Using the Sponsored Project Reports WebViewer

Sponsored Project Financial Reports for Principal Investigators / Project Managers / Scope Investigators

As a faculty member with oversight of sponsored projects, we understand how important it is for you to easily access financial project information on a regular basis. We have therefore developed a way to electronically deliver pre-run reports to you in a PDF format on a monthly and quarterly basis. The purpose of this job aid is to provide you with guidance on how to access these reports, which will be for any Government Grant (GG), Private Grant (PG), or Industry Clinical Trial (IN) projects for which you are the Principal Investigator or Scope Investigator.

Note: The following instructions are based on Internet Explorer 8. Use of other web browsers will result in slightly different presentation and functionality.

In accordance with University policy, you will be timed out after a session has been inactive for 30 minutes or more. If you want to continue looking at your Sponsored Project Financial Reports after a 30 minute period of inactivity, you will need to re-authenticate by signing in again with your UNI and UNI password.

How will I receive these reports?

You will receive an e-mail, as follows:

- **From**: arcteam (ARC is the name of our financial system, Accounting and Reporting at Columbia)
- **Subject**: Sponsored Project Monthly or Quarterly Financial Reports
- **Frequency**: Monthly and quarterly, usually around the middle of the month after closing activities for the prior month have taken place

The e-mail will contain the following URL: [https://spreports.finance.columbia.edu](https://spreports.finance.columbia.edu). When you click on this URL, you will be asked to authenticate by logging in using your UNI and UNI password:
You can also find a sign-in button on the Quarterly Financial Review webpage on the Finance Gateway - http://finance.columbia.edu/content/quarterly-financial-review. The WebViewer button is half-way down the page, on the left.

**Using the Webviewer**

The tool available to help you with the quarterly financial review process is the **Sponsored Project Reports WebViewer**. It was developed to provide a way to electronically deliver pre-run reports to you in a PDF format on a monthly basis. As of April 2015, the Webviewer includes a new set of quarterly reports that can be utilized to review your project expenditures.

**The WebViewer**

Click the below button to open up the WebViewer. You will also be emailed this link whenever new reports become available.

**Go to WebViewer**

**Reading the Reports**

For each sponsored project or activity you following indexed on the left side of your screen:
- **Cover Sheet**
- **Sponsored Project Quarterly Financial Report (SPFR)** Summary
- **Sponsored Project Quarterly Financial Report**
- **Payroll Summary Quarterly Report**
- **SAPO Budget vs. Encumbrance Report**

If you are a PI with a project and also the Sponsor of that project, you will see the project listed first.

**Questions to Ask During the Review**

Before beginning a financial review, we suggest you review and ensure that all staff on your projects reflect the allocation. If effort is not correct, please contact your administrator. Learn more...

The purpose of this quarterly review is to ensure the appropriateness of expenditures on your project.

**Signing in to the WebViewer**

When signing in, your unique identifier (UNI and UNI password) will take you to the Sponsored Project Monthly Financial Reports WebViewer where you will see listed all of the sponsored projects and/or activities for which you are the Principal Investigator (PI), Project Manager (PM) or Scope Investigator (Scope I). **Note:** the report distribution excludes projects / activities that have been expired for more than 120 days from the end of the reporting month. The page defaults to the Monthly Reports view.
To access quarterly financial reports, click on the “Quarterly Reports” button.

**Information Presented**

The number of projects / activities listed is based on the number of sponsored projects owned by the PI / PM, and/or number of scope activities owned by the Scope I, for the particular month or quarter being reported on. Prior month or quarterly information is also available in the WebViewer by selecting a different accounting period.

1. Confirms authenticated UNI.
2. List of sponsored projects and/or scope activities that PI / PM / Scope I may review.
3. “Long Project Description” – click on this link to view reports for that particular project / activity for the month shown in the “Actt Period” column.
4. Ability to select a different (prior) accounting period and reports from that accounting period.
5. “Log out” option returns to the Authentication/Login Screen.
Organizing Information in the WebViewer

Note that columns in the WebViewer are sortable (alphanumeric, either ascending or descending) to allow you to organize the information in a way that is most helpful to you. For example, if you would like to view all of your projects / activities by Funding Agency, click on either the up arrow to organize in ascending order (a-z), or the down arrow to organize in descending order (z-a). Please also note that if there are more than 50 projects / activities to view, they will be on more than one page; click on the page number you want to go to, or just click “Next”.

List of projects / activities before sorting:

The list sorts, by default, by Project ID and then Activity ID.
To select multiple columns for sorting:

1. Select first column to be sorted, e.g. UNI (see below)

2. In order to select additional columns for sorting, hold the ‘Shift’ key and select additional columns. In this example the Long Project Description, Funding Agency and Short Project Description have been selected for sorting (see below). Note: Columns selected for sorting will have the column heading set to blue.
JOB AID

Where there are no projects or scope activities for a PI / PM / Scope I to review, the following screen will be seen after logging in:

If you do not see projects or activities listed that you would expect to see, please click on the “Refresh” button on the top bar of the WebViewer. In addition, you can refresh your browser by following the guidance in the “Clear Browser Cache Instructions” job aid [http://finance.columbia.edu/content/clear-browser-cache-instructions](http://finance.columbia.edu/content/clear-browser-cache-instructions). If you still do not see projects or activities listed that you would expect to see, please contact your Departmental Administrator or Senior Business Officer.

Once you have selected a sponsored project or activity for which you want to review the monthly financial reports, you will be prompted to Open, Save or Cancel the file (note: the download prompt is browser specific). If you just want to review the information but not save it, click “Open”. If you would like to save the PDF for future reference, click “Save”.

File Download

Do you want to open or save this file?

Name: 7543903_GG010017_fy2013_8_IC2265.pdf
Type: Adobe Acrobat Document, 353KB
From: sprereports.finance.columbia.edu

Open  Save  Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
There is also the option to download all reports shown on the page (up to 50) into one single PDF. If this option is chosen (see below) a separate tab will be opened in the browser. Please note that depending on the number of reports that are being downloaded, it may take several minutes to connect while the consolidated PDF is being compiled.

Monthly Reports

For GG or PG projects / activities, the following will be listed on the left side of the screen:

- Cover Sheet
- Sponsored Project Financial Report (SPFR) Summary*
- Sponsored Project Financial Report (SPFR) Detail
- Payroll Summary Report*
- Payroll Detail Report
- Purchase Order Open Commitment Report**
- Project Cost Summary/Overrun Report***

For IN projects / activities, the following will be listed on the left side of the screen:

- Cover Sheet
- Non-Sponsored Project Financial Report (Non-SPFR) Summary*
- Non-Sponsored Project Financial Report (Non-SPFR) Detail
- Payroll Summary Report*
- Payroll Detail Report
- Purchase Order Open Commitment Report**

Quarterly Reports

For GG or PG projects / activities, the following will be listed on the left side of the screen:

- Cover Sheet
- Sponsored Project Quarterly Financial Report (SPFR) Summary*
- Sponsored Project Quarterly Financial Report (SPFR) Detail
- Payroll Summary Quarterly Report*
- Payroll Detail Quarterly Report
- SAPO Budget vs. Encumbrance Report **
For IN projects and activities, the following will be listed on the left side of the screen:

- Cover Sheet
- Non-Sponsored Project Quarterly Financial Report (Non-SPFR) Summary*
- Non-Sponsored Project Quarterly Financial Report (SPFR) Detail
- Payroll Summary Quarterly Report*
- Payroll Detail Quarterly Report
- SAPO Budget vs. Encumbrance Report **

Notes

*If there is no activity on the SPFR Summary or Payroll Summary Reports for the accounting period, then the corresponding detail reports will be blank. In addition, the Open Commitment Report will be blank if there are no open purchase orders in the system.

**On the PO Open Commitment Report, the amount shown under “PO Merchandise Amount” is not the original Purchase Order or SAPO amount; rather, it is the amount that was still available on the PO / SAPO at the time of conversion from old system to new in July 2012. Both the PO Open Commitment Report and the SAPO Budget vs. Encumbrance Report are not for a particular month or quarter (they are not time bound); rather, they are a snapshot in time as of the date shown on the report.

***The Project Cost Summary Report is not limited to a specific project, but rather will show all projects associated with a particular PI/PM UNI and will be included in each report set. Note: the activity report set may be blank if the activity investigator (Scope I) is not a PI / PM on any project.
Viewing Reports

You can view reports by clicking on the Bookmark (left side of screen), or by using the up and down arrows associated with the page numbers on top of the screen.

Note: For Industry Clinical Trials (project ID’s beginning with “IN”), the project description may be blank, or populated with a “short description”.

Options are also available to print and zoom in and/or out.
Please remember that these reports contain sensitive data, including payroll information, and as such, discretion should be used when sharing reports, i.e. only share with others who have the appropriate security access to this information. This reminder is also on the cover sheet of the report set.

Note: Although the PDF reports appear to be different sizes when viewing them on your computer screen, all will print appropriately on letter size (8.5 x 11) paper.
When you are finished viewing specific financial reports for a particular project, click on the “X” in the top right corner to close/exit from the report set.
Documenting a Quarterly Review

Some schools or departments may have their own documentation process for quarterly financial reviews, while others might choose to use the documentation template provided on the WebViewer.

To document a quarterly review using the WebViewer template, navigate to the project listing page, then click on the PDF icon off to the right, in the Project Review column. There is also an option to open All Project Reviews at once.

Specific documentation actions and archiving guidance will come from your school or department.

Options may include using the WebViewer Project Review template which includes the following sections:

- Review language
- PI signature
- Administrator signature
- Space for notes about your review or questions/errors/follow-up items

The Project Review document contains review language and places for needed signatures. If expenditures require further investigation by an administrator, a space is provided for notations.
The Sponsored Project Quarterly Summary Attestation (SPQSA) document summarizes all of the Projects and Activities that the Investigator is responsible for within a particular department and has the same sections as the WebViewer Project Review template. This allows for a single signature per Investigator for all their Projects/Activities within one department rather than one per Project.

If a PI manages Projects/Activities across multiple departments, then one SPQSA document will be generated for each department.

Click the “Long Project Description” link or the “Project Review” icon to view the SPQSA document.

The SPQSA documents are included in both the "Download all reports (PDF) on this page” and the “Download all Project Reviews (one PDF) on this page” functions.

Follow the directions provided by your school or department as to how and where these documents should be kept.

Getting Help

If you have questions or feedback regarding the sponsored project reporting material, please speak with your Department Administrator or Senior Business Officer. If you have additional questions, please contact the Finance Service Center. You can log an incident or request a service by using a self-service web form, or contact the Service Center by phone: 212-854-2122.

Updated February 2018