Custom Reports Fact Sheet

enQuire
Grants, Contract & Project Management

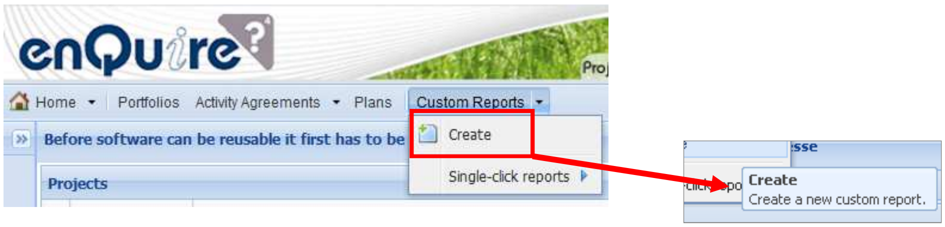
Custom Reports Factsheet #2 for Regional Liaison Officer:

display all CfoC Activity Agreements with total approved funding and payments made to date.

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

Date: Jun 12 Audience: RLO

Follow steps 1 to 8 below to display total approved funding and payments made to date on Activity Agreements.

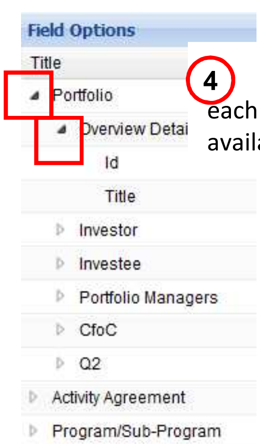


1 Log in to your enQuire account, and select the drop-down arrow next to **Custom Reports** in primary navigation, and then **Create**.

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

3 Select the following **Data Options:**

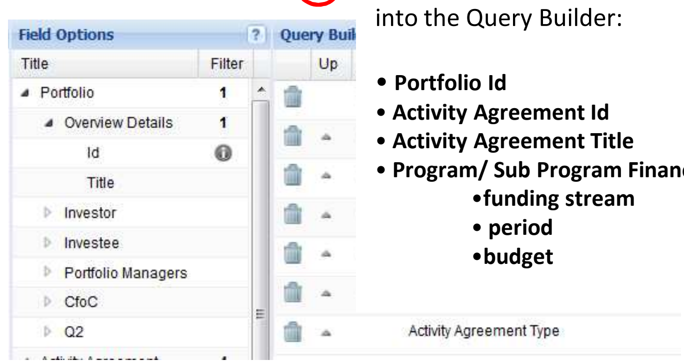
- Portfolio
- Activity Agreement
- Program/Sub-Program



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

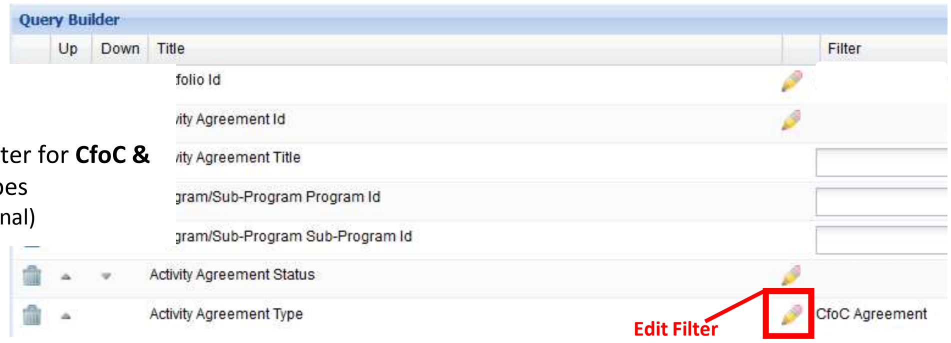
5 Drag and Drop the following fields into the Query Builder:

- **Portfolio Id**
- **Activity Agreement Id**
- **Activity Agreement Title**
- **Program/ Sub Program Financial**
    - **funding stream**
    - **period**
    - **budget**



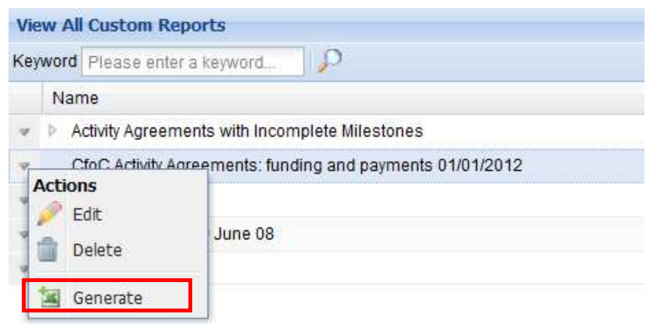
6 Apply the following filter:

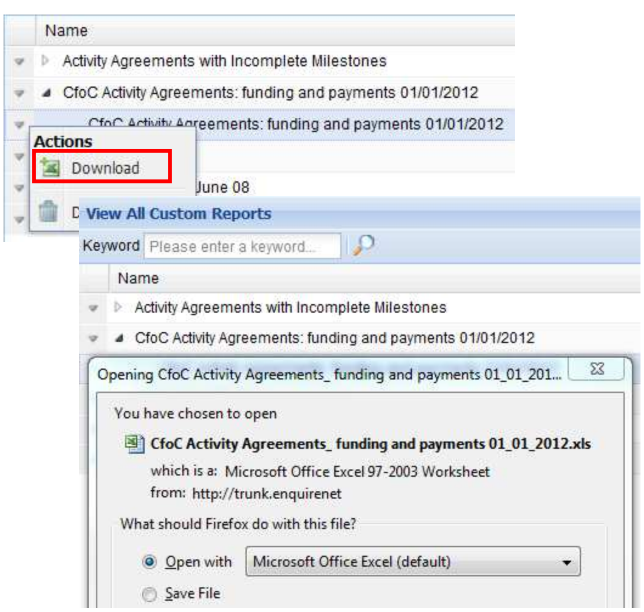
a) Select the edit icon to filter for **CfoC & Q2** Activity Agreement types
b) Filter for Portfolio id (optional)



7 Select the **Save** button at the bottom of the page. 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 the Custom Report name 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 name, which will drop-down to the Generated report.

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

Your report will now open in an Excel workbook.