

FAST Finance Reporting How-To Sheets Pinned reports: what are they and how can they save me time?

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 (steps 1 to 2).
- **Optional!** Schedule pinned reports so they will be emailed to you when you need them (step 3).
- Retrieving a pinned report (step 4).
- Changing the parameters of a pinned report (step 5).

Can others see my pinned reports?

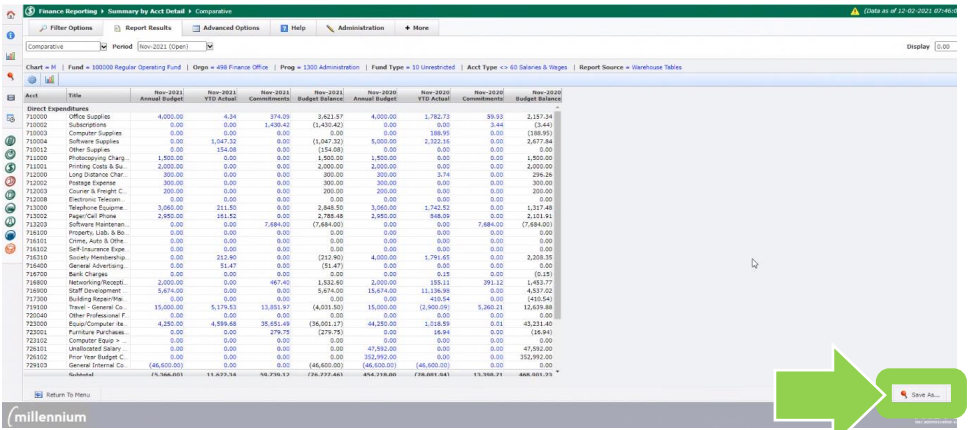
- Not by default. When you pin a report to your favourites, it is pinned as a report on **your** profile. Contact financial.systems@carleton.ca if you want a pinned report to be visible to others.

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

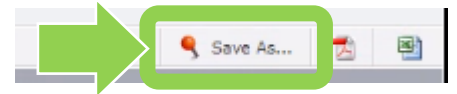
Account	Year	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance
Direct Expenditures	2010	4,000.00	4,000.00	0.00	2011	4,000.00	4,000.00	0.00	2012	4,000.00
110000 Office Supplies	2010	0.00	0.00	0.00	2011	1,400.42	1,400.42	0.00	2012	1,400.42
110001 Computer Supplies	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110002 Software Licenses	2010	1,047.32	1,047.32	0.00	2011	5,000.00	5,000.00	0.00	2012	5,000.00
110003 Other Supplies	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110004 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110005 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110006 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110007 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110008 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110009 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110010 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110011 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110012 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110013 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110014 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110015 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110016 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110017 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110018 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110019 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110020 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110021 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110022 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110023 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110024 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110025 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110026 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110027 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110028 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110029 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110030 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110031 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110032 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110033 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110034 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110035 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110036 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110037 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110038 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110039 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110040 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110041 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110042 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110043 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110044 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110045 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110046 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110047 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110048 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110049 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110050 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110051 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110052 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110053 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110054 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110055 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110056 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110057 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110058 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110059 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110060 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110061 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110062 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110063 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110064 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110065 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110066 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110067 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110068 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110069 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110070 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110071 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110072 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110073 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110074 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110075 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110076 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110077 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110078 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110079 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110080 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110081 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110082 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110083 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110084 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110085 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110086 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110087 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110088 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110089 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110090 Travel Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110091 Reproduction Expenses	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110092 Printing & Copying	2010	0.00	0.00	0.00	2011	0.00	0.00	0.00	2012	0.00
110093 Postage & Freight	2010	0.00	0.00	0.00	2011	0.00				

2a. Pin a report:

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



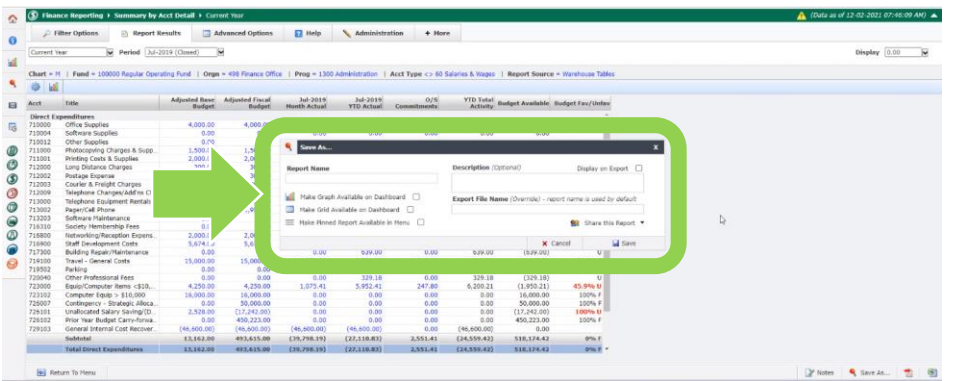
(larger view)



2b. Pin a report:

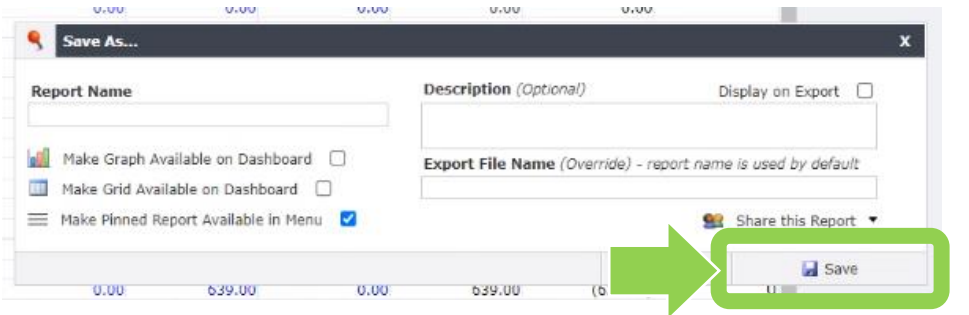
The 'Save As' window will appear. Fill in the 'Report Name' field with a name you will recognize.

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



(larger view)

Click on the grey 'Save' button.



3a. **Optional Step. Schedule a report:**

Click on the grey **'Schedule'** button to have the 'FAST Finance Reporting' application email a given report to your inbox.

Finance Reporting > Summary by Acct Detail > Current Year (Data as of 19-09-2023 08:04:12 AM)

You are currently viewing the pinned report: Test

Filter Options | Report Results | Administration | + More

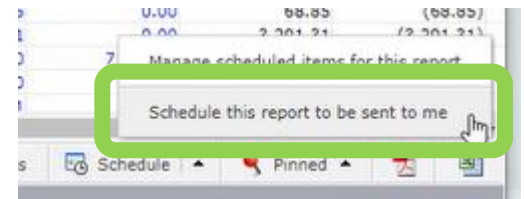
Current Year | Period: Sep-2023 (Open) | Display: 0.00

Chart = M | Fund = 100000 test01 | Orgn = 498 Financial Services Office | Prog = 1300 Administration | Report Source = Warehouse Tables

Acct	Title	Adjusted Base Budget	Adjusted Fiscal Budget	Sep-2023 Month Actual	Sep-2023 YTD Actual	O/S/ Commitments	YTD Total Activity	Budget Available
Labor								
610601	Admin Support CUPE 2424 Re	0.00	0.00	0.00	37,277.24	451,610.72	488,887.96	(488,887.96)
610606	Admin Management F/T Salari	0.00	0.00	0.00	65,544.30	506,141.21	571,685.51	(571,685.51)
611200	Administrative P/T Salaries	0.00	0.00	0.00	0.00	1,425.00	1,425.00	(1,425.00)
611201	Adm. P/T-leaves, replacement	0.00	0.00	0.00	5,150.00	23,175.00	28,325.00	(28,325.00)
611205	Student P/T Salaries -Adminst	0.00	0.00	0.00	748.80	306.00	1,054.80	(1,054.80)
620000	Internal FMP Labour Charges	0.00	0.00	0.00	0.00	0.00	0.00	0.00
620101	Internal Salary Recoveries	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Subtotal	0.00	0.00	0.00	108,730.34	982,657.93	1,091,378.27	(1,091,378.27)
	Total Labor	0.00	0.00	0.00	108,730.34	982,657.93	1,091,378.27	(1,091,378.27)
Direct Expenditures								
710000	Office Supplies	0.00	0.00	0.00	69.87	33.05	102.92	(102.92)
710002	Subscriptions	0.00	0.00	0.00	0.00	3.44	2.44	(3.44)
711000	Photocopying Charges & Supp	0.00	0.00	0.00	0.00	0.00	0.00	0.00
711001	Printing Costs & Supplies	0.00	0.00	0.00	260.00	0.00	260.00	(260.00)
712000	Long Distance Charges	0.00	0.00	0.00	0.00	0.00	0.00	0.00
712002	Postage Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00
712003	Courier & Freight Charges	0.00	0.00	0.00	0.00	0.00	0.00	0.00
713000	Telephone Equipment Rentals	0.00	0.00	0.00	68.85	0.00	68.85	(68.85)
713002	Cell Phone	0.00	0.00	0.00	3,291.31	0.00	3,291.31	(3,291.31)
713203	Software Maintenance	0.00	0.00	0.00	0.00	7,684.00	7,684.00	(7,684.00)
716800	Networking/Reception Expens	0.00	0.00	0.00	0.00	70.62	70.62	(70.62)
716800	Staff Development Costs	0.00	0.00	0.00	705.51	0.00	705.51	(705.51)

Return To Menu | Not | Schedule | Pinned

Click on the **'Schedule this report to be sent to me'** option.

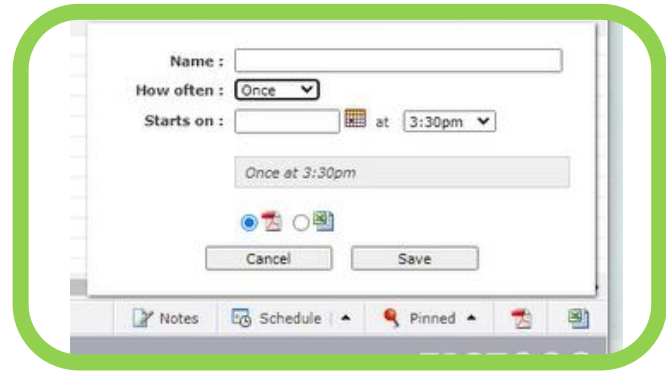


3b. **Optional Step. Schedule a report:**

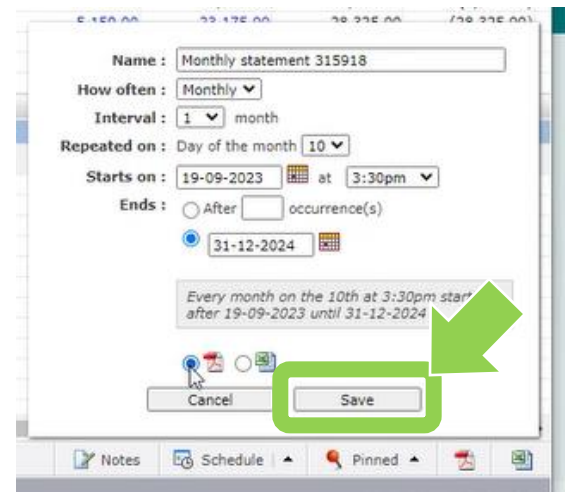
Fill in all fields.

Tip: Choose a 'Starts on' date in the middle of the month to ensure the previous month's transactions are included in a report.

Tip: Choose an 'Ends' date, a few months after a given grant ends.



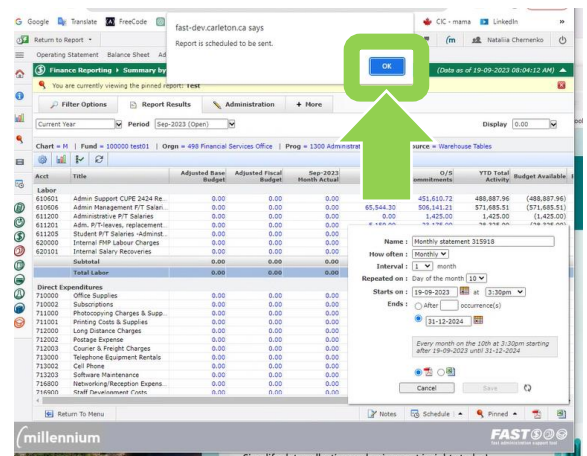
Click on the grey 'Save' button.



3c. **Optional Step. Schedule a report:**

Click on the blue 'OK' button in the pop-up window.

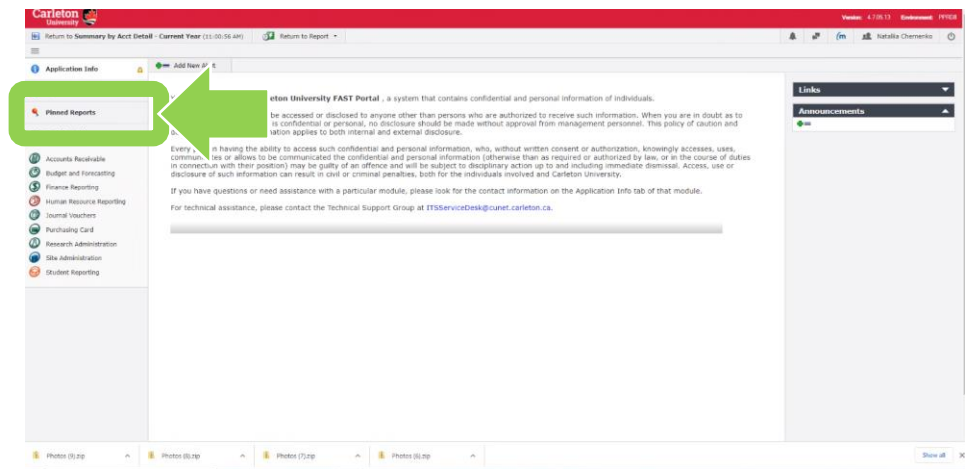
Tip: If you need to change a scheduled report, delete the existing schedule and repeat steps 3a to 3c. To delete, click on the grey arrow button beside the grey 'Schedule' button and choose the 'Manage scheduled items for this report'.



4a. To retrieve a report:

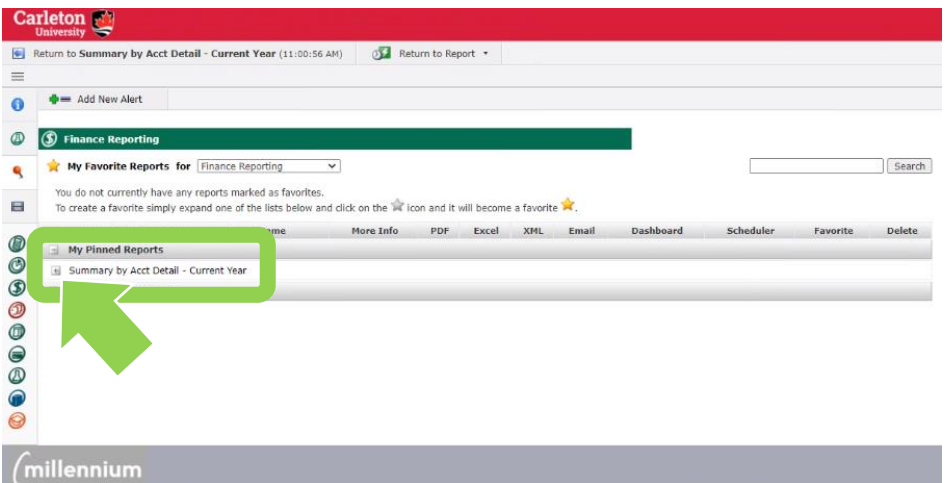
From the FAST home page, click on 'Pinned Reports'.

Tip: Depending on whether you've minimized your menu, you may just see a pin icon.



4b. Retrieve a report:

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

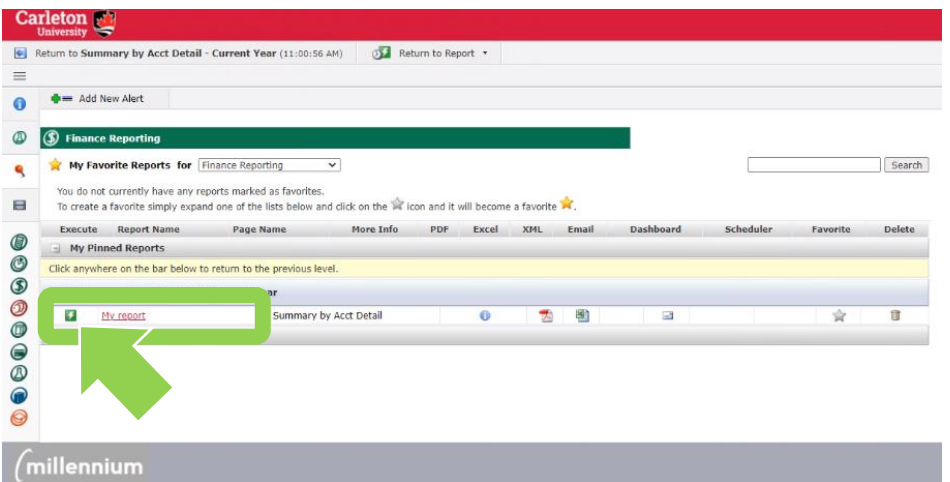


4c. Retrieve a report:

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.

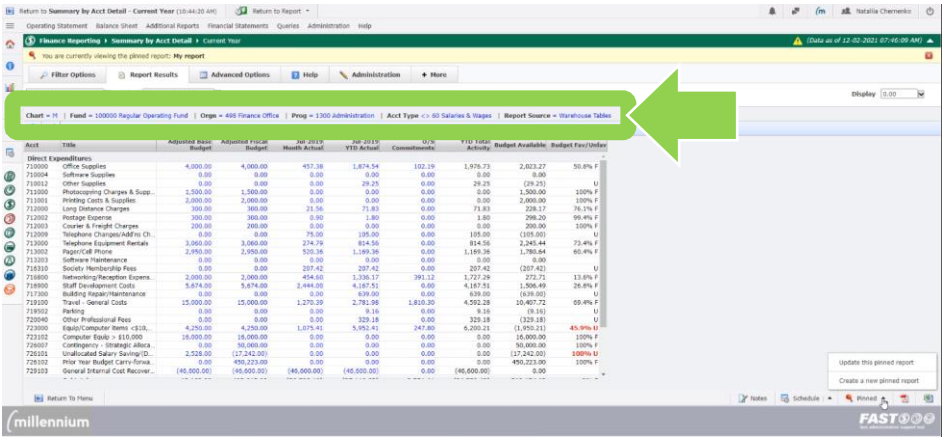
Tip: If you plan to use a given report frequently (e.g. daily, weekly) consider adding it to your favourites. To do so, click on the star icon in a given row. The report will be moved to 'My Favorite Reports' on the same screen.



5a. **Modify a pinned report:**

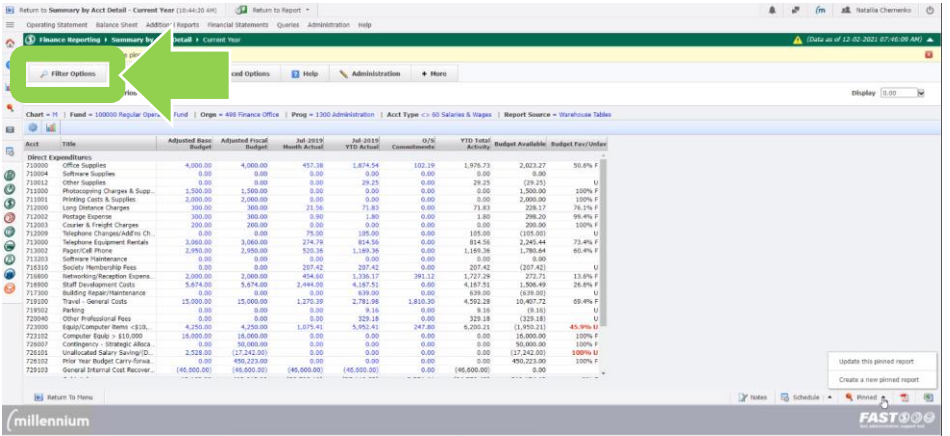
You've retrieved the pinned report.

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



5b. **Modify a pinned report:**

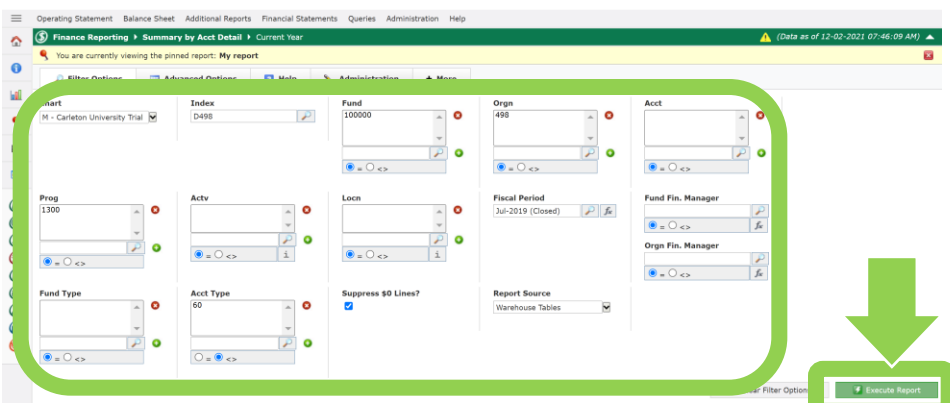
If you need to change any of the filter options in the pinned report, click on the **'Filter Options'** tab.



5c. **Modify a pinned report:**

Change filter options as needed on this screen.

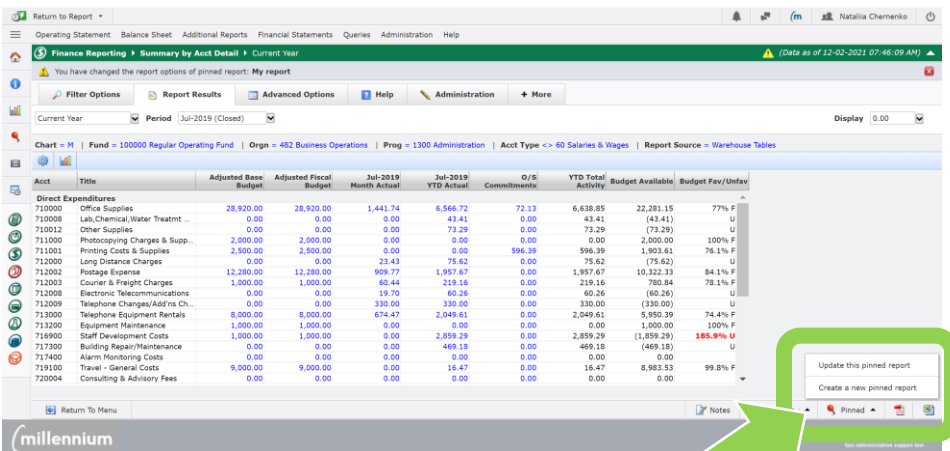
Click on the green **'Execute Report'** to generate the data.



5d. 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
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