How do I create a pinned report?

This how-to sheet outlines the steps required to:

- Save frequently used reports as pinned reports so you will not have to re-create reports each time you wish to view them.

Can others see my pinned reports?

- Not by default. When you pin a report to your favourites, it is pinned as a report on **your** profile.   Contact financial.systems@carleton.ca if you want a pinned report to be visible to others.

1. This how-to sheet begins in an open report that you want to pin. Any report can be pinned.

(Image related to the tip)

Tip: Pinned reports work best when you set functional filters (e.g. Fiscal Period) instead of static filters (e.g. a specific date range). If your open report has a static date filter, consider doing the following before you pin it …

- click on the 'Filter Options' tab
- click on the '*fx*' button beside 'Fiscal Period' filter to view options, and
- choose a functional filter (e.g. 'Current Fiscal Year/ Current Period').

This will ensure that your pinned report does not display outdated data (i.e. save you step 4).
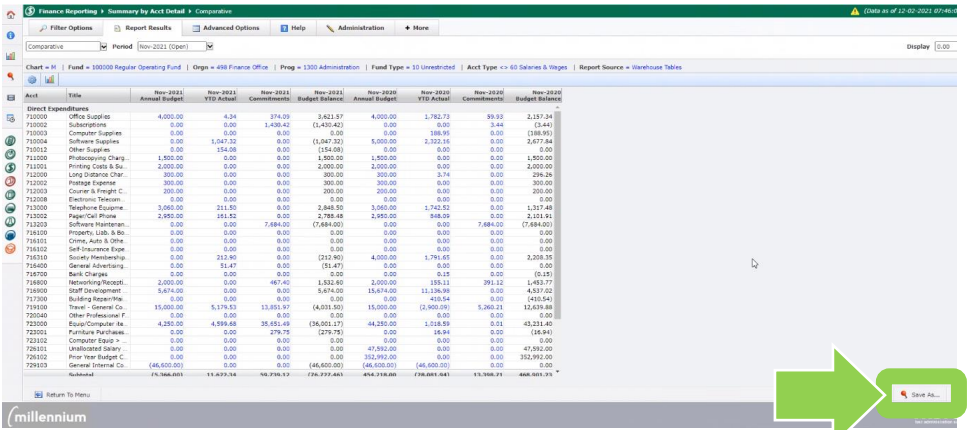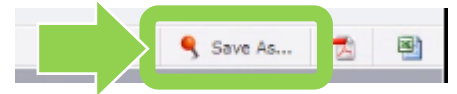
2a. **To pin a report:**

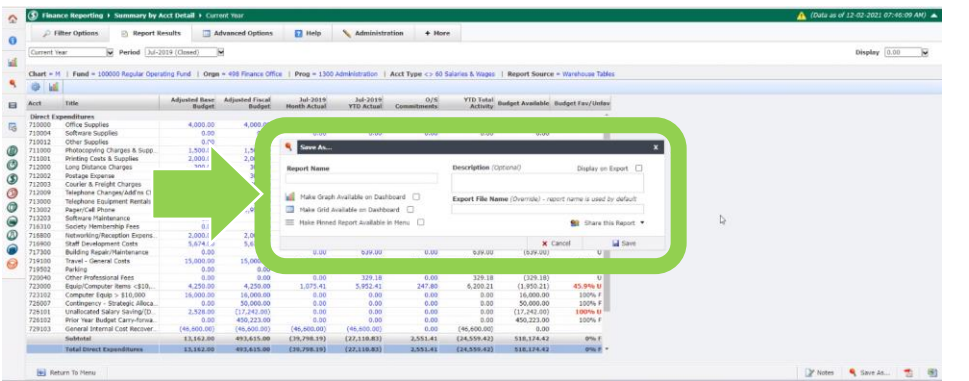Click on the '**Save As**' button to pin the report to your favourites.

(larger view)
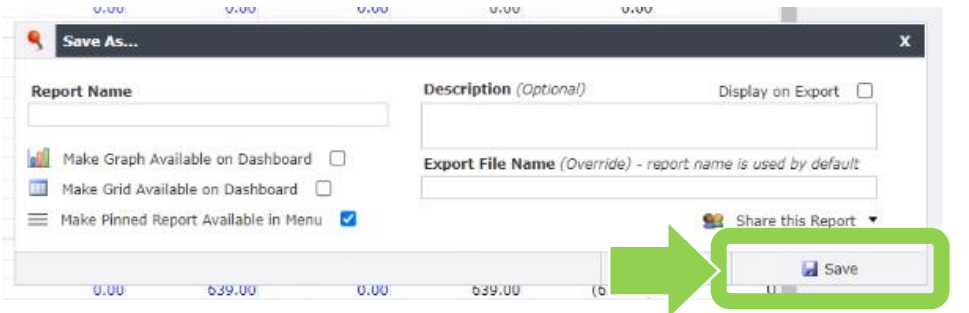

2b. **To pin a report:**

The '**Save As**' window will appear. Fill in the **'Report Name'** field with a name you will recognize.

Tip: Contact financial.systems@carleton.ca to discuss how to use the other options available in this window.


(larger view)

Click on the '**Save**' button.

Save As...   x

Report Name   **Description** *(Optional)*   Display on Export ☐

[   ]   [   ]

📊 Make Graph Available on Dashboard ☐   **Export File Name** *(Override) - report name is used by default*
🔲 Make Grid Available on Dashboard ☐   [   ]
≡ Make Pinned Report Available in Menu ☑   👥 Share this Report ▼

                                                                    💾 Save

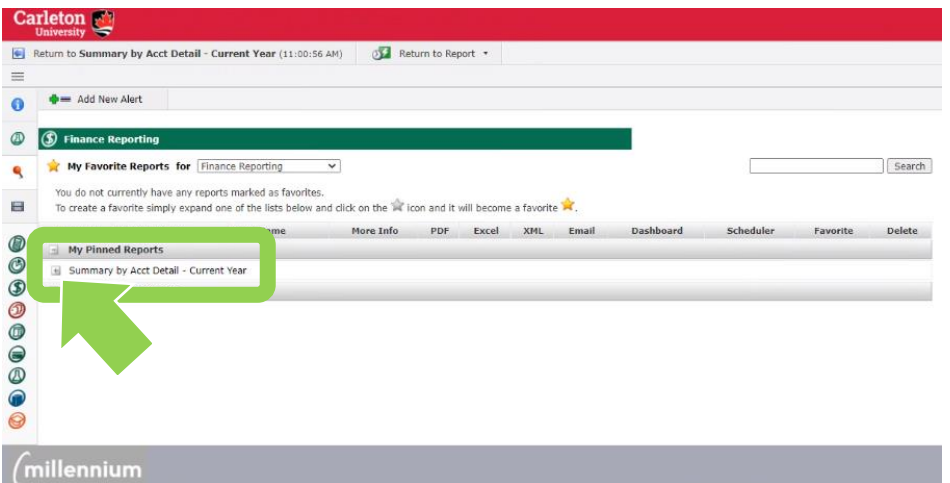| 3a.	**To retrieve a report:**

From the FAST home page, click on '**Pinned Reports**'.

Tip: Depending on whether you've minimized your menu, you may just see a pin icon.
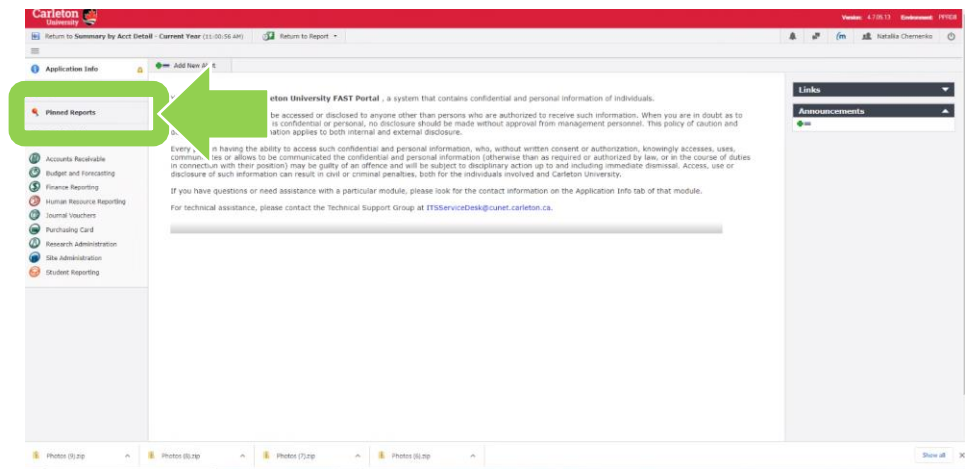
3b.	**To retrieve a report:**

You may have multiple types of reports listed under '**My Pinned Reports**'. To expand a given folder, click on the '**+**' button.

3c.	**To retrieve a report:**

Click on the lightning bolt icon button to execute the report.

Note: If you click on the report name (e.g. 'My report') the application will take you to the screen that allows you to modify report filters.

Tip: If you plan to use a given report frequently (e.g. daily, weekly) consider adding it to your favourites. To do so, click on the star icon in a given row. The report will be moved to 'My Favorite Reports' on the same screen.
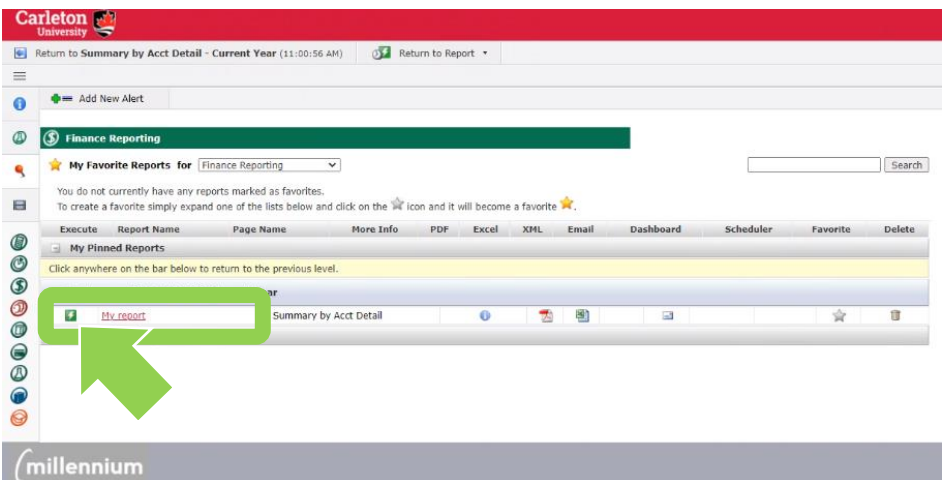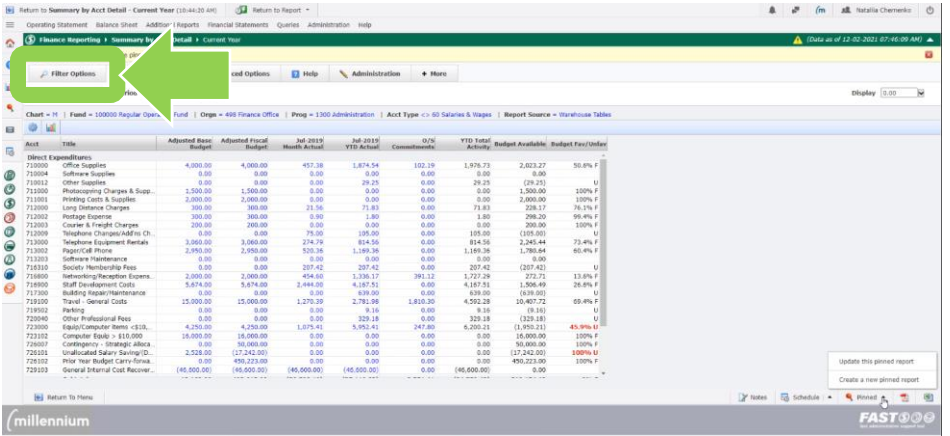
| 4a. | **Modifying a pinned report**

You've retrieved the pinned report.

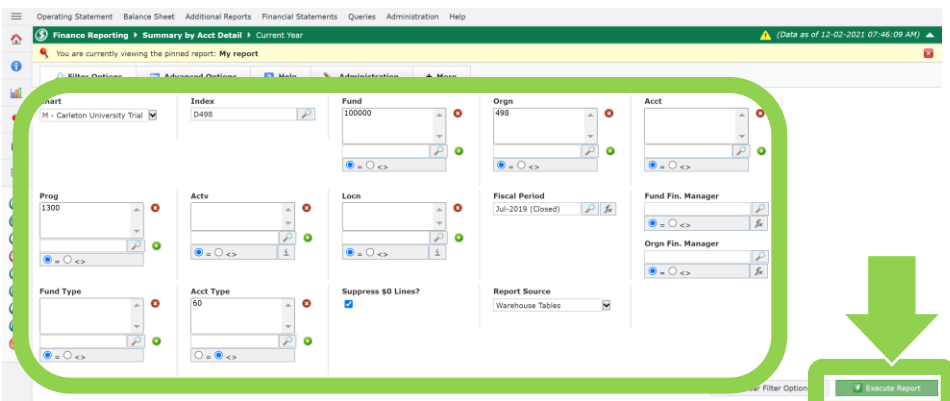This row displays the filter options used to generate the data. | |

| 4b. | **If** you need to change any of the filter options in the pinned report, click on the '**Filter Options**' tab. | |

| 4c. | Change filter options as needed on this screen.
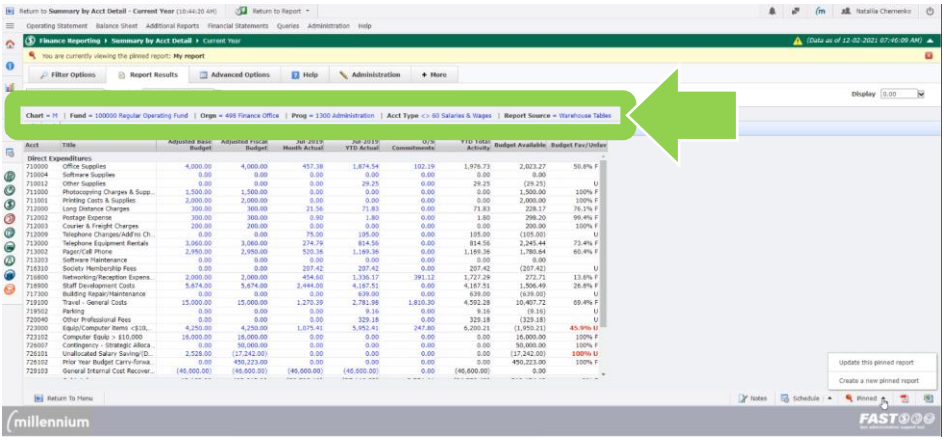
Click on the green '**Execute Report**' to generate the data. | |

| 4d. | You have two options to save the updated pinned report:

• You can replace the old pinned report by clicking on the '**Pinned**' button in the lower righthand corner of the screen and choosing '**Update this pinned report**', OR

• You can keep both the old and this new version by clicking on '**Create a new pinned report**'.

(complete as in step 2b of this how-to sheet) | |
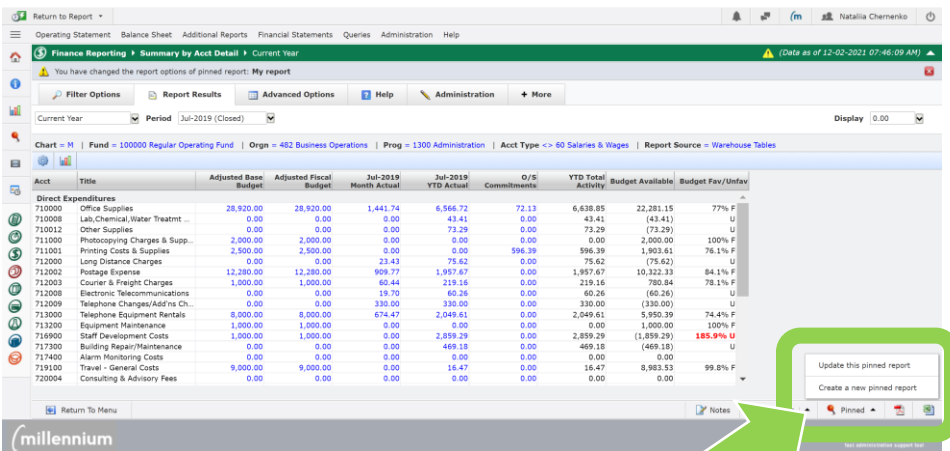
What next?

- Visit the [FACTS' FAST Finance Reporting tools and support page](#) to find more how-to sheets.
- Questions about the system? Email financial.systems@carleton.ca