Step-by-Step instructions, the most common mistakes, and other tips & tricks!
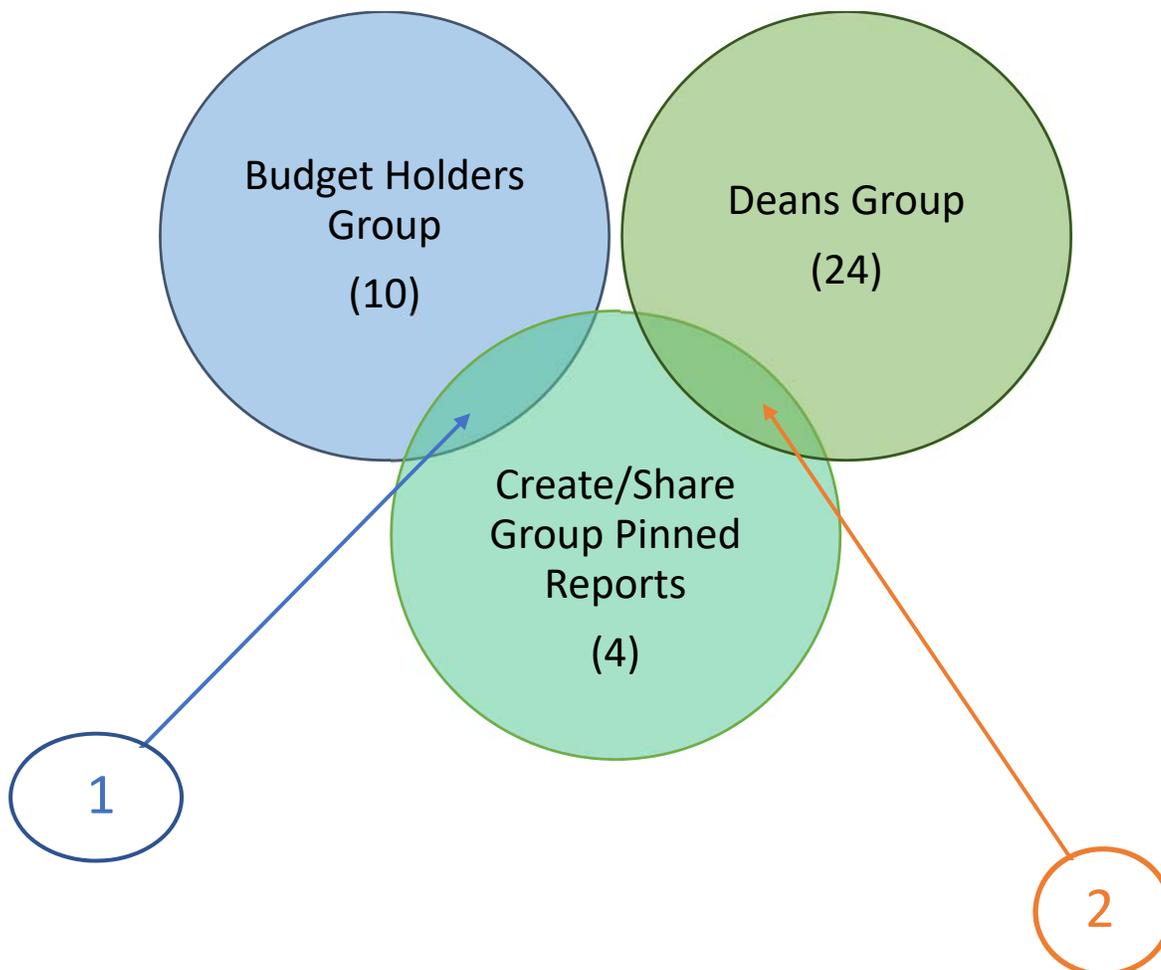
Necessary Roles and Rules to share content

To create and deploy content such as Group Pinned Reports or Group Dashboards, users must have one of the following:

- The application Administrator role (e.g. Master role) → Can share with all groups in the given application
- The Site Administrator role → Can share with all groups in all FAST applications
- The application-level role of "Create/Share Group Pinned Reports" (to share Pinned Reports) and/or "Dashboard Administrator" (to share Dashboards) AND be a member of any groups that he/she is authorized to share content with**

** If a user is granted the "Create/Share Group Pinned Reports" role, it does not automatically mean that he/she is able to share Pinned Reports across the application. It means that he/she can only share content with Groups that he/she is also a member of.
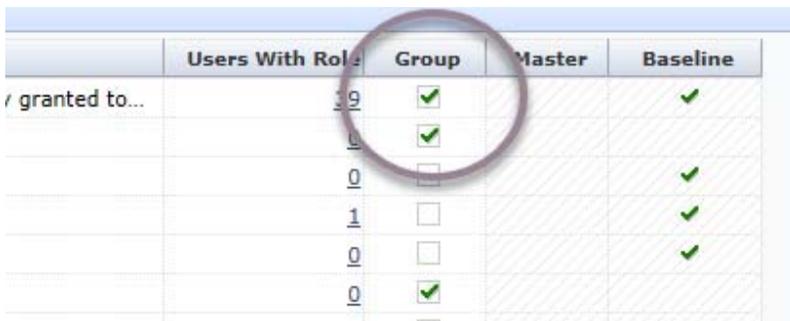
Think of it like this:

In the sample above, not all members of the Deans Group, nor the Budget Holders can create shared Pinned Reports, even if "maintenance" access to those Pinned Reports is given to the Group. Only the members of the groups that also have the "Create/Share Group Pinned Reports" Role can share content and then only with the groups they intersect with.

In this case, 2 of the 24 Deans can create/share Pinned Reports with the Dean's Group and 1 of the Budget Holders can create/share Pinned Reports with the Budget Holder's Group.

Steps to Create and manage shared content

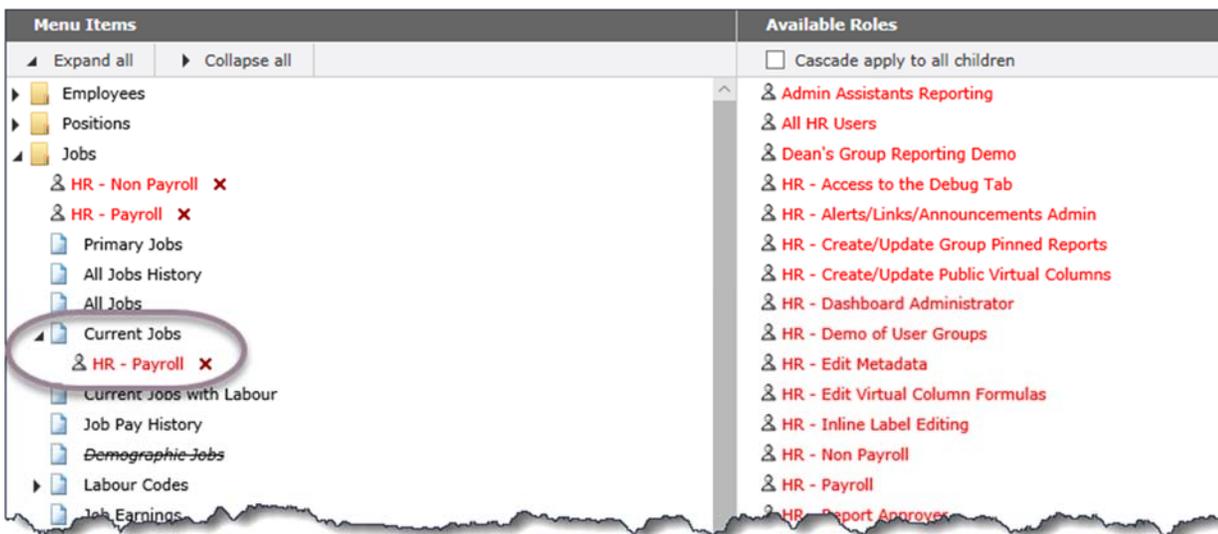1. Create a Role (or use a Baseline Role) and enable it as a **Group**:
    Administration → Access → Define Roles

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

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.

   By adding the "Create/Update" access, only members of the Group who also have the "Create/Update Group Pinned Reports" Role will actually be able to maintain or edit the Group Pinned Report; the rest will simply be able to run it. Refer to the Venn Diagram above for reference.

Sharing Option 1: Users in these groups can run this report → In other words, this group has Menu Access to the reporting page and can see and run the report as though they had pinned it themselves.
**Sharing Option 2:** Users in the groups who are also in the "Create/Update Group Pinned Reports" Role can run and maintain this report → this group could contain a variety of access levels. Many in the group could simply be able to see/run the report just as in Sharing Option 1; one or more members of the group have the ability to now maintain and edit the report on an ongoing basis. This report now "belongs" to the group it's been handed to.
Sharing Option 3: Users in these groups can run this report but won't be able to change any filters or options → This is a "read-only" level of access. The groups that display on the drop-down list do not have Menu Access to the reporting page (in other words, could not log into FAST and run the report themselves). The way the report is formatted and delivered is the only way it will display for these end users.

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*Important Note: If members of the groups in **Option 3** also have Menu Access from another role that they belong to, their access level will defer to **Option 1**; that is, standard read/run access.*

Current Version: 4.5.01+

5. 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. They can access the report directly from the Notification and/or from their Pinned Reports Tab within the application itself. It will be located under the Group Pinned Reports section for whichever group it has been assigned to.
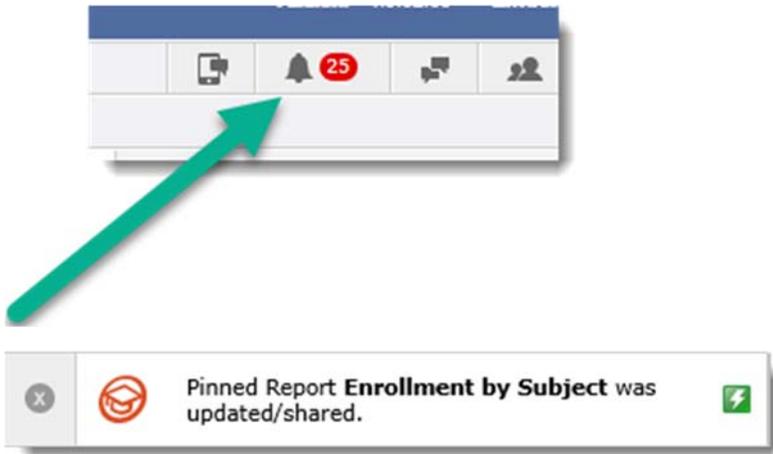
    Note: This feature is only available if your institution has Notifications enabled

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

6. 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.

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: