Home > Cvent Portal

### Cvent Portal III

November 30, 2020 by Melanie Jones [2]

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

The <u>University of Colorado Cvent Portal</u> [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 <u>eComm specialist</u> [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 recieve the following email (be sure to check your promotions or SPAM folder).
  - The link to set your password will expire after a few hours.



## Portal Name

Hi PortalUserFirstName PortalUserLastName,

You've been invited to the Portal Name. To create your account, <u>navigate to the</u> <u>portal</u> 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.

		Events > New Employee Meet & G		
Home				
General	$\sim$			
Website	$\sim$	Report Templates		
Registration	~	Sort by: 📃 Last Mod		
Marketing	$\sim$			
Email	~	Copy of Event Experie Created on Feb 3, 2022 2:2		
Attendees	~	Copy of Event Experie		
OnArrival	~	Created on Feb 3, 2022 2:2		
Reports	^			
Reports				
Invitee Summary				

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



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 rep	port is	visible to	elected
Groups	(4)				
CRM CoE			+		
Standard E	Event User		+		
Users (3	3)				
	Name		$\diamond$	Username	
	Daniella Torres			daniella.torr	res@cu.e
Car	ncel	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 notifcation email (image below) through Cvent to let Portal Users know when a Report has been Published.



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

## 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 <u>CU's Cvent Portal</u> [3] to input their username and password

Cvent Portal Login [3]

[3]

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

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



See a Repor

Q

## 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

0	9_ADV_2021 J	DCL	uncheon_	Trans
	Transaction Distribut	tion De	tails	
	Transaction Date (i)	$\diamond$	Transaction ID	$\diamond$
	Jul 7, 2021	6:51 PM		
	Jul 18, 2021	2:19 PM		
	Jun 29, 2021	4:04 PM		
	Jul 17, 2021	9:22 AM		
L	Jun 29, 2021 1	2:17 PM		
	lul 17-2021 1	1·14 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



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

			$\cdots$ Actions $\checkmark$	×
		Filter Re Filter repo returned f	Filters	
$\diamond$	Payment Method	Export to Value (.cs Export to	o Comma Separated sv) o Microsoft Excel	
	Visa	(.xlsx) Export to		
	Visa	Dai -	nny	

- 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_	Transactic	on Details
	:	Filters
n Details		Agenda Item Name
Payment Method	⇔ Firs	Select All
Visa	Mar	Bronze Medal Spor
Visa	Dan	Challenge Fund at .
Visa	Ran	Silver Medal Spons
Check	Meg	VIP Patron Package
Check	Mar	- Iournal Number
Visa	Eric	Apply
American Express	Lisa	

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

Portal users can Export Reports in their entirely 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

## ransaction Details

$\diamond$	Name on Card	$\diamond$	Transaction Type	$\diamond$	Payment Met
			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/ecomm-wiki/cvent-portal

#### Links

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

[5] https://www.cu.edu/blog/ecomm-wiki/cvent-reporting [6] https://www.cu.edu/blog/ecomm-wiki/newreporting-portals-vs-legacy-reports-parked-report-groups [7] https://www.cu.edu/blog/ecomm-wiki/howmanage-reports-portals