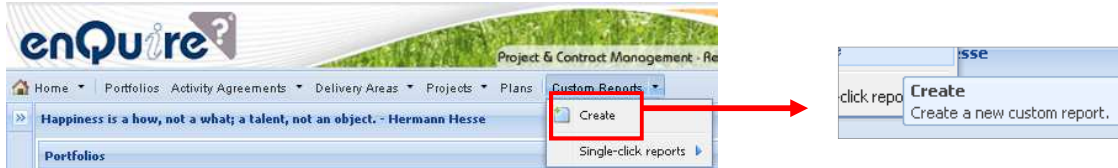**enQuire**
Grants, Contract & Project Management

# Custom Reports Factsheet #5 for Portfolio Managers:

**Display all Active Projects and Active Activity Agreements**

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

*Date: May 12 Audience: PFM*

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Follow instructions below to display all Active Projects and 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**.



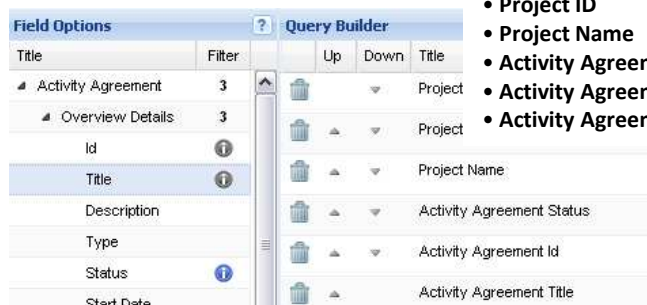**2** Enter a Report Name (mandatory) and Report Description (optional).

**3** Select the following **Data Options**:
- Activity Agreement
- Program/Sub-Program
- Funding Source
- Project



**4** Expand the arrows beside each Field Title to reveal available selection.
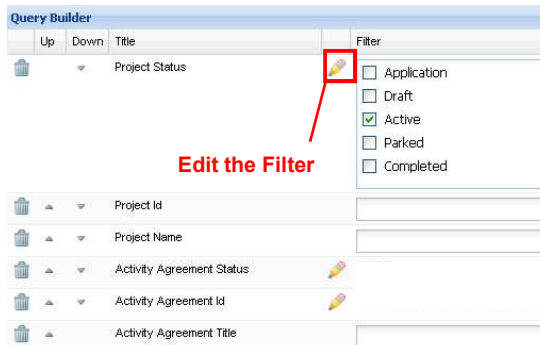
**5** Drag and drop the following fields into the Query Builder:
- **Project Status**
- **Project ID**
- **Project Name**
- **Activity Agreement Status**
- **Activity Agreement ID**
- **Activity Agreement Title**



enQuire helpdesk
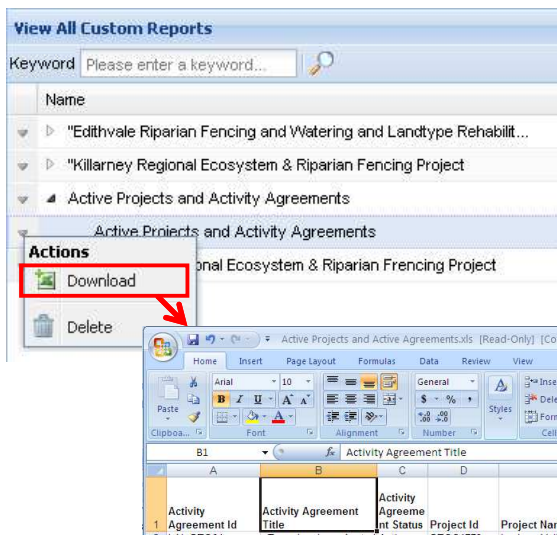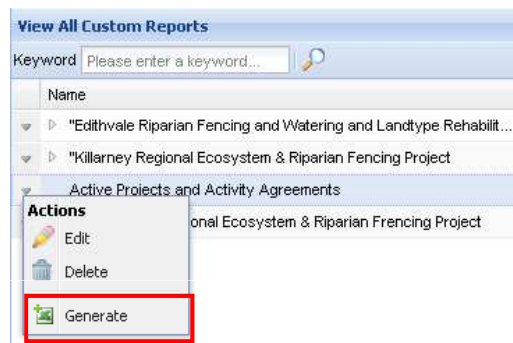+61 (7) 3846 1555
admin@enquire.net.au

**6**

Apply the following filters:

a) Select the edit icon to filter **Active Projects**

b) Select the edit icon to filter **Active Activity Agreements**

**Edit the Filter**

**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 your 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.