FAQs for VU Users
(VU PIs, Lab Managers, and Lab Members)

Working with Vouchers:
- How are vouchers added to iLab?
- How do I view my voucher information?
- How do I grant access to voucher funds for lab members?
- How do I purchase VUMC core services using voucher funds?
- What is the available balance of my voucher?
- Running Reports on Voucher Funds
How are vouchers added to iLab?

VICTR vouchers are activated via an overnight feed from the StarBRITE application. If the user that has been awarded the voucher has a VUMC lab group setup in their name, the voucher will automatically appear.

Since the vouchers represent funding from VICTR, a VUMC lab group will need to exist for the individual awarded the voucher. Therefore, **VU users that have been awarded voucher funds will have a special “VUMC Scholarship & Voucher” lab created.**

- This lab must be selected when placing an order with the VUMC core group in order to view and pay with the voucher fund.

**VUMC Users:** The PI will see their voucher in their “VUMC” Lab group.

- Example: Smith, Jane (VUMC) Lab

**VU Users:** The PI will see their voucher in their “VUMC Scholarship & Voucher” Lab group.

- Example: Johnson, Jake (VUMC Scholarship & Voucher) Lab

**Troubleshooting:** If you are unable to view your voucher in iLab, please contact the VUMC Office of Research support team at VUMCcores@vumc.org. To resolve, we will need the voucher redemption ticket associated with your award. The ticket will reference the VICTR award number (VR) and the name of the individual that received the award.
How do I view my voucher information?

PIs and Lab Managers can view the following information for each awarded voucher in the PI’s fund grid. *Only the PI and lab managers will have access to the PI’s fund grid.

- **Voucher Number** (i.e, V0000012345)
- Hover over the voucher number to view:
  - Expiration date
  - Core Name
  - Balance: the remaining amount available to spend

**NOTE:** To view the PI’s fund grid, click ‘My Groups’ in the left-hand navigation panel. Select the applicable lab group. Then click the ‘Membership Requests & Billing Numbers’ tab of the lab group module.
How do I grant access to voucher funds for lab members?

Once a voucher fund has been activated in iLab, the PI and/or the Lab Manager will need to grant access to the voucher fund for the PI, lab manager, and any lab members.

To access the fund grid and assign access to the voucher fund:

1. Click on my groups on the left side of the iLab page.
2. Click the lab name under the Labs/Groups I Manage section.
3. Click the Membership Requests & Billing Numbers tab to view the active center numbers for the lab.
4. All lab members and active funds will be displayed.
   a. Check the box on the row for the user to grant access to the specific fund number.
5. The system will automatically save your changes.
   a. All new changes will be highlighted green.
How do I purchase VUMC core services using voucher funds?

Once (1) a fund has been activated in iLab via the overnight feed from the StarBRITE application and (2) the PI or lab manager has granted a member access to the fund, the user can submit a reservation or service request with the core’s iLab site.

1. When requesting the service or reservation, select the applicable (VUMC Scholarship & Voucher) Lab.
   a. Example: Johnson, Jake (VUMC Scholarship & Voucher) Lab

2. Complete the service request or reservation request (i.e, complete the custom form).

3. In the payment information section:
   a. Verify the Billing Number option is selected.
   b. Use the bottom drop down field to select the voucher fund.

**Payment Information**

You may supply the Billing Number (optional)
Please select the payment method:
%

<table>
<thead>
<tr>
<th>%</th>
<th>Billing Number ▼</th>
</tr>
</thead>
<tbody>
<tr>
<td>100.0</td>
<td>V0000032307 - $15000.00 (Does not expire)</td>
</tr>
<tr>
<td>100.0</td>
<td>V0000032307 - $15000.00 (Does not expire)</td>
</tr>
<tr>
<td>100.0</td>
<td>4008007079 - Demo Test (Expires on December 31, 2019)</td>
</tr>
<tr>
<td>100.0</td>
<td>4045508911 - Test funds (Does not expire)</td>
</tr>
<tr>
<td>100.0</td>
<td>4043338914 - R01 Grant Funds (Does not expire)</td>
</tr>
<tr>
<td>100.0</td>
<td>1040662319 - test decription 1 (Warning: Expires on September 30, 2019)</td>
</tr>
<tr>
<td>100.0</td>
<td>4040661278 - R01 test funds (Expires on December 31, 2019)</td>
</tr>
</tbody>
</table>

**NOTE:** Voucher funds are core specific. You can only use your voucher to purchase services from the assigned VUMC core facility.
What is the available balance of my voucher?

Option 1: The remaining balance can be viewed in the PI’s Lab Group Module. (See the “How do I view my voucher information?” section of this SOP).

Option 2: The remaining balance can also be viewed when requested core services or making a reservation in iLab.
- The amount that displays next to the voucher number is the remaining balance amount.

Balance Notes: Any pending purchases will also encumber against the available balance in iLab. This includes:

1. Service added to an open project that have not yet been marked as complete.
   a. This typically happens when a core has provided an estimate/quote of services via the iLab application.
2. Pending reservations that have not yet occurred.
Running Reports on Voucher Funds

From the left menu click the “reporting” label. The reporting functionality within iLab will allow users to generate reports of amount spent of specific funds or across a Lab.

1. Click on the Reporting label in the left menu to navigate to the reporting module.
   a. Click Spending by all Labs I manage.

2. Select Load Default to load the iLab default report settings (recommended).

3. Enter the Report Settings:
   a. Select the date range for the report.
      i. Start Date: Day funding started
      ii. End Date: Today’s date.
   b. Select the date field: Select Purchase date.
   c. OPTIONAL: Click Charts & Tables to adjust and modify the reports that will populate.

4. Click Run Report to refresh the report.
To refine the report and specify the data down to the specific *voucher fund*.

1. Using the *filter panel* on the left side, *adjust the filters* (i.e., “payment number”) to refine the report.
2. Click *Apply filters*.
3. The report will update with data specific to those filters.
To review the expense activity, download the data or export the reports to excel.

1. Click Export
2. Select Source data as CSV/XLS.

3. An excel document will download. All activity set to charge to your voucher fund will be included.

4. Sum the Total Price column to calculate the total amount spent on your voucher fund within the specified date range.

5. Report Export Notes
   a. Billing Status column:
      i. ready_to_bill: Charge is included in either a pre-invoice or a final invoice
      ii. billing_initialized: Charge has been completed for billing. An invoice will be generated at month-end.
      iii. not_ready_to_bill: Activity requested by lab. This activity has not yet been marked ready to bill by the core; therefore, the work has not been completed.
         1. NOTE: This activity is only displayed if the “purchase date” is used in the report filters.

   b. Date columns:
      i. Purchase Date: Date the service was requested or date of reservation
      ii. Completion Date: Date the core completed the work and billed the charge.
      iii. Billing Date: Date the core finalized all charges for the period.
**Charts & Tables:** This information can also be viewed without generating an export file through the Charts and Table option.

1. In the report settings, click the **Charts and Tables** icon.

   ![Report settings](image)

2. Update the chart settings box:
   a. Click the **red x** to remove all the pre-populated charts.
   b. Click **Add a new chart or table**.

   ![Add, remove, edit and re-order charts and tables for this report](image)
3. Select the following options from the drop down options for each of the fields.
   a. Click the **green check** icon to save the filter choices.
   b. Click **Apply** to save the changes.

4. A **data table** for each cost center within the user’s purview will display.
User can save report settings including the Charts and Tables to quickly run as needed.

1. Enter the report settings.
2. Enter the Charts and Tables Settings
3. Run the Report
4. Click the Save icon.

5. Enter a name for the report. Click Save.
To run a saved report:

1. Click **Load saved**
2. Select the saved report.
3. Click **Load**

4. **Update the dates** for the report and click **Run report!**