CU-Data How-to Videos [1]

IMPORTANT: The CU-Data reporting system is being upgraded to Cognos 12 on Thursday evening, August 15, 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.
- <u>Searching in CU-Data</u> [5] Shows how to search for prompt values, like SpeedTypes or Employee ID numbers, when running a report in CU-Data.
- <u>Drilling Down in CU-Data</u> [6] Shows clicking on blue underlined text in m-Fin reports to see underlying reports for more detail.

Saving and Scheduling Reports

- <u>Creating Report Views in CU-Data</u> [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.
- <u>Scheduling Reports for Month-End/Year-End Close</u> [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.
- <u>Updating Report Views (including Scheduled Reports)</u> [9] Shows how to update a saved Report View to include different prompts.
- <u>Troubleshooting Scheduled Reports</u> [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.
- <u>Updating Your Home Page in CU-Data</u> [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.
- <u>Understanding PO Encumbrances</u> [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
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This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.
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[2] https://www.cu.edu/controller/training/m-fin-reports-cu-data/cu-data-upgrade-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
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[17] https://www.cu.edu/controller/forms/questions-feedback-0

[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