

## Running and Scheduling Reports Presentation – March 2026

Poll Questions:

Kenyetta can launch this poll immediately following the housekeeping notes (before turning things over to Kristina)

Poll Question # 1:

What do you use m-Fin reports in CU-Data for today?

- Running financial reports for my own use
- Running financial reports for my manager
- Scheduling financial reports to be run at a preset time
- I have never run an m-Fin report - show me how!

Allow for multiple selections

Slide 11:

Poll Question # 2:

You've run an m-Fin report and want to rerun it with different SpeedTypes or periods. What should you do?

- Click the Run button to update your values and rerun the report.
- Click the Run As icon, then Reset prompts and run to update your values and rerun the report.
- Click the home icon, then open the report again using the Recent section.
- Use the view switcher to close the report, then open the report using the Team Content menu.

After Kristina discusses slide 14:

Poll Question # 3:

You schedule a report for month-end and choose to receive it by email. What must you do to view the report and drill down into the underlying data?

- Open the PDF file
- Connect to VPN
- Connect to VPN and log into CU-Data

Kristina will walk through more system demo. Then, before Kristina discusses Slide 15:

Poll Question # 4:

You already have a report scheduled and need to add new SpeedTypes. Which option is best?

Schedule a new report

Update the existing report schedule to add or remove SpeedTypes

Disable the existing report schedule and schedule a new report

**Note:**

During the Internal Session, Poll #1 was:

How can you mark a report or folder as a Favorite?

Click the heart icon on the far right of the report name.

Click the View Switcher dropdown.

Click the Magnifying glass.

Click the Personal menu icon.

Links to drop in chat, and when:

<https://www.cu.edu/controller/training/access-training-requirements>

<https://www.cu.edu/controller/m-fin-how-navigating-cu-data>

<https://www.cu.edu/controller/m-fin-how-scheduling-reports-month-endyear-end-close>

<https://www.cu.edu/controller/training>