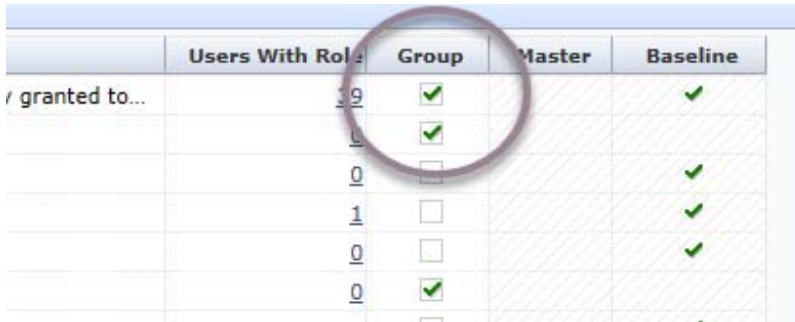


Steps for Saving, Sharing and even Scheduling Pinned Reports

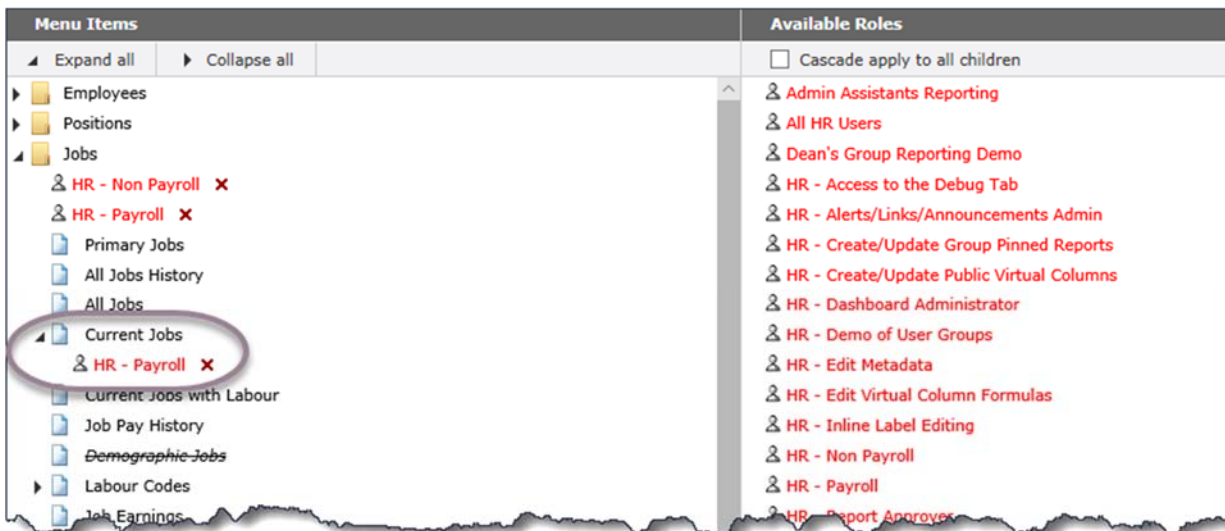
Step-by-Step instructions, the most common mistakes, and other tips & tricks!

1. Create a Role (or use a Baseline Role) and enable it as a Group:
Administration → Access → Define Roles



	Users With Role	Group	Master	Baseline
/ granted to...	39	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	1	<input checked="" type="checkbox"/>		
	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>
	1	<input type="checkbox"/>		<input checked="" type="checkbox"/>
	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>
	0	<input checked="" type="checkbox"/>		

2. Add Menu Access to the Role (from Step 1) to the Reporting Page(s) you wish to create your Pinned Reports from (this is the most commonly missed step!):
Administration → Access → Menu Access



Menu Items

- Expand all
- Collapse all
- Employees
- Positions
- Jobs
 - HR - Non Payroll ✕
 - HR - Payroll ✕
 - Primary Jobs
 - All Jobs History
 - All Jobs
 - Current Jobs
 - HR - Payroll ✕
 - Current Jobs with Labour
 - Job Pay History
 - Demographic Jobs
 - Labour Codes
 - Job Earnings

Available Roles

- Cascade apply to all children
- Admin Assistants Reporting
- All HR Users
- Dean's Group Reporting Demo
- HR - Access to the Debug Tab
- HR - Alerts/Links/Announcements Admin
- HR - Create/Update Group Pinned Reports
- HR - Create/Update Public Virtual Columns
- HR - Dashboard Administrator
- HR - Demo of User Groups
- HR - Edit Metadata
- HR - Edit Virtual Column Formulas
- HR - Inline Label Editing
- HR - Non Payroll
- HR - Payroll
- HR - Report Approver

3. Add people to your new Group! There are a variety of ways to do this, the simplest is using User/Role Assignment, but you can also use Role Transfer or your favourite method!
Administration → Access → User/Role Assignment
4. Create the desired Pinned Report in FAST and don't forget to SHARE it with the desired Group(s). Remember that there are 3 separate options for "sharing" including: Standard View/Run, Create/Update and View Only.

Steps for Saving, Sharing and even Scheduling Pinned Reports

Save As...

Report Name
Current Jobs Pinned Report

Description (Optional) Display on Export
Pinned Report of all your Current Jobs as of today

Make Graph Available on Dashboard

Make Grid Available on Dashboard

Users in these groups can run this report
HR - Payroll

Users in these groups who are also in the "Create/Update Group Pinned Reports" role can run and maintain this report

Users in these groups can run this report but won't be able to change any filters or options

- Once the report is saved (and shared), the members of the Group(s) will get an automatic Notification in FAST including a hyperlink to execute the report.
Note: This feature is only available if your institution has Notifications enabled

If you wish to schedule the report to deliver to your end users via email

- Access the Admin Scheduler and create the event:
Administration → Report Scheduler → Event Calendar
Remember to choose your: Report, Recipient group, Frequency, Interval, Day(s) of the Week, Start and End date, Delivery format (PDF, XL, CSV), etc.

Steps for Saving, Sharing and even Scheduling Pinned Reports

Type : Report

Name : New Hires Report

Application : Human Resource Reporting

Email to : HR - Payroll

Report : New Faculty Hires

How often : Weekly

Interval : 2 weeks

Repeated on : S M T W T F S

Starts on : 12/10/2018 at 1:30pm

Ends : After 31/03/2019

Every 2 weeks on Friday at 1:30pm starting the week of 12/10/2018 until 31/03/2019

From : CSV

Subject : Scheduled pinned report

Body : Attached is your scheduled pinned report.

Include hyperlink to report

Send email if no records are returned

Notification email : Only on error Every send

Note: To schedule this report to more than one group, you need to create a separate schedule. Similarly, to schedule another report to the same group, you will need to create a separate schedule. Each scheduled event is a one to one relationship between a Pinned Report and a Group.

To facilitate creating multiple schedules, use the COPY function on the Event Calendar:

