m-Fin How-to: Scheduling Reports to Run Daily or Weekly [1]

In CU-Data, you can schedule m-Fin reports to run automatically, on a daily or weekly basis. You can even set them to email to you. You do this in 3 steps.

To schedule monthly reports, see m-Fin How-to: Scheduling Reports for Month-End/Year-End Close [2].

Read the procedures

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.
   - 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.
   - At the bottom right of your screen, click **Show Options** and clear the EFFECTIVE DATE by unchecking it.
   - Enter one or more speedtypes.
   - Click **Finish**.
2. When the report displays, click the **Add this Report** icon at the top left of your page - it's the one that looks like a 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 **My Content** from the navigation menu. Sometimes it takes a minute or two to show up.
2. Click on the **More** menu - it's the three dots to the right of the report name - and select **View Versions**.
3. Click on the date -- and then on the **trash** icon. Select **OK** on the Confirm Delete popup.
4. This will delete the report output version that had previously saved.
5. Now it's time to specify how much output you'd like to save going forward. Click on your report view's **More** menu. This time select **Properties**.
6. From the **Report** tab, click **Advanced**. Highlight the number next to ***Report output versions*** to set it to a new amount, perhaps 5 -- which will save the last 5 runs.

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. Shift over to the **Schedule** tab and click **New**.
    - Change the **Schedule** prompt to *Daily* or *Weekly*.
    - Set an end date, or select ***No end date***.
    - The **Format** will default to HTML … you can update this to PDF, Excel, Excel Data, or CSV - or leave it as is.
    - 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**. You'll need to type in your email address directly on the line below, then click **Done**
2. Click the **Create** button.
3. Now you can go into your **My content** folder and click on the Report View name to see the latest scheduled run. To see older saved runs, click on the Report View's **More** menu, and select **View Versions**.

Have a question or feedback?

Questions & Feedback [3]

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[3] https://www.cu.edu/controller/forms/questions-feedback-0