

Cvent Portal ^[1]

November 30, 2020 by [Melanie Jones](#) ^[2]

NOTE Publishing Reports to the Cvent Portal will require the support of your eComm specialist.

The [University of Colorado Cvent Portal](#) ^[3] makes Cvent Reports available to stakeholders via a secure login. These free licenses grant individuals access to specific Reports that can be viewed in real-time, filtered and exported as needed. Follow the steps below to get started:

STEP 1 | Request Portal User (free)

- Contact your [eComm specialist](#) ^[4] to have a Portal User created for free. You'll need to provide a First Name, Last Name and Email Address
- When someone's added to the Portal, they receive the following email (be sure to check your promotions or SPAM folder).
 - *The link to set your password will expire after a few hours.*



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Portal Name

Hi PortalUserFirstName PortalUserLastName,

You've been invited to the Portal Name. To create your account, [navigate to the portal to set your password](#). Don't forget to **bookmark the portal** for future use.

- **Your username:** PortalUsername
- **Your password:** Created on first login

Contact PortalSenderFirstName PortalSenderLastName if this email expires (after 24 hours).

[Go to Portal & Set Password](#)

- Click **Go to the Portal & Set Password** and complete the steps to activate your account.
 - *TIP! Bookmark this page for future reference.*
 - *Reports cannot be shared until a Portal User's account has a password set (or is active).*

STEP 2 | Request Reports to be Published

- The Report(s) that you wish to have shared should already be created and saved. [5]
- Share the Report Visibility with your eComm specialist.
- Share Already Saved Report
- Share Report While Saving

Navigate to your saved Report. Click the dropdown arrow next to the Run button. Click Edit

Visibility in the dropdown.

Home

General



Website



Registration



Marketing



Email



Attendees



OnArrival



Reports



Reports

Invitee Summary

Events > New Employee Meet & G

Report Templates

Sort by:



Last Mod

Copy of Event Experie

Created on Feb 3, 2022 2:2

Copy of Event Experie

Created on Feb 3, 2022 2:2

In the **Visible to** section, it is set by default to **Only me**. To expand visibility to others, **click the pencil icon**.

Save Report

Report Details

*** Name**

Copy of Copy of Event Experience Usage

Description

500 characters remaining

Cancel

Save and Exit

Save

In the **This report is visible to** dropdown, choose **Selected Users**.

Scroll to the User section. **Search** for the person you want to share the Report with and **check the box** next to their name. Click **Apply Changes**.

Save Report

This report is visible to

Selected

Groups (4)

CRM CoE



Standard Event User



Users (3)

<input type="checkbox"/>	Name		Username
<input checked="" type="checkbox"/>	Daniella Torres		daniella.torres@cu.e

Cancel

Apply changes

- Your eComm specialist can then publish the saved Report to the Portal and share it with

specific users.

- **Event Reports** | Provide the Event Title and Report Names you wish to have Published.
- **Cross-Event Reports** | Let them know it's a Cross-Event Report and provide the Report Name you wish to have Published.

CHANGE OF PROCESS New Report Notifications were not used prior to Summer 2021.

- eComm specialists can opt to send a notification email (image below) through Cvent to let Portal Users know when a Report has been Published.



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Portal Name

Hi PortalUserFirstName,

A **new report has been published** to the Portal Name. To view it, please sign in to your account below.

[ExamplePublishedContentName](#)

Thank you,

PortalSenderFirstName PortalSenderLastName

[Login to Portal](#)

STEP 3 | Access Portal & Reports

- Once a Portal User sets up their account (see *Step 1 | Request Portal User* above), they can login to [CU's Cvent Portal](#) [3] to input their username and password

[Cvent Portal Login](#) [3]

* Username

melanie.jones@cu.edu

* Password

••••••••

[Forgot Password?](#)

Log In

[3]

Forgot Password? If you can't login, click the **Forgot Password?** link. After providing your username (your email address) you'll receive an email to reset your password.

- After logging in, Portal Users see Reports that have been made available to them to Run



See a Report

0X_DEPT_Event Title_Report Des

Description:
For CU Foundation

Published By:
melanie.jones@cu.edu



- Once a Report is ran, a portal user can view, filter and export the information as needed.
- [View Report](#)
- [Apply Filters](#)
- [Export Report](#)

View Report Details without needing to export. You can scroll down to see more rows and to

the right to see more columns.

09_ADV_2021 JDC Luncheon_Trans

Transaction Distribution Details

Transaction Date 	Transaction ID 
Jul 7, 2021 6:51 PM	
Jul 18, 2021 2:19 PM	
Jun 29, 2021 4:04 PM	
Jul 17, 2021 9:22 AM	
Jun 29, 2021 12:17 PM	

Jul 17 2021 11:14 AM

NOTE If another user has previously applied a filter, it may still be applied. This could result in you viewing or exporting a fraction of the data. Check the Filters to confirm you have your intended information.

The Report creator can make a variety of relevant filters available to be applied in the Report. Portal users can apply Filters to view and/or export a segment of the data in two easy ways:

1 | Click the **Filters** on the right hand side

ils

... Acti

Transaction Type	Payment Method	First Name
Online Charge	Visa	Marilyn
Online Charge	Visa	Danny

2 | Hover **Actions** in the top right >> Click **Filter Report Data** in the dropdown

... Actions ▾

Filter Report Data
Filter report's visible data by the returned fields

Export to Comma Separated Value (.csv)

Export to Microsoft Excel (.xlsx)

Export to Tab-Delimited (.txt)

Payment Method

Visa

Visa

Danny

- Either route will expand the **Filters pane on the right side**.
- **Scroll through available filters** to modify them, then **click the green Apply button** towards the bottom.

C Luncheon_Transaction Details

The screenshot shows a web application interface. On the left, there is a table titled 'Transaction Details' with columns for 'Payment Method' and 'First Name'. The table contains several rows of data. On the right, there is a 'Filters' panel with a green border. The panel has a title 'Agenda Item Name' and a list of items with checkboxes. The 'Apply' button is highlighted with a green border.

Payment Method	First Name
Visa	Mar
Visa	Dan
Visa	Ran
Check	Meg
Check	Mar
Visa	Eric
American Express	Lisa

Filters

Agenda Item Name

- Select All
- Bronze Medal Sponsor
- Challenge Fund at .
- Champion Sponsor
- Silver Medal Sponsor
- VIP Patron Package

Journal Number

Apply

Click the **Clear All** button to remove any filters that have been added.

Portal users can Export Reports in their entirety or after applying Filters. Choose to Export as a .csv, .xlsx or .txt file.

- Hover **Actions** in the top right >> Select one of the export options in the dropdown

Transaction Details

◇ Name on Card	◇ Transaction Type	◇ Payment Method
	Online Charge	Visa
	Online Charge	Visa

Grouping

If grouping has been applied to the Report, you will have the option to keep the grouping in your export or remove it (detailed view).

Related Wikis

- [Cvent Reporting](#) ^[5]
- ['New' Reporting & Portals vs. Legacy Reports & Parked Report Groups](#) ^[6]
- [How-To Manage Reports in the Portal \(for Portal Managers\)](#) ^[7]

Display Title:

Cvent Portal

Send email when Published:

No

Source URL: <https://www.cu.edu/blog/ecommerce-wiki/cvent-portal>

Links

- [1] <https://www.cu.edu/blog/ecommerce-wiki/cvent-portal> [2] <https://www.cu.edu/blog/ecommerce-wiki/author/39>
[3] <https://web.cvent.com/p/d45997e7-1b69-4226-9d54-9e61c42e2ec8>
[4] <https://www.cu.edu/ecommerce/strategy/leadership>

[5] <https://www.cu.edu/blog/ecommerce-wiki/cvent-reporting> [6] <https://www.cu.edu/blog/ecommerce-wiki/new-reporting-portals-vs-legacy-reports-parked-report-groups> [7] <https://www.cu.edu/blog/ecommerce-wiki/how-manage-reports-portals>