

## **m-Fin How-To: Creating Report Views in CU-Data** [1]

Do you regularly run reports for the same SpeedTypes? Saving pre-set prompt values for your Cognos reports can save you time and effort.

### **Watch the video**

### **Read the procedures**

1. First - run the report that you want to save.
2. When the report displays, click the **Add this Report** icon on the top left of your screen. It's the one that looks like a floppy disk ...
3. Select **Save report as report view** from the drop down. A popup window will appear. If you like you can change the default name of this Report View.
4. In any case, choose **Select My Folders** as the location.
5. Then click **OK**. You'll find yourself back on the reporting system homepage.
6. When you want to revisit your Report View, click **My ContentMy ContentMy content is a folder in which you can save content - such as saved report views, shortcuts, and Query Studio queries - for your own use.** [2] from the navigation menu.
7. Clicking directly on the Report View name in this folder will re-display the report with all the same parameters you entered when you first saved it. Clicking on the **Run As** icon in the report will re-prompt for a new period or other change ...

### **Would you rather always land on the prompt page for your Report View?**

You can take a few simple steps now to ensure you always land on the prompt page.

1. While in **My ContentMy ContentMy content is a folder in which you can save content - such as saved report views, shortcuts, and Query Studio queries - for your own use.** [2], instead of clicking on the Report View name, click on the three dots to the right of it.
2. Then, select **View Versions**.
3. Click on the date and **EN-US** will appear just below.
4. Now, click **Delete report version** and then click **OK** on the Confirm Delete popup.
5. This will delete the report output version that had previously saved.
6. And now ... when you click the Report View from the **My ContentMy ContentMy content is a folder in which you can save content - such as saved report views, shortcuts, and Query Studio queries - for your own use.** [2] folder ... you'll go straight to your saved prompt page!

**Do you want to update the default format of your Report View - or, change your m-Fin report PDF to portrait orientation?**

First, complete the steps above to save a Report View of the m-Fin report. Then, you can change the default format for that Report View. [3]

**Have a question or feedback?**

## **Questions & Feedback** [4]

**Feedback or Question \***

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**Your Email Address**

Submit

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**Source URL:** <https://www.cu.edu/controller/m-fin-how-creating-report-views-cu-data>

### **Links**

[1] <https://www.cu.edu/controller/m-fin-how-creating-report-views-cu-data>

[2] <https://www.cu.edu/>

[3] <https://www.cu.edu/controller/m-fin-how-changing-orientation-your-pdf>

[4] <https://www.cu.edu/controller/forms/questions-feedback-0>