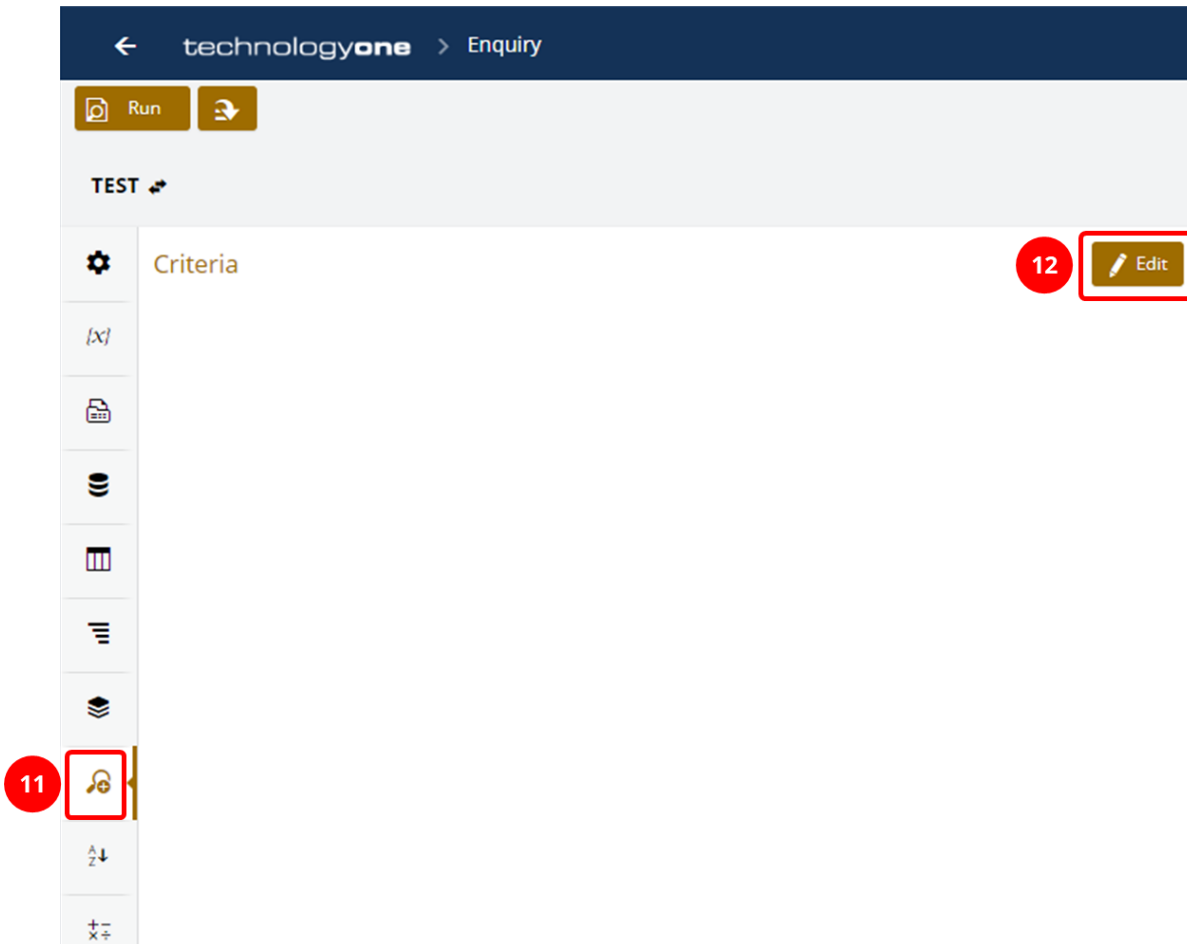
^ **Parameters**

9 Chart Name
GL (General Ledger) {x} ▾

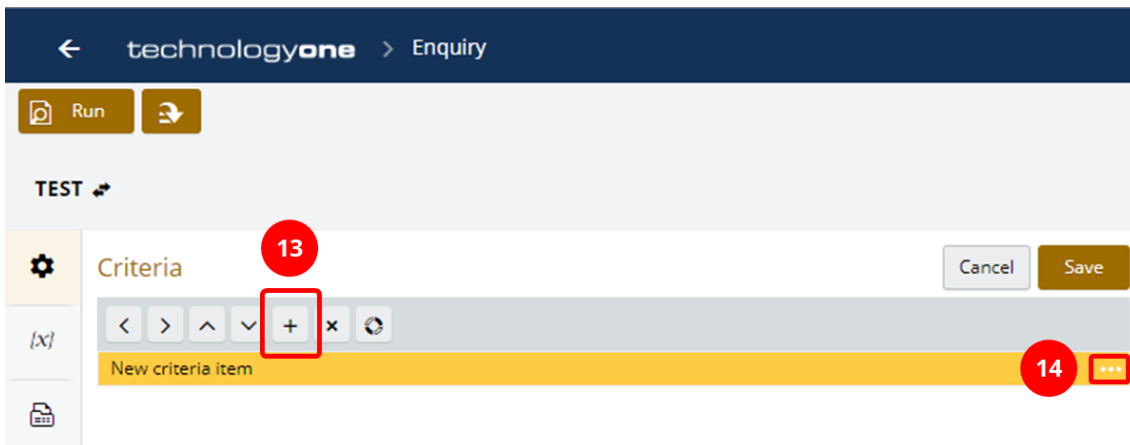
Enable commitments
N (No) {x} ▾

10 OK Cancel

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**.

Edit

15 Field
Ledger Name

16 Operator
Equals

17 Value
23GLA [x]

18 OK Cancel

9. To swap the criteria connection between **And/Or**, click on the circle icon.

← technologyone > Enquiry

Run

TEST

Criteria

19

20

Cancel Save

[x]

< > ^ v + ×

Swap between and/or

Ledger Name equals 23GLA

or

College Level 2 equals 22000

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.

The screenshot shows the 'technologyone' interface for an 'Enquiry' that has been 'Saved'. The main area is titled 'TEST' and 'Columns'. Below the title, there is a search bar with the text 'No records found.' and a table with columns 'Column Name' and 'Description'. The table is currently empty. On the left sidebar, the 'Table' icon is highlighted with a red circle labeled '21'. In the top right of the 'Columns' panel, the '+ Add' button is highlighted with a red circle labeled '22'. A dropdown menu is open, showing a list of column types: 'Add from fields', 'Display', 'Sum', 'Min', 'Max', 'Average', 'Count', 'Count Distinct', 'Expression', 'Colour', 'Image', 'Gauge', 'Traffic Light', 'Calculation', and 'Description'.

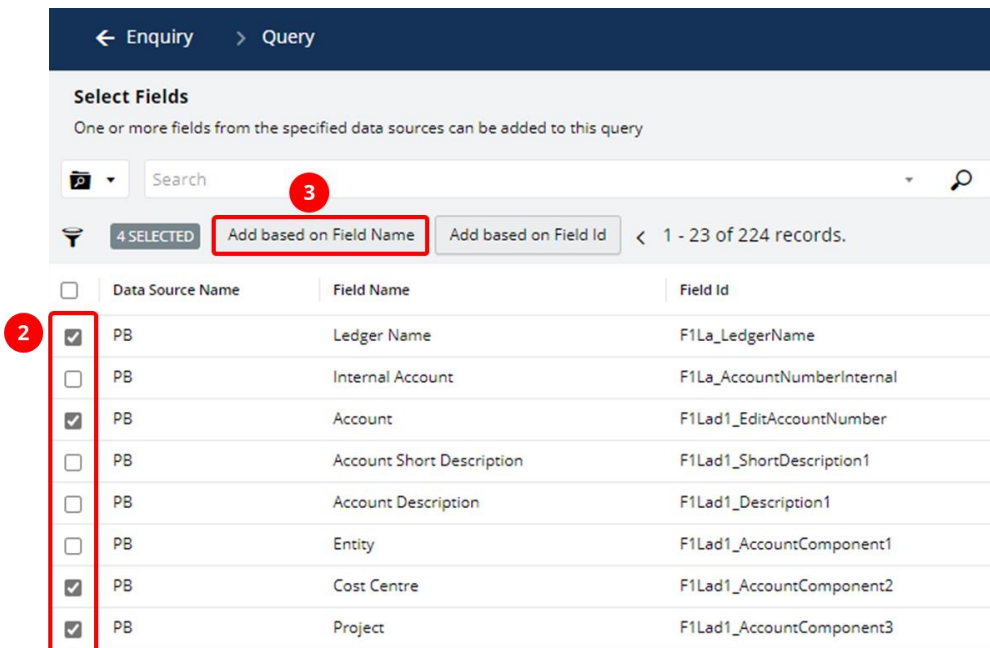
3.1.1 DISPLAY COLUMNS

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

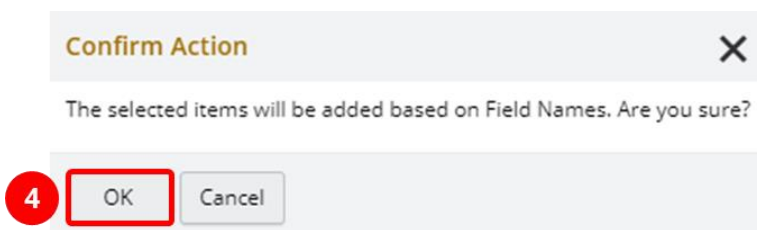


2. **Select the columns** you want to display. A tick will display next to those items selected.

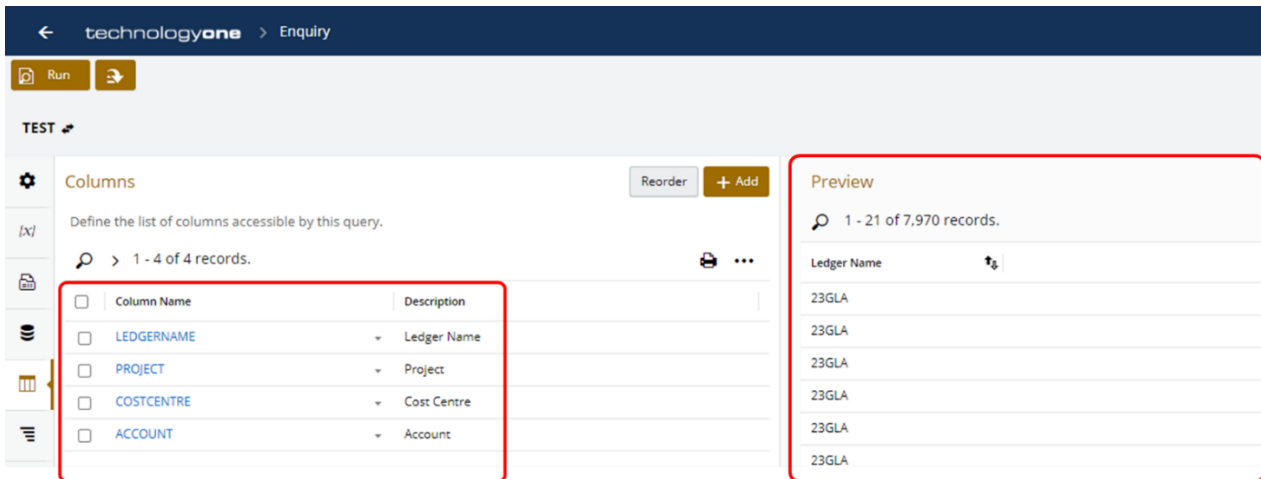
3. Then click **Add Based on Field Name**.



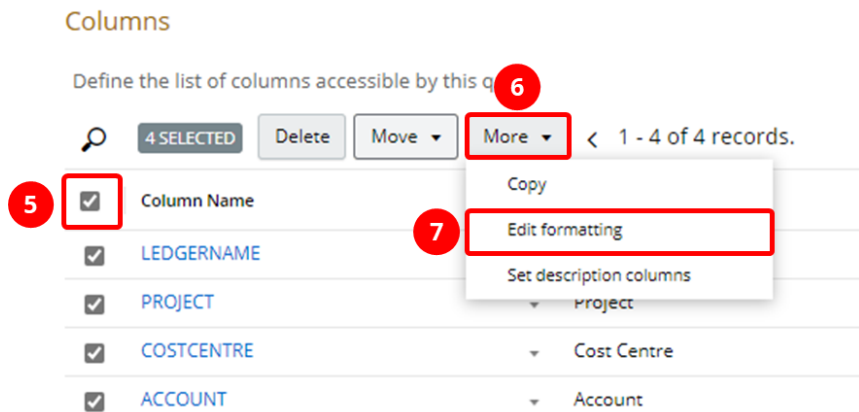
4. Click **OK** on the pop-up box.



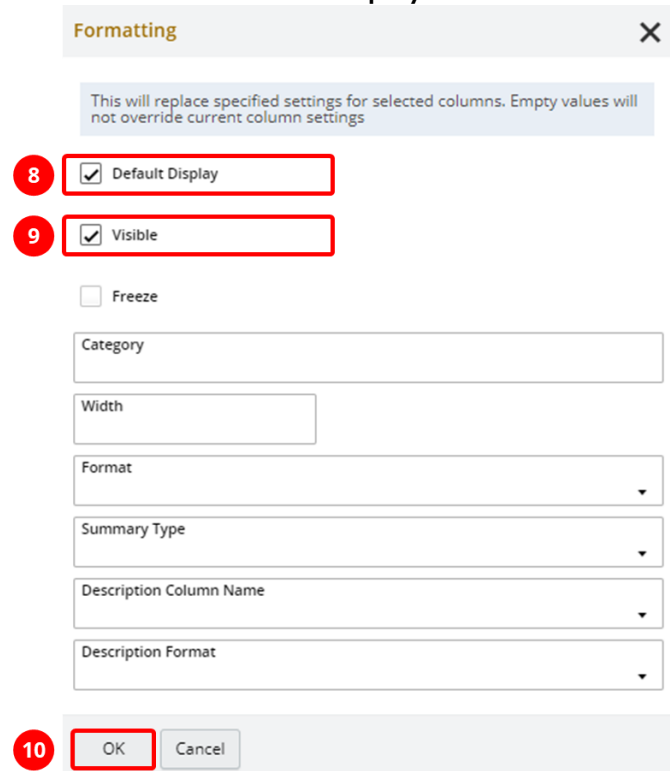
5. Some columns are not visible by default. The **Preview** area will show the expected result.



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.

Changed by Co Nguyen at 19-Jul-2023 10:50:58

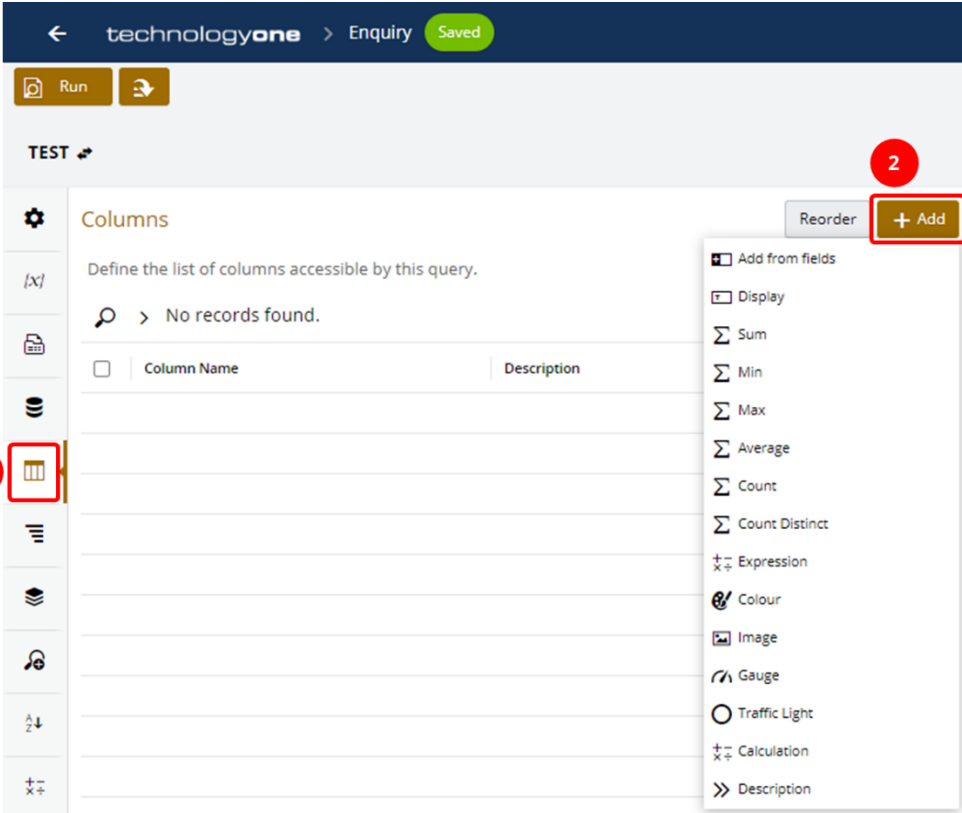
+ Add Preview 11  >>

1 - 21 of 7,970 records.


Ledger Name	Project	Cost Centre	Account
23GLA	39670	525	01.525.39670.2605
23GLA	39670	525	01.525.39670.2605
23GLA	37860	525	01.525.37860.9298
23GLA	08865	525	01.525.08865.9298


3.1.2 SUM COLUMNS

1. Click on **Add**, then select **Sum**.



technologyone > Enquiry Saved

Run 

TEST 

Columns

Define the list of columns accessible by this query.

> No records found.

<input type="checkbox"/>	Column Name	Description
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Reorder + Add

- Add from fields
- Display
- Σ Sum
- Σ Min
- Σ Max
- Σ Average
- Σ Count
- Σ Count Distinct
- ⚡ Expression
- 🎨 Colour
- 🖼 Image
- 📊 Gauge
- 🚦 Traffic Light
- ⚡ Calculation
- 🔗 Description

Add from fields

Display

Σ Sum

Σ Min

Σ Max

Σ Average

Σ Count

Σ Count Distinct

⚡ Expression

🎨 Colour

🖼 Image

📊 Gauge

🚦 Traffic Light

⚡ Calculation

🔗 Description

2. Fill in the **required fields**, then click on **Save**.

Column

Cancel Save

General

4 Column Name *
SUMSAMPLE

5 Description
Sum Sample Fill in the displayed name [X]

Column Type *
Sum (Sum)

Settings

Default Display

6 Data Source Name *
PB (Period Balances) Select Data Source

7 Field *
F1Lpb_BalanceAmount1 (Amount) Select Sum Column

Data Type
Decimal

Max Length *
14

Decimal Places
2

Criteria Add criteria if required

8 < > ^ v + x ↺
No criteria defined.

Formatting

Visible

Note: You will need to scroll down to see all required fields.

Run

TEST

Columns

Column

Cancel Save

12

Data Type
Decimal

Max Length *
14

Decimal Places
2

Criteria

No criteria defined.

Formatting

Visible

Freeze

Category

9 Width
100 Decide the default column width

10 Format
#,##0.00;-#,##0.00 Select the required format

Summary Type
Sum (Sum)

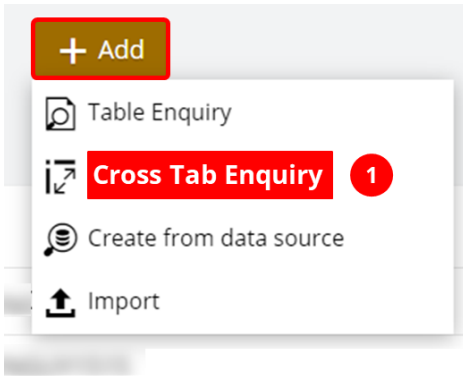
Description Column Name

Description Format

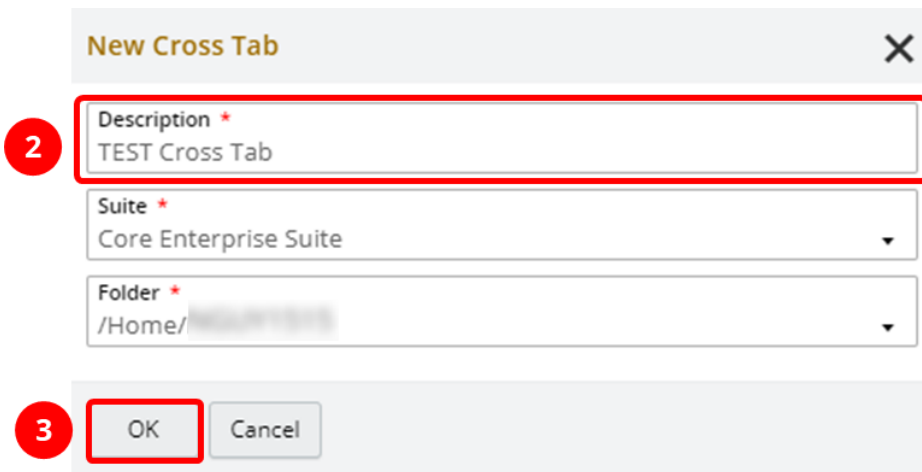
11 Colour Source
Select column colour if required

3.2 CREATING CROSS TAB ENQUIRY

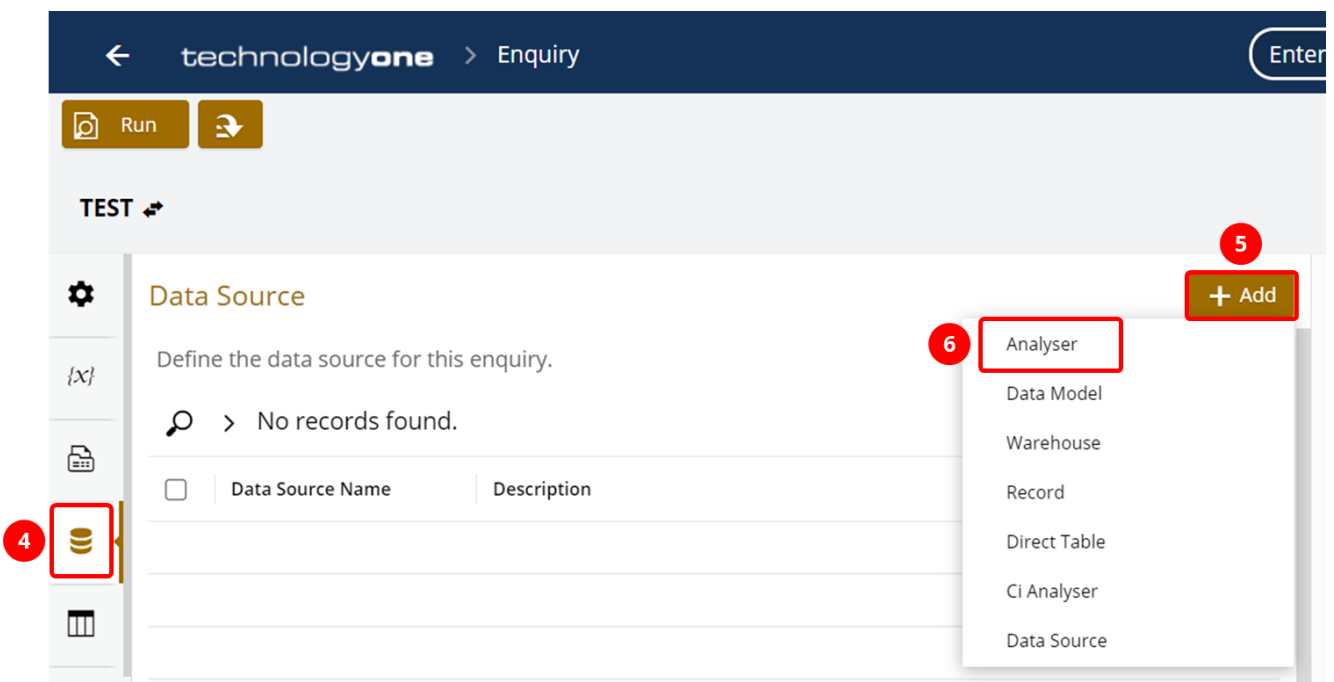
1. Click on **Add**, then select **Cross Tab Enquiry**.



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.

← Enquiry > Data Source Explorer

7 **Analysers** Data Models Warehouses Records Direct Tables Ci Analysers

Select Data Source
An analyser from the available list can be used as a data source

Search

1,071 - 1,080 of 1,730 records.

Description ▾	Product	Functional Group Description
8 Period Balances (Financial System Administration)	Financials	Financial System Administration
Permitted Values - Analyser Item (Stakeholder Man...	Stakeholder Management	Stakeholder Management
Plan Profiles (Project Management)	Enterprise Asset Management	Project Management

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

Add Analyser Data Source ✕

^ **General**

Data Source Name *
PB

Data Source
Period Balances (Financial System Administration)

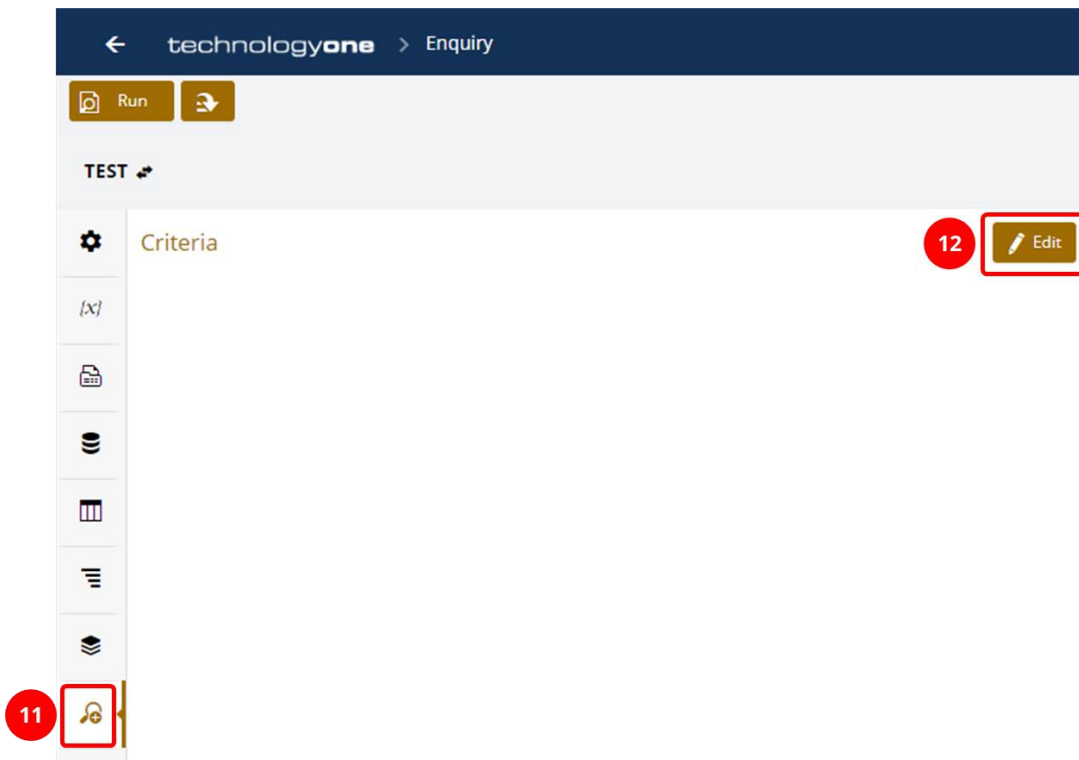
^ **Parameters**

9 **Chart Name**
GL (General Ledger) {x} ▾

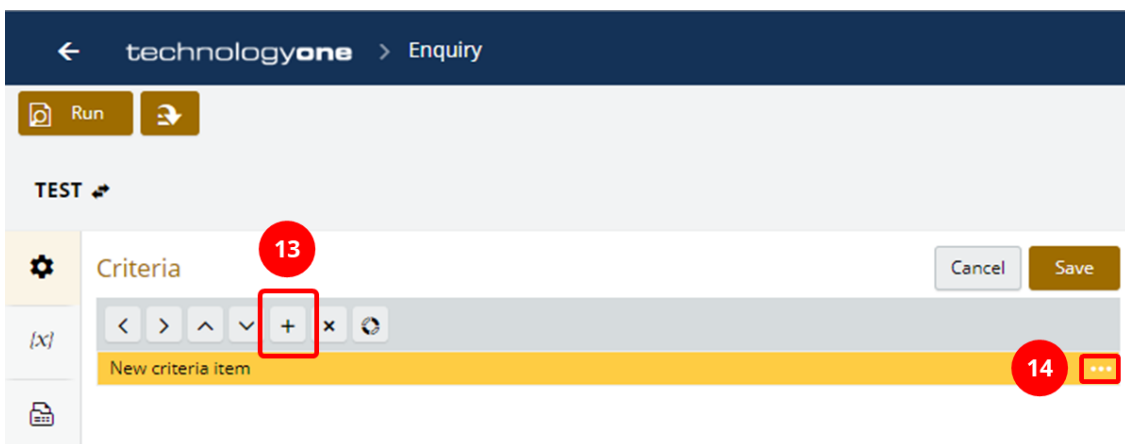
Enable commitments
N (No) {x} ▾

10 **OK** Cancel

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

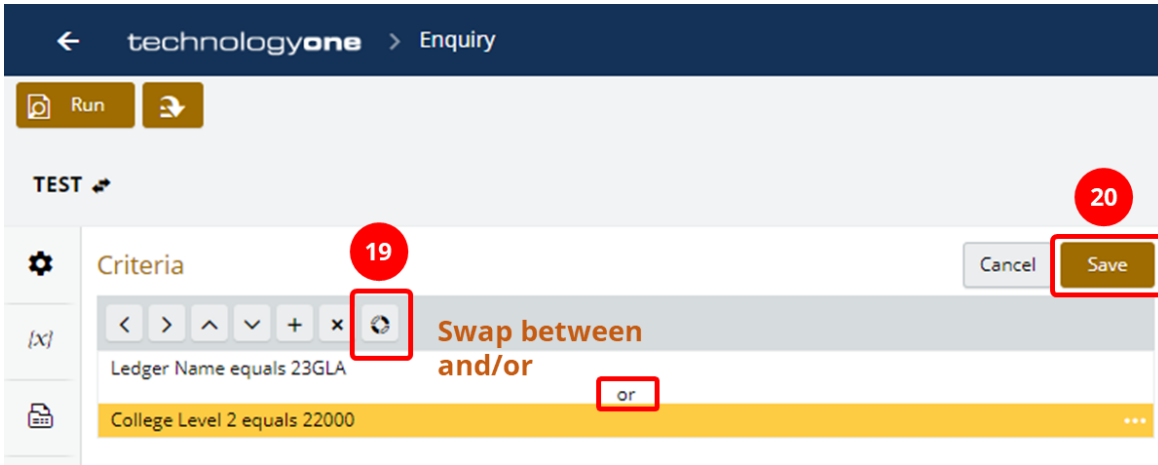


8. Once you have set the Criteria, click **OK**.

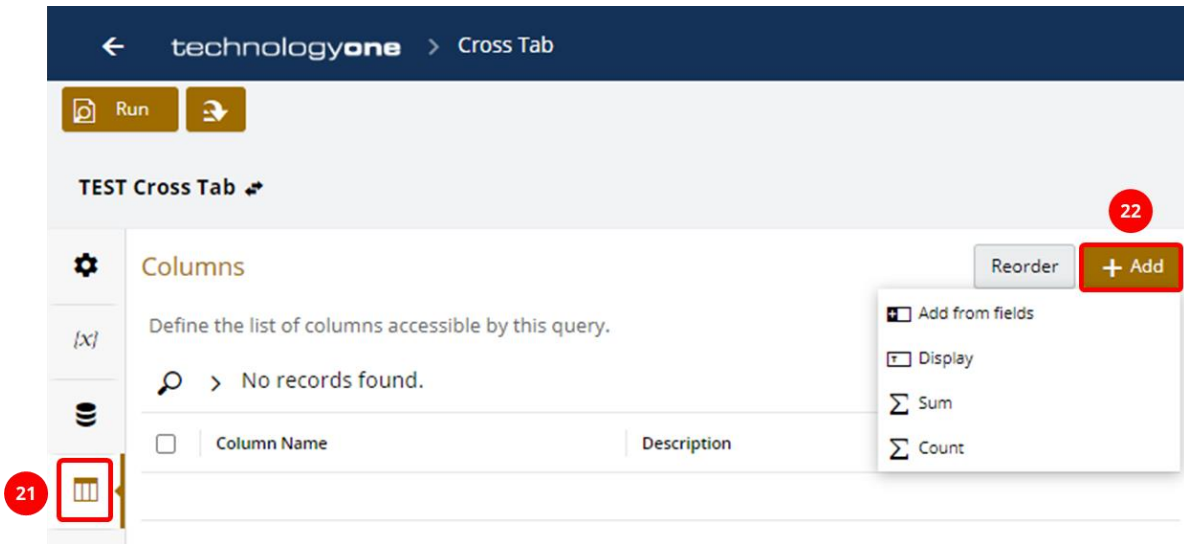
The 'Edit' dialog box contains the following elements:

- 15: A dropdown menu for 'Field' with 'Ledger Name' selected.
- 16: A dropdown menu for 'Operator' with 'Equals' selected.
- 17: A text input field for 'Value' containing '23GLA' and a small '[x]' icon.
- 18: 'OK' and 'Cancel' buttons.

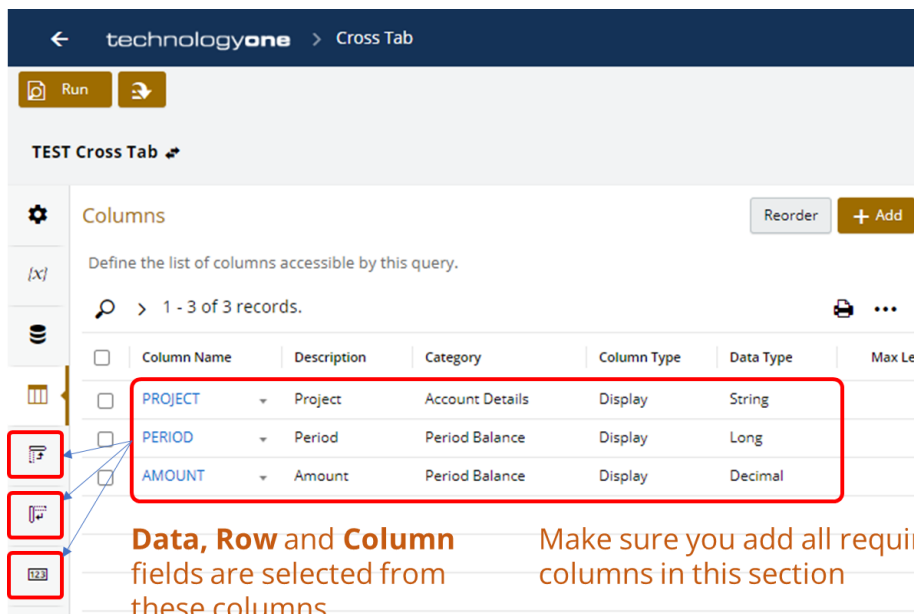
9. To swap the criteria connection between **And/Or**, click on the circle icon.



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.

technologyone > Cross Tab

Run

TEST Cross Tab

Column Dimensions

Reorder + Add

Define the complete list of column dimensions accessible by this query.

> No records found.

Column Name	Description
-------------	-------------

12. Select the **column fields** you wish to add. A tick will display next to those items selected. Then click **Add**.

technologyone > Cross Tab

Run

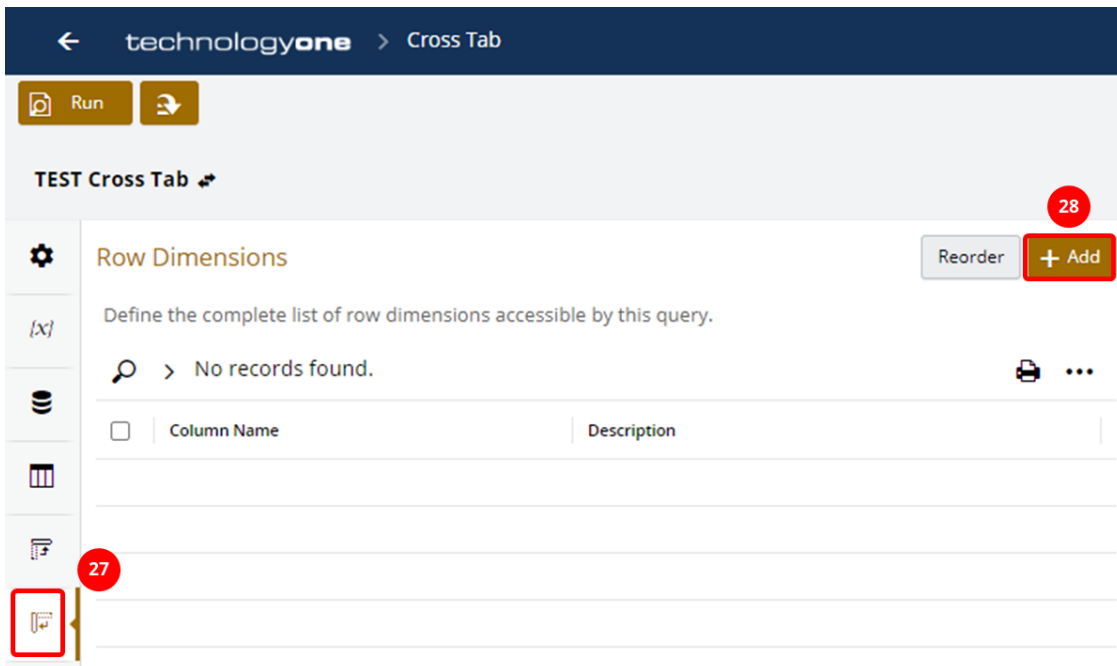
TEST Cross Tab

Add Column Dimensions

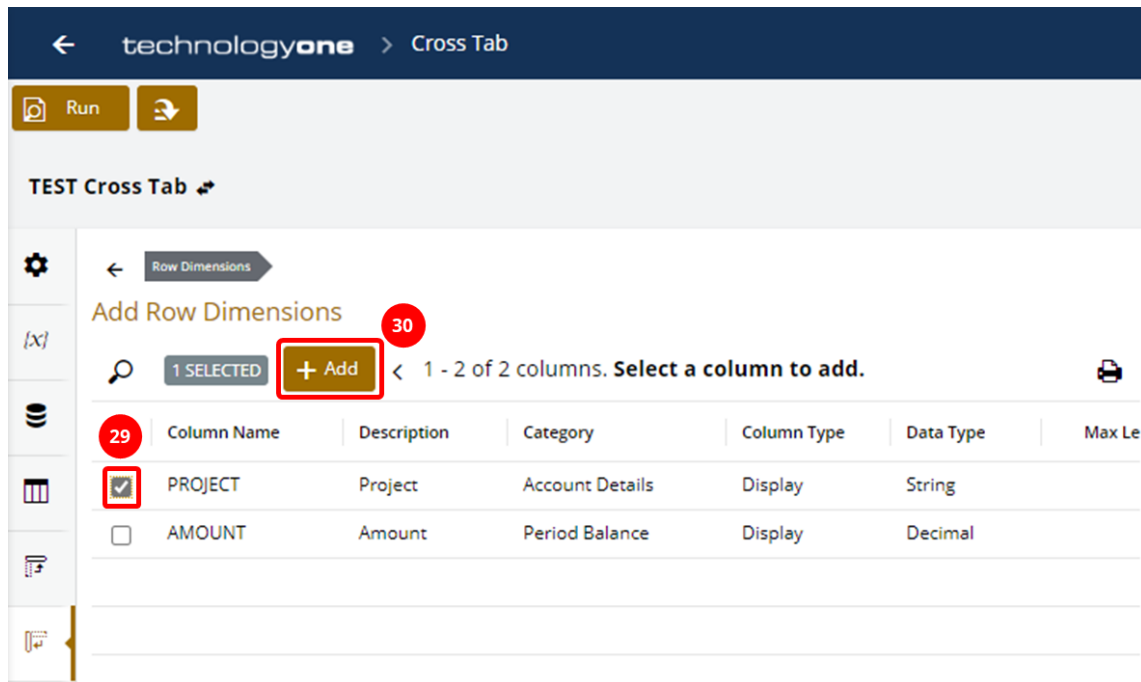
1 SELECTED + Add < 1 - 3 of 3 columns. Select a column to add.

Column Name	Description	Category	Column Type	Data Type	Max Le
PROJECT	Project	Account Details	Display	String	
<input checked="" type="checkbox"/>	PERIOD	Period	Period Balance	Display	Long
<input type="checkbox"/>	AMOUNT	Amount	Period Balance	Display	Decimal

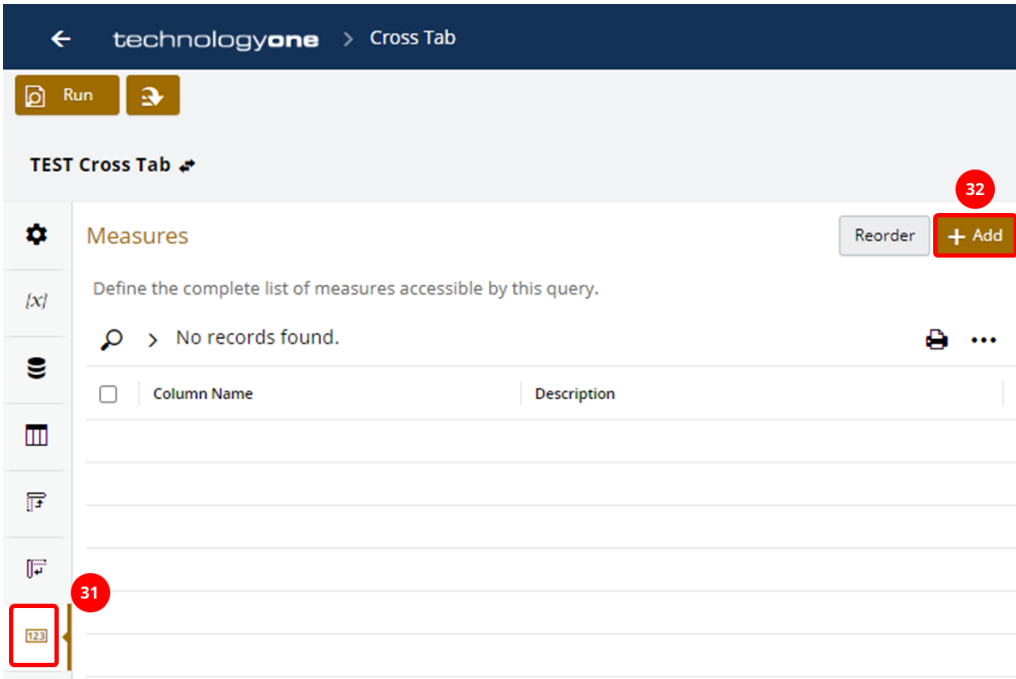
13. Click on the **Row Dimensions** icon on the side bar to add row fields.



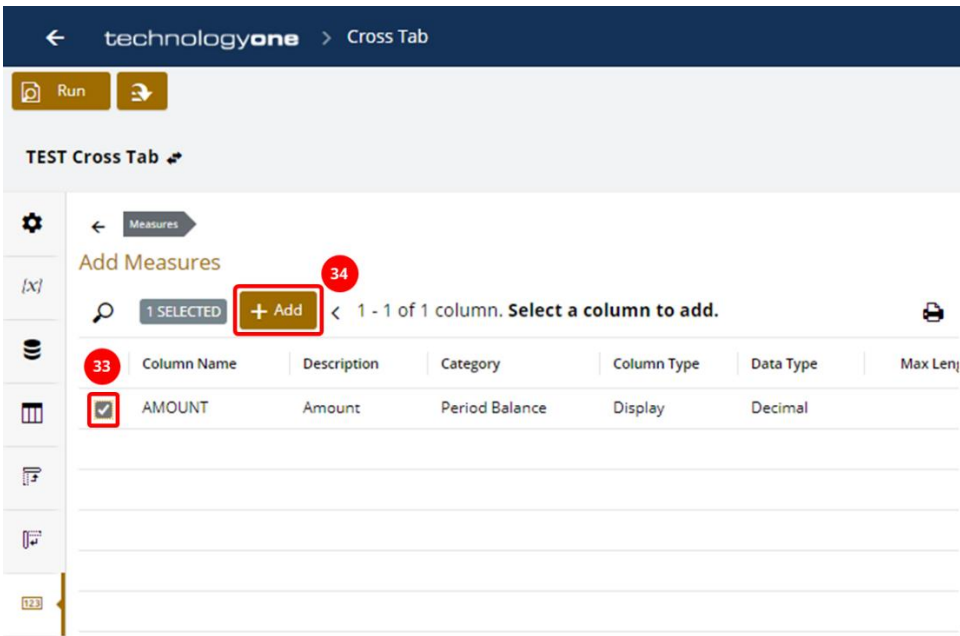
14. Select the **Column Names** you wish to add. A tick will display next to those items selected. Then click **Add**.



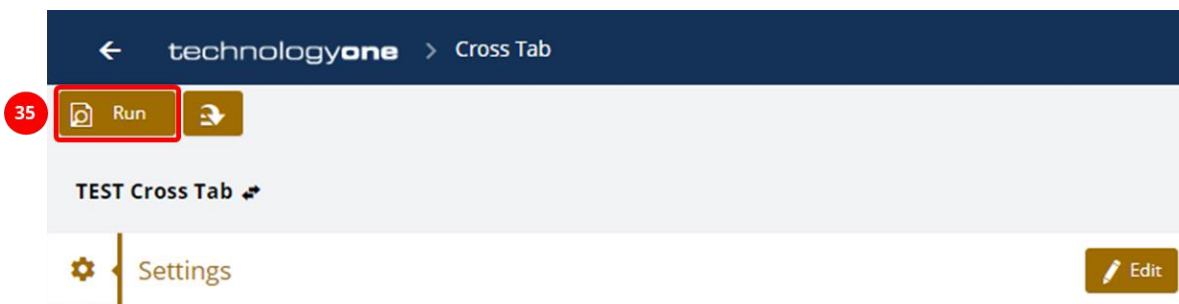
15. Click on the **123** icon the side bar to add data value.



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



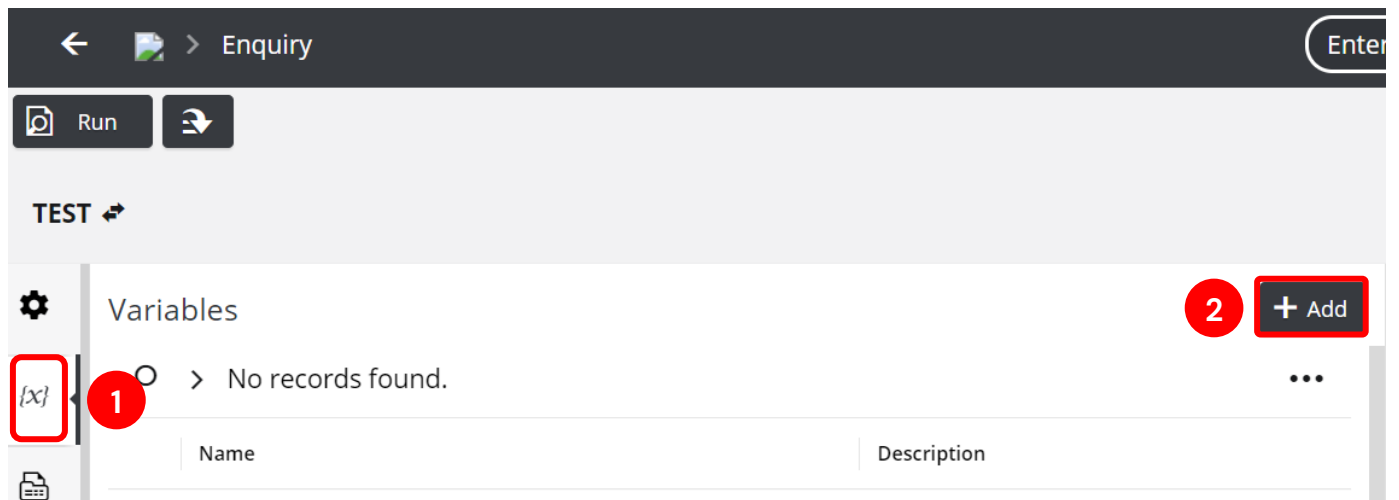
17. Click **Run** on the upper left corner to execute the enquiry.



4 SETTING UP VARIABLE TO ENQUIRIES

4.1 CREATING VARIABLE

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



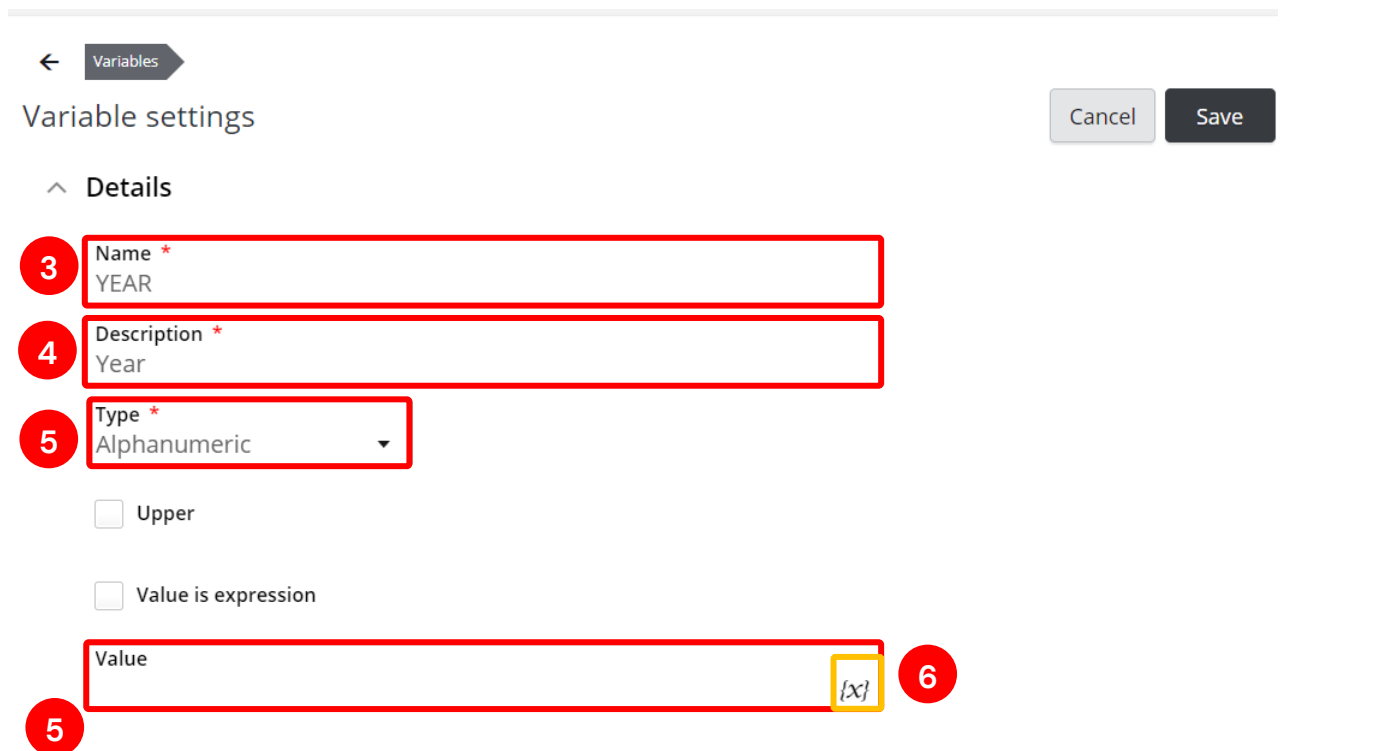
2. Fill in the **Name**, **Description** for the variable.
Name field cannot contain any space.
Choose **Alphanumeric** for Type field.

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**.

Select Variable ✕

System (CES) System (SM) Audit

 23GLA 

  1 - 2 of 2 records.  

System Variable	Description	Value
CPM_LEDGER_ACTUAL	Actuals (GL) Ledger for BI Portlets	23GLA
FLIN_ACTUAL_LDG_GL	Actual Ledger	23GLA

7

Now, the system variable has been assigned the variable Year value. Click **Save**.

 Variables 

Variable settings


Cancel **Save**

8

Details

Name *
YEAR

Description *
Year

Type *
Alphanumeric  

Upper

Value is expression

Value
{&CES:FLIN_ACTUAL_LDG_GL} 

Visible

4.2 ASSIGNING VARIABLE TO CRITERIA

Criteria

(Ledger Name Is equal to 23GLA AND College Level 2 Is equal to 22000)

Edit

1

2

Criteria

Cancel Save

< > ^ v + x ↻

Ledger Name = 23GLA

and

College Level 2 = 22000

3

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

Edit

Field
Ledger Name

Operator
Equals

Value
23GLA Remove {x}

4

5

OK Cancel

Select the variable we just set up earlier.

Select Variable ✕

Variables **System (CES)** System (SM) Audit

1 - 1 of 1 record.



Name 6	Description	Value
YEAR	Year	{&CES:FLIN_ACTUAL_LDG_GL}

Click **OK**.

Edit

Field
Ledger Name

Operator
Equals


Value
{&YEAR} **7**

OK Cancel

Then click **Save**.

Criteria

Cancel **Save** **8**



Ledger Name equals {&YEAR} ...

and

College Level 2 = 22000

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**.

Preferences

Layout

Heading

Sub Heading

Display Density
Standard (Standard)

Header Lines
1

Enable Parameters

Enable Grouping

Enable Consolidation

Enable Drilldown

Edit

1

2

Tick **Enable Parameters**, then click **Save**.

Preferences

Layout

Heading {x}

Sub Heading {x}

Display Density
Standard (Standard) ▼

Header Lines
1

Enable Parameters

Enable Grouping

Enable Consolidation

Enable Drilldown

Cancel

Save

3

4

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.

1 - 13 of 2,960 records.

Ledger Name	Project	Cost Centre	Account	Amount
23GLA	00072	601	01.601.00072.1101	384.52

Parameters [X]

Year * **6**
23GLA [X]

OK Cancel

This is the value of the system variable set earlier.

Select Variable [X]

System (CES) System (SM) Audit

23GLA [Search]

1 - 2 of 2 records.

System Variable	Description	Value
CPM_LEDGER_ACTUAL	Actuals (GL) Ledger for BI Portlets	23GLA
FLIN_ACTUAL_LDG_GL	Actual Ledger	23GLA

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.

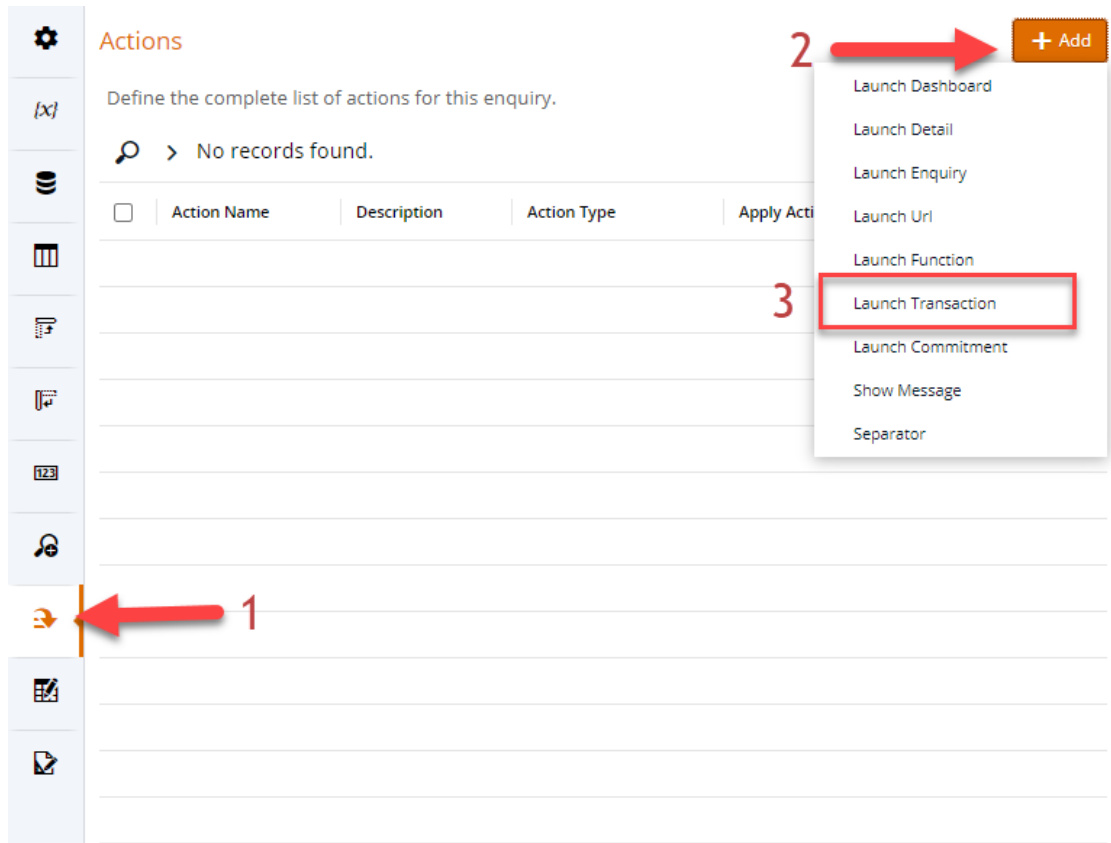
Columns [Reorder] [+ Add]

Define the list of columns accessible by this query.

1 - 9 of 9 records.

Column Name	Description	Category	Column Type
<input type="checkbox"/> LEDGERNAME	Ledger Name	Account Det...	Display
<input type="checkbox"/> ACCOUNT	Account	Account Det...	Display
<input type="checkbox"/> ACCOUNTDESCRIPTION	Account Description	Account Det...	Display
<input type="checkbox"/> PROJECT	Project	Account Det...	Display
<input type="checkbox"/> PERIOD	Period	Period Bala...	Display
<input type="checkbox"/> AMOUNT	Amount	Period Bala...	Display
<input type="checkbox"/> PROJECTDESCRIPTION	Project Description	Account Det...	Display
<input type="checkbox"/> FFSLEVEL1	FFS Level 1	Account Det...	Display
<input type="checkbox"/> FFSLEVEL1DESCRIPTION	FFS Level 1 Description	Account Det...	Display

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.

← Actions

Action

Cancel Save

4

1

2

3

^ General

Action Name *
ACTION01

Description *
Transactions [x]

Action Type *
Launch Transaction

Active

Apply action on cells

Apply action on column dimensions

Apply action on row dimensions

Display on
Selected Row Dimensions

Row dimensions*
ACCOUNT X

^ Details

Suite
Core Enterprise Suite

Function Name
\$LDG.TRANS.LST (Transaction Listing)

Open In New Tab

Apply User Default View

Run the enquiry.

Run

cross_ca

Actions

+ Add

Preview

[x] Define the complete list of actions for this enquiry.

> 1 - 1 of 1 record.

Click on the Account to access the transactions.

cross_tab



	+ 22GLA	Total
01.525.02552.6201	45,000	45,000
01.525.02552.6202	(45,000)	(45,000)
01.525.04185.9298	(142)	(142)

← **technologyone** > Transaction Listing

01.525.02552.6201 | Asset-Equipment
Flinders Uni. Asset Capitalis. Asset-EquipmentActive

1 - 1 of 1 record.

6 CONSOLIDATION

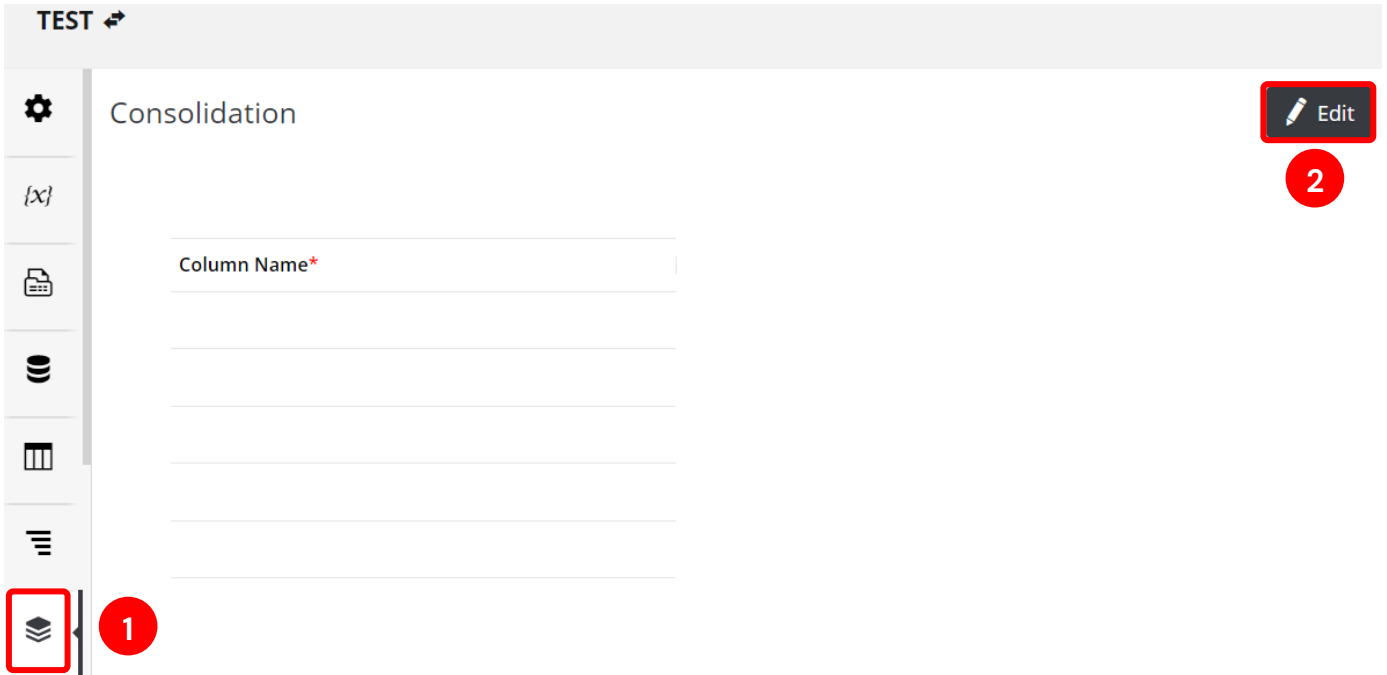
When there are multiple rows with same details, you can consolidate those rows using consolidation function.

TEST

1 - 13 of 2,960 records.

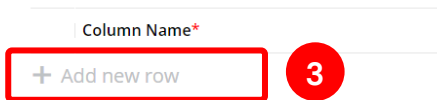
Ledger Name	Project	Cost Centre	Amount
23GLA	00072	601	384.52
23GLA	00072	601	21.04
23GLA	00072	601	40.37
23GLA	00072	601	5.20
23GLA	00072	601	7.70
23GLA	00089	700	0.02
23GLA	02034	601	0.01
23GLA	02034	601	0.01

In Enquiry setting, go to Consolidation tab, click Edit.

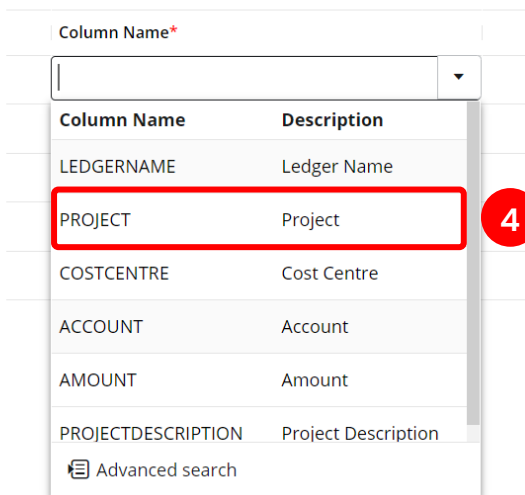
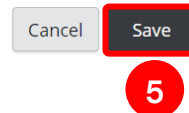


Click on **+Add new row**, then select the field that you want to use for the consolidation. In this example, we will choose Project. Then click **Save**.

Consolidation



Consolidation



When you run the enquiry, you will see all the lines with the same project code are now merged into one.

TEST

🔍 1 - 13 of 645 records.

Ledger Name	Project	Cost Centre	Account	Amount
23GLA	00072	601	01.601.00072.1114	458.83
23GLA	00089	700	01.700.00089.1701	0.02
23GLA	02034	601	01.601.02034.1707	0.02
23GLA	02166	761	01.761.02166.2022	397.00

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.

TEST

🔍 1 - 13 of 2,960 records.

Ledger Name	Project	Cost Centre	Account	Amount
23GLA	00072	601	01.601.00072.1101	384.52
23GLA	00072	601	01.601.00072.1103	21.04
23GLA	00072	601	01.601.00072.1105	40.37
23GLA	00072	601	01.601.00072.1106	5.20
23GLA	00072	601	01.601.00072.1114	7.70

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

TEST

🔍 1 - 13 of 645 records.

Ledger Name	Project	Cost Centre	Account	Amount
23GLA	00072	601	01.601.00072.1114	458.83
23GLA	00089	700	01.700.00089.1701	0.02

7 COLUMN DESCRIPTION

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

Ledger Name	Project	Cost Centre	Account
23GLA	00072	601	01.601.00072.1101

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.

TEST ↗

Columns

Define the list of columns accessible by this query.

🔍 > 1 - 5 of 5 records.

<input type="checkbox"/>	Column Name	Description	Category	Column Type
<input type="checkbox"/>	LEDGERNAME	Ledger Name	Account Details	Display
<input checked="" type="checkbox"/>	PROJECT	Project	Account Details	Display
<input type="checkbox"/>	COSTCENTRE	Cost Centre	Account Details	Display
<input type="checkbox"/>	ACCOUNT	Account	Account Details	Display
<input type="checkbox"/>	AMOUNT	Amount		Sum

Reorder + Add

Add from fields
 Display
 ∑ Sum
 ∑ Min
 ∑ Max
 ∑ Average
 ∑ Count
 ∑ Count Distinct
 ± Expression
 🎨 Colour
 🖼 Image
 📊 Gauge
 🚦 Traffic Light
 ± Calculation

Select Fields

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

🔍 project description 🔍

1 SELECTED Add based on Field Name Add based on Field Id <

<input type="checkbox"/>	Data Source Name	Field Name
<input checked="" type="checkbox"/>	PB	Project Description
<input checked="" type="checkbox"/>	PB	Cost Centre/Project Description
<input type="checkbox"/>	PB	Project Description 2
<input type="checkbox"/>	PB	Cost Centre/Project Description 2

Confirm Action ✕

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

OK Cancel

Go to Project column.

Columns

Define the list of columns accessible by this query.

🔍 > 1 - 6 of 6 records.

Reorder + Add

<input type="checkbox"/>	Column Name	Description	Category	Column Type	Data Type	M
<input type="checkbox"/>	LEDGERNAME	Ledger Name	Account Details	Display	String	
<input checked="" type="checkbox"/>	PROJECT	Project	Account Details	Display	String	
<input type="checkbox"/>	COSTCENTRE	Cost Centre	Account Details	Display	String	
<input type="checkbox"/>	ACCOUNT	Account	Account Details	Display	String	
<input type="checkbox"/>	AMOUNT	Amount		Sum	Decimal	
<input type="checkbox"/>	PROJECTDESCR...	Project Descri...	Account Details	Display	String	

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

Column

Cancel Save

Freeze

Category
Account Details

Width
200

Format

Summary Type

Description Column Name

Description Format

Colour Source

Column Name	Descrip
LEDGERNAME	Ledger I
PROJECT	Project
COSTCENTRE	Cost Cer
ACCOUNT	Account
AMOUNT	Amount
PROJECTDESCRIPTION	Project I

Advanced search

7

8

Then select **Code – Description** in **Description Format**.

Description Column Name

Description Format
CodeDescription (Code - Description)

Colour Source

9

Then **Save**.

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

TEST

1 - 13 of 2,960 records.

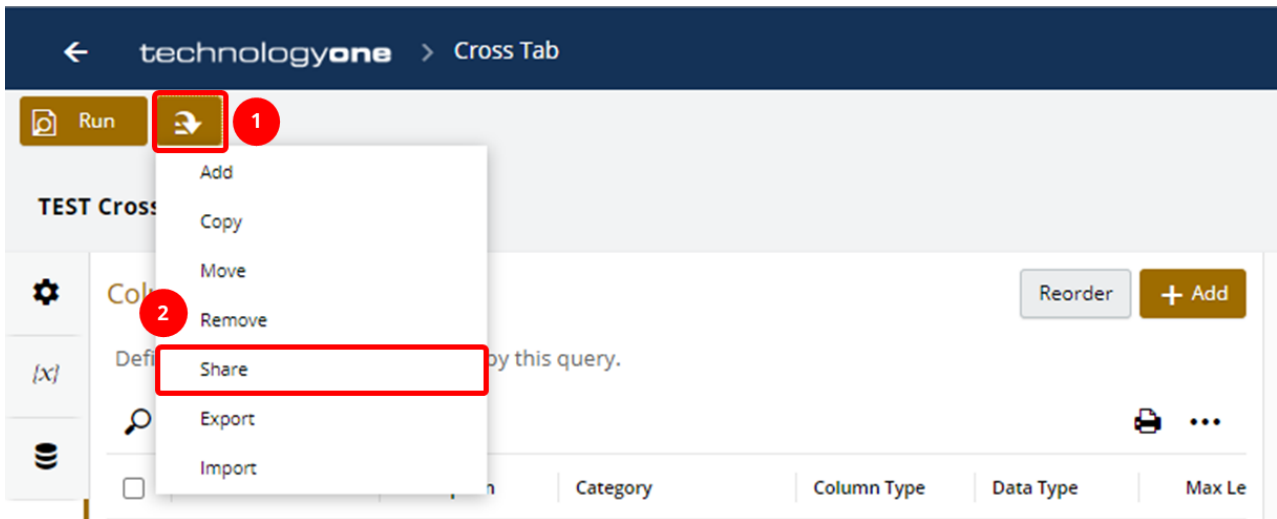
Ledger Name	Project	Cost Centre	Account	Amount
23GLA	00072 - Clinical Supervision	601	01.601.00072.1101	384.52

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.

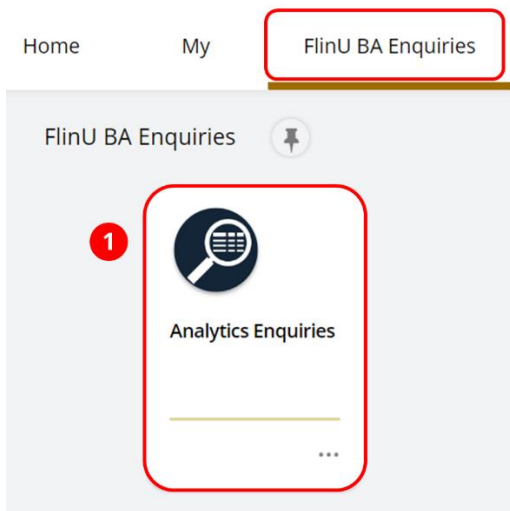
Note: Admin access will allow the recipient to delete the original enquiry. So **Read Only** and **Edit** access are strongly recommended.



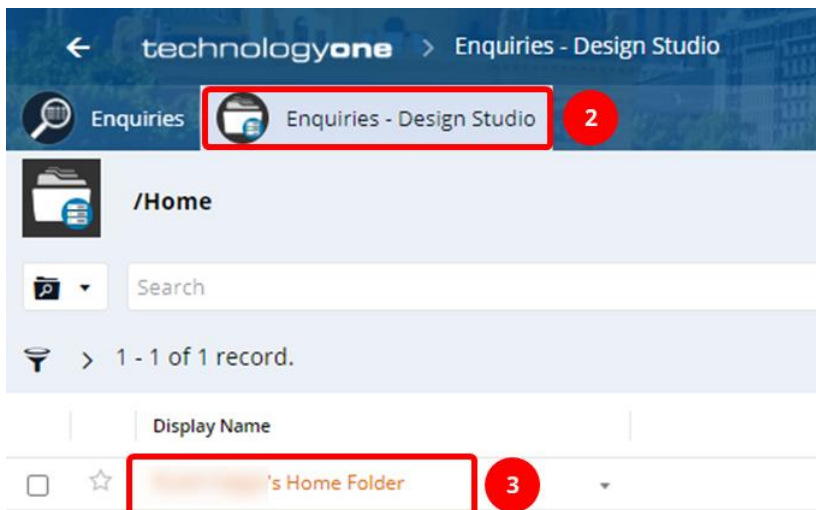
The next steps are for the **Recipient**.

3. The recipient needs to navigate to their **Analytics Enquiries** tab.

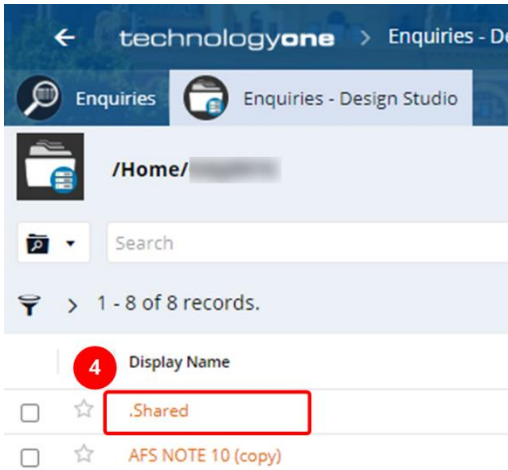
Note: If the recipient does not have access to FlinU BA Enquiries, please submit a request to Service One.



4. Click on the **Enquiries – Design Studio** tab. Then click on the **Home Folder**.



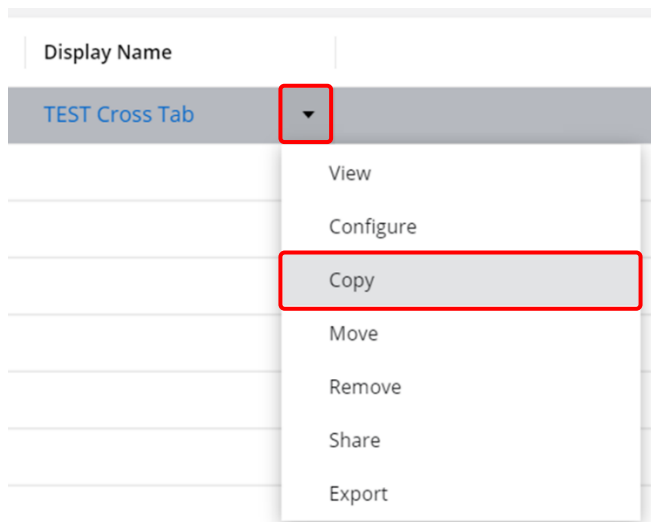
5. Click on the **.Shared** folder to view the shared enquiries stored within the applicable folder.



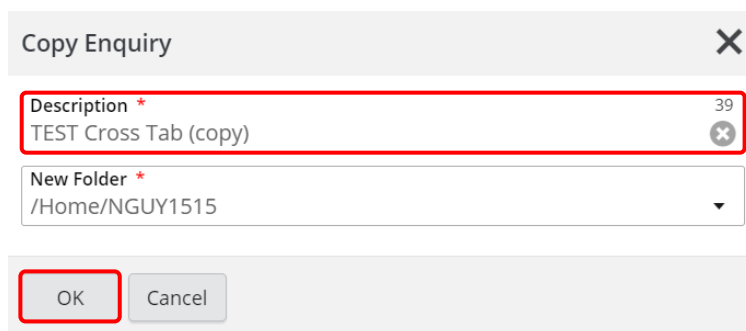
8.1.1 CREATING A COPY OF A SHARED ENQUIRY

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

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



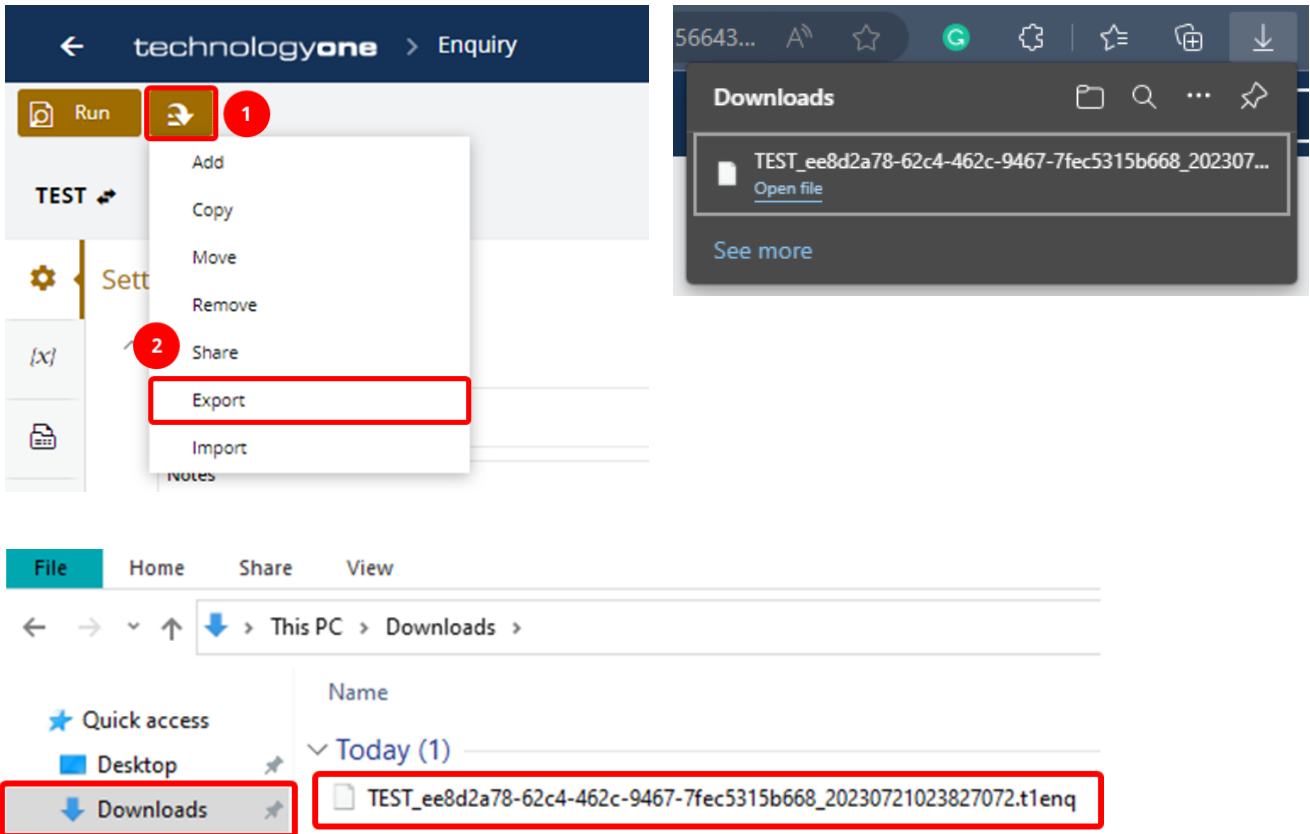
Rename the Copied Enquiry as you want, then click **OK**.



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.

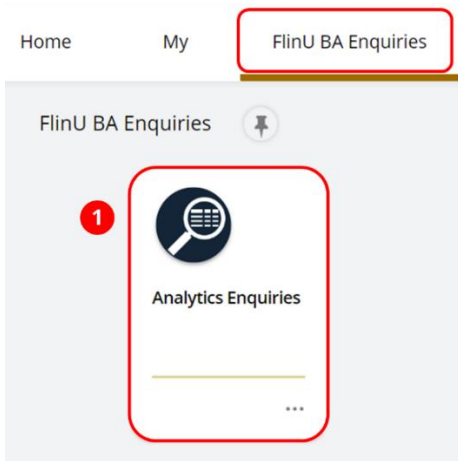


2. Send the file to the person you want to share with.

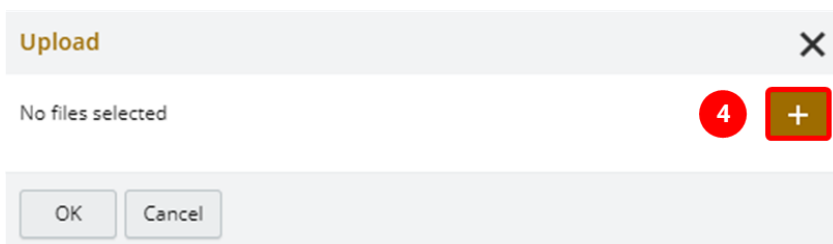
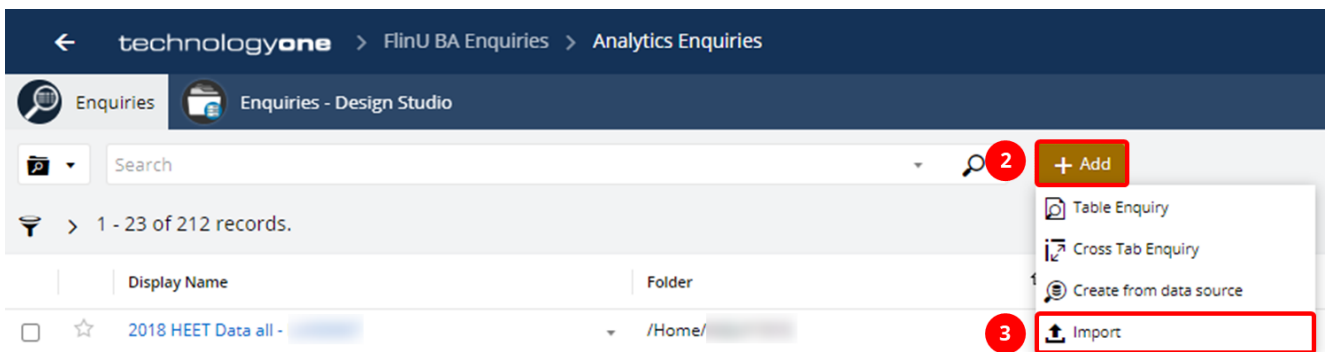
Note: The next steps are for the **Recipient**.

3. The recipient needs to navigate to their **Analytics Enquiries** tab.

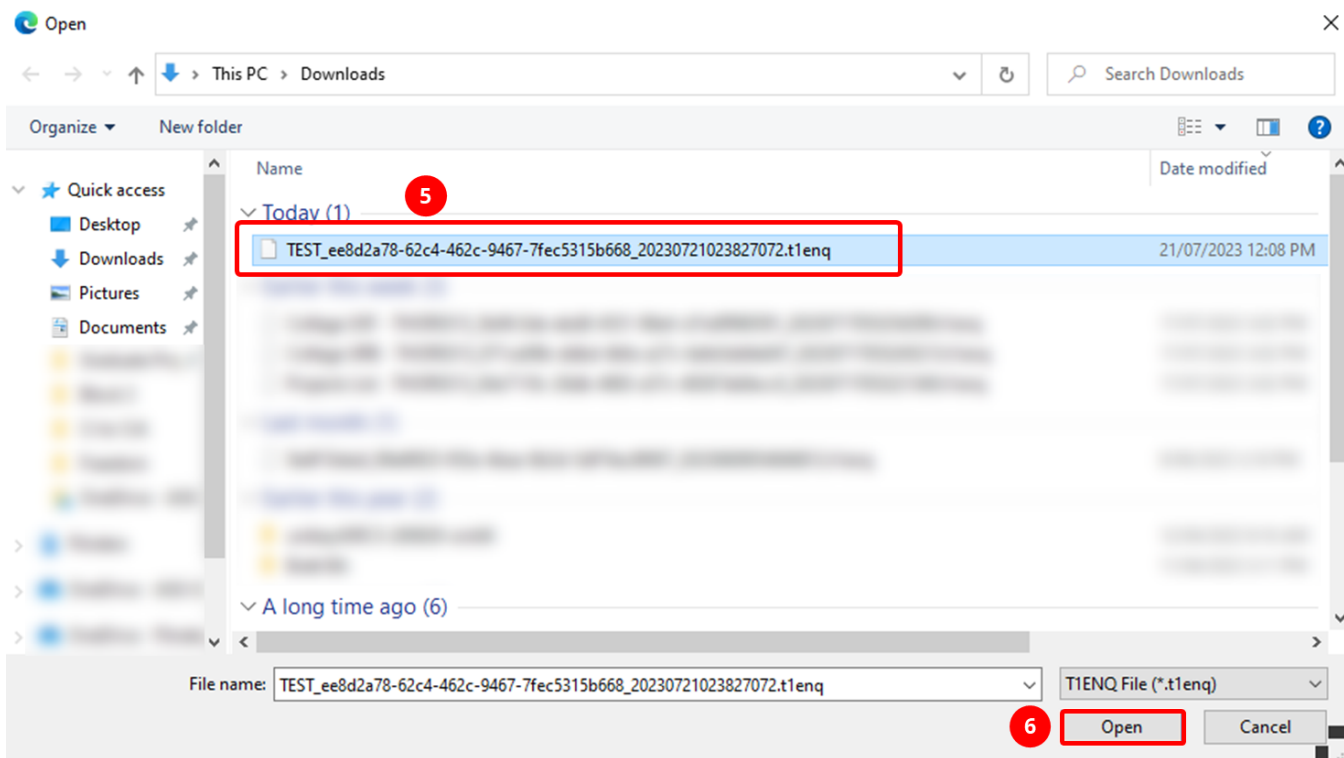
Note: If the recipient does not have access to FlinU BA Enquiries, please submit a request to Service One.



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.

