Guide to Enquire

Guide to using the Enquire Funds Management System for DOC Community Fund recipients

Department of Conservation
Te Papa Atawhai

Te Kāwanatanga o Aotearoa
New Zealand Government

Cover image: Queenstown Landscape (Bon Scott)

Purpose of the document

This document provides a comprehensive guide to using the Enquire Funds Management System, specifically tailored for DOC Community Fund recipients. It includes instructions on accessing the system, managing accounts, navigating the interface, and completing various tasks such as reporting.

Introduction

What is Enquire?

Enquire is a web-based funds management system that supports the Department of Conservation's grantees in managing and reporting on their projects.

You can access Enquire using the following link: Enquire Login

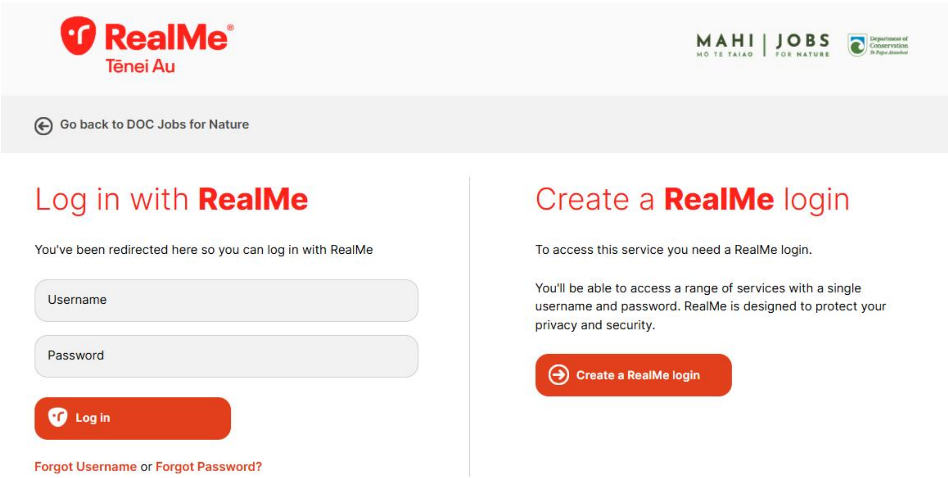
Key terms

- **Accountable officer:** The person responsible for the organisation's use of Enquire.
- **Client portal:** The external-facing component of Enquire.
- **Key contact:** The primary contact person for an organisation's Enquire account.
- **Notification:** Alerts sent to users regarding actions required or updates.
- **Update request:** A request for additional information or updates on a project.
- **Workflow:** The sequence of processes through which a piece of work passes from initiation to completion.

Getting started

How do I access Enquire?

To access Enquire for the first time, you need to register as an Enquire user via RealMe. Either you will have received an email with a link to create an account or you will create an account through Enquire. Either way you will be taken to the login screen below.



RealMe login screen. You will see this page once you click login in Enquire.

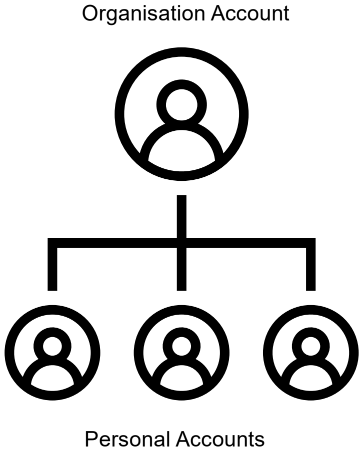
If you already have a RealMe login, go to [Enquire Login] and enter the RealMe login that you used to set up the account.

If you do not, click “Create a RealMe login.” If you are creating a RealMe account, you **do not** need to get the account verified.

Managing you and your organisations account

There are two main accounts in Enquire: a personal account and an organisation account. You need a personal account before you can access an organisation account.

Personal Account



To access Enquire, you need your own personal Enquire account, with a login linked to your RealMe account. When you log in, you will see all the organisations that you are involved in. If there are no organisation accounts showing, you will need to be added to one.

There are three account types:

- **Account Administrator**: Can access and update all projects, account details, and contacts.
- **General User**: Can access and update all projects.
- **Basic User**: Can only access projects they are assigned to.

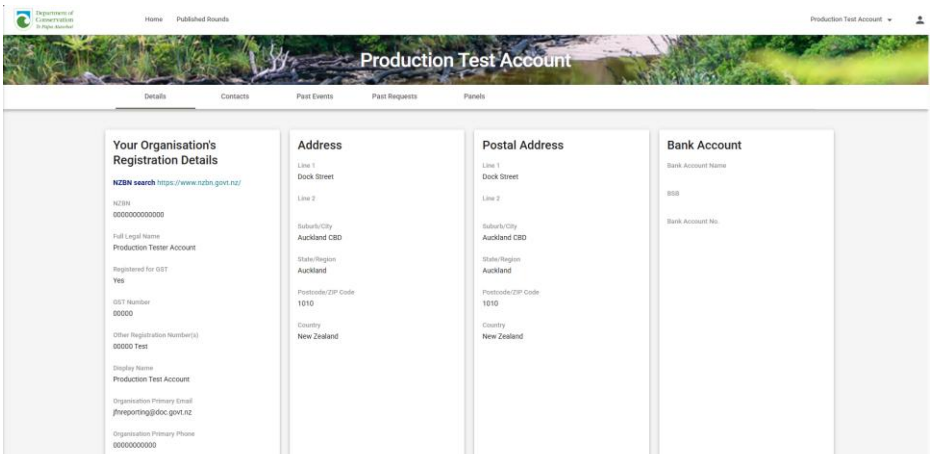
Organisation account

Organisation accounts allow personal accounts to access and manage projects, submit applications, and handle various tasks throughout the project life.

Organisation accounts are managed by an Account Administrator. They can add and remove people in the organisation account and change the account type.

Managing your organisation and adding users

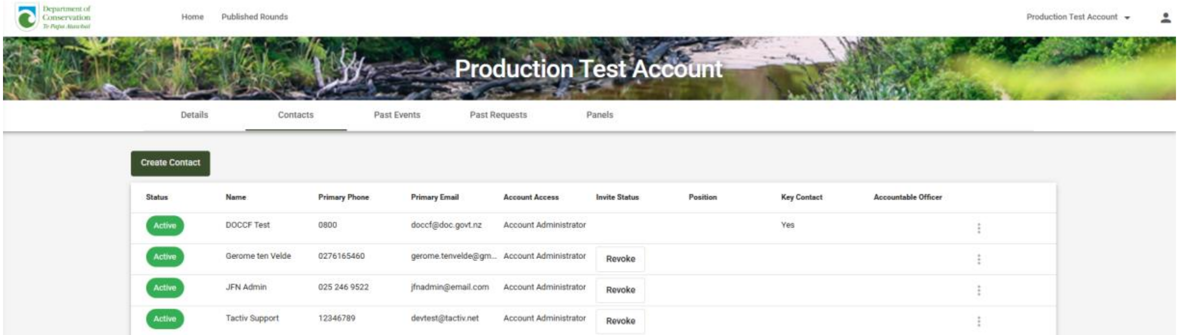
By clicking on your organisation’s name in the top right corner and selecting **account details**, you can update details for your organisation and who has access.



Account Details screen: From this screen you can edit your Organisation’s details.

Details

All the basic details for your organisation are available in the details screen. These fields are all editable if details change.

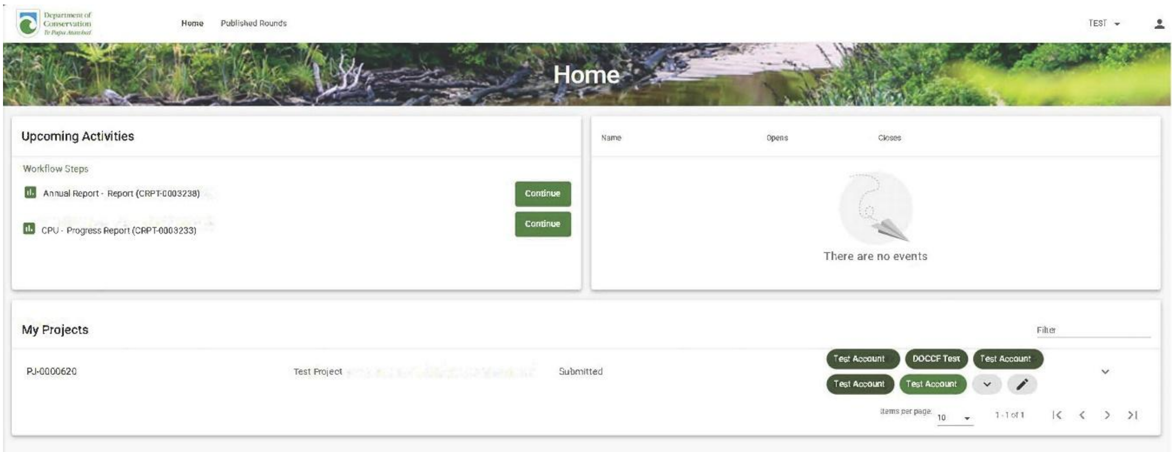


Contacts

You can manage all the people connected to your organisation account here. You can:

- Invite someone to the organisation by clicking **Create Contact**. Fill in the name and email address and click the send invitation box and click save. This will send an invite to them.
- Remove someone from your account by clicking **Revoke**. Confirm you want them removed and they won't be able to access your organisation's account.
- Choose your **key contact.** They will receive all notifications in Enquire. **Make sure you keep this up to date and accurate.**
- Choose the **accountable officer**. They have no additional privileges but are responsible for keeping the account up to date.

Navigating the system



Enquire Dashboard. It is split into three parts: Upcoming Activities, My Projects, and Events.

Dashboard overview

The dashboard (above) provides an overview of your organisation's work with the Department. You will find all the projects that your organisation is involved in, any upcoming reports or request for information, and any events happening. These three sections are broken down below.

Upcoming Activities

Most of your work will take place here. Any requests from the Department will be displayed here. You will find all the information to negotiate your Deed of Grant, report on your project, or respond to any other requests.

All requests that appear in this section will also have an email notification sent to your **key contact**.

To access a request, click on **Start** or **Continue** and you will be taken to a new screen with details about the request. Detailed instructions will be included within each request.

My Projects

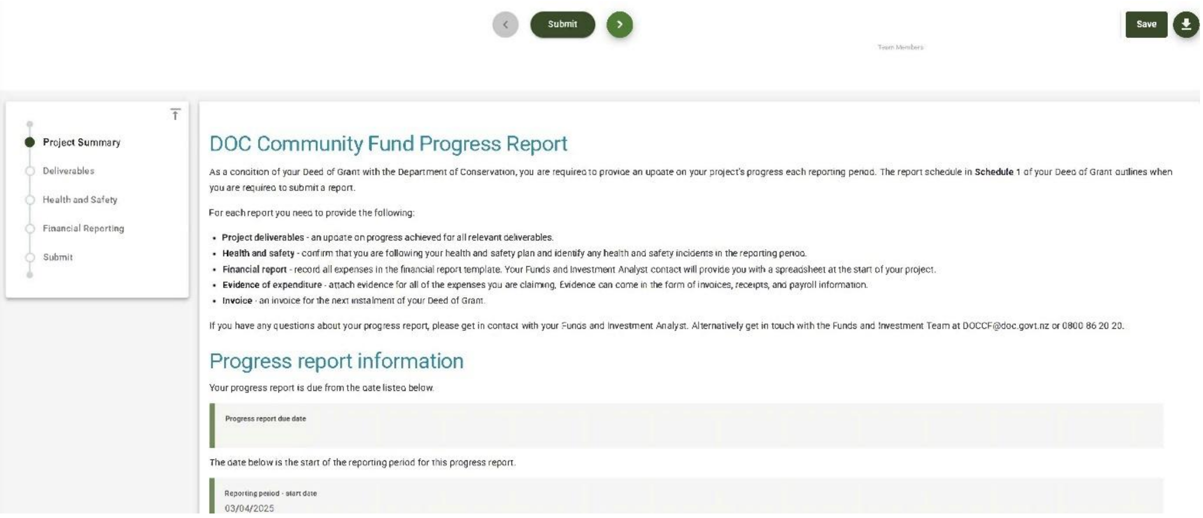
All projects that your organisations are involved in will be displayed here. These can include projects that you have awarded funding for or applications you have submitted. You can find details of all activities associated with that project by clicking the ˅ button.

Events

The event section shows any funding opportunities currently available or other important information. Future rounds of the DOC Community Fund will be advertised here.

Completing an activity

When you have an activity to complete, including for submitting reports, the page layout will be standard across all the different requests.



Standard activity screen: Use the arrows at the top or the index on the left to navigate pages. Click Submit to submit your activity. Save your progress using the Save button and download a copy for sharing outside Enquire using the Download button.

How to navigate

Activities will likely contain multiple pages. To navigate between pages, you can use the arrow buttons at the top.

Alternatively, you can click on which page to go to using the index on the left-hand side.

Saving your changes

You can save changes in Enquire using the **Save** button in the top right-hand corner. Similarly, every time you navigate to a new page, your progress will be saved.

If you are on the same page for a while, ensure you regularly save your progress.

Sharing information inside and outside Enquire

Inside Enquire

Other people who have access to your organisation account can view the request. Multiple people can access the request at the same time, but it is recommended that only one person inputs information.

Outside Enquire

You can download a copy of the information inside a request using the **Download** button in the top right corner.

How to submit

Once you are ready to submit your request, click the **Submit** button. If there are any mandatory questions that you have not completed, these will show up in red and the pages that these questions are on will appear red on the left-hand index.

If you accidentally click submit, most requests will be able to be sent back to you. If this is not the case, it will be clearly advertised on the form before you submit it.

Submitting reports in Enquire

Your Analyst will take you through the full process step-by-step.

First, your organisation’s key contact will receive an email notification advising them that a report is ready for completion and the due date.

The report workflow can then be accessed from your Enquire dashboard. Follow the instructions carefully and attach any financial documents at the end.

The report will be reviewed by your Analyst, who will either accept it or notify your key contact that it requires further information.

Support and troubleshooting

How to contact support

For technical assistance, contact Enquire Support at enquiresupport@tactiv.net. For project-related queries, contact your Analyst.