How-To Manage Reports in the Portals

October 25, 2023 by Melanie Jones

NOTE The following are instructions for an eComm specialist. Users can submit a request for a report to be published to the portal by following three easy steps.

One of the eComm specialist’s roles in Cvent includes managing how stakeholders can access Cvent data in real-time, without a steep cost. Follow the steps below to create Portal Users and Publish Reports to the Portal for easy access.

STEP 1 | Add User(s) to Portal

Having trouble adding a portal user? If the person is a current test user, it might indicate the username is already taken. Submit a help ticket to remedy the issue.

For someone to access reports via the portal, they will need to be a Portal User (a free license). eComm specialists can follow the next steps to create new Portal Users or check if they already exist.

- Hover the dot menu in the top right
- Click Admin in the dropdown
Click the Access Portal tab on the left
Once expanded, click Access Portals
The access portal page will appear. Click the University of Colorado Cvent Portal name
Portal User without Paid Cvent License

Portal User with Paid Cvent License

With the portal open, click the Guests tab. You can view existing Portal Users on this page by searching or scrolling.

Select the blue Add Guests button in the top-right.
It's worth confirming if the Portal User already exists, and needs to be added to the University of Colorado Portal.

To do so, check the box next to their name then select Add to Portal (image below).

- Another pop-up appears. You can Send invitation or Don't send invitation (and send later).
- Portal users need to create their password through the invitation which expires after 24 hours. See Troubleshooting below if you need to resend the Portal Invitation.
Once a password is set, they will be an Active Portal User within the University of Colorado Portal (meaning you can complete step 3 - granting them access to a specific Report).

If the user is not already listed, select the **Create Portal User** button in the top-right.
A pop-up appears. Provide **Email**, **First Name**, and **Last Name**
- Select the blue **Save** button.
- The pop-up will disappear. Change the dropdown to **Access Portal Users**
- **Check the box next to the User(s) you want to add to the Portal**
  - Use the search function to find a user with ease.
- Select the blue **Next** button in the top-right
Another pop-up appears. You can **Send invitation** or **Don't send invitation** (and send later).

- Portal users need to create their password through the invitation which expires after 24 hours. See Troubleshooting below if you need to resend the Portal Invitation.
Once a password is set, they will be an Active Portal User in the University of Colorado Portal (meaning you can complete step 3 - granting them access to a specific Report).

Have a Cvent user who hosts events through their paid license and wants to be a Portal user? The process for publishing Reports to these users compared to those who are only a Portal user are slightly different.

- **Click the Guests tab >> Select the green Add Guests button in the top-right**
- **Active Users will display in a list**
- **Check the box next to the User(s) you want to add to the Portal**
- **Next, select the green Next button in the top-right**
- **License users who are also Portal users will not get an email because they do not need to set a password. These users will sign in with the same username and password for their Cvent account, so no need to remember two sets of credentials.**

**IMPORTANT FOR STEP 3** Licensed Users (who are also Portal Users) **can not be notified of a Report being published** to the Portal via Cvent. Otherwise, all eComm specialists will also be emailed. You'll have to let these users know the old-fashioned way - through a separate message.

**IMPORTANT FOR STEP 3** Licensed Users (who are also Portal Users) must have the event shared with them AND the Portal Report shared with their Portal User to access data. If only the Report is shared with the Portal User (who also has a real, paid license), they will see the
Report but when they run it, no data will display.

**STEP 2 | Save Report with Naming Convention**

**Did a user create the Report?**

They need to share the Report Visibility with their eComm specialist. Otherwise the eComm specialist will not be able to view the Report or Publish it to the Portal.

Your eComm specialist can publish the saved Report to the Portal and share it with specific users.

Create Event or Cross-Event Report and **Save Report per naming convention**.

- Naming Convention: **0X_DEPT_Event Name_Report Description**
  - where X indicates your campus number and
  - DEPT indicates your department or unit

**Rename Report**

1. Rename a saved Report by navigating to the event and running the Report.
2. Once ran, hover **Actions** in the top right >> Click **Save** in the dropdown (image below)
3. In the popup, rename the Report and click Save.

`Survey Responses`
Visibility

Edit the Visibility if you wish to share this Report with another full licensed user to access when they login to Cvent. This is not the same as getting a report published to the Portal and shared with a (free) Portal User.

- *To successfully share an event report with a licensed user, you must share the event [7] and the event report.*

STEP 3 | Publish to Portal

Once you have a saved Report (per the naming convention in step 2) you can publish it to the portal and grant viewing rights to specific Portal Users. Sending email notifications and setting content expiration dates are optional features available to make managing Reports in the Portal even easier.

- After saving and running the Report (per the correct naming convention), hover Actions in the top-right
- Click Publish to Access Portal in the dropdown

Content Expiration

*TIP!* Set a Content expiration date in the top right corner for automatic unpublishing - minimizing clutter for the Portal User.

*NOTE* Sadly, eComm specialists will still see the Published Report in Admin >> Access Portal >> Access Portals >> Content tab after the expiration date. To avoid clutter, it's a best
practice to remove published Reports after they expire (instructions below in step 4).

**Viewing Rights**

- Keep default **Visible to: Only selected users**
- Keep default **Email notifications to: Only email portal guests**
- Change **Filter by dropdown to: Access Portal User**
- **Check the box** next to the individuals who should have access
  - *If you do not see a portal user here, it means they are not active, yet. You might need to re-trigger the invite so they can set their password (once set, they are an active Portal User and can be selected).*
- Click the green **Publish** button at the bottom of the page.
Important Note: Licensed Users (who are also Portal Users) must have the event shared with them AND the Portal Report shared with their Portal User to access data. If only the Report is shared with the Portal User (who also has a real, paid license), they will see the Report but when they run it, no data will display.

- If you do not want to notify anyone when a Report is Published, set Email notifications: Don’t email users
!TIP! NEVER Email all users with viewing rights. This will email all Cvent admins and eComm specialists, in addition to the selected Portal User.

**STEP 4 | Un-Publish from Portal**

!TIP! Set a content expiration date when publishing a report (step 2) for automatic unpublishing from the Portal Users perspective.

**NOTE** Sadly, setting a content expiration on a published report (step 2) will NOT remove the report from the eComm specialists perspective. automatic unpublishing from the Portal Users perspective. To avoid clutter for eComm specialists, it's a best practice to remove published Reports after they expire.

**Manually Un-Publish Report**
- Click the dot menu in the top right
- Select Admin in the dropdown

Hover Access Portal in the navigation
Click Access Portals on the left
Select the University of Colorado Cvent Portal
- Navigate to the second tab: Content
- Scroll/Search for Report name
- Click Actions
- Select Remove Content in the drop-down
Troubleshooting

Need to resend a Portal Invitation or Remove a Portal User?
- Navigate to **Admin >> Access Portals**
- Select the only Portal listed
- Navigate to the **Guests** tab
- Check the box next to the person
  - The *Invited* Status in the last column indicates they did not activate their account.
- Then you can **Send Portal Invitation** or **Remove** them.

**Related Wikis**

- Cvent Reporting [8]
- Cvent Portals (make Cvent reports accessible to others for free) [3]
• How-To Manage Reports in the Portal (eComm specialists) [1]
• Cvent Report Visibility (make Cvent reports accessible to other licensed Cvent users) [5]

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Send email when Published:
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