Custom Reports
Fact Sheet

Custom Report Factsheet #1 for Regional Liaison Officers:

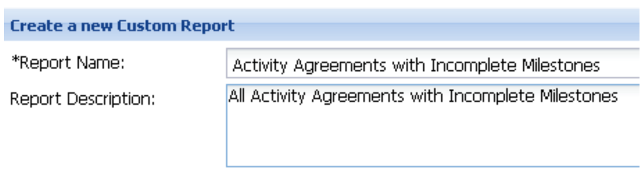
Display all Activity Agreements with Incomplete Milestones

Regional Liaison Officers (RLO) are the investors that view specific Activity Agreement Performance and Financials and their reports.

Date: May 12 Audience: RLO

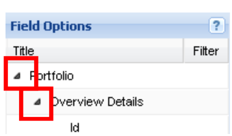
Follow instructions below to display incomplete milestones in Activity Agreements

1. Log in to your enQuire account, and select the drop-down arrow next to **Custom Reports** in primary navigation, and then **Create**.

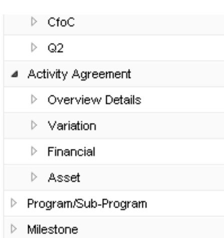


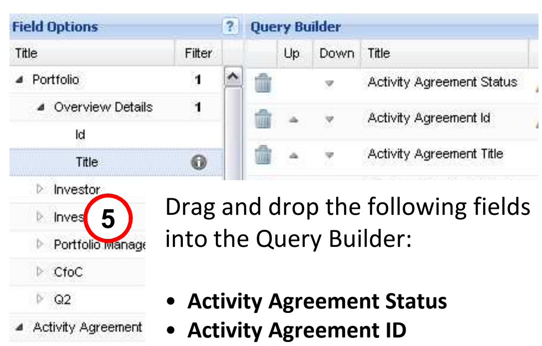
2. Enter a Report Name (mandatory) and Report Description (optional).

3. Select the following **Data options**:
   - Portfolio
   - Activity Agreement
   - Program/ Sub-Program
   - Milestone

4. 

Expand the arrows beside each Field Title to reveal available selection.





5. Drag and drop the following fields into the Query Builder:

- **Activity Agreement Status**
- **Activity Agreement ID**
- **Activity Agreement Title**
- **Milestone Due Date**
- **Milestone ID**
- **Milestone Description**
- **Milestone Status**
- **Portfolio Title**

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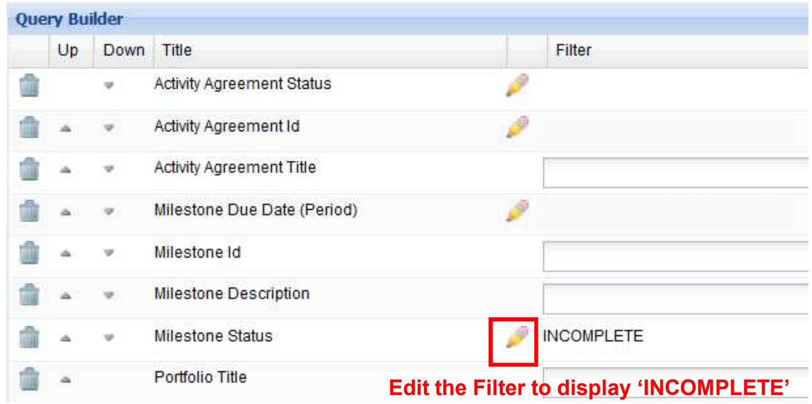
6 Apply the following **Filter**:

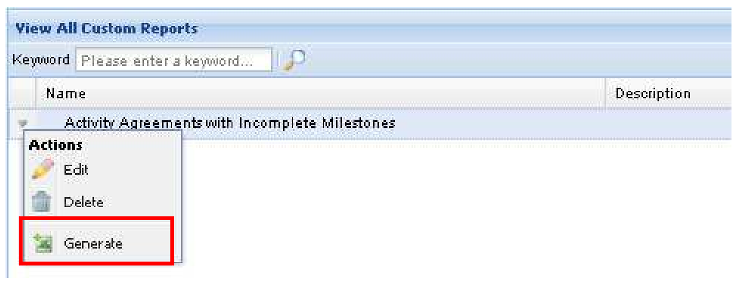
a) Select the edit icon to filter **Incomplete** for Incomplete **Milestone Status.**

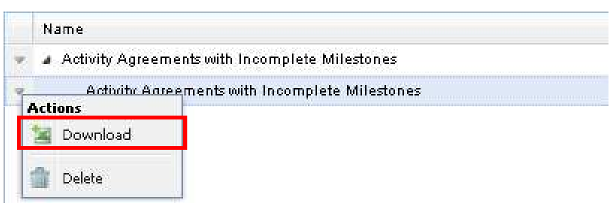
Select the **Save** button at the bottom of the page.

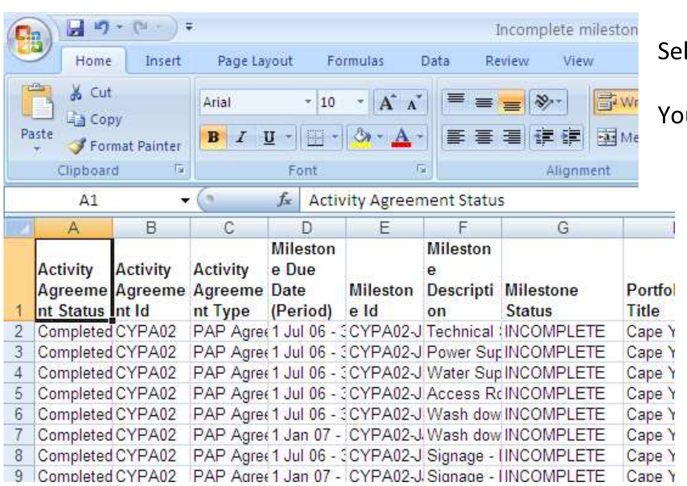


7 You will now be taken to the **View All Custom Reports** Screen – your Query will be listed here.

Select the drop-down arrow next to your Custom Report Title and then **Generate.**







8 Your Custom Report may take a minute to Generate.

Once the screen has loaded again, select the arrow pointing to the Custom Report Title and then the Generated report listed below.

Select the drop-down arrow and then **Download.**

Your report will now open in an Excel workbook.