

CREW Tips & Tricks


Submitting Report Requests

Report Library page hints


1. All CREW users see the *My Favorites* and *All* major category tabs. The other tabs are dependent upon user access.
 - The *Finance* and *Public* tabs only appear if a user has an active HDW% responsibility established in the Oracle Financials source system.
 - The *Human Resources* tab only appears if the user has an active HDW% responsibility established in the PeopleSoft source system.
 - The *Grants Management* tab only appears if a user has an active role established in the Grants Management Application Suite (GMAS) source system.

2. **Sorting** – By default, reports are sorted on the Report Library page major category tabs by Report Code, and will display that way when you first navigate to the page after login. You can, however, optionally choose other sorts by clicking on the Category, Report Code, and Report Name column headings. Once you have clicked on the heading an up or down arrow will appear next to it, indicating the direction of the sort. The down arrow indicates an ascending sort, and the up arrow indicates a descending sort. Clicking on the selected heading a second time will change the sort order.

Note: If you choose a sort other than Report Code, the setting will remain as you set it until you exit CREW regardless of the limits you place on the list of displayed reports or the times you navigate out from the page and back again. To return to the default sort, you need only click on the Report Code column heading.

3. **Report Codes** – The last three characters of the Report Code are unique. Therefore, searching for *075 on the Report Library page will always bring back only one resulting record. Note also that the first two letters are an abbreviation for the report's corresponding category.
4. **Report Category Picklist** – You can use the drop-down report category picklist and the  button to filter the list of your reports to show only those associated with a particular category (e.g. Human Resources, Payroll, General Ledger, etc.). Note: the picklist will only show categories associated with reports for the major category tab

(My Favorites, All, Finance, etc.) you are on.

5. **Display All Reports** – If you have previously used the Report Category picklist or the text-search to limit the reports displaying on the major category tab, you can use the Display All Reports and  buttons to reset the tab to the default list of reports.
6. See below for [hints on entering search criteria](#) on the Report Library page and in CREW parameter lookups.

Using wildcards for searches

The “*” wildcard is implicitly added by CREW to the end of every search string you enter (although you will not actually see it).

However, you must explicitly add a wildcard character to the front of a search string in order to find cases where the search string does not fall at the beginning of the value being searched.

Use the following wildcard characters in your searches:

Use this character...	...to represent
* or %	0 or more characters
_ or ?	1 character

For example, searching for “**Depart**” will return:

Departmental Inquiry
Department Summary
Departing Employees

While searching for “***Depart**” will instead return:

Detail Department Report
Departmental Inquiry
Department Summary
Departing Employees

Parameter lookup tricks

1. “ALL” means **all displayed on that single page**.
2. “INV” means **all displayed on that single page, *except the items that have been selected***.
3. The lookup window may not display the buttons on the bottom of the page. Scroll down to the bottom of the lookup window to click the OK or CANCEL buttons.

Scheduling Options

Once Now No nuances: this means exactly what it says. The report request will be scheduled to run at the time you click submit.

Once Tonight Schedules the report request to run at 12:00:01 a.m. the next morning.

For example, if you schedule a report to run “Once Tonight” at 10:00 a.m. on 5/19, the request will show on your home page as scheduled for 12:00 a.m. on 5/20.

Once on _____ You will need to actively select a date; no default date will be assigned.

Important note: If today's date is 5/18 and you enter the date 5/18, the report will kick off immediately.

Here's why: By entering today's date, you have just told the system to run the report at 12:00:01 a.m. on 5/18. Since in all likelihood you have scheduled the report during working hours, the system will correctly identify that midnight has passed, and will schedule the report to run immediately. So in this context Once On [Today] is equivalent to Once Now.

Once on Event Schedules the report request to run at 12:00:01 a.m. the morning after a scheduled University business event, currently the close of the prior accounting period (5th working day of each month), the fiscal quarter or year-end closes.

Important note: The dates for the scheduled events are always calculated forward in time from the submit date. Only the next scheduled event will show on the user's CREW Home page. Accounting period event schedule dates are calculated based on the closing schedules maintained in the Oracle General Ledger.

If an upcoming event does not yet have a date in Oracle, CREW will display a schedule date of 12/31/2999. The day after the date(s) for an event is entered in Oracle, any requests with the 12/31/2999 default will be updated to the correct date.

If a previously scheduled event date is changed in Oracle (e.g., the month-end close is delayed), all of the requests scheduled for the event will be updated in the next nightly load process. As part of the nightly schedule, updates to event dates are given precedence over scheduled report requests, so any changes to the event dates would be accomplished before any report requests launched.

**Repeat Daily
Until _____**

1. The **default until date** is set to three years from the current date, but can be changed to any date between today and five years from today. You can and should change this to a date that makes sense for your business process.
2. Try to avoid using dates far in the future. Too often users schedule reports to run indefinitely and forget to go back and end the schedule when their business needs or job duties change and they no longer require the report to run. Report requests that are never used take up valuable system resources that could be used to serve other business purposes. This is true for all recurring reports, but especially for reports that repeat daily.
3. Always use a date greater than today. If you enter today's date, your report will be scheduled for midnight today, a time that has already passed. CREW will correctly identify that midnight has passed, and will schedule the report to run immediately. No other requests will be scheduled thereafter, because the Until ____ date has passed.

**Repeat Weekly
on [Day of
the Week]
Until _____**

1. The **default until date** is set to three years from the current date, but can be changed to any date between today and five years from today. You can and should change this to a date that makes sense for your business process.
2. Be careful to make sure that the date you've selected as [Day of the Week] coincides with the end date you've entered in the Until field.

For example, if you have chosen Sunday as the day of the week, you should choose an Until date that falls after the last Sunday you want the report to run.

3. As above, if you want transactions through Sunday, you should choose Monday as the day of the week and enter a date that falls after the last Monday you wish the report run.

**Repeat
Monthly on
[Day of
the Week]
Until _____**

1. The **default until date** is set to three years from the current date, but can be changed to any date between today and five years from today. You can and should change this to a date that makes sense for your business process.
2. Note that the "Days of the Month" pick-list doesn't contain any dates past 28. Instead of the 29th, 30th, and 31st, the pick-list only contains an entry called "Last."

Why? Because the system needs to be able to derive a date to schedule each report for each month. If you were to schedule a report for the 31st of every month, CREW wouldn't know how to schedule reports for months with fewer than 31 days. Similarly, if you scheduled a report to run on the 30th of every month, it couldn't run for February, and would be run a day early for the months with 31 days.

The solution to this is to have a setting called "Last," which automatically derives the last date of the month. Users wishing to schedule a report just for the 29th for a month with 31 days can do that through the Once On _____ option.

**Repeat on
Event [Event]
Until _____**

1. Schedules the report request to run at 12:00:01 a.m. the morning after each in a series of scheduled University business events, currently the prior accounting period closes (5th working day of each month), the fiscal quarters or year-end closes.
2. The **default until date** is set to three years from the current date, but can be changed to any date between today and five years from today. You can and should change this to a date that makes sense for your business process.

Important note: The dates for the scheduled events are always calculated forward in time from the submit date. Only the next scheduled event will show on the user's CREW Home page. Accounting period event schedule dates are calculated based on the closing schedules maintained in the Oracle General Ledger.

If an upcoming event does not yet have a date in Oracle, CREW will display a schedule date of 12/31/2999. The day after the date(s) for an event is entered in Oracle, any requests with the 12/31/2999 default will be updated to the correct date.

If a previously scheduled event date is changed in Oracle (e.g., the month-end close is delayed), all of the requests scheduled for the event will be updated in the next nightly load process. As part of the nightly schedule, updates to event dates are given precedence over scheduled report requests, so any changes to the event dates would be accomplished before any report requests launched.

Managing Report Requests

Request sorting on the CREW home page

1. By default, report requests are sorted on the date and time shown in the Date column in descending order regardless of status, and will display that way when you first navigate to the page after login. You can, however, optionally choose other sorts by clicking on the Request ID, Report Code, Report Name, My Request Name, and Request Status column headings. Once you have clicked on the heading an up or down arrow will appear next to it, indicating the direction of the sort. The down arrow indicates an ascending sort and the up arrow a descending sort. Clicking on the selected heading a second time will change the sort order.
 2. Only one sort order at a time may be imposed; that is, it is not possible to sort by Report Code *and* Date, or Report Name *and* Request ID, or any other combination of sort orders.
 3. If you choose a sort other than the default, the sort order will remain as you set it until you exit CREW regardless of the number of times you navigate away from the page and back again. To return to the default sort, you need only click on the Date column heading.
 4. For Scheduled and Pending requests, the Date column shows the date and time for which the request was or is scheduled. Therefore, by default scheduled requests will appear at the top of the list because their dates are always in the future.
 5. Requests and request groups in status “Schedule Later” do not display a date in the Date column; however, they will sort according to the creation date (or last update date) when a Date sort is selected.
 6. **Special Handling for Request Groups** – When request groups appear with independent requests on the home page, sorting on Request ID, Report Code, Report Name, My Request Name, or Status will sort the groups first by name, then will sort within the group on whatever column was selected, and finally sort the independent requests according to the sort column.
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Deleting vs. canceling a report request

When you **delete** a request, you are removing the output as well as the report request row from the list on your home page. For requests in queued, pending, running, or the various hold statuses, selecting delete will both cancel the request and remove the report request row from the list on your home page.

You might decide to delete requests in order to have only relevant requests remain on your home page. However, you should note that all completed, cancelled, and error report requests and their corresponding output are automatically deleted after a certain number of days as part of CREW's standard "housekeeping" activities (in order to preserve valuable space). See the [CREW housekeeping](#) schedule below.

Canceling a request leaves the request in the list on your home page in case you want to resubmit it; however, it will stop the original request from processing any further.

You might decide to cancel a request if you realize that you used an incorrect report parameter, or if you want to cancel an ongoing scheduled request from continuing to execute on its scheduled date.

Please note that canceling a scheduled request will only cancel the current iteration of this request. To cancel all future iterations, you should delete the scheduled request.

CREW housekeeping


Report requests and any associated output are deleted from the database according to a set schedule based upon request status as follows:

Report Request Status	Deleted after
Error	7 days
Completed	7 days
User Cancelled	7 days
Admin Cancelled	7 days
Queued	2 days
Pending	2 days
Running	2 days
Zone Hold	2 days
System Hold	2 days
Admin Hold	2 days
System Cancelled	0 days

Note: CREW never automatically deletes Requests in "scheduled" status.

**Canceling
scheduled
report requests**

Once you submit a report to run on a scheduled basis (e.g., Monthly), upon the completion of the report request (either complete, cancel, or error status), CREW will automatically submit the next scheduled request and you will see it listed on your home page.

Note: If a scheduled report request completes with the error status, CREW will automatically resubmit the next scheduled request. You will need to determine what caused the request to complete in error, and correct it by clicking the Edit Parameters  icon before the next scheduled run.

If you decide that you no longer want a scheduled request to run, simply delete the scheduled report request from the home page. That request will not run, nor will CREW schedule any future iteration.

Viewing Report Output

Row count on cover page

On certain reports, it is possible for the row count shown on the CREW Request Information page or the report header page to be different from the actual rows that display on the report. The reason for this is that the row count on the cover page reflects the total lines of raw data that were returned by the report's underlying query before any filters (parameters, security, etc.) were applied.

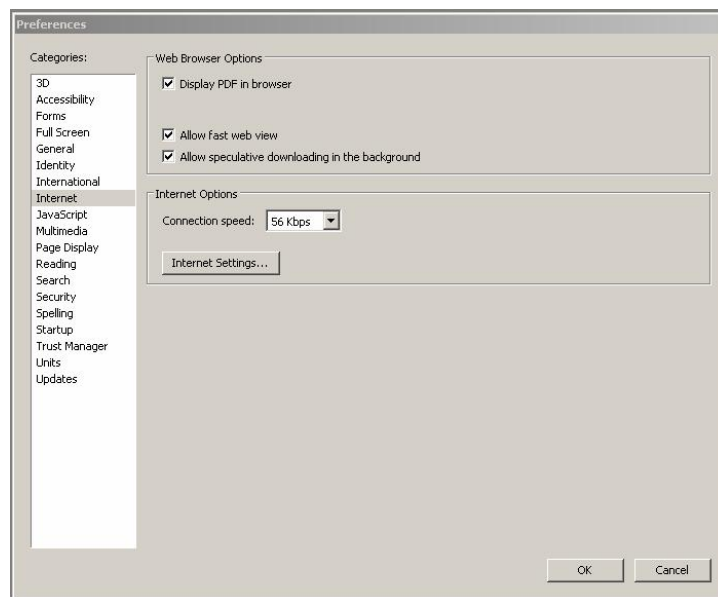
Saving report output to your desktop using IE

If you right-click on the request icon while using Internet Explorer as your browser, you will be prompted to save the output ("Save Target As..."). Note that this may not work in other browsers.

Blank open window after closing PDF report

To correct this problem, you will need to reset your Adobe Acrobat Reader Web Browser Options settings as follows.

1. With Adobe open on your desktop, select Edit > Preferences
2. Click on Internet
3. In the Web Browser Options section check all items listed, particularly "Display PDF in Browser" and "Allow speculative downloading in the background"



CREW Access and Security

Determining your HR security access

Run the security report *Individual-Data Permission List Lookup* (SCDPEMP041) to determine your access to HR data. This report will give you a list of each HR department you have permission to report on in addition to the names of each individual in those departments and their ID numbers. This report is especially useful for people new to reporting as it can help them better understand what access they have.

Note: Users with University-wide reporting responsibilities should not run this report, as the resulting file would be too large.

Determining your sponsored security access

Access to sponsored or grants management reports and data is derived from GMAS security privileges. For information on how to obtain sponsored projects reporting access, go to the GMAS project website at: <http://oas.harvard.edu/gmas/reporting.html>.

Determining your financial security access

Access to financial reports and data is derived from Oracle HDW responsibilities. For information on how to obtain access to CREW financial reporting contact your tub's authorized requestor at: http://able.harvard.edu/other/fin_auth_requestors.pdf

**Understanding
the CREW
Gateway and
System
Messages pages**

The **Gateway** page is the first page you encounter when you attempt to link to CREW. Its purpose is to display any current or planned exception messages and to identify recent problems with data loads. It also provides a button for you to log in to CREW. By presenting you with load exception information prior to login, you can decide if you want to log in to run a report or wait until the data load your report relies on has completed.

The **System Messages** page looks a lot like the Gateway page. But there are differences.

- You cannot log in from the System Messages page – you have already logged in at that point.
 - The System Messages page only shows you recent problems with data loads that correspond to your security rights. In other words, if you do not have rights to run any of the Financial reports, you will not see any information regarding loads related to Financials. By paring down the information on the System Messages page, you can focus your attention on only those things relevant to your reporting needs.
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