Quick Guide to Running Reports in CREW

Follow the steps below to submit report requests in the CREW system.

1. From the CREW home page, click New Request to go to the Report Library page.

2. From the Report Library page, click the name of the report you wish to run. Use the tabs and drop-down box to filter the report list. Only reports you are allowed to run will be displayed on this screen.

You may also want to:

- Review the data status column, which tells you how up-to-date the data is for each report.
- Click a report code number to open a new window with a report catalog for that report. Report catalogs include information about the purpose of each report, the parameters you will need to enter, where the data comes from, and other useful details.
- Use the checkboxes to select frequently used reports and click Add to Favorites to add them to a tab that will contain just your selected reports.

3. Clicking a report name takes you to the Parameters page for that report. Here you need to fill in the details about your report request. Use the Lookup icon ( ) to search for unknown parameter values or to select multiple values from lists.

Common parameters include:

- **My Request Name** – A title you give to this report request
- **Output Type** – The format you want to receive your results in (PDF, Excel, Text, CSV, or BQY)
- **As Of Date** or **Date Range** – The date you want to draw reporting data from
- **Includes** and **Excludes** – Checkboxes you can use to keep or discard certain types of data

4. After entering your parameters, click one of the action buttons.

- Submit Now – Sends this report request to the servers for immediate processing
- Schedule – Lets you run this request overnight, on a future date, or on a recurring basis
- Cancel – Aborts this request and brings you back to the Report Library page
- Save – Saves the currently entered parameters as a parameter set with a name of your choice

5. Submitting a report request will return you to the CREW home page. This screen shows you the status of the reports you submitted in the last seven days as well as future scheduled reports. Check for updates to by clicking Refresh.

6. Once a report completes, the results can be viewed. Click the report icon (, , , or depending on the selected output format) to open the results in a new window. From this window you can save or print the results or copy the text to paste elsewhere.

7. To resubmit a completed report, click . This takes you to the Scheduling page where you can launch a copy of the original report. From there you can click Change Parameters if you want to adjust the parameters for the new version of the report.

For more details, view the online tutorial at http://able.harvard.edu/crew/ or call the Help Desk at 6-2001.