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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 Save drop-down arrow in the top left of your screen – it's next to the Report Output icon.
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.** Your report view is saved. It may take a few moments to save to your **My content.**
6. When you want to revisit your Report View, click the **My Content** tab on the home page. Or click the Open Menu button in the top left > Content > My Content
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. From the **My content** tab, instead of clicking on the Report View name, click the **Action menu** ---- three dots to the right of the heart icon.
2. Then, select **View Versions.**
3. Click on the date and **EN-US** will appear just below.
4. Now, click on the **Delete report version link** 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 content** tab … 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. [2]

Have a question or feedback?

For questions or feedback contact

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

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