

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.

Last updated April 13, 2026.

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

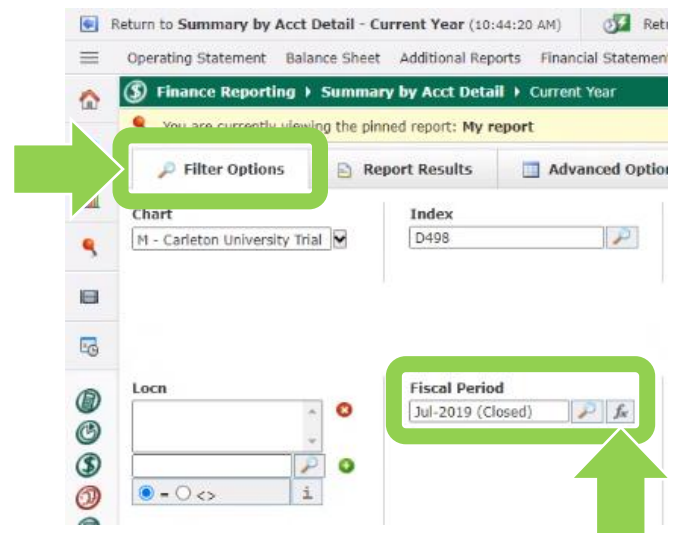
Account	Year	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance
Direct Expenditures	4,000.00	4.00	395.00	3,605.00	4,000.00	11,762.11	7,757.11	3,242.89	12,441.00	4,683.89
110000 Office Supplies	0.00	0.00	3,430.41	(3,430.41)	0.00	76.00	3,430.41	3,430.41	0.00	(3,430.41)
110001 Computer Supplies	0.00	0.00	0.00	0.00	0.00	100.00	100.00	100.00	0.00	(100.00)
110004 Software Licenses	0.00	1,047.12	0.00	1,047.12	5,000.00	3,322.00	1,678.00	3,322.00	1,678.00	(1,678.00)
110005 Other Supplies	0.00	194.88	0.00	194.88	0.00	0.00	194.88	0.00	194.88	(194.88)
110006 Publications/Chrg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110007 Printing Costs & Sup	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110008 Long Distance Call	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110009 Postage Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110010 Courier & Freight C.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110011 Electronic Transfer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110012 Freight Exp	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110013 Software Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110014 Property, Lease & Rn	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110015 Comm. Aids & Othr	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110016 Bad-Due/Unrecd Exp	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110017 Repairs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110018 Office Rent	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110019 Office Maintenance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110020 General Accounting	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110021 Office Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110022 Printing/Postage	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110023 Staff Development	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110024 Building Repairs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110025 Travel - General Exp.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110026 Other Professional F.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110027 Equip Computer Ac	4,200.00	4,598.00	38,055.00	(33,857.00)	44,200.00	1,028.00	43,172.00	43,172.00	43,172.00	(1,972.00)
110028 Furniture/Fixtures	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110029 Computer Equip >	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110030 Landfilled Equip	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110031 Prior Year Budget C.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110032 General Interest C.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Subtotal	4,000.00	4,000.00	4,000.00	0.00	4,000.00	11,762.11	7,757.11	3,242.89	12,441.00	4,683.89

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').

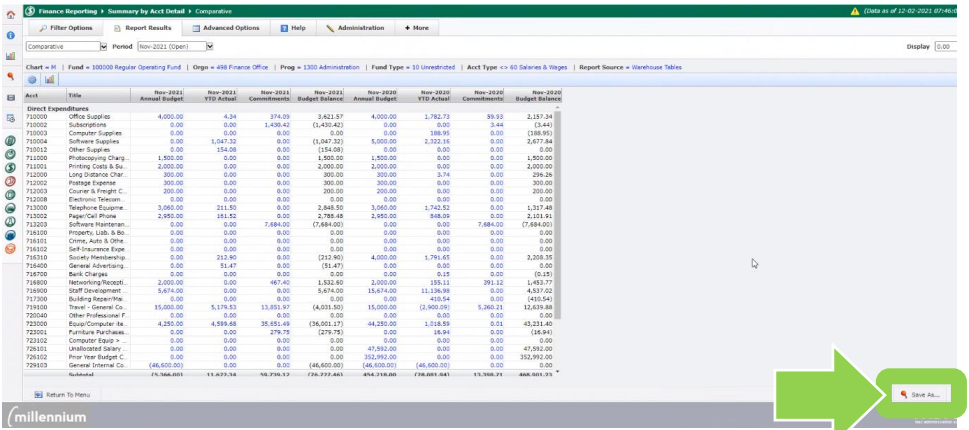
This will ensure that your pinned report does not display outdated data (i.e. save you step 5).

(Image related to the tip)



2a. Pin a report:

Click on the 'Create' button to pin the report to your favourites.



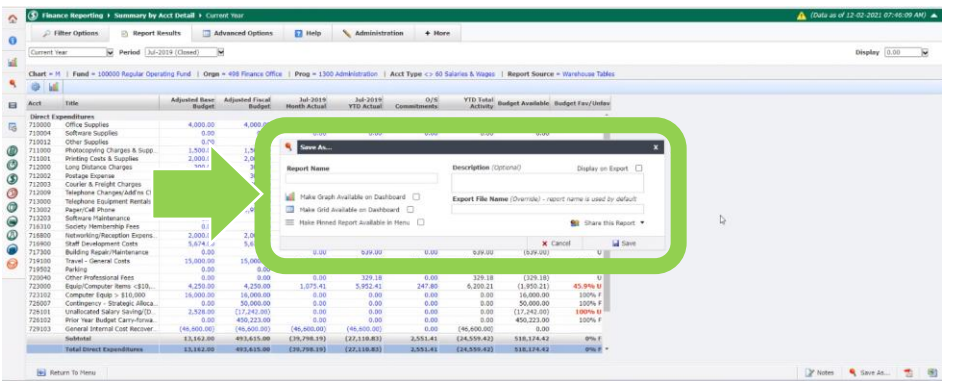
(larger view)



2b. Pin a report:

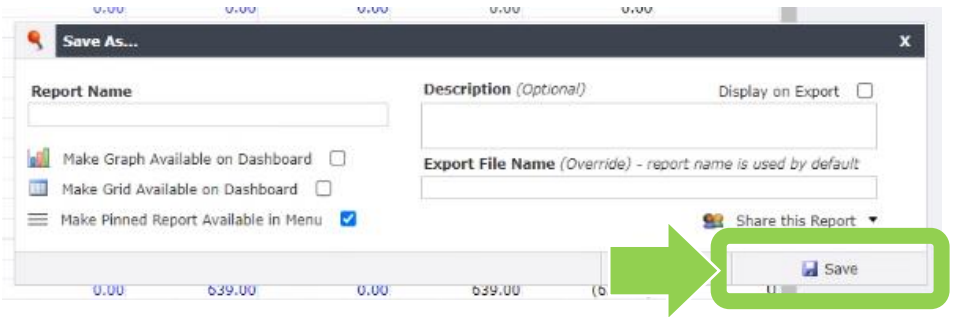
The 'Save As' window will appear. Fill in the 'Report Name' field with a name you will recognize.

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

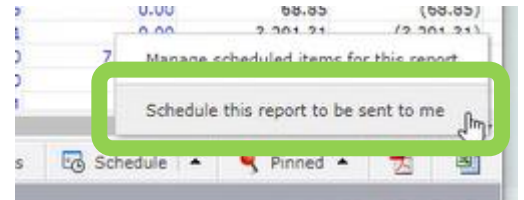
Current Year | Period: Sep-2023 (Open) | Display: 0.00

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	982,637.93	1,091,378.27	(1,091,378.27)
	Total Labor	0.00	0.00	0.00	108,730.34	982,637.93	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.

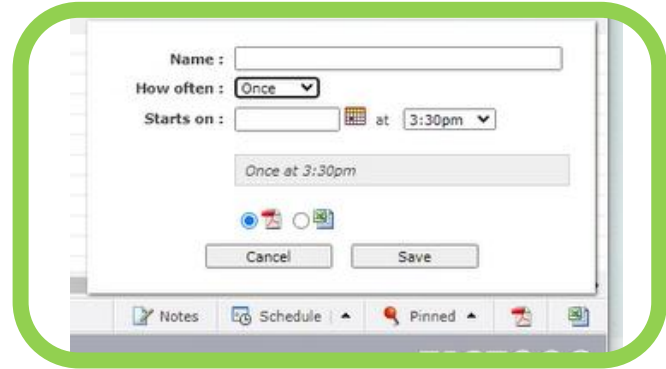


3b. **Optional Step. Schedule a report:**

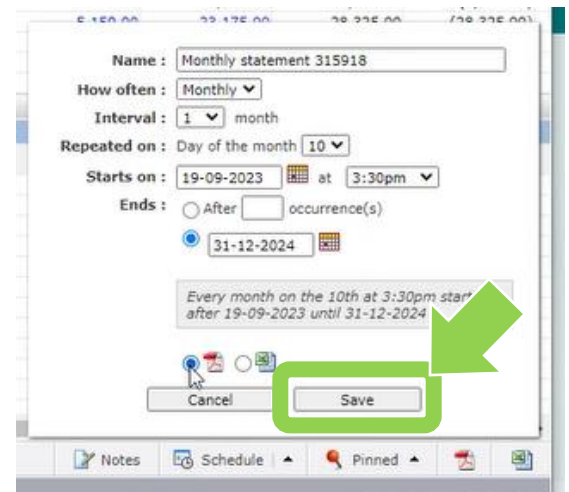
Fill in all fields.

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.



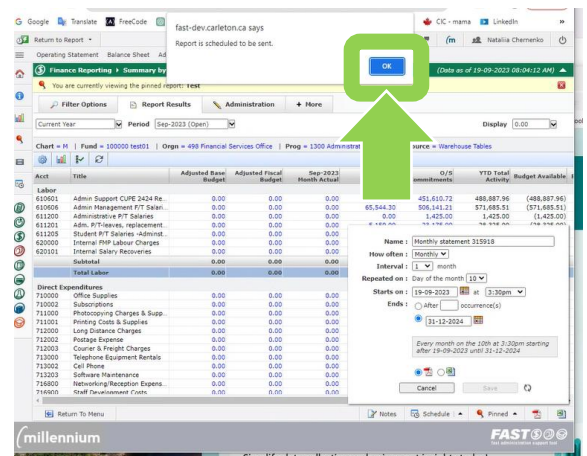
Click on the grey 'Save' button.



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

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

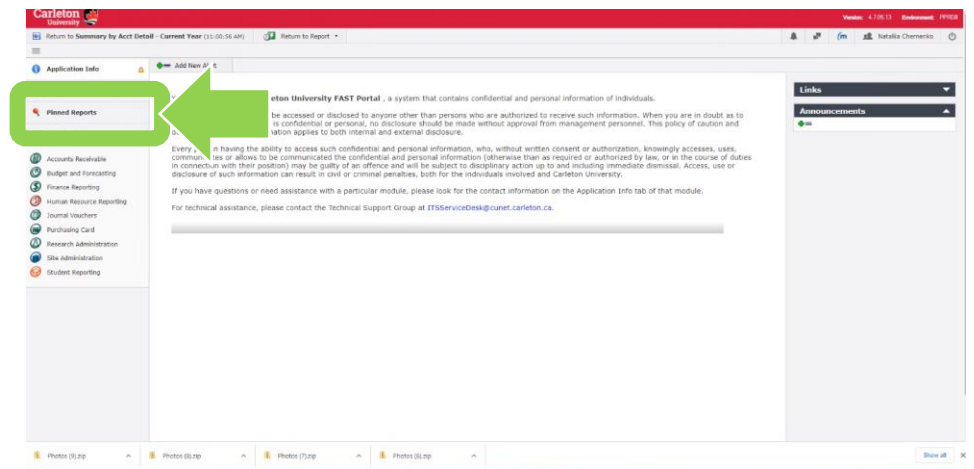
Tip: If you need to change a scheduled report, delete the existing schedule and repeat steps 3a to 3c. To delete, click on the grey arrow button beside the grey 'Schedule' button and choose the 'Manage scheduled items for this report'.



4a. To retrieve a report:

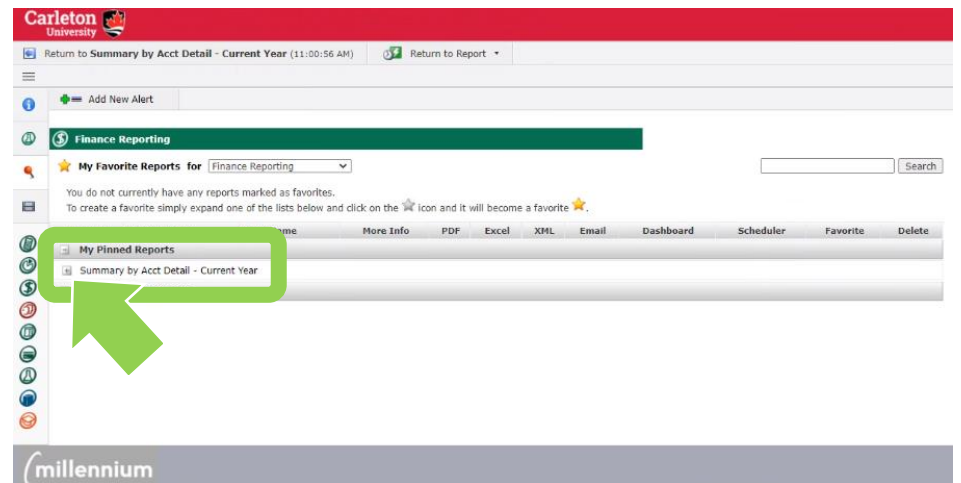
From the FAST home page, click on 'Pinned Reports'.

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.

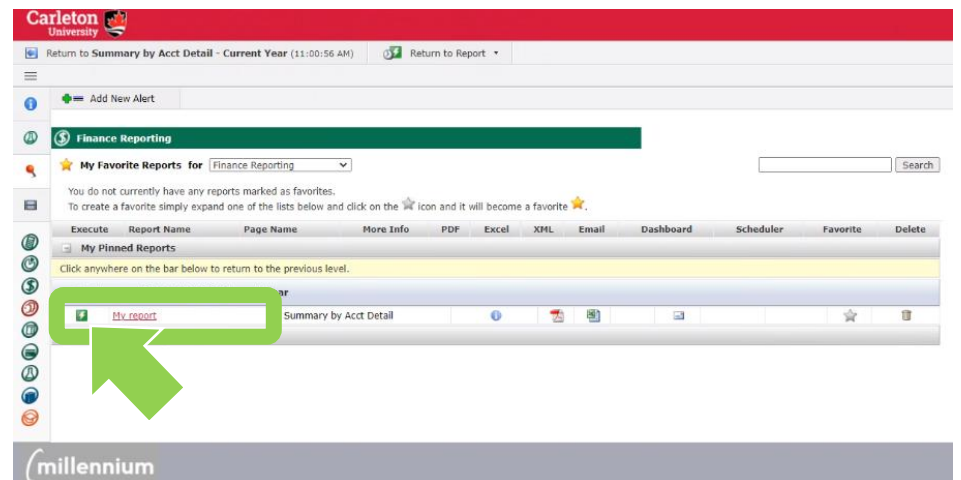


4c. Retrieve a report:

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.

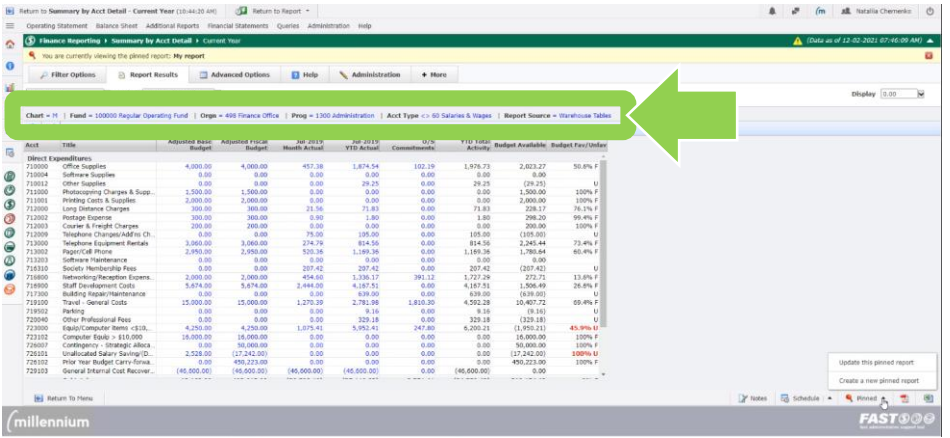
Tip: If you plan to use a given report frequently (e.g. daily, weekly) consider adding it to your favourites. To do so, click on the star icon in a given row. The report will be moved to 'My Favorite Reports' on the same screen.



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

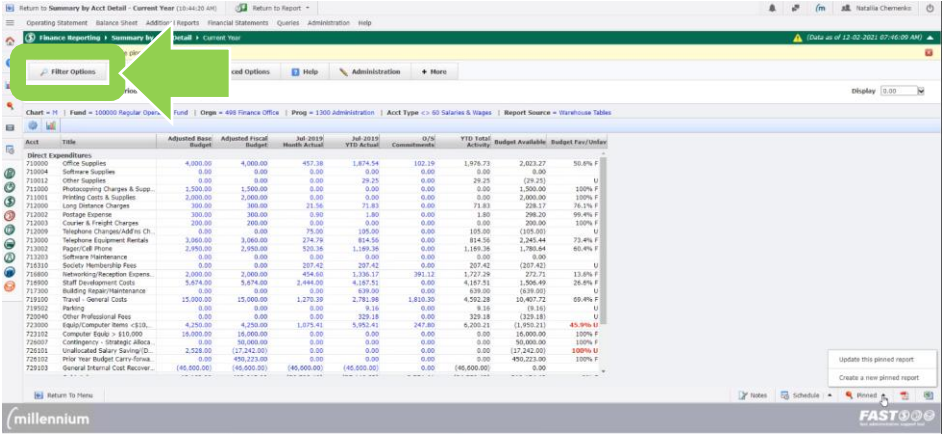
You've retrieved the pinned report.

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



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

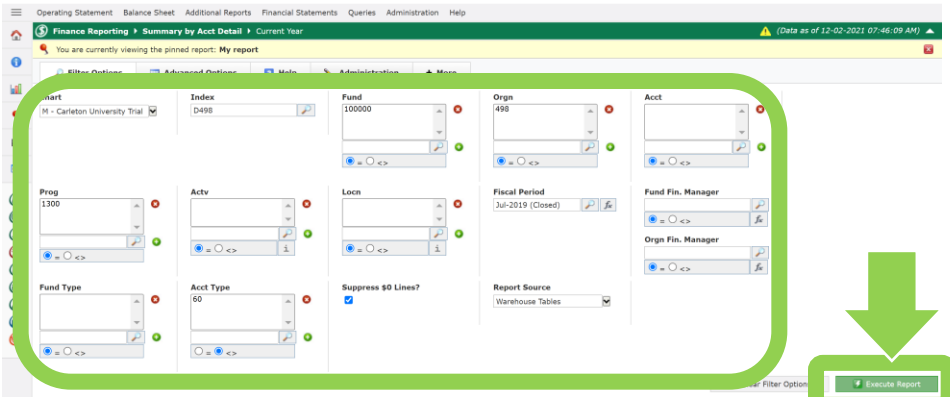
If you need to change any of the filter options in the pinned report, click on the 'Filter Options' tab.



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

Change filter options as needed on this screen.

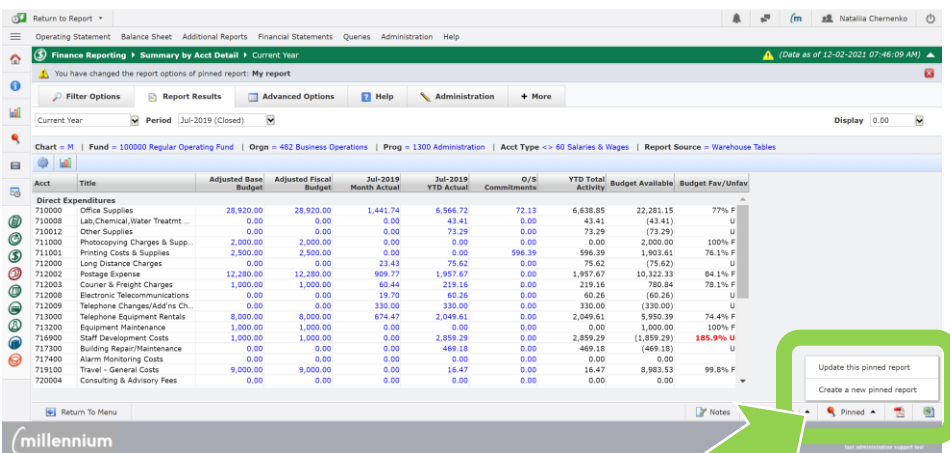
Click on the green 'Execute Report' to generate the data.



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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