

Custom Reports Factsheet #3 for Business Contract Manager and Business Financial Manager:

Display all organisations & individuals supported and/or engaged with



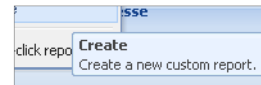
Business Financial Managers (BFM) are in charge of the financials of a group. They can view all Activity Agreements and complete and/or submit Financial Reports.

Date: May 12 Audience: BCM & BFM



Business Contract Managers (BCM) are in charge of the contracts with investors and investees.

Follow instructions below to display all organisations & individuals your Group have supported and/or engaged with.



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

Create a new Custom Report

*Report Name:

Report Description:



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

Select the following **Data Option**:

- Project

Field Options

Title	Filter
<input checked="" type="checkbox"/> Project	
<input checked="" type="checkbox"/> Overview Details	
Id	

Expand the arrows beside each Field Title to reveal available selection

Status	
Percent Complete	

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

- Project Status
- Project Name
- Delivery Agent Name

6 Apply the following filters:

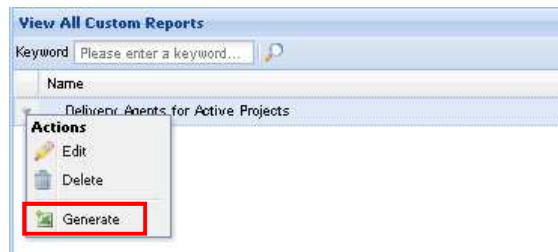
a) Select the No repeat checkbox for **Delivery Agent Name** so the data only displays once



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

7 On the **View All Custom Reports** your Query will be listed here by Title.

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 Title, which will list the Generated reports beneath.

Select the drop-down arrow and then **Download**.
Your report will now open in an Excel workbook.

