

## **CU-Data How-to Videos** <sup>[1]</sup>

### **Learn how to run and save reports in CU-Data.**

= Features a Mastering m-Fin mini-webinar recording

#### **Running Reports**

- [Navigating CU-Data](#) <sup>[2]</sup> - Shows how to navigate to CU-Data to run reports.
- [Running a Report in CU-Data](#) <sup>[3]</sup> - Shows how to run a report in CU-Data.
- [Searching in CU-Data](#) <sup>[4]</sup> - Shows how to search for prompt values, like SpeedTypes or Employee ID numbers, when running a report in CU-Data.
- [Drilling Down in CU-Data](#) <sup>[5]</sup> - Shows clicking on blue underlined text in m-Fin reports to see underlying reports for more detail.

#### **Saving and Scheduling Reports**

- [Creating Report Views in CU-Data](#) <sup>[6]</sup> - Shows how to save pre-set prompt values (helpful if you regularly run reports for the same SpeedTypes). Shows how to change the default format for a Report View and change the orientation of a PDF report.
- [Scheduling Reports for Month-End/Year-End Close](#) <sup>[7]</sup> - Shows how to save pre-set prompt values and schedule a report to run automatically after each month-end close. You can also schedule reports to run on a daily or weekly basis.
- [Updating Report Views \(including Scheduled Reports\)](#) <sup>[8]</sup> - Shows how to update a saved Report View to include different prompts.
- [Troubleshooting Scheduled Reports](#) <sup>[9]</sup> - Shows how to renew credentials to correct issues with scheduled reports that are no longer running.

#### **Updating CU-Data Preferences**

- [Changing the Orientation of your PDF](#) <sup>[10]</sup> - Shows how to update the default format of a report view so that it prints a PDF of your m-Fin report in portrait orientation, rather than landscape.
- [Updating Your Home Page in CU-Data](#) <sup>[11]</sup> - Shows how to set a report or report view as your home page so that you land directly on it when you open CU-Data.

#### **Highlight Videos**

- [Looking up Available Gift Fund Balances](#) <sup>[12]</sup> - Shows how to look up the CU Foundation available balance for a linked Fund 34 Gift SpeedType in the Finance System or in CU-Data.?
- [Looking up Study Subject Payments](#) <sup>[13]</sup> - Shows how to run the m-Fin Financial Detail II report for common study subject payment accounts.?
- [Monthly Financial Review Reports](#) <sup>[14]</sup> - Shows the 5 reports you should review every

month if you are responsible for reconciling a SpeedType or group of SpeedTypes.

- Understanding PO Encumbrances <sup>[15]</sup> - Shows how purchase order encumbrances and actual expenses look on your m-Fin Financial Detail report.

## Have a question or feedback?

## Questions & Feedback <sup>[16]</sup>

### 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

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**Source URL:**<https://www.cu.edu/controller/training/m-fin-reports-cu-data/cu-data-how-videos>

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