Published on *University of Colorado* (https://www.cu.edu)

CU-Data How-to Videos [1]

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

= Features a Mastering m-Fin mini-webinar recording

Running Reports

- Navigating CU-Data [2] - Shows how to navigate to CU-Data to run reports.
- Running a Report in CU-Data [3] - Shows how to run a report in CU-Data.
- Searching in CU-Data [4] - 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 [5] - 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 [6] - 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 [7] - 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) [8] - Shows how to update a saved Report View to include different prompts.
- Troubleshooting Scheduled Reports [9] - 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 [10] - 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 [11] - 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 [12] - 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 [13] - Shows how to run the m-Fin Financial Detail II report for common study subject payment accounts.?
- Monthly Financial Review Reports [14] - Shows the 5 reports you should review every

month if you are responsibile for reconciling a SpeedType or group of SpeedTypes.
- Understanding PO Encumbrances [15] - Shows how purchase order encumbrances and actual expenses look on your m-Fin Financial Detail report.

Have a question or feedback?

For questions or feedback contact

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

Links
[1] https://www.cu.edu/controller/training/m-fin-reports-cu-data/cu-data-how-videos
[2] https://www.cu.edu/controller/m-fin-how-navigating-cu-data [3] https://www.cu.edu/controller/m-fin-how-running-report-cu-data [4] https://www.cu.edu/controller/m-fin-how-searching-cu-data
[5] https://www.cu.edu/controller/m-fin-how-drilling-down-cu-data [6] https://www.cu.edu/controller/m-fin-how-creating-report-views-cu-data [7] https://www.cu.edu/controller/m-fin-how-scheduling-reports-month-endyear-end-close [8] https://www.cu.edu/controller/m-fin-how-updating-report-views-including-scheduled-reports-cu-data [9] https://www.cu.edu/controller/m-fin-how-troubleshooting-scheduled-reports
[10] https://www.cu.edu/controller/m-fin-how-changing-orientation-your-pdf [11] https://www.cu.edu/controller/m-fin-how-updating-your-home-page-cu-data
[12] https://www.cu.edu/controller/finm-fin-how-looking-available-gift-fund-balances
[13] https://www.cu.edu/controller/m-fin-how-looking-study-subject-payments
[14] https://www.cu.edu/controller/m-fin-how-monthly-financial-review-reports
[15] https://www.cu.edu/controller/m-fin-how-understanding-po-encumbrances
[16] mailto:fss@cu.edu?subject=Question%20or%20Feedback%20&body=What%20page%20this%20is%20from:%20' + window.location.href +