

CU-Data How-to Videos ^[1]

IMPORTANT: The CU-Data reporting system will be upgraded to Cognos 12 on March 14, 2024. With Cognos 12, you will see a number of enhancements to the CU-Data User Interface (UI). Some of the menu items that you regularly use for m-Fin reports will move to different locations on the home screen ... but they will all still be there, just arranged in a more streamlined menu. Note that the m-Fin reports themselves have not changed. [Learn more about the upgrade here](#) ^[2].

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

= Features a Mastering m-Fin mini-webinar recording

Running Reports

- [Navigating CU-Data](#) ^[3] - Shows how to navigate to CU-Data to run reports.
- [Running a Report in CU-Data](#) ^[4] - Shows how to run a report in CU-Data.
- [Searching in CU-Data](#) ^[5] - 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](#) ^[6] - 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](#) ^[7] - 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](#) ^[8] - 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 \(including Scheduled Reports\)](#) ^[9] - Shows how to update a saved Report View to include different prompts.
- [Troubleshooting Scheduled Reports](#) ^[10] - 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](#) ^[11] - 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](#) ^[12] - 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](#) ^[13] - 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](#) ^[14] - Shows how to run the m-Fin Financial Detail II report for common study subject payment accounts.?
- [Monthly Financial Review Reports](#) ^[15] - Shows the 5 reports you should review every month if you are responsible for reconciling a SpeedType or group of SpeedTypes.
- [Understanding PO Encumbrances](#) ^[16] - Shows how purchase order encumbrances and actual expenses look on your m-Fin Financial Detail report.

Have a question or feedback?

Questions & Feedback ^[17]

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

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/training/m-fin-reports-cu-data/cu-data-upgrade-coming-march-14-2024>
- [3] <https://www.cu.edu/controller/m-fin-how-navigating-cu-data> [4] <https://www.cu.edu/controller/m-fin-how-running-report-cu-data> [5] <https://www.cu.edu/controller/m-fin-how-searching-cu-data>
- [6] <https://www.cu.edu/controller/m-fin-how-drilling-down-cu-data> [7] <https://www.cu.edu/controller/m-fin-how-creating-report-views-cu-data> [8] <https://www.cu.edu/controller/m-fin-how-scheduling-reports-month-endyear-end-close> [9] <https://www.cu.edu/controller/m-fin-how-updating-report-views-including-scheduled-reports-cu-data> [10] <https://www.cu.edu/controller/m-fin-how-troubleshooting-scheduled-reports>
- [11] <https://www.cu.edu/controller/m-fin-how-changing-orientation-your-pdf> [12] <https://www.cu.edu/controller/m-fin-how-updating-your-home-page-cu-data>
- [13] <https://www.cu.edu/controller/finm-fin-how-looking-available-gift-fund-balances>
- [14] <https://www.cu.edu/controller/m-fin-how-looking-study-subject-payments>
- [15] <https://www.cu.edu/controller/m-fin-how-monthly-financial-review-reports>
- [16] <https://www.cu.edu/controller/m-fin-how-understanding-po-encumbrances>
- [17] <https://www.cu.edu/controller/forms/questions-feedback-0>