



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 the 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)

To access CREW:

<https://crew.cadm.harvard.edu>

OR

Via the Reporting link on the [GMAS](#) homepage

Got Questions???

Contact your [OSP representative](#)

OR

[CREW Online Help](#) on ABLE