Accessing the VU Grant Annual Expenditure Report in IRIS
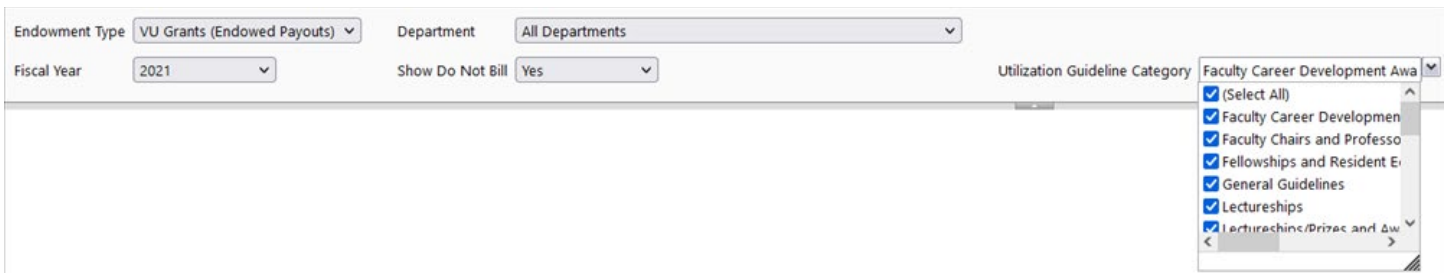
Login weblink for IRIS: https://finweb.app.vumc.org/apps/DOFAppIRIS/DOFAppIRISEndowments/

To run the Annual Report:

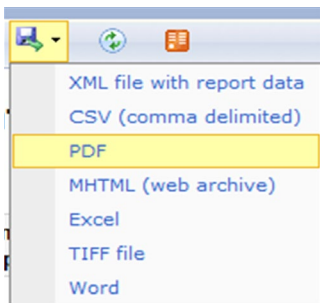**Select "Reports", "Endowments Annual Report (Internal)".**
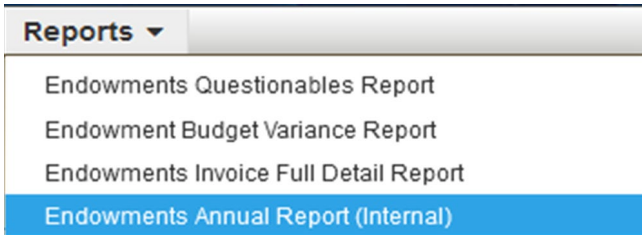
The following screen will appear:

- **In the first drop down box for Endowment Type, select "VU Grants (Endowed Payouts).**
- **In the second drop down box for Department, select your department of responsibility from the list.**
- **Select "2022" for Fiscal Year and "Yes" for Show Do Not Bill.**
- **For the Utilization Guideline Category, make sure the default option of "Select All" is checked.**
- **Finally, to the right of the page, select "View Report". The report will appear on the screen.**

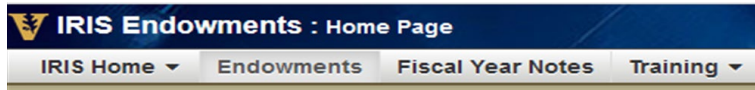**The report can also be printed. To print, select the Export Drop Down menu and choose from the options below.**

The VU Grant Endowments Annual Report (Internal) is made up of the following:
- **Page 1: Summary of VU Grants for Department**
  - o **The Endowments Completed column provides the number of awards approved by the CBO out of the total number of VU Grant awards.**
- **Pages 2 and Beyond: Individual VU Grant Expenditure Reports. The number of reports should equal the number of VU Grants noted on the VU Grant Summary page.**
- **Following the Last Individual VU Grant Report: VU Grants Under 75% Spent Report.**

To approve the Annual Report:

Select "Endowments" from the IRIS Endowments: Home Page menu.

The following screen will appear.

Select "Apply Filters" at the bottom right of the page. The screen with all VU Grants for department will appear.

AO Approval

To approve a VU Grant Expenditure report, select the VU Grant from the list of centers.

The checklist tab for the selected VU Grant will appear. Under the Checklist tab, there is an option for Invoice Period. Make sure the correct invoice period is selected (should be June 2021). At the bottom of the checklist, the next to last task needs to be completed by selecting "Mark As Complete".

- Note 1: The first certification should be done by the individual responsible for the monthly VU Grant activity. Once this person has signed, their electronic signature will be in the Department column, rather than show "Mark As Complete".
- Note 2: This step should be completed prior to CBO approval (i.e. last checklist item).

CBO Approval

To individually approve a VU Grant Expenditure report, select the VU Grant from the list of centers. The checklist tab for the selected VU Grant will appear. Under the Checklist tab, there is an option for Invoice Period. Make sure the correct invoice period is selected (should be June 2021). At the bottom of the checklist, the last task needs to be completed by selecting "Mark As Complete".

- Note 1: The first certification should be done by the individual responsible for the monthly VU Grant activity. If this person has signed, their electronic signature will be in the Department column, rather than show "Mark As Complete".
- Note 2: The final sign-off task in the checklist is for the Chief Business Officer. Once the "Mark As Complete" button is selected, the electronic signature will be captured and the summary page of the report will be updated.

MULTIPLE APPROVALS: To approve multiple VU Grant Expenditure reports at one time, either click the VU Grants from the list of centers and select "Approve Selected" or if all VU Grants are ready for approval, select "Approve All". To select multiple centers, click on the VU Grant and with Ctrl held down, select other centers. The selected centers will be highlighted orange.

Please contact Lynn Capps if you need assistance or have any questions.