

## How-To Manage Reports in the Portals [1]

March 13, 2025 by [Melanie Jones](#) [2]

**NOTE** The following are instructions for Portal Managers. Users can submit a request for a report to be published to the portal [3] by following three easy steps.

One of the eComm specialist's roles (and Super Users) in Cvent includes managing how stakeholders can access Cvent data in real-time, without a cost. Portal Managers can follow the steps below to create Portal Users and Publish Reports to the Portal for easy access.

### **STEP 1 | Add User(s) to Portal**








**Having trouble adding a portal user?** If the person is a current test user, it might indicate the username is already taken. Submit a help ticket [4] to remedy the issue.

For someone to access reports via the portal, they will need to be a Portal User (a free license). Portal Managers can follow the next steps to create new Portal Users or check if they already exist.

- Hover the **dot menu** in the top right
- Click **Admin** in the dropdown

# Events

View: Current Events ▾ Create View

Title		Code		Status
<a href="#">Unsubscribe: eComm Communications</a>		C5NZ92X6BGS		Completed
<a href="#">Subscribe: Employee Development Monthly</a>		GLNTVT57R4C		Active
<a href="#">Subscribe: Registrar Network Newsletter (@colorado.edu...</a>		WHND33N9MXP		Active
<a href="#">Subscribe: Budget &amp; Fiscal News</a>		JWN22DLFDJ9		Active
<a href="#">Subscribe: Benson Center for</a>		D3NP3MSKVYN		Active

- Click the **Access Portal** tab on the left
- Once expanded, click **Access Portals**
- The access portal page will appear. Click the **University of Colorado Cvent Portal** name

General ▼

Account Details ▼

Data Lists ▼

Events ▼

Meetings Management ▼

Manage Users ▼

Libraries ▼

Templates ▼

Budget ▼

Integrations ▼

Access Portal ▲

Access Portals

Portal Users

Reporting ▼

- Portal User without Paid Cvent License
- Portal User with Paid Cvent License

Admin > Access Portal

## Access Portal

Name	Lang
University of Colorado Cvent Portal	en-U

Results per page 25 ▼

- With the portal open, click the **Guests** tab. You can view existing Portal Users on this page by searching or scrolling.
- Select the blue **Add Guests** button in the top-right

- General ▼
- Account Details ▼
- Data Lists ▼
- Events ▼
- Meetings Management ▼
- Manage Users ▼
- Libraries ▼
- Templates ▼
- Budget ▼
- Integrations ▼
- Access Portal ▲
- Access Portals
- Portal Users
- Reporting ▼

## University of Colorado Cve

Portal Details Content Managers Guests

Add guests to view and interact with content and only have access to the portal

<input type="checkbox"/>	Name
<input type="checkbox"/>	Roskop, Nathan
<input type="checkbox"/>	Johnson Akse, Terri
<input type="checkbox"/>	Gama, Tim
<input type="checkbox"/>	Seazzu, Alessandro

- It's worth confirming if the Portal User already exists, and needs to be added to the University of Colorado Portal.
- To do so, **check the box** next to their name then select **Add to Portal** (image below).
  - Another pop-up appears. You can **Send invitation** or **Don't send invitation** (and send later).
  - Portal users need to create their password through the invitation which expires after 24 hours. See Troubleshooting below if you need to resend the Portal Invitation.

- Once a password is set, they will be an Active Portal User within the University of Colorado Portal (meaning you can complete step 3 - granting them access to a specific Report).

Access Portal 

Access Portals

Portal User Groups

## Add Guest

Select users to

ab|

1 selected, 1 of



Name



?

- General
- Account Details
- Data Lists
- Events
- Meetings Management
- Manage Users
- Libraries
- Templates
- Budget
- Integrations
- Access Portal
- Access Portals**
- Portal Users
- Reporting

## Step 1: Select Which Users

All Users & User Groups

<input type="checkbox"/>	Name	
<input type="checkbox"/>	Abdullah, Sara	
<input type="checkbox"/>	Adams, Emily	
<input type="checkbox"/>	Adams, Stephanie	
<input type="checkbox"/>	Adu-Tutu, Adwoa	
<input type="checkbox"/>	Alton, Taylor	
<input type="checkbox"/>	Ami, Claire	

- A pop-up appears. Provide **Email, First Name, and Last Name**
- Select the blue **Save** button.

Get to know the new experience. For the full

**cvent** | ADMIN

General ▾

Account Details ▾

Data Lists ▾

Events ▾

Meetings Management ▾

Manage Users ▾

Libraries ▾

Templates ▾

Budget ▾

Integrations ▾

Access Portal ▾

Access Portals

Portal Users

Reporting ▾

### Create Portal User

#### Basic Information

\* Email Address:  
meljones225@gmail.com

\* First Name:  
Melanie

\* Last Name:  
Jones

\* Username:  
meljones225@gmail.com

#### Additional Information

Language:

Alton, Taylor

Ami, Claire

- The pop-up will disappear. Change the dropdown to **Access Portal Users**
- **Check the box next to the User(s) you want to add to the Portal**
  - ?Use the search function to find a user with ease.
- Select the blue **Next** button in the top-right

- General
- Account Details
- Data Lists
- Events
- Meetings Management
- Manage Users
- Libraries
- Templates
- Budget
- Integrations
- Access Portal

Access Portals

Admin > Access Portal > Access Portals > Step 1: Select

## Step 1: Select Which Users

Access Portal User



Name



Jones, Melanie

- Another pop-up appears. You can **Send invitation** or **Don't send invitation** (and send later).
  - Portal users need to create their password through the invitation which expires after 24 hours. See Troubleshooting below if you need to resend the Portal Invitation.



- General
- Account Details
- Data Lists
- Events
- Meetings Management
- Manage Users
- Libraries

## Step 1: Select Which Users

### Send portal invitation?

You can send the portal invitation to your selected invitation now, you'll have to manually send the em

?

- Once a password is set, they will be an Active Portal User in the University of Colorado Portal (meaning you can complete step 3 - granting them access to a specific Report).

Have a Cvent user who hosts events through their paid license and wants to be a Portal user? The process for publishing Reports to these users, compared to those who are only a Portal user is slightly different.

- Click the **Guests** tab >> Select the green **Add Guests** button in the top-right
- Active Users will display in a list
- **Check the box** next to the User(s) you want to add to the Portal
- Next, select the green **Next** button in the top-right
- *License users who are also Portal users will not get an email because they do not need to set a password. These users will sign in with the same username and password for their Cvent account, so no need to remember two sets of credentials.*

**IMPORTANT FOR STEP 3** Licensed Users (who are also Portal Users) **can not be notified of a Report being published** to the Portal via Cvent. Otherwise, all eComm specialists will also be emailed. You'll have to let these users know the old-fashioned way - through a separate message.

**IMPORTANT FOR STEP 3** Licensed Users (who are also Portal Users) must have the event shared with them AND the Portal Report shared with their Portal User to access data. If only the Report is shared with the Portal User (who also has a real, paid license), they will see the

Report but when they run it, **no data will display**.

## STEP 2 | Save Report with Naming Convention

### Did a user create the Report?

They need to share the Report Visibility with their Portal Manager [5]. Otherwise the Portal Manager will not be able to view the Report or Publish it to the Portal.

A Portal Manager can publish the saved Report to the Portal and share it with specific users.


Create Event or Cross-Event Report [6] and **Save Report per naming convention**.


- Naming Convention: ***0X\_DEPT\_Event Name\_Report Description***
  - where ***X*** indicates your campus number
  - ***DEPT*** indicates the department or unit
  - indicate the ***Event Name*** or ***Cross*** if it's a Cross-Event Report
  - Add an ***\_OG*** at the end if the report should never expire

### Rename Report

1. Rename a saved Report by **navigating to the event and running the Report**.
2. Once ran, hover **Actions** in the top right >> Click **Save** in the dropdown (image below)
3. In the popup, rename the Report and click Save.

# Survey Responses

at apply. 

igugue and/or friend? 

## Visibility

Edit the **Visibility** if you wish to share this Report with another full licensed user to access when they login to Cvent. This is not the same as getting a report published to the Portal and shared with a (free) Portal User.

- ***To successfully share an event report with a licensed user, you must share the event [7] and the event report.***

## STEP 3 | Publish to Portal

Once you have a saved Report (per the naming convention in step 2) you can publish it to the portal and grant viewing rights to specific Portal Users. Sending email notifications and setting content expiration dates are optional features available to make managing Reports in the Portal even easier.

- After saving and running the Report (per the correct naming convention), hover **Actions** in the top-right
- Click **Publish to Access Portal** in the dropdown

09\_ADV\_Cross\_Event Order Details with Transactions

Data Actions

Event Order Details

Grouped by: Transaction Date Transaction ID

>	Transaction Date: Mar 18, 2015	5
>	Transaction Date: Oct 20, 2015	1
>	Transaction Date: Nov 6, 2015	2
>	Transaction Date: Jan 26, 2016	2
>	Transaction Date: Jan 29, 2016	3
>	Transaction Date: Feb 1, 2016	13
>	Transaction Date: Feb 8, 2016	4
>	Transaction Date: Feb 9, 2016	2
>	Transaction Date: Feb 10, 2016	1

125,492 Results

## Content Expiration

**Required** Set a Content expiration date in the top right corner for automatic unpublishing - minimizing clutter for the Portal User. Remember to end the report name with **\_OG** if no expiration date is set.

**NOTE** Portal Managers will still see the Published Report in Admin >> Access Portal >> Access Portals >> Content tab after the expiration date. To avoid clutter, it's a best practice to remove published Reports after they expire (instructions below in step 4).

## Viewing Rights

- Keep default **Visible to: Only selected users**
- Keep default **Email notifications to: Only email portal guests**
- Change **Filter by dropdown to: Access Portal User**
- **Check the box** next to the individuals who should have access
  - ? *\*If you do not see a portal user here, it means they are not active, yet. You might need to re-trigger the invite so they can set their password (once set, they are an active Portal User and can be selected).*
  - **TIP!** Add a **Content expiration date** (usually 30 days after the event close) for the Report to automatically be removed from the portal user's view. You'll still need to Unpublish the Content to clean up the backend of Cvent.
- Click the green **Publish** button at the bottom of the page.

Portal: University of Colorado Cvent Portal

Content: 08\_ODEI\_Fireside Chat: Unpacking Bias\_Waitlisted Registrants

## Viewing Rights

Visible to:  Only selected users  All portal users



Filter by:

Access Portal User



<input type="checkbox"/>	Name	Email Address
<input type="checkbox"/>	Friends Association,	alumr
<input checked="" type="checkbox"/>	Emma	eblai
<input type="checkbox"/>	Gretchen	gb
<input type="checkbox"/>	james	jame



Previous


Pub


**Important Note:** Licensed Users (who are also Portal Users) must have the event shared with them AND the Portal Report shared with their Portal User to access data. If only the Report is shared with the Portal User (who also has a real, paid license), they will see the Report but when they run it, no data will display.


- If you do not want to notify anyone when a Report is Published, set **Email notifications: Don't email users**

**!TIP! NEVER Email all users with viewing rights.** This will email all Cvent admins and eComm specialists, in addition to the selected Portal User.

Content expiration date   

Email notifications:  

- Only email portal guests
-  Email all users with viewing rights
- 

Type	User Type 
Access Portal User	Guest

### STEP 4 | Un-Publish from Portal

**!TIP!** Set a content expiration date when publishing a report (step 2) for automatic unpublishing from the Portal Users perspective.

**NOTE** Setting a content expiration on a published report (step 2) will NOT remove the report from the Portal Managers' perspective. automatic unpublishing from the Portal Users perspective. To avoid clutter for Portal Managers, it's a best practice to remove published Reports after they expire.

#### Manually Un-Publish Report

- Click the **dot menu** in the top right
- Select **Admin** in the dropdown

The screenshot shows the Cvent Events page. At the top left is the Cvent logo, followed by 'EVENTS'. On the top right, there are links for 'All Events' and 'Calendar' with a dropdown arrow. Below the header is a large 'Events' title. Underneath, there is a 'View:' section with 'Current Events' and a dropdown arrow, and a 'Create View' link. The main content is a table with the following data:

Title		Code		Status
Unsubscribe: eComm Communications		C5NZ92X6BGS		Completed
Subscribe: Employee Development Monthly		GLNTVT57R4C		Active
Subscribe: Registrar Network Newsletter (@colorado.edu...		WHND33N9MXP		Active
Subscribe: Budget & Fiscal News		JWN22DLFDJ9		Active
Subscribe: Benson Center for		D3ND3MSKVYN		Active

- Hover **Access Portal** in the navigation
- Click **Access Portals** on the left
- Select the **University of Colorado Cvent Portal**

- General
- Account Details
- Data Lists
- Events
- Meetings Management
- Manage Users
- Libraries
- Templates
- Budget
- Integrations
- Access Portal**
- Access Portals
- Portal Users
- Reporting

Admin > Access Portal

## Access Portal

Name	Lang
University of Colorado Cvent Portal	en-U

Results per page 25

- Navigate to the second tab: **Content**
- Scroll/Search for Report name
- **Check the box** next to the Report(s) you wish to unpublish
- Select **Unpublish Content** which will pop-up across the top



# University of Colorado Cvent Portal

Portal Details **Content** Managers Guests Access Requests Emails Language

Manage all published content after it gets published to a portal from various locations

Content Type

Summary: All Content

All Content

598 Published

85 Expired

31 s

Search



Expiration Date

Visible To

2 selected, 2 on this page

Unpublish Content

<input type="checkbox"/>	Name	Type	Expiration
<input checked="" type="checkbox"/>	01_2023 Spring Advisory Board Reception RSVP	Reports	
<input checked="" type="checkbox"/>	01_AA_Kraus Houck_Event Registrant	Reports	
<input type="checkbox"/>	01_ALUM_22Pac-12BballTourney_registrants	Reports	
	01_ALUM_2022_Registrants		

- **!TIP!** Assuming you set a Content Expiration Date when publishing, applying this filter can make Unpublishing Content even easier.

Content Type: All Content (dropdown) | Summary: All Content

85 Published | 85 Expired | 0 Se

Search (input) | Expiration Date (1) (dropdown) | Visible To (input)

Expired (button with X)

Filter by keyword... (input)

<input type="checkbox"/>	Name ▾	Expira
<input type="checkbox"/>	02_Advancement_Rec 2024_Registrat Report-TEST only	3/31/2

No expiry date

Set to expire

Expired

## Troubleshooting

### Need to resend a Portal Invitation or Remove a Portal User?

- Navigate to **Admin >> Access Portals**
- Select the only Portal listed
- Navigate to the **Guests** tab
- **Check the box** next to the person
  - The *Invited* Status in the last column indicates they did not activate their account.
- Then you can **Send Portal Invitation** or **Remove** them.

- General
- Account Details
- Data Lists
- Events
- Supplier Network
- Manage Users
- Libraries
- Templates
- Budget
- Integrations
- Access Portal**
- Access Portals**

# University of Colorado

Portal Details Content Managers **G**

Add guests to view and interact with

Search

1 selected, 1 on this page

Name

Axon,

Ben

## Related Wikis

- [Cvent Reporting](#) <sup>[8]</sup>
- ['New' Reporting & Portals vs. Legacy Reports & Parked Report Groups](#) <sup>[9]</sup>
- [Cvent Portals \(make Cvent reports accessible to others for free\)](#) <sup>[3]</sup>
- [Cvent Report Visibility \(make Cvent reports accessible to other licensed Cvent users\)](#) <sup>[5]</sup>

### Display Title:

How-To Manage Reports in the Portals

### Send email when Published:

No

**Source URL:**<https://www.cu.edu/blog/ecommerce-wiki/how-manage-reports-portals>

### **Links**

[1] <https://www.cu.edu/blog/ecommerce-wiki/how-manage-reports-portals> [2] <https://www.cu.edu/blog/ecommerce-wiki/author/39> [3] <https://www.cu.edu/blog/ecommerce-wiki/cvent-portal> [4] <https://www.cu.edu/ecommerce/submit-help-ticket> [5] <https://www.cu.edu/blog/ecommerce-wiki/cvent-reporting-visibility> [6] <https://support.cvent.com/apex/CommunityArticle?id=000054860> [7] <https://www.cu.edu/blog/ecommerce-wiki/cvent-share-your-event-other-users> [8] <https://www.cu.edu/blog/ecommerce-wiki/cvent-reporting> [9] <https://www.cu.edu/blog/ecommerce-wiki/new-reporting-portals-vs-legacy-reports-parked-report-groups>