CREW: Sponsored Reporting Intermediate Guide

FAS Research Administration Services

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How to Use this Workbook

This workbook is meant for intermediate CREW users and assumes that readers already have a familiarity with the Period Expense Report, Detail Listings, and Monthly Salary Certifications. Users should also be comfortable with Harvard’s Chart of Accounts\(^1\) and with reading PDFs in Adobe Acrobat and manipulating data in Microsoft Excel.

The workbook can be used on its own or as a companion to the FAS “CREW: Sponsored Basics” workshop. It is meant to be a guide to be worked through from beginning to end. Users can jump to particular reports if necessary by using the Table of Contents above but each section builds on previous sections so important information may be missed. This workbook is meant to be used at a computer so that users can learn by doing. Throughout the workbook, blue text will be used whenever the reader is asked to perform a task. Red text will be used for all notes.

At times, this workbook may allude to other Applications such as GMAS\(^2\). Knowledge of these other applications is helpful but not required in order to use these reports.

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\(^1\) Each Harvard account number contains Tub, Org, Object, Fund, Activity, Subactivity, and Root values.

CREW Report Library

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

Click the New Request link at the upper 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—excluding the Detail Listing
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.
Grants Management Reports Beyond the PER: How They Can Help

Return to the Grants Management tab by clicking on it.

Your page should now look like the image to the right:

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. Some of the most helpful 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 current balances.</td>
<td>Monthly</td>
</tr>
<tr>
<td>Scheduled Reports</td>
<td>A list of all reports scheduled in GMAS for a particular Tub, Org or Principal Investigator.</td>
<td>See which reports are due soon.</td>
<td>Monthly</td>
</tr>
<tr>
<td>Interest Policy</td>
<td>Shows which accounts are overspent in a specified Tub, Org, or Root.</td>
<td>See which accounts are overspent.</td>
<td>Before month closes</td>
</tr>
<tr>
<td>Segments</td>
<td>A list of all segments for a particular Tub, Org and Principal Investigator.</td>
<td>See awards ending soon and anticipated funding.</td>
<td>As needed</td>
</tr>
<tr>
<td>Requests</td>
<td>A list of all requests (including proposals) made to sponsors and the status of each.</td>
<td>See proposal award rate and anticipate new funding.</td>
<td>As needed</td>
</tr>
<tr>
<td>Subagreements</td>
<td>A list of subawards to other institutions and the status (including expenditures) of each.</td>
<td>1. See if current subs are being invoiced regularly. 2. Generate a list with the status of all pending subs.</td>
<td>Monthly</td>
</tr>
<tr>
<td>GL Budgets</td>
<td>Compares the General Ledger (GL) Budget amount with the GMAS Allocation amount</td>
<td>See if all of your detailed budgets match the GMAS allocated amounts.</td>
<td>Monthly</td>
</tr>
<tr>
<td>Sponsored Invalid Code Combinations</td>
<td>Information about invalid charges to the GL. Invalid code combinations happen when the Fund, Activity, Subactivity combination does not exist in GMAS.</td>
<td>Fix coding mistakes in order to ensure the accuracy of reports.</td>
<td>Before month closes</td>
</tr>
<tr>
<td>Unreconciled Accounts</td>
<td>Accounts where the actual expenses don’t equal the final figure reported to the sponsor.</td>
<td>Close expired accounts.</td>
<td>Monthly</td>
</tr>
</tbody>
</table>

Note: Additional information about CREW sponsored reports can be found in Appendices 1-3.

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3 The PER, DL, GL Budgets, GMAS User Security, Unreconciled Accounts, Invalid Code Combinations and Monthly Salary Certification reports are not covered in this workbook.

4 A segment is a GMAS term used to designate part of an ongoing research project. A segment has a distinct period of performance, amount of funding, and scope of work. Each segment also has a unique Fund number in Harvard’s chart of accounts.
## 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.

![Click GMACCTS086 in the Report Code column to get more information about the Sponsored Accounts report.](image)

### GMACCTS086: Sponsored Accounts (Grants Management)

#### Business Purpose/Description

The GMACCTS086 report summarizes account information by account group for each segment. The information includes dates, income, expenses, account allocation and final figures for each account. This report also displays current At Risk status as well as the At Risk amount for any account. Users can utilize this report to monitor the account status, dates, and dollars as well as the segment level information of obligated and anticipated dates and dollars.

#### Detailed Description

Questions answered by this report:

- For a given PI, how does income compare to expenses across all accounts and segments?
- This report will summarize income, expenses, final figures, and account allocations across all segments for any selected PI. This will allow for a quick view of spending habits as compared to income received.
- How many segments does GSE have with an obligated end date set for next month?
- By utilizing the obligated end date range parameter, the report will display all segments that have an obligated end date in the next month. This will allow for pre-award administrators to follow-up on any submitted continuation requests that have not yet been awarded to monitor the need for at risk accounts.
- How many at risk accounts does FAS have for a particular period of time and what is the total amount that is at risk?
**Adding to the My Favorites Tab**

We’ll be working with the Sponsored Accounts, Interest Policy, Segments, Requests, and Subagreements reports in this workbook.

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.

![Report Library Image](image)

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...

![My Favorites Image](image)

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 then one of your PIs in the My Request Name box at the top of the page.

Type “370” 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 PIs ID to the Add box on the right of the page (see XXXXXX 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.

Click on the PDF icon 📄 to see your Sponsored Accounts report. It should automatically open in Adobe Acrobat or you may need to save it to your computer, open Acrobat, and then open the file.

It should look like the report on the following page...
Scheduled Reports: Finding Out Which Reports are Due

The Scheduled Reports report was developed to help grant administrators determine which reports are due to a sponsor for a given segment. It is especially helpful to track how many reports are due for a given time period and can be used for both financial and non-financial reports.

In CREW, select the New Request link at the top or bottom left of any CREW page to bring you back to the CREW Report Library.

In the CREW Report Library, click the Scheduled Reports hyperlink to open the Scheduled Reports parameter page.

Name the request in the My Request Name box.

Type in the Tub, Org, and PI ID, as applicable (use the Lookup function if needed).

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5 See the lookup function on page eight for detailed instructions.
Choose “Adobe Acrobat (pdf)” in the Output Type.

Choose “Detail Report” in the Select Report Type (You could also choose Summary Report).

Note: There are two report types: summary and detailed. The summary report gives you the number of overdue reports by final/not final, report type, number of days past due, and funding type. The detail report provides detail on individual reports such as the type of report due, the sponsor, the responsible preparer(s), the report to date and the report due date.

Choose “Next 30 Days” (or another date) in the Report Due Date Range.

Hit the Submit Now button on the bottom right of the page to run the report.

Note: If you leave the Financial or NonFinancial Report Type blank, CREW will pull back all reports scheduled. Or you can use the Lookup function to choose specific report types.

Note: Other parameters you can choose to input to narrow your results are “Final Reports Only,” “Only Awards Under Institutional Authorities,” and “Only Awards Under SNAP.”

Once the report completes running, click the PDF icon on the CREW home page to download the Scheduled Reports report. It should look something like the following...
Interest Policy Report: Finding Out Which Projects are Overspent

The Interest Policy report was developed to help central administrators figure out which accounts are overspent and should be charged interest. However, it is also very valuable at the department level to see which accounts are overspent on a given day.

Select the New Request link at the top or bottom left of the page you are on to bring you back to the CREW Report Library.

In the CREW Report Library, choose the blue Interest Policy hyperlink to pull up the Interest Policy parameter page:

Name the request in the My Request Name box.

Type “370” as the Tub to shorten the run time for the report.

Type in your department’s sponsored account Org (or look it up using lookup function6) to shorten the run time for the report.

Choose “Interest Policy Active” in the GMAS Report drop-down menu (You could also choose At Risk, Dead, or Dead end of Month).

Choose a Minimum Overexpenditure Amount ($1000 is default).

Hit the Submit Now button on the bottom right of the page to run the report.

Once the report completes running, click the PDF icon on the CREW home page to download the Interest Policy report. It should look something like the following...

---

6 See “Using the CREW Lookup Function” in this document for more detailed lookup instructions.
Segments Report: Getting a List of Awards Ending Soon

The Segments report gives information at the Fund level. It is especially helpful when someone needs to find out which projects are ending soon or about awards of a certain sponsor or funding type.

In CREW, select the New Request link at the top or bottom left of any CREW page to bring you back to the CREW Report Library.

In the CREW Report Library, click the Segments hyperlink to open the segments parameter page.

Type in your Tub and Org(s).

Choose “Adobe Acrobat (.pdf)” as the Output Type

Choose “Active” as the Segment Status

Choose “Next Month” (or another date) in the Obligated End Date Range.
Note: If you choose a date range in more than one drop-down menu, CREW will assume that you only want awards that satisfy all the requirements. For example, if you specify “Next Month” in the Obligated AND the Anticipated end date ranges, an award will only show up if its Obligated AND Anticipated end date is next month.

Hit the Submit Now button at the bottom right of the page.
Once the report completes running, your CREW Home page should look something like this...

Click on the PDF icon for the Segments report (the first report above) to open a PDF in Adobe Acrobat.

The Segments report should look similar to the report on the following page...

Note: The second and third segments (funds) on the following report have Anticipated Amounts differing from the Authorized amounts. These Anticipated Amounts are for multi-year projects and will probably be awarded on or very close to the Obligated End Date, providing the sponsor receives a satisfactory progress report and has enough funding to authorize further spending. If you’d like to see how much more money a project will probably receive, subtract the Obligated amount from the Anticipated amount. It is easy to do this for many projects at once by downloading the data and manipulating it in Excel.

The Income column states the amount the Sponsor has given to Harvard, either at the beginning of the obligated period or as reimbursement for funds already spent.

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7 Downloading in Excel will be covered later in this workbook.
Requests Report: Getting a List of Proposals and Their Current Status

The Requests Report provides a list of requests made to sponsors. It includes a summary of proposed dollars for all requests and information about the status of the request (pending, approved, rejected, etc).

From the CREW Home page, select the New Request link at the top or bottom left of the page to bring you back to the CREW Report Library.

Click the Request hyperlink in the Report Name column to open the Requests parameter page:

```
<table>
<thead>
<tr>
<th>Parameter Set</th>
<th>[Default]</th>
<th>[Go]</th>
<th>[Delete]</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Request Name</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
<tr>
<td>Tub</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
<tr>
<td>Org</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
<tr>
<td>Fund</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
<tr>
<td>Sponsor</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
<tr>
<td>Sponsor Type(s)</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
<tr>
<td>GPMAS Project ID - Segment Number</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
<tr>
<td>Central Administrator</td>
<td>[Required]</td>
<td>[Required]</td>
<td>[Required]</td>
</tr>
</tbody>
</table>

Output Type (Required)
- Adobe Acrobat (.pdf)

GPMAS Report (Required)
- Requests

Request Status
- Awarded
- Approved
- Rejected
- Denied

Request Creation Date Range
- None
- Select a range from list or enter a custom date range

Request Due Date Range
- None
- Select a range from list or enter a custom date range

Request Submission Date Range
- None
- Select a range from list or enter a custom date range

Request Proposed Start Date Range
- None
- Select a range from list or enter a custom date range

Request Anticipated Start Date Range
- None
- Select a range from list or enter a custom date range

Save as Parameter Set [Save] [Cancel] [Submit Now] [Schedule]
```

Type in your Tub and Org (if applicable).

Choose “Adobe Acrobat (.pdf)” as the Output Type.

Type in the PI’s ID number if necessary (use the Lookup function if needed).

Choose “Other” on the Request Submission Date Range drop-down menu and input the date range you desire (1/1/07-1/1/08 was chosen for the report above). You may also choose one of the standard dates.

Hit the Submit Now button at the bottom right of the page. CREW will take you to the Home page.

Once the report has completed running, click on the PDF icon to the right of the report. You will then see a PDF of the Requests report. It will look something like the report on the following pages...

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8 See “Using the Lookup Function” elsewhere in this document for detailed instructions.
**Requests Report: Generating a Microsoft Excel (.xls) Report**

The Requests Report above provides a lot of information, much of which may not be relevant to what the user is trying to discover. In this case it might be helpful to generate a report type other than PDF. CREW can also generate most reports as Microsoft Excel files, which can then be manipulated and formatted.

**Using the Resubmit Button**

On the Home page (see below) notice the two arrows going in a circle in the Actions column. This is a resubmit button that allows the user to change and resubmit the report right away or to schedule the report to run at a different time.

![CREW Home page](image1)

From the CREW Home page, select the resubmit button to open the Resubmit page.

![Resubmit page](image2)

Click the Change Parameters button (above) to open the Requests parameter page (next).
Change the Output Type to Microsoft Excel (.xls)

Hit the Submit Now button. CREW will generate an Excel file which will appear on the CREW Home page to the right of the report.
Click the .xls icon.

The report will either open automatically in Excel or you will need to save it on your computer and open it from there using a dialog box like the one to the right. ➔

Note: Once open, Excel may still consider the file to be a text file. If you format the file and then try to save it you may see a dialog box like the one below:

If this happens, you should Click NO so that you don’t lose your formatting.
You will then see the Save As dialog box...

Choose “Microsoft Office Excel Workbook” in the “Save as type” drop-down menu and hit the Save button.

If you haven’t changed the file name and you are in the same folder you will then see...

Click YES to overwrite the text file.

The next page shows an unformatted and a formatted Requests report.
Subagreements Report: Keeping Up with Subawards

The Subagreements Report provides information about the most recent amendment status, start and end dates, awards and expenses and other important subagreement information.

Run a List of Active Subagreements

Click New Request to go to the CREW Report Library.

Click on Subagreements to open the parameter page.

You will then see...

Assign a request name in the My Request Name input box.

Type in the Tub, Org, and PI ID, as applicable (use the Lookup function if needed).

Choose “Microsoft Excel (.xls)” as the Output Type

See the lookup function on page eight for detailed instructions.
Choose “Active” as the Subagreement Status.

Hit the Submit Now button at the bottom right of the page.

CREW will take you to the Home page.

Once the report has completed running, click on the .xls icon to the right of the report. CREW will then download an Excel version of the report, listing all active subagreements for the Org or PI that you specified.

Once formatted and analyzed, your Excel file might look something like the following report...

<table>
<thead>
<tr>
<th>Department Active Subagreements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PI</strong></td>
</tr>
<tr>
<td>NASA-Goddard Space Flight Center</td>
</tr>
<tr>
<td>National Science Foundation</td>
</tr>
<tr>
<td>NASA-Goddard Space Flight Center</td>
</tr>
<tr>
<td>National Science Foundation</td>
</tr>
<tr>
<td>National Science Foundation</td>
</tr>
<tr>
<td>NASA-Goddard Space Flight Center</td>
</tr>
<tr>
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</tr>
<tr>
<td>NASA-Goddard Space Flight Center</td>
</tr>
<tr>
<td>NASA-Goddard Space Flight Center</td>
</tr>
<tr>
<td>NASA-Goddard Space Flight Center</td>
</tr>
<tr>
<td>National Science Foundation</td>
</tr>
<tr>
<td>National Science Foundation</td>
</tr>
</tbody>
</table>
**Generate a List with the Status of all Pending Subawards:**

Go to the CREW Home page and click on the Resubmit button to the right of the Subagreements report you just ran.

After the Resubmit page opens, click the Change Parameters button to open the parameter page.

Assign a different request name in the My Request Name input box.

Hit the Ctrl button on your keyboard and click “Active” in the Subagreement Status to deselect it.

Click the checkbox to the left of “Outstanding Amendments Only”

Insert a number in the “More than days old” data field.

Hit the Submit Now button at the bottom right of the page.

CREW will take you to the Home page.

When the report has completed running, click on the .xls icon to the right of the report. You will then download, save, and format an excel version of the report.

Once formatted, your Excel file might look something like the following...

### Department Subagreements Outstanding

<table>
<thead>
<tr>
<th>PI K</th>
<th>NIH/NIHMS</th>
<th>Sponsor</th>
<th>Fund</th>
<th>Subaward Id</th>
<th>Prop Status</th>
<th>Amount</th>
<th>Subaward ID</th>
<th>Prop Status</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI K</td>
<td>NIH/NIHMS</td>
<td>Sponsor</td>
<td>Fund</td>
<td>Subaward Id</td>
<td>Prop Status</td>
<td>Amount</td>
<td>Subaward ID</td>
<td>Prop Status</td>
<td>Amount</td>
</tr>
</tbody>
</table>

*UR= Under Review, PSA= Pending Sponsor Approval

**SASP= Sponsor Approved, Sub Pending, PSA= Pending Sponsor Approval

Note: Other abbreviations can be figured out by looking at the Parameters page or running a PDF.
Additional CREW Home Page Information and Functionality

Go to the CREW Home page. You should now see something like this...

![CREW Home Page Screenshot](image)

**Report Lifespan**

The reports that you have run today will remain on the CREW Home page for only seven days. However, there are a few ways to save the parameters of these reports using the Home page.

**Users can save report parameters by**

- clicking the resubmit icon and scheduling them to run automatically (for example, on the 15th of the month or whenever the month closes)
- clicking the resubmit icon and scheduling them to run “later”

**Users can organize the Home page by**

- Sorting the reports by clicking the column headers under the Welcome to CREW banner.
- Using the Create Group button towards the bottom of the page by creating groups of related reports and scheduling those reports to run automatically. This is especially helpful if you are regularly running a pair or more of reports for the same fund, like a monthly PER and detail listing to reconcile your award.
- Getting rid of past reports using the Delete Selected button towards the bottom of the page.

**Users can send report parameters to other CREW Users by** selecting the report to copy in the checkbox to the right of the report and clicking Copy to User button towards the bottom of the page. **Note:** This will only work if the other user has the requisite security responsibility.
Where to Go for More Training and Help

FAS RAS Job Aids and Learning Page has documents about many other aspects of grants administration. It can be found at: http://www.fas.harvard.edu/~research/training/index.html

OSP Training Page has documents and online trainings about CREW and other aspects of grants administration. The main training page can be found at http://vpf-web.harvard.edu/osp/training/home.php. The CREW-specific materials can be found at: http://vpf-web.harvard.edu/osp/training/tips_tools.php

The FAS RAS Website has a box that searches University web pages related to research administration, including the website for the Office for Sponsored Research. It can be found at: http://www.fas.harvard.edu/~research

Questions about Research Administration in General?
Please contact your department’s grants manager or see the FAS RAS “Where to go for Help” page at http://www.fas.harvard.edu/~research/administration/help.html or fasrsrch@fas.harvard.edu

Questions and suggestions about this workbook? Please contact FAS Research Administration Services at fasrsrch@fas.harvard.edu

Questions about FAS Non-Sponsored Financial Administration?
Please contact the FAS Administrative Systems Assistance Program (ASAP) at 6-7136 or FASASAP@fas.harvard.edu

ABLE (A Better Learning Environment) has an online CREW tutorial which provides general information about the system; demonstrations of how to run, schedule, view, or resubmit reports; look up parameters; save default parameters; create selection sets; download report results; and use CREW’s built-in report guide as well as detailed information about each of the CREW screens. It can be found at http://able.harvard.edu/crew/

Technology Help Desk: 496-2727
## Appendix 1: Grants Management Reports Available in CREW

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Business Purpose/Description</th>
<th>Who can Run this report?</th>
<th>How often should this report be run?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored Accounts</td>
<td>The Sponsored Accounts report summarizes account information by account group for each segment. The information includes dates, income, expenses, account allocation and final figures for each account. This report also displays the current At Risk status as well as the At Risk amount for any account. Users can utilize this report to monitor the account status, dates, and dollars as well as the segment level information of obligated and anticipated dates and dollars.</td>
<td>General</td>
<td>As needed</td>
</tr>
<tr>
<td>Interest Policy Report</td>
<td>The Interest Policy Report provides information at the account group level that shows which accounts have over expenditures. These accounts are subject to interest penalties on the over expended amount. The account statuses this report considers are at-risk accounts, active and closed accounts.</td>
<td>General</td>
<td>As needed</td>
</tr>
<tr>
<td>Sponsored Invalid Code Combinations Report</td>
<td>The Invalid Sponsored Code Combinations Report provides information at the account level of invalid charges in the GL as the Fund, Activity, Subactivity combination does not exist in GMAS. This report is used by Central Financial Services, Tub Level Administrators and Department Administrators to identify charges that used invalid fund-activity combinations.</td>
<td>General</td>
<td>Monthly</td>
</tr>
<tr>
<td>Monthly Salary Certification Report</td>
<td>The Monthly Salary Certification Report provides total salary distribution information for all non-faculty members receiving a portion of salary from a sponsored project. It enables Principal Investigators to certify the salary amounts charged to each project by non-faculty members on sponsored projects for each month.</td>
<td>Special permissions</td>
<td>Monthly</td>
</tr>
<tr>
<td>Period Expense Report</td>
<td>The Period Expense Report (PER) is used to monitor financial activity against sponsored accounts. It is a picture of the financial position of an account on a specific date. This is a report that is generally used by Financial Services and Department Administrators when preparing invoices and financial reports to submit to sponsors.</td>
<td>General</td>
<td>Monthly</td>
</tr>
<tr>
<td>Segments</td>
<td>The Segment Report will be used to create a list of all segments for a particular Tub, Org and Principal Investigator. A segment is a way of dividing a project into pieces with distinct periods of time, amounts of funding, and scope of work; often a new segment is indicated by peer review submission. Each active segment has a unique fund value.</td>
<td>General</td>
<td>Quarterly</td>
</tr>
<tr>
<td>Scheduled Reports</td>
<td>Scheduled Reports is used by grant administrators to determine what reports are due to a sponsor for a given segment. Sponsored Programs managers use this report to monitor portfolio distribution assignments and to track how many reports are due for a given time period.</td>
<td>General</td>
<td>As needed</td>
</tr>
<tr>
<td>Requests</td>
<td>The Requests report is comprised of both the standard Requests Report and the more specialized Purge Pending Report, accessible by selecting the appropriate report from the GMAS Report field on the parameters screen. This report also provides users with lists of requests in GMAS according to various parameters such as Principal Investigator, Org, Tub, etc. The Requests Report also includes a summary of proposed dollars for all requests resulting from the query, as well as select approvals information. The Purge Pending Report provides Central Pre-Award Offices with lists of requests that should be purged from GMAS because their Submitted to Sponsor Dates are greater than 900 days prior to the date the report was run. The Purge Pending Report assists with the data quality maintenance of GMAS.</td>
<td>General</td>
<td>As needed</td>
</tr>
<tr>
<td>Subagreements</td>
<td>The Subagreements report lists all subagreements for a given project. This report will summarize the most recent amendment status, issued start and end dates, issued amount and expenses as well as other important subagreement information. This report can be run for any given PI, segment, subrecipient or the number of days an amendment has been outstanding.</td>
<td>General</td>
<td>Monthly</td>
</tr>
<tr>
<td>Unreconciled Accounts</td>
<td>The Unreconciled Sponsored Accounts report lists all accounts with an expense variance. In order to close accounts, the expenses posted to each account must be equal to the final figure of expenses reported to the sponsor. This report displays the exception to this rule. An account is considered overspent if expenses are in excess of the final figure. If expenses are less than the final figure, the account is underspent.</td>
<td>General</td>
<td>Quarterly</td>
</tr>
<tr>
<td>Summary Actuals and Budget</td>
<td>Use this report to view summary level actual balances and budget balances for any code combination of the full chart of accounts.</td>
<td>General</td>
<td>As needed</td>
</tr>
</tbody>
</table>
# Appendix 2: Reports to Run Monthly

## Sponsored Programs Quick Tip:
**Reports to Run Monthly for Effective Grants Management**

### Period Expense Report

**Purpose**
Indicates income and expenses to date by object code for the current period and from the inception of the award to date.  
If a budget has been entered for your award, the PER will indicate the balance remaining and % balance expended. This indicates the amount remaining on your award for the current budget allocation.

**Parameters**
- Run for current award budget period to last closed period  
- Keep parameters to a minimum (only include fund #)  
- De-select active accounts only so that you can see the entire picture and all expenses.

### Detail Listing Report - Lite

**Purpose**
Indicates expenses by transaction, and can be sorted many ways. If you want it to match the PER (and be able to compare it to PER easily) select subactivity as the first sort. The detail listing will include invalid code combinations, if your subactivity totals do not match the PER totals, that is an indication that there may be invalid transactions posted to this account.  
A review of the detail listing will help you confirm that all applicable charges were posted correctly to your sponsored account.

**Parameters**
- Run this report by month at the last closed period (report period = most recent month)  
- Keep parameters at a minimum - fund only yields the richest results  
- Can be sorted many ways: by object code, subactivity, journal name, journal source, etc. For training grants, we suggest the first sort be object code and the second sort be employee ID.

### Salary Certifications

**Purpose**
Provides total salary distribution information for all non-faculty members receiving a portion of salary from a sponsored project. It enables Principal Investigators to certify the salary amounts charged to each project by non-faculty members on sponsored projects for each month.

**Parameters**
- PI or Org and Report Period = most recent month

### Sponsored Invalid Code Combinations

**Purpose**
Identifies transactions posted to an invalid activity/sub-activity/fund combination. These transactions do not appear on the PER or in GMAS, and are not included in invoices or financial reports to our sponsors. If not corrected promptly, the department may need to post them to unrestricted accounts as they cannot be reported to or reimbursed from the sponsor.  
This report indicates the last time a transaction was posted to each invalid code. Run a detail listing to review all transactions to that fund/activity/subactivity combination.

**Parameters**
- Enter your org value (or leave blank and let your security settings determine the results)  
- Run this report by month at the last closed period (report period = most recent month)

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**To access CREW:**

- [https://crew.cahm.harvard.edu](https://crew.cahm.harvard.edu)  
- OR via the Reporting link on the [GMAS homepage](http://www.gmas.harvard.edu)

**Got Questions??**

- Contact your [OSR representative](mailto:osp@crew.harvard.edu)  
- OR [CREW Online Help](http://www.crew.harvard.edu) on [ABLE](http://www.able.harvard.edu)
## Appendix 3: Reports to Run Quarterly

### Sponsored Programs Quick Tip:
**Reports to Run Quarterly for Effective Grants Management**

#### Unreconciled Sponsored Accounts

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Parameters</th>
</tr>
</thead>
</table>
| Identifies all accounts with an expense variance. In order to close accounts, the expenses posted to each account must be equal to the final figure of expenses reported to the sponsor. This report displays the exception to this rule. One could run this report if a PI was leaving the university to identify their accounts in need of reconciliation and closeout. | Run for 7/1/99 to six months ago  
Keep parameters to a minimum (only include tub and org #)  
Could also be run by PI or by Sponsor |

#### Segments

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Parameters</th>
</tr>
</thead>
</table>
| Identifies all segments (funds) for a particular Tub, Org, Sponsor, and/or PI. You can run this report by PI to give your PI a snapshot of all obligations and expenses on active awards by award. The segments report can also be used to identify those accounts that are ending in 120 days or less to enable grants managers to either request a no cost extension or begin the account reconciliation process. This can be used to review the financial status of awards and could also be used to review your entries for the 'other support' section of your current proposal. | Run this report for your org value and choose anticipated end date of Next 120 days  
Run this report by PI for all active and pending segments in their portfolio  
One could add a column to identify the amount remaining (obligated less expenses) and or the % remaining on each award |

#### Scheduled Reports

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Reports is used by grant administrators to determine what reports are due to a sponsor for a given segment. Sponsored Programs managers use this report to monitor portfolio distribution assignments and to track how many reports are due for a given time period. This can be used to identify how many progress reports are due in the next three months and who the sponsors are.</td>
<td>Run this report for due dates 1/1/99 to the end of the next three months. You could run this by PI as well.</td>
</tr>
</tbody>
</table>

#### Sponsored Accounts

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>The sponsored accounts report summarizes information by account group for each project. The report could be used to review dates, income expenses and account allocation for each account. This report will also identify the at risk and/or restricted status of each account, so that one could review award status and the expenses charges to at risk and /or restricted accounts.</td>
<td>Run this report with your tub and org and select active segments and active accounts. One could also select accounts where the at risk flag and/or restricted flag is set to yes.</td>
</tr>
</tbody>
</table>

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To access CREW: [https://crew.cadm.harvard.edu](https://crew.cadm.harvard.edu)
OR
Via the Reporting link on the [GMAS](https://example.com) homepage

Got Questions???
Contact your [OSP representative](https://example.com)
OR
[CREW Online Help](https://example.com) on ABLE