

Custom Reports Factsheet #5 for Portfolio Managers:

Display all Active Projects and Active Activity Agreements

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Portfolio Manager (PFM) usually signs off on group reports and views all information for your group.

Date: May 12 Audience: PFM

Follow instructions below to display all Active Projects and Activity Agreements



enQuire helpdesk +61 (7) 3846 1555 admin@enquire.net.au Custom Report Factsheet #5 – Display all Active Projects and Active Activity Agreements for Portfolio Managers



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Apply the following filters:

a) Select the edit icon to filter Active Projects

b) Select the edit icon to filter Active Activity Agreements

	Up	Down	Title	Filter
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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 your Custom Report name and then **Generate.**

Keyword	Please enter	a keyword				
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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.

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