CREW Sponsored Basics

**Prerequisites:**
Access to at least one sponsored Fund in CREW (Common Reporting Environment for the Warehouse) system.

FAS Research Administration Services

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Log on and go to the CREW Report Library

Log on to CREW at https://crew.cadm.harvard.edu/crew/gateway.do

Click the New Request link at the top left or bottom left of the CREW Home page to go to the CREW Report Library (see below).

Note the green and gray tabs below the Search box.

Click on each tab to see which reports are displayed.

My Favorites: a tab you can add frequently used reports to
All: contains all CREW reports—financial, sponsored, and chart of accounts
Finance: all financial reports that are not grants or chart of accounts reports- including the Detail Listing and the Summary Actuals reports
Grants Management: all sponsored reports except the Detail Listing
Public: chart-of-accounts-related reports

Note: The Detail Listing report is found on the Finance tab, even though it is also used in grants management.

Click on a column header (Category, Report Code, Report Name, etc.) to sort by that column.
How CREW Sponsored Basics Can Help You

Go to the Grants Management tab by clicking on it. Your page should now look like the following:

Note: the Grants Management tab is selected in the picture to the right.

The other reports listed on the Grants Management tab help faculty support staff and department grants administrators in many ways. The most basic departmental reports are detailed below:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Helpful in order to:</th>
<th>Suggested Run Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored Accounts Report</td>
<td>An overview of sponsored projects at the PI, Department, or school level.</td>
<td>See an overview of a program &amp; current balances.</td>
<td>As Needed</td>
</tr>
<tr>
<td>Period Expense Report (PER)</td>
<td>A snapshot of balances and budgets vs. expenses on a sponsored account for a period of time the user specifies and for the entire period of performance to date.</td>
<td>1. Get a balance for a particular award 2. Compare budgets to expenses</td>
<td>Monthly</td>
</tr>
<tr>
<td>Detail Listing (regular and lite)</td>
<td>Details about every single transaction for an award or awards for the period of time the user specifies.</td>
<td>1. to see when/if a charge has hit 2. To reconcile invoices against transactions and ensure proper backup 3. To ensure expenses were charged to the proper accounts</td>
<td>Monthly</td>
</tr>
</tbody>
</table>

1 This report corresponds most closely to Report 0 in FASSPAR
Using the Report Code Hyperlinks to Get More Information About Reports

The Report Code column contains hyperlinks that bring up Report Metadata pages. These pages allow the user to get information about particular reports. These hyperlinks appear (and function) everywhere in CREW.

Click GMACCTS086 in the Report Code column to get more information about the Sponsored Accounts report.
**Adding to the “My Favorites” Tab**

If you wish, add the above reports to your My Favorites tab by checking the boxes to the right of the Data Status column for each of those reports. See the picture below.

Once the above reports have been selected (notice the green checkmarks above), hit the Add to Favorites button at the lower left of the report library (again, see above).

Then click the “My Favorites” tab to go to the My Favorites page. You should now see something like this…

If you wish to remove these from your My Favorites page later, click the check boxes on the right and then click the Delete from Favorites button.
Sponsored Accounts Report: Getting an Overview of a PI’s (or Org’s) Active Project Funds and Subactivities

The sponsored accounts report gives a high-level overview of a sponsored research program. The user can run the report by Tub, Org, Fund, PI, Sponsor, and/or by GMAS Project ID-Segment Number.

Running the Sponsored Accounts Report

Choose the blue Sponsored Accounts hyperlink in the CREW Report Library:

This will pull up the Sponsored Accounts parameter page:

Type “Principal Investigator” and the name of one of your PIs in the My Request Name box at the top of the page.

Type “370” (or whichever tub you are searching) as the Responsible Tub to shorten the run time for the report.

Choose “Active” in the Segment Status and the Account Status boxes at the top right of the page.

Turn to the next page to look up the PI’s HUID.
Using the CREW Lookup Function

Use the Lookup function to find and insert a particular PI’s HUID.

Note: This function can be used for many different data types—anywhere that the magnifying glass icon 🕵️ appears.

Click the magnifying glass icon 🕵️ to the right of the Principal Investigator data field in the middle of the page to bring up the lookup dialog box:

Type the PI’s last name in the Last Name Search box.

Click the checkbox to the left of the PI that you’d like to use (see above).
Click the Add button to move your PI's ID to the Add box on the right of the page (see XXXXXXX below).

Click OK at the bottom of the page to fill in the Principal Investigator data field on the Sponsored Accounts report.

The PI's HUID will automatically be added to the parameter page and your screen should now look something like this:

Hit the Submit Now button on the bottom right of the page to run the report.
CREW will now take you to the Home page…

Once the report completes running, your home page might look something like this…

Note the Request Status column now says "Completed."

Note the PDF icon. If this icon has a slash running through it, the report contains no data. The first report above (Request ID 1217517) contains no data but the second (1217516) has run successfully. Please keep in mind that sometimes the PDF icon will have a slash through it if data exists but you do not have the correct responsibility to access the data.

Click on the PDF icon to see your Sponsored Accounts report. It should automatically open in Adobe Acrobat. If it does not open, you may need to save it to your computer, open Acrobat, and then open the file.

It should look like the Sponsored Accounts report in the example packet.
**Running a Period Expense Report (PER)**

Click the “Grants Management” tab to see the Grants Management reports that you have access to (you may not see everything on the graphic below) and scroll down until you see “Period Expense Report.” Scroll down and click on the “Period Expense Report” link to bring up the report parameters page.

Type in or Select the parameters highlighted here.
Run the report by clicking “Submit Now” at the bottom of the page.

You will now be on the CREW Home Page again.

Once the Request Status says Completed, the report is ready and you should see something like the report circled below. Click on the PDF icon to download your report.

In Firefox, you may need to double click the icon in the “Downloads” window.
In Internet Explorer, you may see a dialogue box that looks like the one on the right:

Either way, you'll need to open the .pdf file in Adobe Acrobat or some other .pdf reader. For more information on how to do this, see http://www.webpagecontent.com/arc_archive/125/5/

Once opened, the first page of the PDF should look something like the following:
Changing the Period Expense Report output from PDF to Excel

To run the same report as an Excel file, return to the report parameters page and select Microsoft Excel from the Output Type (Required) drop-down box then re-submit the report:
Running a Detail Listing Report

Click the “Finance” tab to see the Finance reports you have access to (you may not see everything shown on the graphic below) and scroll down until you see “Detail Listing.”

Scroll Down to find the Detail Listing Report and click on the “Detail Listing Report” link to bring up the parameters page.
IF NECESSARY, click the arrow to the right of “Responsibility (Required)” and choose a responsibility with “OSR” in it. Note: This step will only be necessary if you monitor both non-sponsored and sponsored funds.

Enter/Select the parameters highlighted here.

Two of these responsibilities have “OSR” in them and therefore deal with sponsored funds.

Replace [InsertFund] with your fund number

Type your fund number here
Run the report by clicking “Submit Now” at the bottom of the page

You will now be on the CREW Home Page again.

Once the Request Status says Completed, the report is ready and you should see something like the report circled below. Click on the PDF icon to download your report.
In Firefox, you may need to double click the icon in the “Downloads” window.

In Internet Explorer, you may see a dialogue box that looks like this:

Either way, you'll need to open the .pdf file in Adobe Acrobat or some other .pdf reader. For more information on how to do this, see http://www.webpagecontent.com/arc_archive/125/5/5/

Once opened, the first page should look something like the following:
Changing the Detail Listing report output from PDF to Excel
To run the same report as an Excel file, return to the report parameters page and select Comma Separated Values (csv) from the Output Type (Required) drop-down box then re-submit the report: