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m-Fin How-to: Updating Report Views (including Scheduled Reports) in CU-Data [1]

Do you need to update a saved Report View to include different prompts, such as SpeedTypes or Account Codes? You can make updates to your previously saved content. Since Scheduled Reports are Report Views that fire on a trigger, you'll follow these same steps to update your scheduled reports.

Watch the video

Read the procedures

Step 1: Editing the Report View's Properties

1. Locate your Saved Report View and edit its properties to reflect your updated prompts.
    - From the home page, click the **My content** tab to access your saved Report Views, including your scheduled reports.
    - Alternately, you can click **Open menu** button in the top left > **Content >My content**.
2. Locate the Report View 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 **Report** tab
5. Scroll down. Click **Edit Values**.
6. The prompt page for your Report View will display. It may take a few seconds. Update the values on this prompt page as needed.
7. Click **Next** at the bottom of the page to update additional prompt pages.
8. If there's no **Next** button or if you are finished with your updates, click **Finish**.
9. Click the **Save** button to save your edits. Click the **Close** button to close the Properties screen.

Step 2: Deleting the old report output

Locate the old report output and delete it.

10. In the **My content** tab, locate your Report View and click on the Action menu – three dots to the right of the heart icon - and select **View Versions**.
11. Click on the date -- and then on the **Delete report version**. Select **OK** on the Confirm Delete popup. This will delete the report output version that had previously saved.
12. Now, when you run your Report View or receive your scheduled report, it will display your updated prompts.

Have a question or feedback?

For questions or feedback contact

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