m-Fin How-to: Scheduling Reports for Month-End/Year-End Close [1]

Do you run the same m-Fin reports after each month-end close? In CU-Data, you can schedule these reports to run automatically. You can even set them to email to you.

Some m-Fin reports cannot be scheduled. See a list of reports that cannot be scheduled in the procedures below.

Need to update a scheduled report to include different prompts, such as SpeedTypes or Account Codes? See Updating Report Views [2]

Watch the Mini-Webinar

Read the procedures

List of m-Fin Reports That Cannot Be Scheduled

Not all m-Fin reports can be scheduled. These are the m-Fin reports that can not be scheduled at this time.

m-Fin Abnormal Balance & Resource Deficit
m-Fin Account Actuals Period By Fiscal Year
m-Fin Account Tree List
m-Fin Actuals By Fiscal Year
m-Fin Audit Trail Udit Trail
m-Fin Average Daily Balance
m-Fin Award Expenditure By Month
m-Fin Compensation Summary
m-Fin Expenditures Sponsor by Fiscal Year
m-Fin Fiscal Roles
m-Fin Fiscal Roles II
m-Fin ICR Split
m-Fin LAUNCH
m-Fin LOC Pool
m-Fin Nacubo Expense Purpose
m-Fin OLT
m-Fin Org Expenditures by Month
m-Fin Org Tree Lineage
m-Fin Org Tree List

m-Fin Payments Received Org Overview
m-Fin Payroll Fiscal Year Detail
m-Fin PET
m-Fin Position Budget - Actuals Detai
m-Fin Project Expenditures By Month
m-Fin Projects Direct and Indirect Cost
m-Fin Proposal ID Lookup
m-Fin Receivables Transaction Finder
m-Fin ROL
m-Fin Source Code Lookup
m-Fin SpeedType List
m-Fin SpeedType Status
m-Fin Sponsor Funding
m-Fin Tree Zoom II

Step 1: Save a Report View of the report

Navigate to your report, update the prompts, and save a Report View.

1. Run the report that you want to save.
    - If the report you are scheduling is a month-end report, follow these steps:
        1. On the first prompt page, clear the Fiscal Year and Accounting Period fields. If there's a Current option, clear that field, too. Do this by clicking each dropdown menu to select the dotted line.
        2. At the bottom right of your screen, click **Show Options** and clear the Effective Date by unchecking it.
    - If the report you are scheduling is not a month-end report (daily, weekly, monthly, yearly), do not clear the Fiscal Year, Accounting Period, or Current fields, and do not uncheck the Effective Date under **Show options**.
    - Enter one or more SpeedTypes.
    - Click **Finish**.

      Note - If you're scheduling the m-Fin **Financial Detail**, it still requires the from accounting period, but should allow you to clear both of the Fiscal Year ?prompts and the To Accounting Period. If you want to run with the from ?accounting period cleared as well, please consider m-Fin Financial Detail II.
2. When the report displays, click the **Save** drop-down in the top left corner of the screen – it's the downward caret (V) button next to the floppy disk. Select? **Save report as report view**.
3. A popup will appear. If you'd like -- you can change the default name of this Report View. In any case, choose **Select My Folders** as the location.
4. Click **OK**.

Step 2: Make room for your Scheduled Reports

Modify the Report View's properties to save more output. Since this defaults to save only one output, start by deleting the output that just saved. Then, increase the number of Report Output versions, making room for more.

1. Find your Report View by clicking **Open menu > Content > My content**. Sometimes it

takes a minute or two to show up.
2. Click the **Action?menu** menu - it's the three dots to the right of the heart icon - and select **View Versions**.
3. Click on the date -- and then on the **Delete report version** link. Select **OK** on the Confirm Delete popup. This will delete the report output version that had previously saved.
4. Now it's time to specify how much output you'd like to save going forward. Click on your report view's **Action?menu**. This time select **Properties**.
5. Click the **Report tab**, scroll down, click the drop-down next to **More** options and scroll down. Under Display of report output versions, change the number to a new amount, perhaps 12 -- which will save the last 12 runs. Click anywhere outside of this field.
6. In the top right, click the **Save** button.

Step 3: Schedule delivery of your report

Identify the format and delivery method for your report and enter the trigger that prompts delivery of your report.

1. Select the **Schedule** tab then click **Create Schedule**.
2. The scheduling screen defaults to the *Schedule* tab.
    - If you are scheduling a month-end report:
        1. Change the Frequency **Type** prompt to *By trigger*.
        2. Type FINCLOSE as the Trigger Name. This must be one word, all capital letters.
    - If you are scheduling a report other than a month-end report, simply select the Frequency Type you wish to schedule and fill in the specifics.
    - If you only want to receive your scheduled report for a set time, deselect **No end date** then update the end date/time.

      Note - Alternately, you can schedule reports to run on a daily or weekly basis. To do so change the Type prompt to your desired frequency: Daily or Weekly and set how often you'd like delivery to occur. If scheduling daily or weekly reports, you will not be prompted to enter a trigger name.

3. Select the *Options* tab.
    - The Format will default to *HTML* … you can update this to *PDF, Excel, Excel Data, or CSV* - or leave it as is.
    - Scroll down. The **Delivery** method will default to *Save*.
      If you would like to have your report emailed to you after each month-end close, select *Send Report by Email*. Click **Edit Details**. Type in your email address directly on To line. You have the option to add an additional email address, customize the subject line, and/or add a message.
    - **Want to receive a copy of your report in the email?** Select *Attach report output*. You may need to scroll down to see this option.
    - Click **Save**.
    - Click **Close**.
4. Now you can go into your **My content** tab and click on the Report View name to see the latest scheduled run. To see older saved runs, click on the Report View's **Action menu**, and select **View Versions**.
5. If you opted to receive your report by email, you'll receive an email to the provided

address after each month-end close. You’ll need to be logged into VPN and CU-Data in order to open any report links.
If you opted to attach a pdf copy of the report to your email (step 3), you’ll be able to open this pdf file without being logged into VPN or CU-Data. However, you will not be able to drill down into underlying data.

Want to stop receiving a scheduled report?

Disable a scheduled report if you want to stop scheduled runs/emails but keep your saved content. You’ll still be able to run the saved report on demand and access saved outputs.

1. Click on the **My content** tab to access your scheduled m-Fin reports.
2. Locate the scheduled report you want to update and click the **Action menu**, the three dots to the right of the heart icon.
3. Select **Properties**
4. On the **Schedule** tab, disable the schedule by clicking the Enable toggle. Once disabled this button will be gray.

Delete a scheduled report entirely if you no longer need it and will not need it in the future.

1. Click on the **My content** tab to access your scheduled m-Fin reports.
2. Locate the scheduled report you want to update and click the **Action menu**, the three dots to the right of the heart icon.
3. Select **Properties**
4. Select the **Schedule** tab then click **Delete**.

Tips

- Review the list of reports that can't be scheduled.?
- Make sure you're connected to VPN and logged into CU-Data when opening emailed links.?
- Want a version that doesn't require VPN? Attach a pdf to the email.?
- You can add or remove SpeedTypes and recipients to existing report schedules.? Learn how.
- Don't need a scheduled report anymore? Add an end date or delete it.
- If a scheduled report suddenly stops running, follow these tips to fix it.

Have a question or feedback?

Questions & Feedback [3]

Feedback or Question *

Your Name

Your Email Address

CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

Links

[1] https://www.cu.edu/controller/m-fin-how-scheduling-reports-month-endyear-end-close
[2] https://www.cu.edu/controller/m-fin-how-updating-report-views-including-scheduled-reports-cu-data
[3] https://www.cu.edu/controller/forms/questions-feedback-0