

**Millennium
FAST**

**Finance
Reporting**

Memorial University of
Newfoundland

User Guide
Version 4.0

September 2013

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Introducing FAST Finance Reporting 4.0

What is FAST Finance Reporting 4.0?

FAST Finance Reporting is the finance reporting portion of a data warehouse application from Millennium Computer Systems. FAST Finance Reporting accesses data, from Banner Finance, through a data warehouse that is refreshed daily. This allows users to easily query financial and budget data, produce ad hoc reports and much more.

The data warehouse is refreshed at 6 a.m. every morning, therefore the information you will be reporting on will be as of 6 a.m. that morning.

In addition to FAST Finance Reporting, Memorial also uses the FAST Budget system for developing and tracking our operating budget. There is a separate User Guide available for this application through our Budget Office.

How do I get access?

Employees with access to Banner Finance and responsibility for reporting within their units can have access to FAST Finance Reporting. ***Access will be granted by Financial and Administrative Services based on the approval of the appropriate Dean, Director or Department Head.***

The *username* and *password* will be the same as those used to log into Banner Finance.

If you don't have Banner Finance Reporting access, request it by completing the Banner Access Application located at the following link:

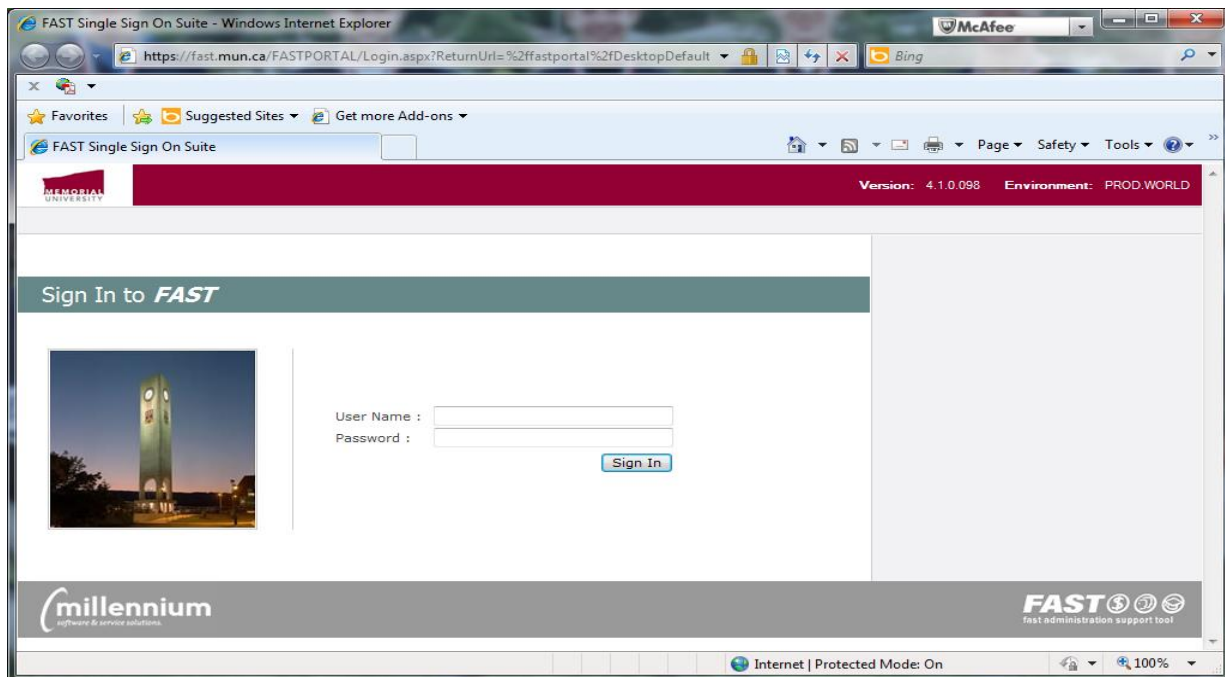
http://www.mun.ca/finance/forms/security_app.pdf

Now that I have access, how do I login?

Go to this webpage:

<https://fast.mun.ca/FASTPORTAL/>

Enter your **username** and **password**:

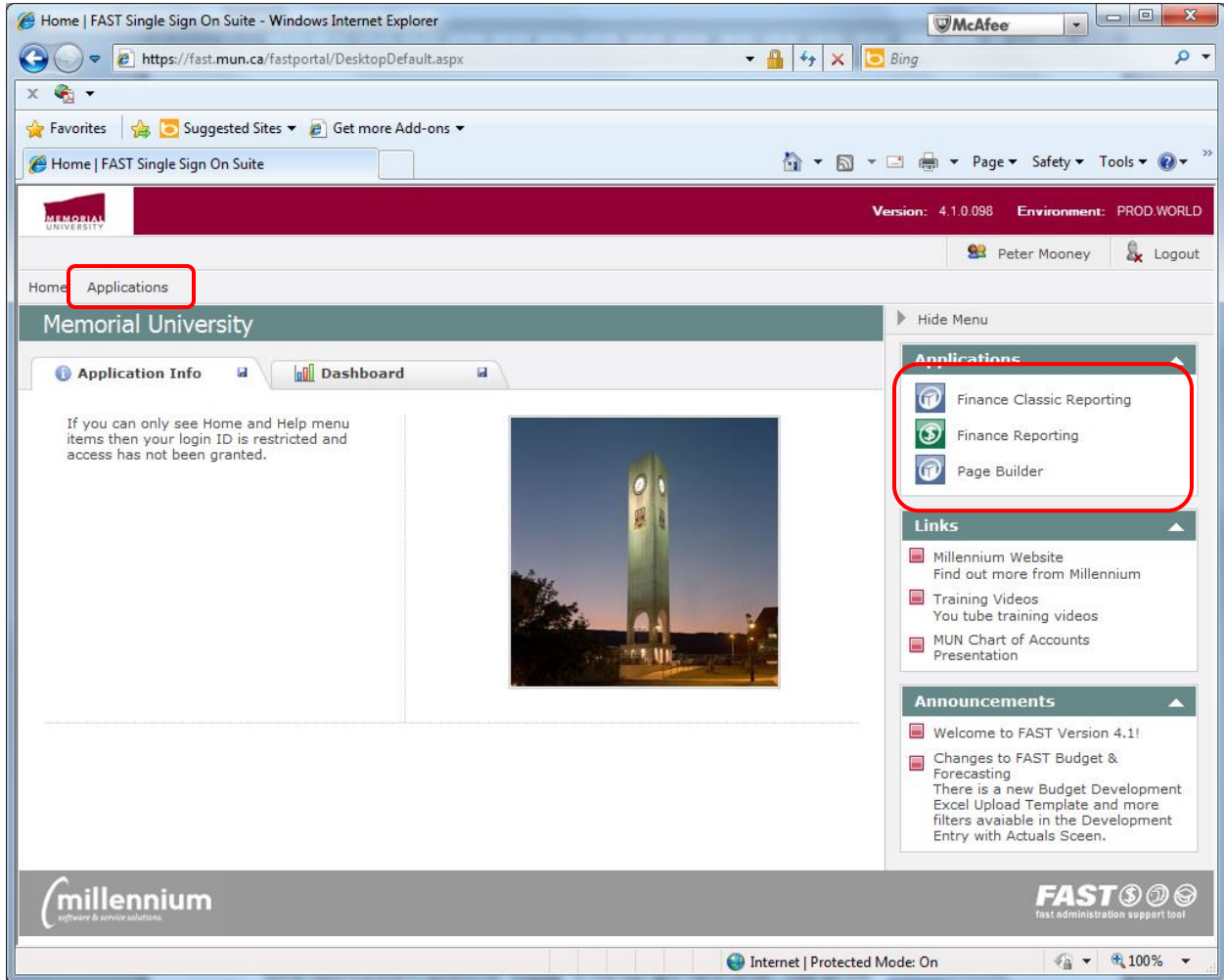


The **FAST Home Page** will display.

NOTE: In order to access FAST off campus, users must have remote desktop access.

FAST Home Page

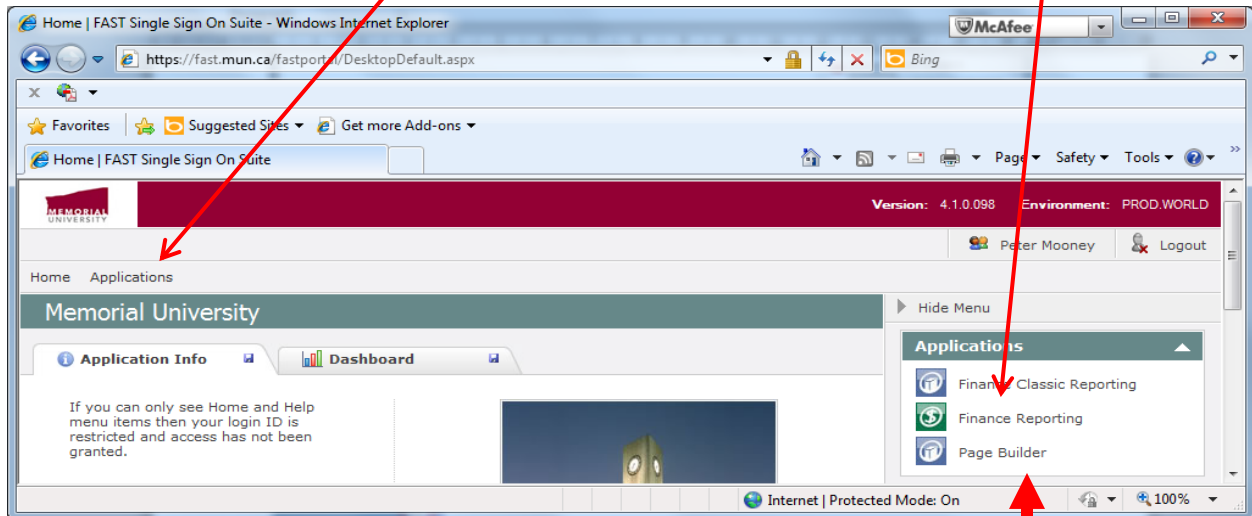
Depending on your permissions, the FAST Home Page may list several applications. *This document will discuss how to use the **Finance Reporting** application.*



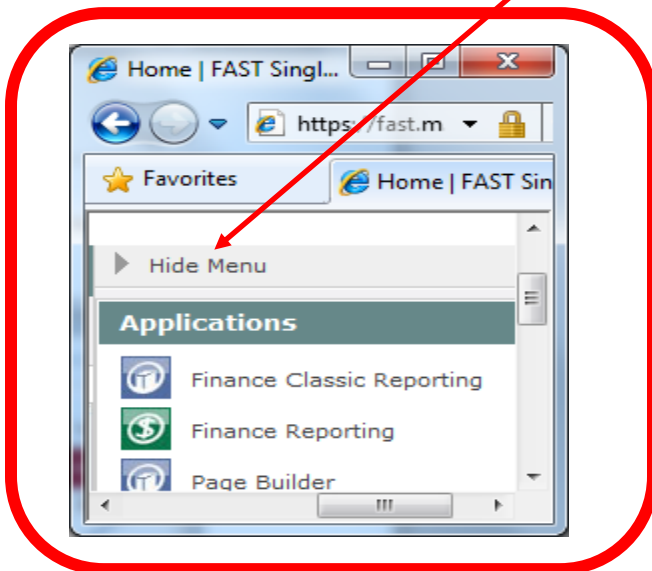
Accessing Finance Reporting

There are two ways to access the **Finance Reporting** application:

- Click on the menu selection **Applications**, and then select **Finance Reporting** from the drop down list. Or
- If the menu pane is visible on the right-hand side of the page, select **Finance Reporting** from there.



Quick Tip... the "<" or ">" button toggles the hide menu option.

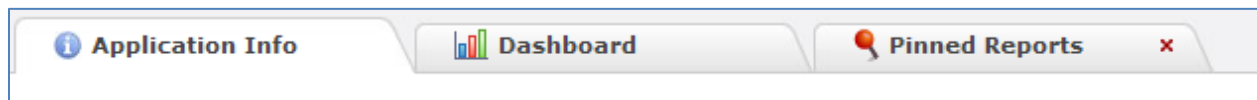


Finance Reporting

Finance Reporting is an application that allows users to access information within the FAST system. The information may be viewed using standard report formats provided with the application, which can be customized using parameters to display only the information users wish to see. A Dashboard tool is also available which allows users to set up customized graphical representations of selected reports. Pinned Reports allows users to save frequently run reports so that they can access them without having to configure parameters every time. All these features can be accessed from the **Finance Reporting Home Page**.

Overview

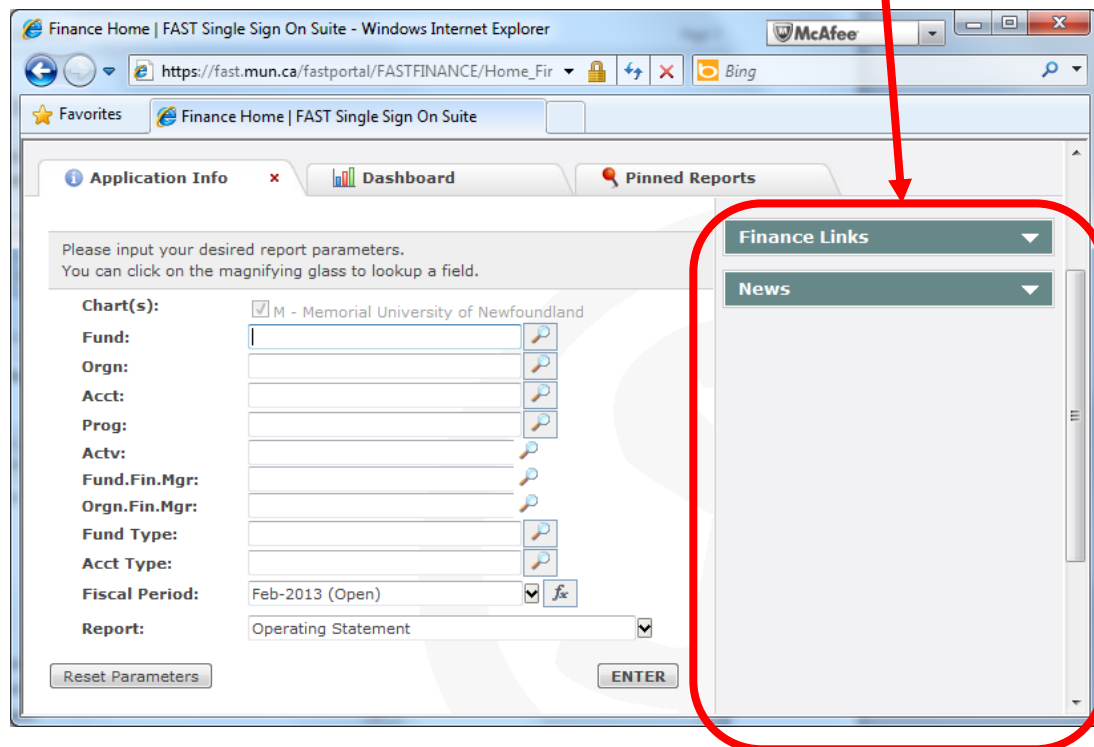
On the **Finance Reporting Home Page**, you can choose fiscal periods, generate various reports using specified parameters, or access your Dashboard or Pinned Reports. There are three tabs on this page:



Each tab serves a different function. Their functions are:

- **Application Info** allows users to select a fiscal period or run reports with specified parameters
- **Dashboard** allows users to set-up customized graphical representations of selected reports
- **Pinned Reports** allows users to save frequently run reports to use as either a private, group or public report.

To the right of the tabs is an area where FAS will establish other finance links and publish any news, such as upcoming training sessions, etc.

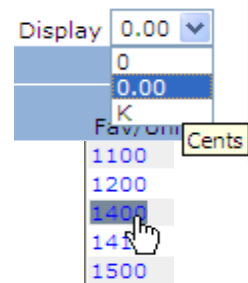


Navigation and Display Options

Finance Reporting has a number of features to allow users to quickly navigate the system, define parameters to generate reports, view system data, and export generated reports.

Display Formats for Amounts

Some reports present a **Display** option in the top right-hand corner. Click on this to specify how amounts should be displayed. If the “0.00” format is chosen, cents are displayed; if “0” is chosen, amounts are rounded to the nearest dollar; if “K” is chosen, amounts are rounded to the nearest thousand.



Drill-down Links

When data has been returned, look for text that has been highlighted in blue to indicate a hyper-link is present (these also display a hand cursor when you hover over them). Click on these links to drill down to more detail. If you continue, you will eventually drill down to individual documents.

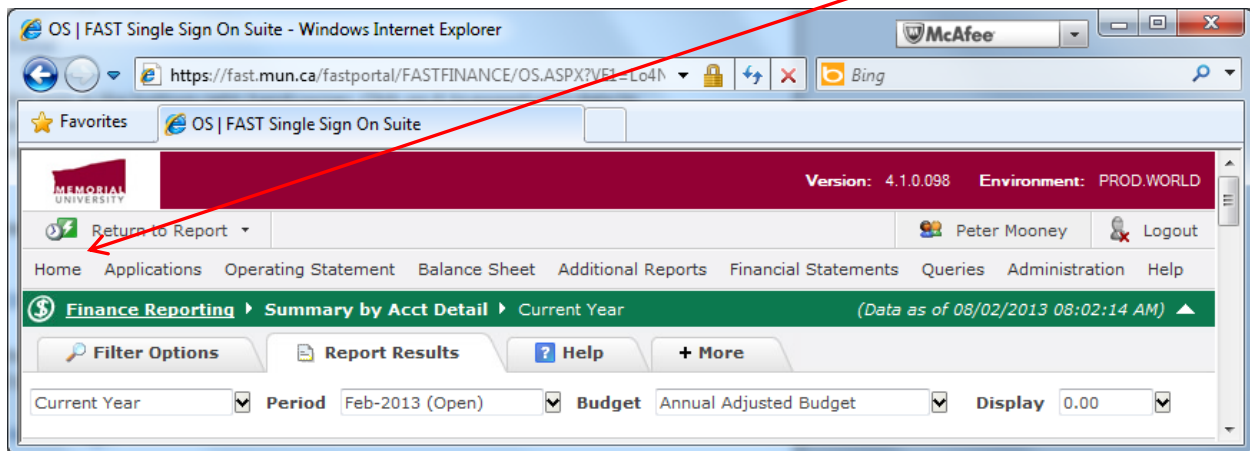
Backwards and Forwards Navigation

Want to return to the previous page? Use the back arrow on your browser. Or... right-click on a white space anywhere on your page, and when the shortcut menu appears, click on **Back**.


Want to go forward? Use the forward arrow on your browser. Or... right-click on a white space on your page, and when the shortcut menu appears, click on **Forward**.

Returning to the FAST Home Page

No matter where you are, you can return to the **FAST Home Page** by clicking **Home** on the menu.



Exporting your Report to Excel

 Most pages display the Excel icon (pictured at left) in the bottom right-hand corner. Click on it to export your data to an Excel spreadsheet in the *xls* format. Once clicked, a file download dialog will appear: click on **Open** to open the file, or **Save** to save it to a specified location. Remember, this report will not include formulas, only data.

Export your Report to PDF



Most pages display this icon in the bottom right-hand corner. Click on it to export your report to a PDF file. There will be a momentary pause, and then a file download dialog box will appear: click on **Open** to open the file, or **Save** to save it to a specified location.

Entering Wildcards

Use a “%” symbol to enter a wildcard value for that parameter. For example, to report on all organization codes that start with “3”, enter “3%” into the Orgn parameter:

Orgn:

Entering Ranges

Use “:” to enter a range of values for that parameter. For example, to report on all fund codes from 200000 to 299999, enter it like this in the Fund parameter:

Fund:

Entering Lists

Use “,” to enter a list of values for that parameter. For example, to report on account codes 76000 and 76800 only, enter it like this in the Acct parameter:

Acct:

Entering a Combination of Values

You can also use a combination of commas, colons, and % characters all in the same field.

Example: Using the Acct Code Field: 70000:70499,70600,75% will give results that include codes from 70000 to 70499 as well as 70600 and all 75 accounts.

Application Info Tab

About the Application Info tab

The **Application Info** tab allows users to select a fiscal period or run reports using specified parameters.

Finance Home | FAST Single Sign On Suite - Windows Internet Explorer

https://fast.mun.ca/fastportal/FASTFINANCE/Home_Finance.aspx

Application Info x Dashboard Pinned Reports

Please input your desired report parameters.
You can click on the magnifying glass to lookup a field.

Chart(s): M - Memorial University of Newfoundland

Fund:

Orgn:

Acct:

Prog:

Actv:

Fund.Fin.Mgr:

Orgn.Fin.Mgr:

Fund Type:

Acct Type:

Fiscal Period: Feb-2013 (Open)

Report: Operating Statement

Reset Parameters ENTER

Finance Links

News

? If you prefer, you can also just leave all the input boxes blank and click the ENTER button. This will produce a report summarizing all of your accounts.


Note: You can enter multiple values in any field by separating them with a comma.
You can also enter a range in any field by separating the two values with a colon.
You can also use the % character as a wildcard.

The parameters on the **Application Info** tab allow you to specify the data which should appear on your report. These parameters are the same as those available in most Banner reports and operate in the same way.

The funds and organizations available to you in FAST are based on your security and access level in Banner Finance.

- **Chart:** Specify Chart
- **Fund:** Specify Fund Code(s)
- **Orgn:** Specify Organization Code(s)
- **Acct:** Specify Account Code(s)
- **Prog:** Specify Program Code(s)
- **Actv:** Specify Activity Code(s)
- **Fund Fin Mgr:** Selects data for the Funds controlled by a specific Financial Manager
- **Orgn Fin Mgr:** Selects data for the Orgs controlled by a specified Financial Manager

- **Fund Type:** Specify Fund Type(s)
- **Acct Type:** Specify Account type(s)
- **Fiscal Period:** Specify Fiscal Year/Period (only one allowed). Defaults to the latest open month.
- **Report:** Defaults to the **Operating Statement** Report.

The search button  (to the right of all parameters) allows you to look for any value that you would like to use as a parameter of your report.

Also, you can use a “%” symbol to enter a wildcard value for parameters.

Generating Reports

By default, the chart and current fiscal period are specified on the **Application Info** tab of the **Finance Reporting Home Page**.

Before generating any report, ensure the correct fiscal period is specified. If it is not, click the down arrow beside the fiscal period, select the correct period from the drop down list, and then confirm your selection by clicking the green checkmark at the bottom of the drop down box.

There are three ways to generate a report in FAST Finance:

- Specify parameters and run the report from the **Application Info** tab.
- Select the report you wish to run from the **FAST Finance Menu Bar** (Refer to page 11 for further information about using the FAST Finance Menu Bar); or
- Click on a pre-defined report on the **Pinned Reports** tab (Refer to page 29 for further information about using the Pinned Reports tab);

Running Reports from the Application Info Tab

If running the report from the **Application Info** tab, you must first enter the parameters to specify the data you want. All parameter choices are displayed on the tab.

Enter whatever parameters are required to narrow down your report to the information you require. Parameters can be entered as a single request, a range request or a list request as noted previously.

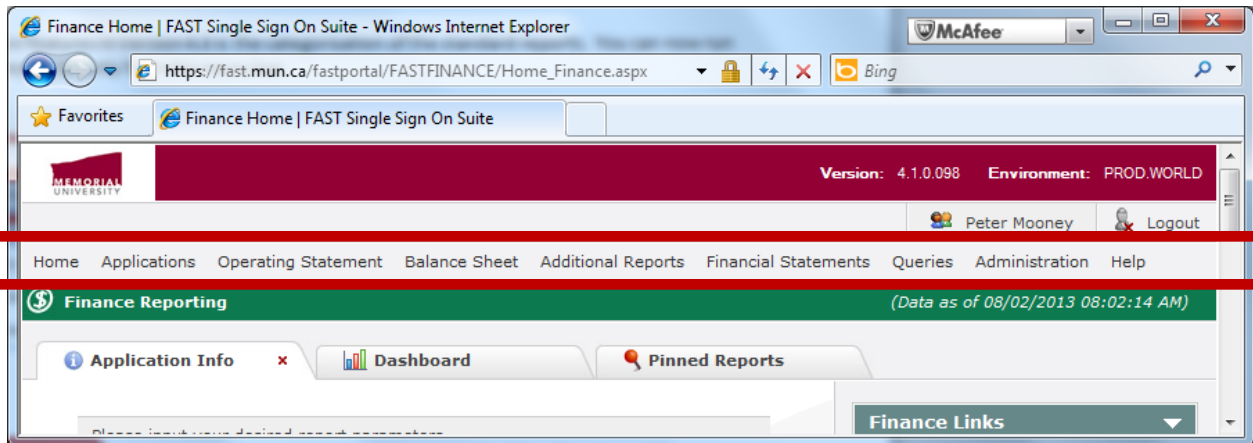
Once you have selected the correct parameters, press **ENTER** to generate the report. Once generated, the report will display using the **FAST Finance Reporting Page**.

NOTE: If you press enter without entering any parameters you will generate a report on everything you have access to, including operating, ancillary, research, special purpose and plant funds. **It is not recommended you do this.** Because you are limited by your fund/org security, FAST will look at every fund and organization in Banner to determine if it is allowed to report the financial information back to your user ID, which may be a very time consuming process.

Running Reports from the FAST Finance Menu Bar

Within **Finance Reporting**, you can also run any financial report directly from the menu bar.

All standard reports have been categorized within FAST Version 4.0. Simply click on the category of report you wish to run and a drop-down list will display your report options within that category.



Once you have selected your report from the list of available options, the **Filter Options** tab will display allowing you to select the parameters for your report.

Please note the **Filter Options** tab contains all the parameters that are found on the **Application Info** tab.

Select the parameters you wish to use for your report, and then click the **Execute Report** button to generate the report. Once generated, the report will display using the **FAST Finance Reporting Page**.

Fast Finance Reporting Page

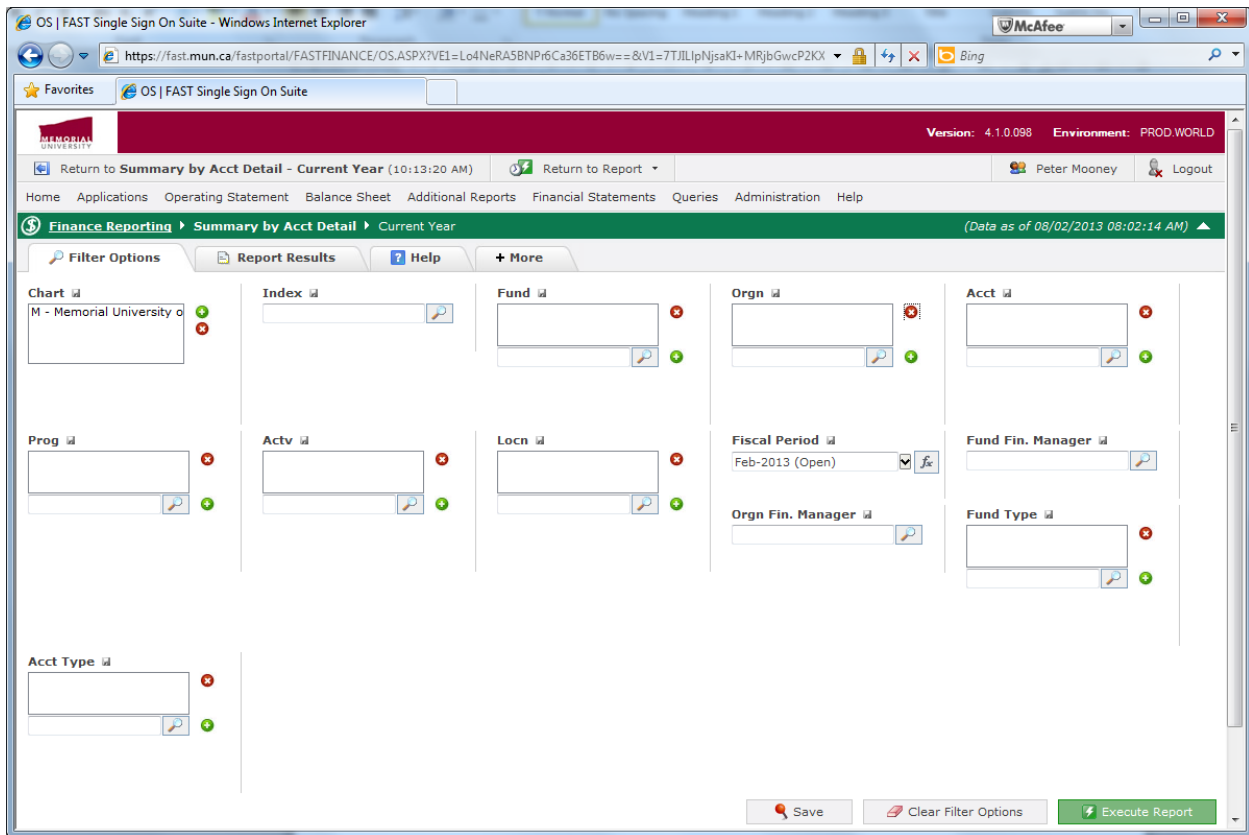
Once a report has been generated, the **FAST Finance Reporting Page** is used to display the report’s output onscreen. It also allows users to change the report’s parameters and re-run the report.

There are four tabs on the Reporting Page:

- **Report Results** displays a Fast Finance report’s output onscreen;
- **Filter Options** allows users to select parameters and run or re-run a report;
- **Help** provides users with onscreen assistance;
- **More** allows users to go directly to the following screens: *Pinned Report, Advanced Options, Graph, Help, Administration and Edit My Tabs.*

The **Report Results** tab automatically displays once a report has been run.

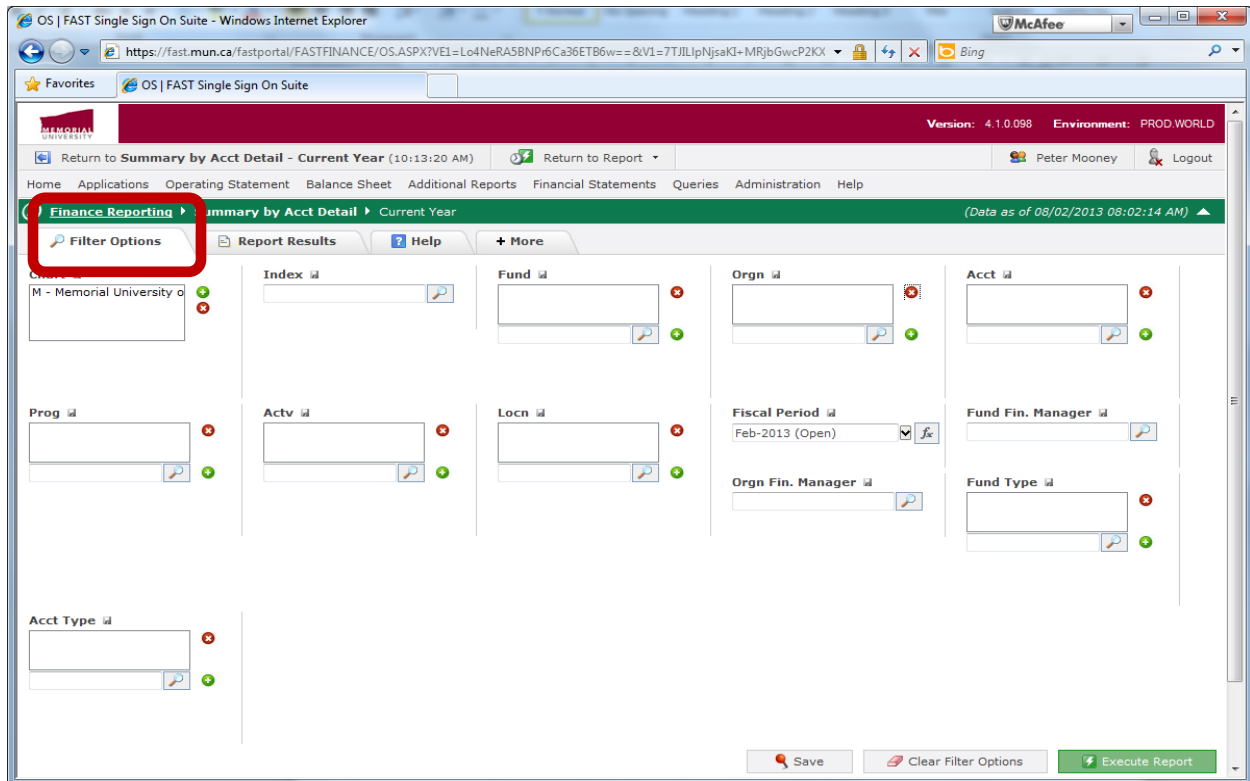
Click on the **Filter Options** tab to select or change parameters for a report.



Filter Options tab

The **Filter Options** tab allows users to enter parameters for, and then run, a report.


There are several different filter option controls you can use to select and sort data in your report. The types of filter options used for a report will depend on the report and how it was set-up. Generally, the filters are the same as those available on the **Application Info** tab (see Page 09 for details).



There are a number of ways to modify filters on this page. Users may:

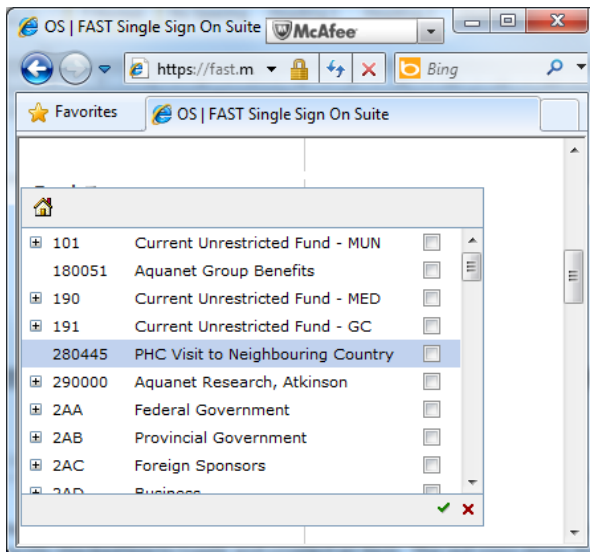
- Add parameter values using drop down lists;
- Add parameter values directly (if they are known);
- Delete values from a filter; or
- Clear filter options to delete all filter parameters.

Add parameter values using drop down lists


Click on the magnifying glass icon () attached to any filter you wish to modify; the filter's selection options will display in a drop down box.

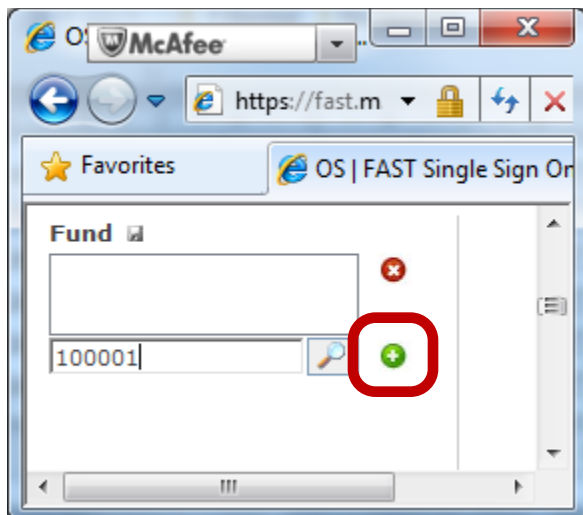
Once the drop down box displays, perform the following actions to modify the filter:

- Click on the “+” sign to expand a group,
- Click on the selection box to place a “✓” next to any parameter you want to choose, **NOTE:** You can also click on a currently checked box to toggle and unselect an item.
- Clicking on the green “✓” at the bottom of the drop down box confirms the parameter selections and closes the drop down list, and
- Clicking on the red “x” at the bottom of the drop down box closes the drop down list without modifying the filter.




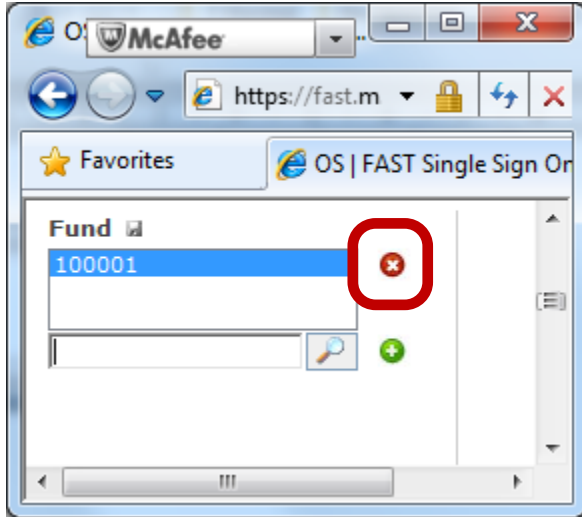
Add parameter values directly

If you know your parameter's value, you can enter it directly rather than use the search field. Simply type the value in the field next to the filter's magnifying glass and select the  sign to add. Once saved, the value will display in the box below the filter name.



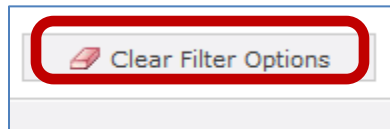
Delete values from a filter

To delete a value, highlight the item to be deleted and then click the . Once deleted, the value will no longer display in the box below the filter name.





Clear Filter Options

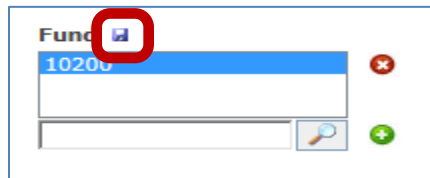
To clear ALL filter options, select the **Clear Filter Options** button.



Sticky Filters


A Sticky filter allows data used as a filter option on a report to be carried over and used as the same filter options on the next report. In **Finance Reporting**, this functionality is available on the **Filter Options** tab.

On the **Filter Options** tab, if a filter has a  icon next to its name, then the parameters for that filter may be saved and carried from one report to the next. Click the  icon to save the data in the filter.

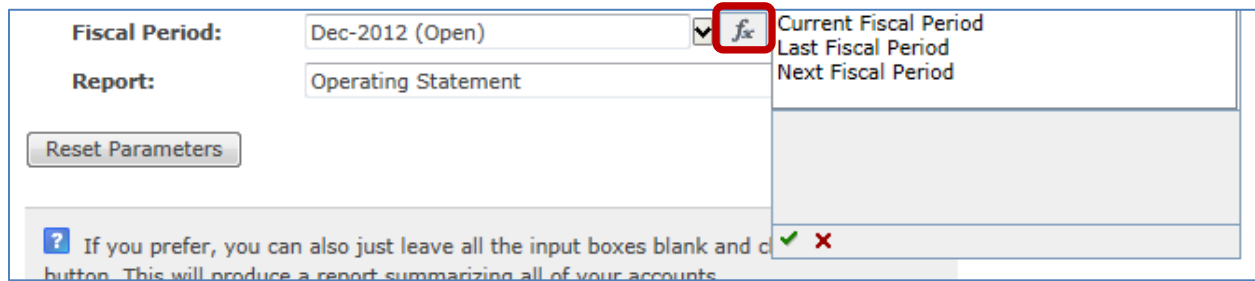


NOTE: Some of the parameter lists are very long and the sticky filters may not be obvious; you might have to scroll down the list to see them. If you do not want to use the sticky filters, you can click the **Clear Filters** button.

Dynamic Selection of Fiscal Periods

The  is called Dynamic Selection. This function allows you to select not a specific period, but “**Current Fiscal Period**”, “**Last Fiscal Period**” or “**Next Fiscal Period**”. By selecting this function, your report result will always be the current, last or next period, but not a defined date.

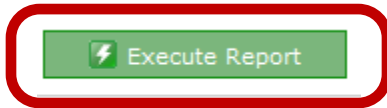
This is particularly convenient when you save your report as a pinned report.



The screenshot shows a report configuration form. The 'Fiscal Period' dropdown is set to 'Dec-2012 (Open)'. A red box highlights the 'fx' icon next to the dropdown arrow. A dropdown menu is open, showing three options: 'Current Fiscal Period', 'Last Fiscal Period', and 'Next Fiscal Period'. Below the dropdown is a 'Report:' field set to 'Operating Statement' and a 'Reset Parameters' button. At the bottom, there is a help message: '? If you prefer, you can also just leave all the input boxes blank and click the [fx] button. This will produce a report summarizing all of your accounts.' To the right of the help message are green and red checkmarks.

Execute Report

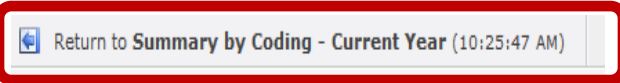
Selecting this button will run the report based on the parameters set.



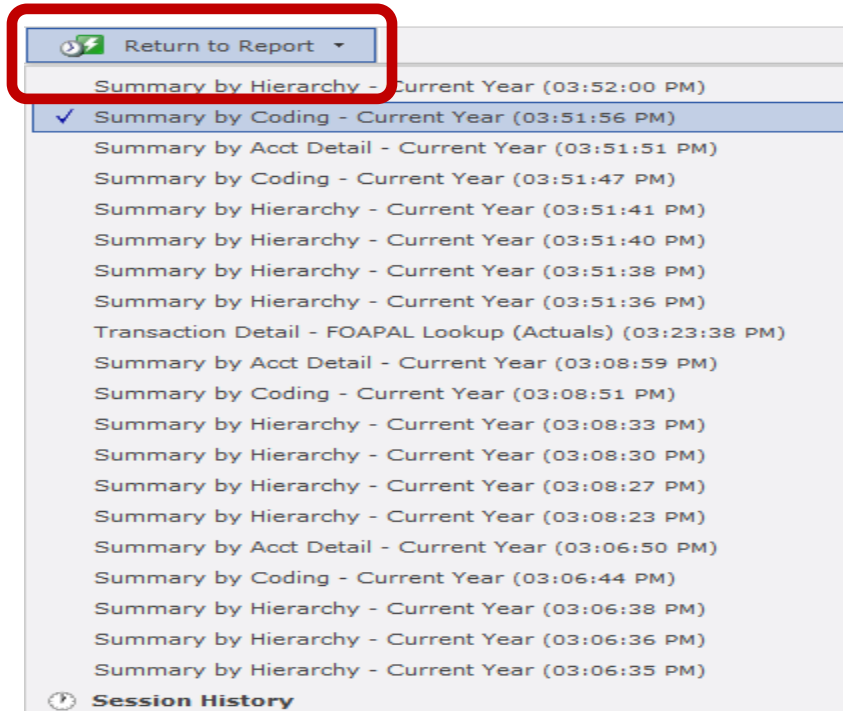
Navigation Features

The following features allow users to navigate quickly to different system pages and / or financial reports.

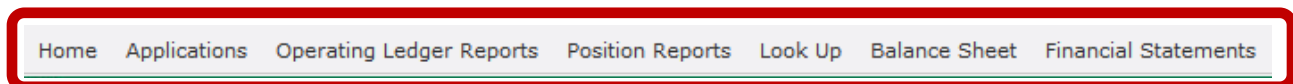
Use the **Return to** menu to go back to the previous report that you just generated.



Use the **Return to Report** menu to go back to any reports that you have generated during the current session.



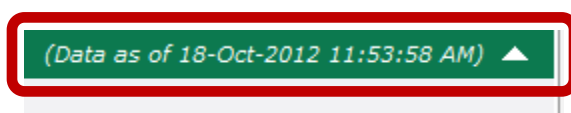
Use the **FAST Finance Menu Bar** anytime to go to the FAST Home Page, another FAST application (e.g. Budget) or run other reports.



Use the **Finance Reporting** link to go to the **Finance Reporting Home Page**.

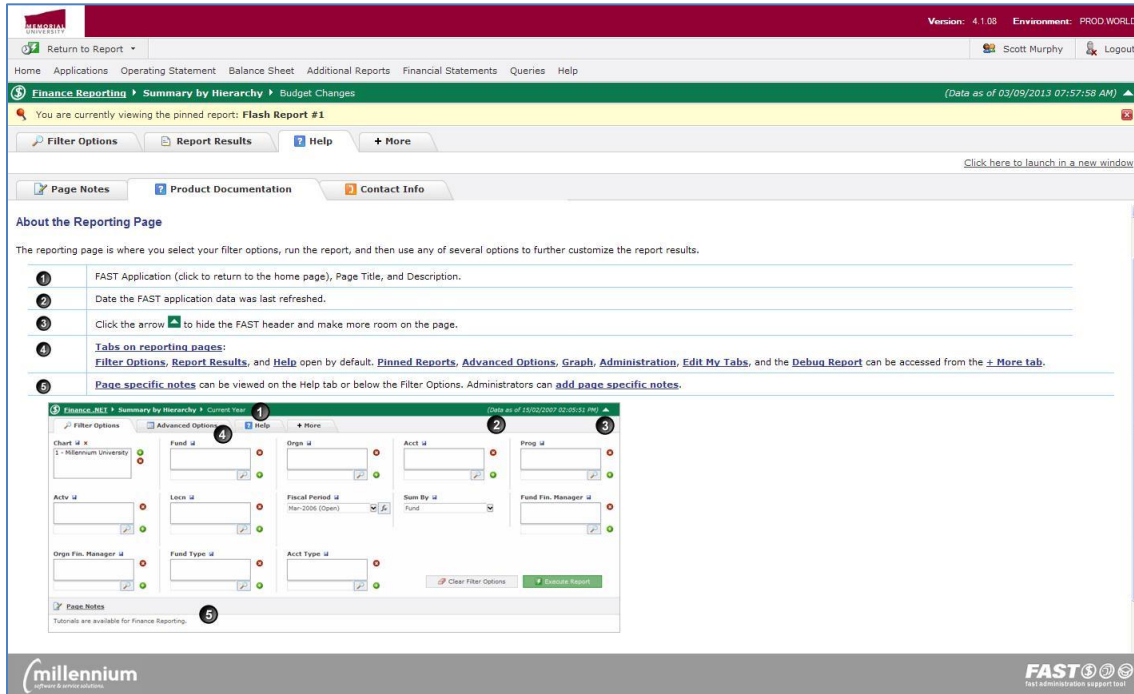


This date shows when the Finance data was refreshed.



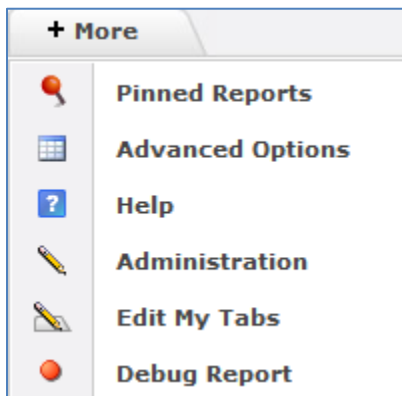
The HELP tab

This tab provides users with detailed information about how to use the **Reporting Page** and the various tabs (i.e. **Filter Options**, **Reporting Results**, **More**) associated with it.



The More tab


This tab allows users to go directly to the following pages: **Pinned Report**, **Advanced Options**, **Graph**, **Help**, **Administration**, and **Edit My Tabs**. Users just have to open the **More** tab and click on the link to whatever page they wish to navigate to.

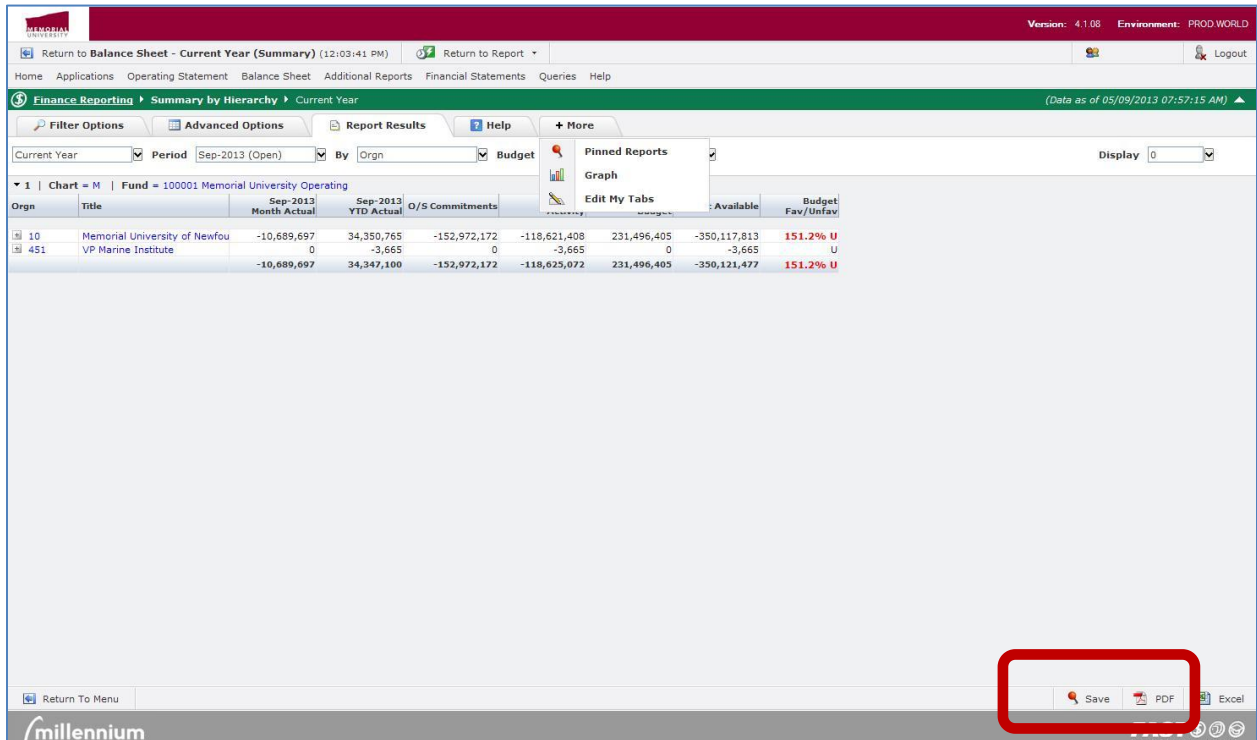


Creating a Pinned Report


Once a report has been successfully generated, if the report is to be re-run on a regular basis then a Pinned Report can be created from it. Creating a Pinned Report allows the report’s parameters to be saved so that the report can be quickly run in the future without having to reconfigure all the parameters.

To create a Pinned Report, perform the following steps:

- Once you have generated your desired report, click the  button on the **FAST Finance Reporting Page**.



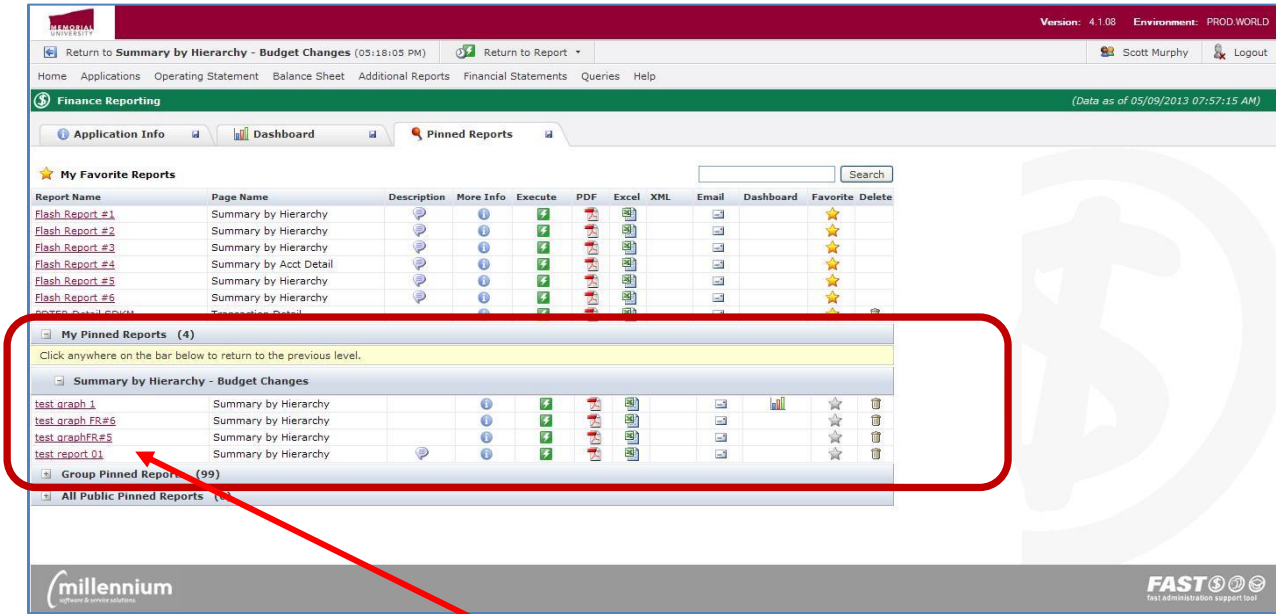
A message box will display, allowing you to create the Pinned Report.

- Type the **Report Name**;
- Type a **Description** of the report;
- If you want to make the report public, select **Make Report Public** (this function is only available to select users);
- Select **Make Grid Available on Dashboard**; and
- Click  to save the Pinned Report.

The screenshot shows a dialog box for creating a Pinned Report. It has a yellow background and contains the following fields and options:

- Report Name:** Fund 10200 Budget
- Description (Optional):** November Budget
- Make Report Public:**
- Make Graph Available on Dashboard:**
- Make Grid Available on Dashboard:**
- A **Save** button (floppy disk icon) is highlighted with a red box.

To view the Pinned Report you just created, go to the **FAST Finance Reporting Page** and open the **Pinned Reports** tab. The report will be found in the **My Pinned Reports** section.

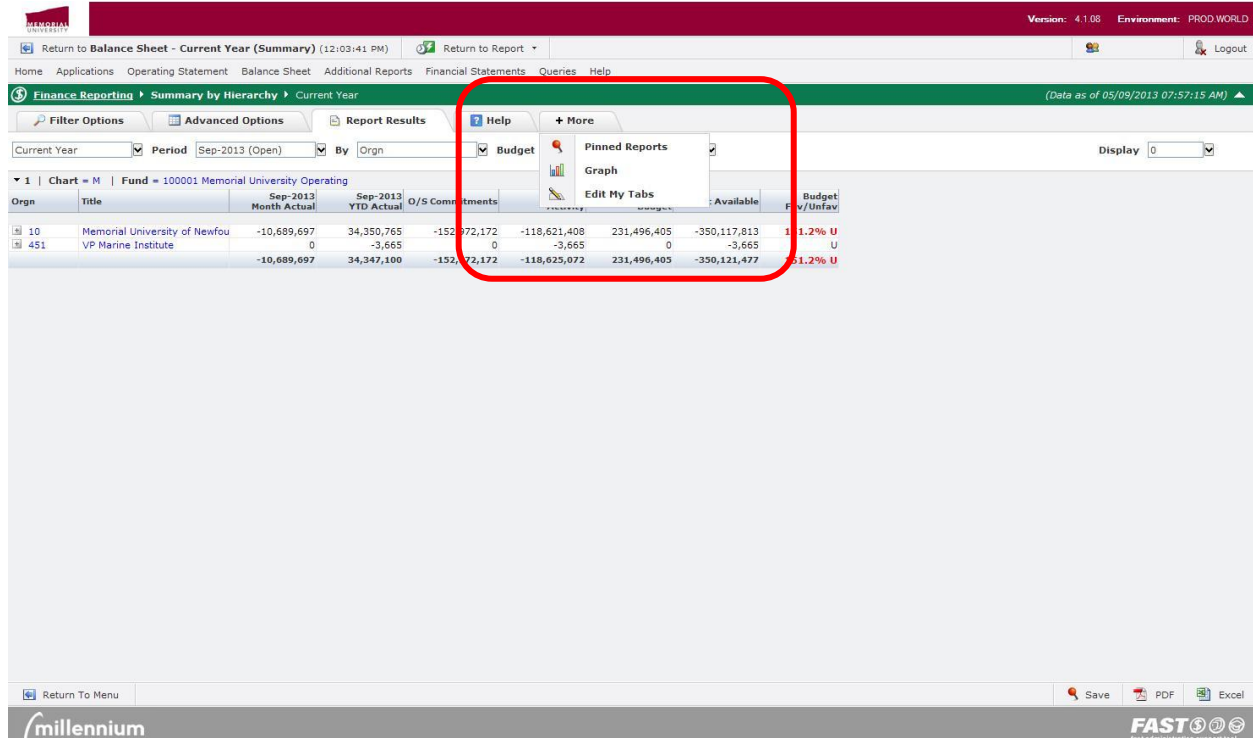


To run the report, simply click the report name.

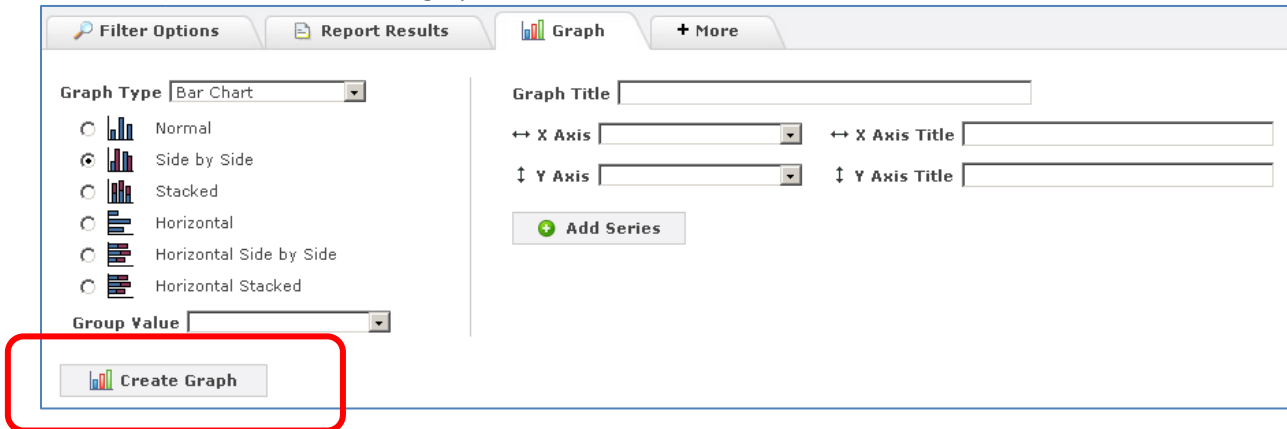
Creating Graphs from Reports

Once a report has been successfully generated, a graph can be created to provide a visual representation of the report’s output.

To create the graph, on the **Reporting Page** open the **More** tab and select the **Graph** option.



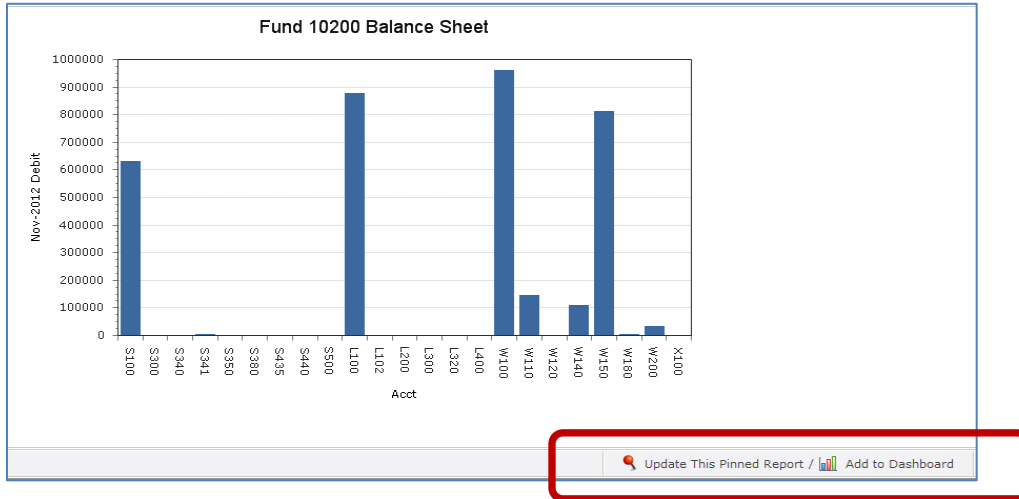
The **Graph** tab will open, and this is where you will format (by selecting the **Graph Type**, **Graph Title**, **X and Y Axis**) and then create the graph.



NOTE: When selecting the following graph types: *“Side by Side”*, *“Stacked”*, *“Horizontal Side by Side”*, and *“Horizontal Stacked”*, you will be able to enter additional “Y” series.

Once all formatting options have been chosen, create the graph by selecting the **Create Graph** button. A graph will now be created based on your selections above.

Next, to save the graph, select the **Update This Pinned Report/Add to Dashboard** button.



The following menu will display:

- Type the graph’s name in the **Report Name** field;
- Type in a **Description** of the graph;
- Select **Make Graph Available on Dashboard**; and
- Click to save the graph.

When processing is complete, you will get the following message at the bottom of the screen.

✓ Pinned report updated successfully at 21-Nov-2012 03:31:59 PM ✕

The graph has now been created and can be accessed on the **Dashboard** tab under **Private Graphs Available**.

Private Graphs Available (2)					
AVP Report (Summary by Acct Detail)	Finance Reporting				
Fund 10200 Balance Sheet (Balance Sheet)	Finance Reporting				

However, before the graph can be viewed, it must be added to a dashboard and then the **Display Dashboard** option selected. Refer to pages 25 and 26 for instructions on how to add graphs to a dashboard and then display them.

Dashboard Tab




About the Dashboard



On the Dashboard tabs, you can display the graphs and grids you created from your FAST reports. The graphs use live data and when a FAST application is refreshed, the data in the graphs is refreshed as well.

Both the **FAST Home Page** and **Finance Reporting Home Page** have Dashboard tabs. On the **FAST Home Page**, you can display graphs for all FAST applications you have access to. On the **Finance Reporting Home Page**, only graphs for that application are displayed.

When a dashboard is selected, any graphs and grids selected for that dashboard will open by default; if none have been added, then the Manage Dashboard section will open.

On the Dashboard tab, users can perform the following tasks:

- **Make the Dashboard tab the Default:** Click the small save icon  on the Dashboard tab. The icon will change to an  indicating the Dashboard tab is now the default (i.e. will display first when a home page is selected); the save icon  will simultaneously be removed from the other tabs.

If you no longer want the Dashboard tab to be the default tab, click the  and it will change back to the  icon. The **Application Info** tab will again be the default.


- **Add a Dashboard:** Create and name a dashboard for your dashboard tab. Each dashboard tab may have more than one dashboard.
- **Delete a Dashboard:** Remove a dashboard if no longer needed.
- **Manage the Dashboard:** Create, add or remove graphs from your dashboard, set the order you want them to display, and display the graphs.
- **View Report or Graph Details:** Click the hyperlinked name to run the report the graph was based on. The title is the name you gave the report when you pinned it and may not be the same as the graph title.
- **Drill Down:** Move the mouse pointer over any pie slice or bar in a chart to show the value (record count and column used for the X axis). Click to drill down and display only that data in the report.
- **Create a PDF file of the Graph:** Click PDF Icon to open a graph in PDF format, with the option to send to a colleague or print it.
- **Minimize:** Click the arrow to hide the graph and make more room.

Add a Dashboard

When you click on the **Dashboard** tab, the following menu opens up.

The screenshot shows a dialog box titled "Add Dashboard". It has a "Display Dashboard" button in the top right corner. Below the title bar, there are two input fields: "Dashboard Name" (containing "AVP Dashboard") and "Group that can view Dashboard (Optional)". At the bottom right, there are "Cancel" and "Save" buttons. The "Dashboard Name" field and the "Save" button are highlighted with red boxes.


To add a dashboard to your tab, type the name you want to call your dashboard under **Dashboard Name** and click the **Save** button (see diagram above).

You may create multiple dashboards under a single tab. To create an additional dashboard, click the green plus sign  next to the current dashboard and follow the same process as above.

Once you have created a dashboard, the following screen will appear when you select the **Dashboard** tab. The Dashboard display area will be empty until you add graphs to this dashboard (see page 25 for details).

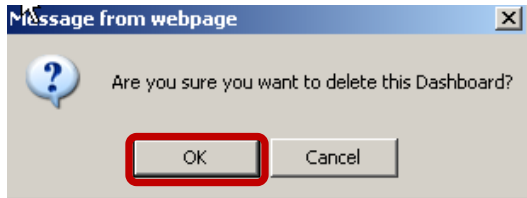
The screenshot shows the main application window with the "Dashboard" tab selected. The dashboard area is empty and highlighted with a red box. A red arrow points from the text above to the dashboard area. The interface includes a navigation bar with "Application Info", "Dashboard", and "Pinned Reports" tabs. The "Dashboard" tab is active, and the dashboard area contains the text "Your Dashboard is empty. Add items from lists below." Below the dashboard area, there are sections for "Private Graphs Available (3)" and "Public Graphs Available (0)".

Delete a Dashboard

If you decide not to keep a dashboard, click on the  to delete it.

The screenshot shows the dashboard interface with the "AVP Dashboard" tab selected. The "AVP Dashboard" tab is highlighted with a red box. The dashboard area is empty and contains the text "Your Dashboard is empty. Add items from lists below." The interface includes a navigation bar with "Application Info", "Dashboard", and "Pinned Reports" tabs. The "Dashboard" tab is active, and the dashboard area contains the text "Your Dashboard is empty. Add items from lists below." Below the dashboard area, there are sections for "Private Graphs Available (3)" and "Public Graphs Available (0)".


The following message will display. Select **OK** to delete the dashboard; select **Cancel** if you decide to keep it.



Add Graphs to a Dashboard

Before a dashboard can display any graphs, the graphs must be added to the dashboard. Any graph which is accessible to a user (i.e. can be seen in the **Public Graphs Available** area or the **Private Graphs Available** area) can be added to a dashboard. A single graph can be added to multiple dashboards.

Perform the following steps to add a graph to a dashboard:

- Select the **Dashboard** tab;
- Choose the dashboard you wish to view from the drop down list;
- Click the **Manage Dashboard** button (this button will toggle to the **Display Dashboard** button);
- Click the “+” to expand the list of **Private Graphs Available** or **Public Graphs Available**; and
- Click the  sign associated with a graph to add the graph to the dashboard.

Version: 4.1.08 Environment: PROD.WORLD

Return to Summary by Hierarchy - Budget Changes (09:41:13 AM) Return to Report




Home Applications Operating Statement Balance Sheet Additional Reports Financial Statements Queries Help

Finance Reporting (Data as of 27/08/2013 07:56:42 AM)

Application Info Dashboard Pinned Reports

SM Test Dashboard 1 Display Dashboard

Your Dashboard is empty. Add items from lists below.

Private Graphs Available (3)							
test_graph_1 (Summary by Hierarchy)	Finance Reporting						
test_graph_FR#6 (Summary by Hierarchy)	Finance Reporting						
test_graphFR#5 (Summary by Hierarchy)	Finance Reporting						

Public Graphs Available (0)

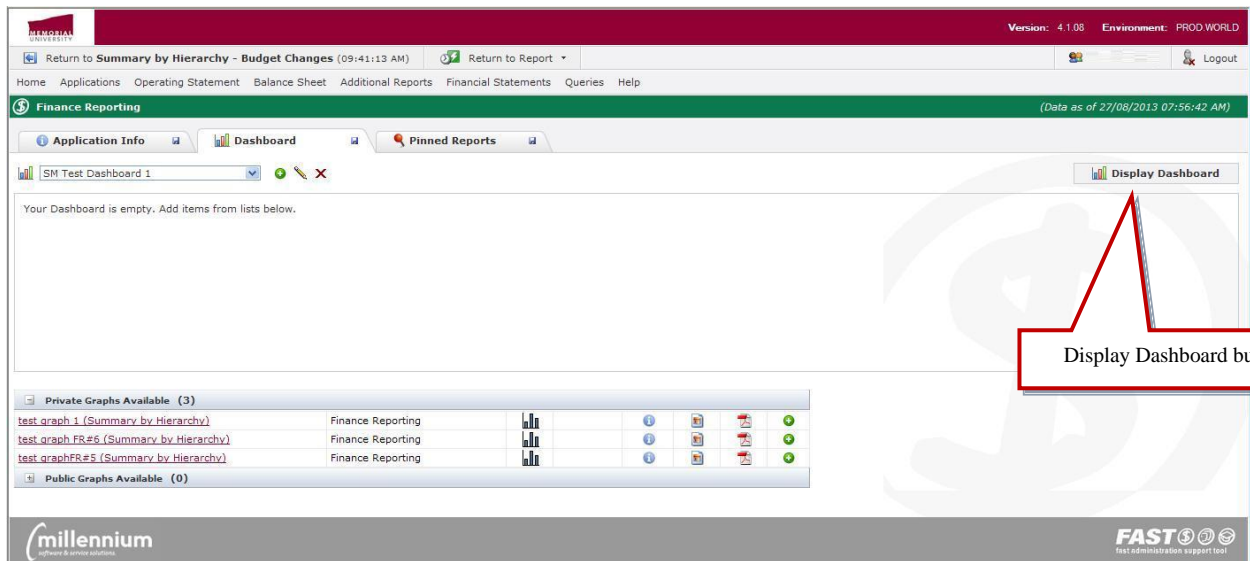
millennium

FAST fast administration support tool

Display the Dashboard

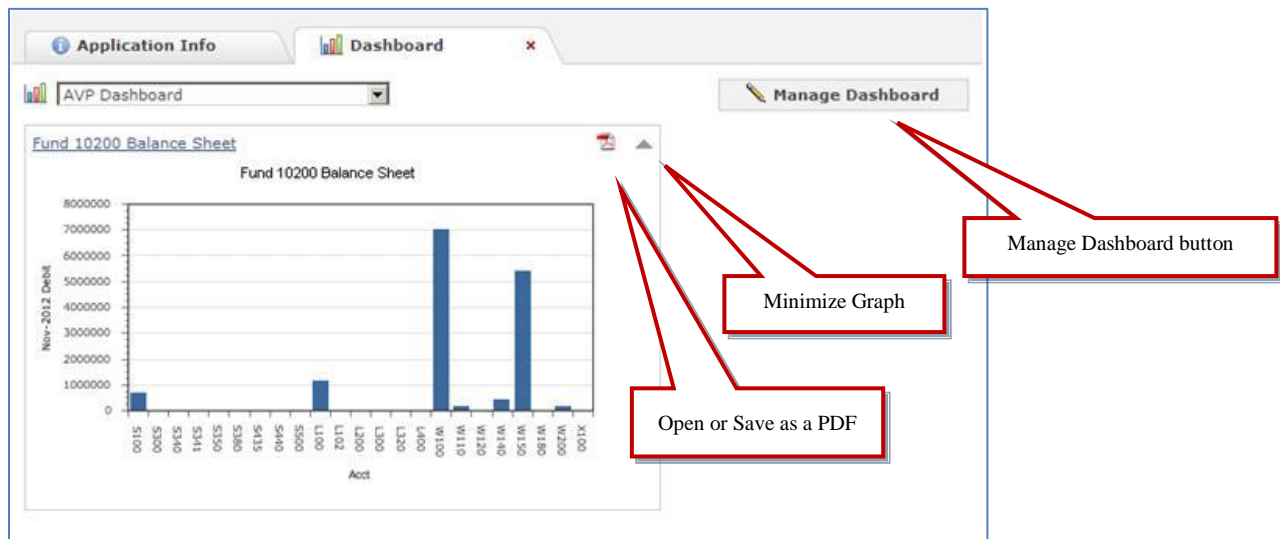
The final step before users can view graphs that have been added to a dashboard is to display the dashboard.

Click the **Display Dashboard** button on the **Dashboard** tab, and all graphs associated with that dashboard will display. (Once clicked, the Display Dashboard button will toggle to the **Manage Dashboard** button.)





Once a dashboard is in display mode, the following functions are available:

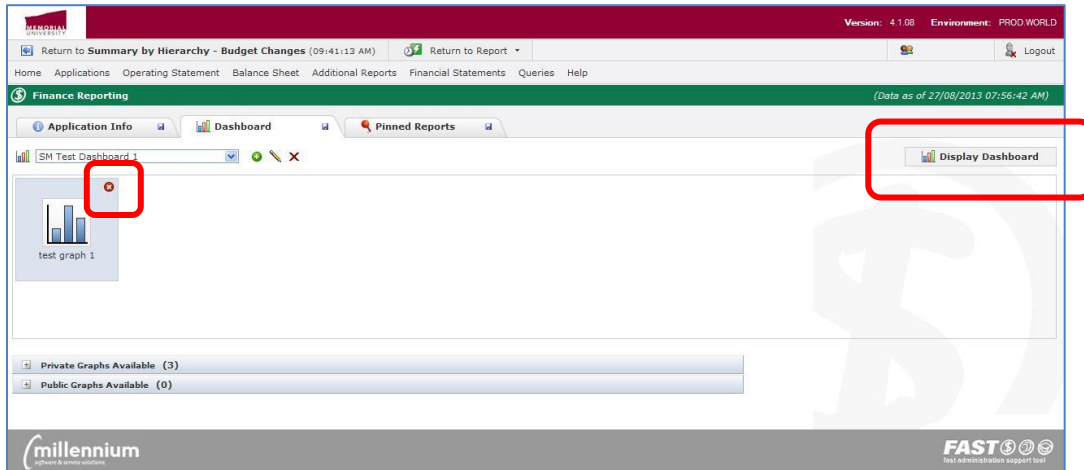
- **Manage Dashboard** button: if clicked, this will allow the dashboard to be modified;
- **Minimize Graph** button is displayed for each graph on the dashboard. This will allow users to minimize / hide graphs they do not wish to view.
- **PDF** button is displayed for each graph on the dashboard. This will allow users to open or save the graph in PDF form.



Delete a Graph from the Dashboard

Perform the following steps in order to delete a graph from a dashboard:

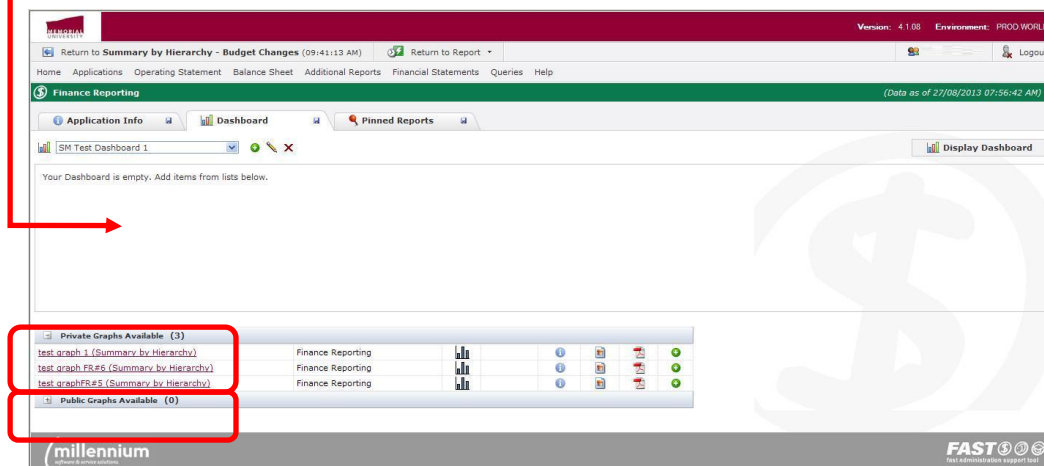
- Open the **Dashboard** tab;
- Ensure the correct dashboard name is displayed in the drop down list;
- Click the **Manage Dashboard** button;
- Move the pointer over the icon of the graph to be deleted; a  will display in the top right corner of this icon. Click the  to delete the graph;
- Click the **Display Dashboard** button in order to re-display the dashboard.



Manage the Dashboard

Clicking the **Manage Dashboard** button allows the dashboard to be edited. When the dashboard is in edit mode, there are three sections for displaying information:

- **Dashboard Display area,**
- **Private Graphs Available,** and
- **Public Graphs Available.**



On the **Dashboard** tab, by default the graphs and grids display. If none have been added, then the dashboard will open in edit mode.

Display Area

Once graphs have been added to a dashboard, they are displayed in this area.

A graph’s position within the display area can be modified by simply clicking on the graph icon and dragging it to the desired location.

Private Graphs Available

Contains graphs you created and pinned. Only you can see the graphs in this section.






All graphs in this section will be listed using the graph names they were called when pinned. There are options to view the graph description, open the graph as a JPG or in PDF format, execute the report for the graph, and add the graph to a dashboard.

Public Graphs Available

Contains graphs anyone has tagged as public for the Finance Reporting application. Everyone with access to the application can see the graphs in this section.

Available Functions

The following chart provides a summary of the functions available on the **Dashboard tab**.

<p>Graphs on the dashboard In the Graphs Available section (Public or Private) the name of the graph and next to it the reporting page it was based on are displayed.</p> <p>In the Display Area an icon with the graph’s name will display for each graph added to the dashboard.</p>	<p>Description Move your mouse over the icon  to view a description of the report.</p>	<p>JPG Click  to open a JPG image of your graph. Not available for grids.</p>	<p>PDF Click  to open the graph in PDF format. Not available for grids.</p>
<p>Change Position While in edit mode, click the graph icon in the display area and drag it to the desired location.</p>	<p>Execute In the Graphs Available section (Private or Public), click the graph’s name to execute and run the report the graph is based on. The page opens, sets the options, and executes the report.</p>	<p>Add/Remove In the Graphs Available section (Private or Public), click the  to add the graph to your Dashboard.</p> <p>In the Graphs Available section (Private or Public), click the  to remove the graph from the dashboard. It goes back to its original location.</p>	

Pinned Reports Tab

If you use specific report options on a regular basis, you can save them as a Pinned Report. It reduces the amount of time you spend running a report because the filter and advanced options are already set on a Pinned Report.

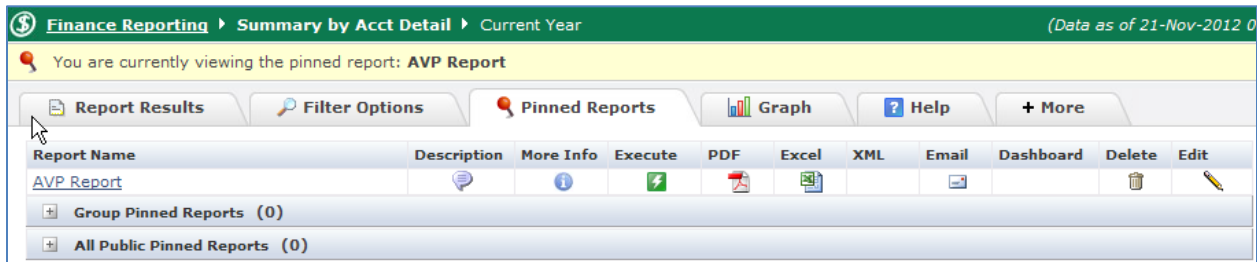
These are some scenarios where you might want to pin a report:

Scenario	Solution
You use the same filter and/or advanced options on a daily basis	Mark it as My Favorite
You need several staff to run a report on a specific day	Assign the report to a pre-set group
You need to e-mail a report link with confidential information to someone who rarely uses the system	Pin the report, do not save as public, and then click the E-mail report link, check the Execute box
Someone wants to export data into an Excel spreadsheet or a database application	Click the XML and/or Excel boxes
Someone has requested the report in a printable format	Click the E-mail report link, and then check the PDF box

How Pinned Reports are Organized

The **Pinned Reports** tab appears on the **FAST Finance Home Page** and on the **FAST Finance Reporting Page**, under the **More** tab. When you click this option on the **Home Page** all your pinned reports are shown. When the tab is selected on the **Reporting Page** only pinned reports for that type of report are shown.

The **Pinned Reports** tab has three sections: **My Pinned Reports**, **Group Pinned Reports** and **All Public Pinned Reports**. All reports are listed by Report Name (i.e. what the report was pinned as), and there are options to view information, execute, e-mail, delete, and edit pinned reports.



My Pinned Reports

Reports you pinned—only you can see the reports in this section.

Grouped Pinned Reports











Reports you share with a specific group (to create a specific group, contact the **Banner Systems Group** within Financial and Administrative Services (FAS)).

All Public Pinned Reports

Reports anyone has tagged as public for this reporting page. Everyone with access to the page sees the reports in this section. The Delete and Edit options display only for reports you pinned.

Available Functions

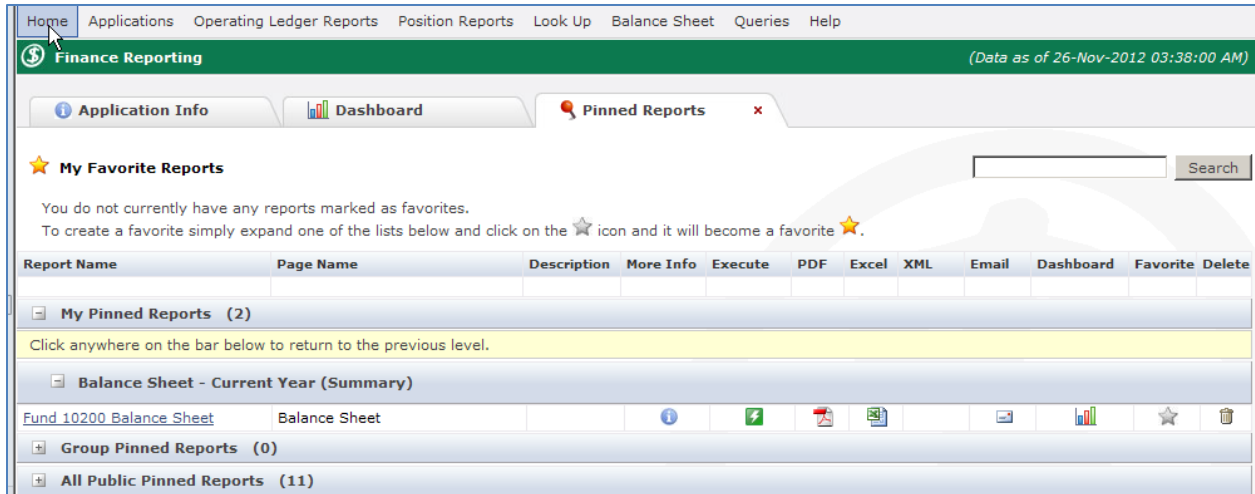
The following functions are available on the Pinned Reports tab.

<p>Description Move your mouse over the  icon to view a description of the report.</p>	<p>More Info Move your mouse over the  icon to view who created the report, the created date, last executed date, and the number of times the report has been run.</p>	<p>Execute Click  to execute and run the report. The page opens automatically, sets the options, and displays the report.</p>	<p>PDF Click  to open the report in PDF format. The page opens automatically, sets the options, executes the report, and opens a PDF.</p>	<p>Excel Click  to open the report in Excel format. The page opens automatically, sets the options, executes the report, and opens an Excel spreadsheet.</p>
<p>XML Click  to open the report in XML format. The page opens automatically, sets the options, executes the report, and opens the XML code in a browser window.</p>	<p>E-mail Click  to send an e-mail message with the report as a web address link. The links can be to Execute the report, or execute the report and open in PDF, Excel, or XML format.</p>	<p>Dashboard  will display if the pinned report is available on your dashboard.</p>	<p>Delete Click  to delete a pinned report if you no longer need it.</p>	<p>Edit Click  to edit a pinned report. You can change the options and/or the name of the pinned report.</p>


E-mailing Pinned Reports

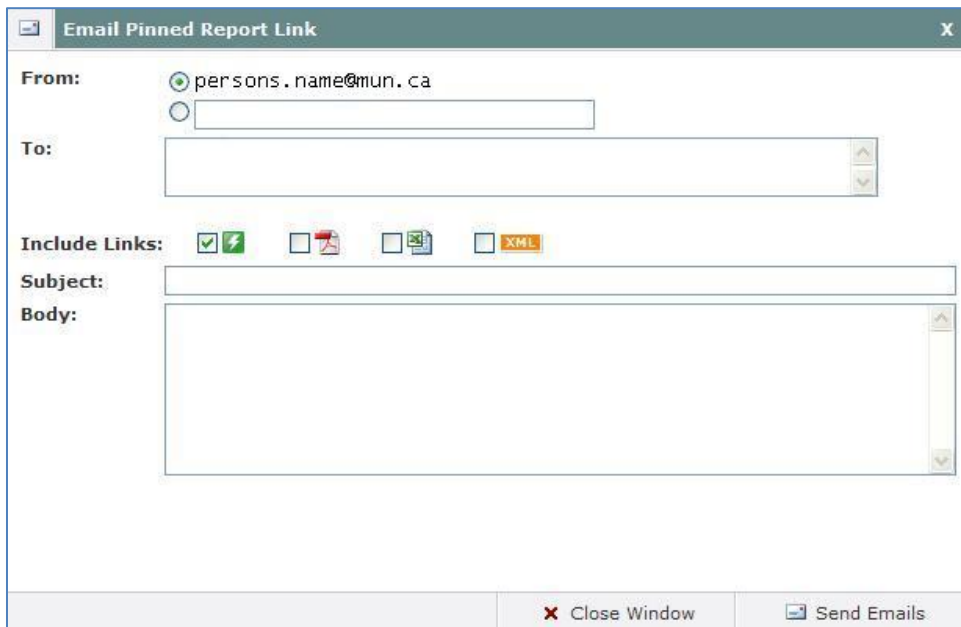
If you have Pinned Reports you want to share, you can e-mail them to other employees within your institution. The reports are sent as links within the e-mail message, one link for each format you select.

Because the employee you are sending the e-mail to will be prompted to sign in, they must have access to the **Finance Reporting** application and the menu option for the report. If they do not have access to the **Finance Reporting** application, they will not be able to view the report.



To **e-mail** a Pinned Report, perform the following steps:





1. Go to the **Finance Reporting Home Page** and open the **Pinned Reports tab** in order to choose the report you wish to email.
2. Click on the  button for the pinned report you wish to email. A message box will display allowing you to create your email.



3. The **From** section defaults to your user name. You can click the second button and type a different e-mail address.
4. In the **To** section, type the e-mail address of the person you are sending the report links to.

Note: Make sure the employee you are sending the e-mail to has

access to the Finance application and menu option.

5. Select the check boxes to Include Links for one or more of these report formats:
 - **Execute:**  Executes the report
 - **PDF:**  Executes the report and opens it in a PDF
 - **Excel:**  Executes the report and opens it in Excel
 - **XML:**  Executes the report and opens in XML format
6. Type a **Subject Line**.
7. Type detailed information in the **Body** of the message.
8. Click **Send e-mails**.