FAQs for VUMC Department Administrators

Reporting & Invoice Review FAQ

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Can I see the details of the charges made against my VUMC Cost Center?

Yes! The system makes getting this information easy. You can use a number of report function to obtain detailed information about core products and services purchased on your billing numbers.

Reviewing Invoices

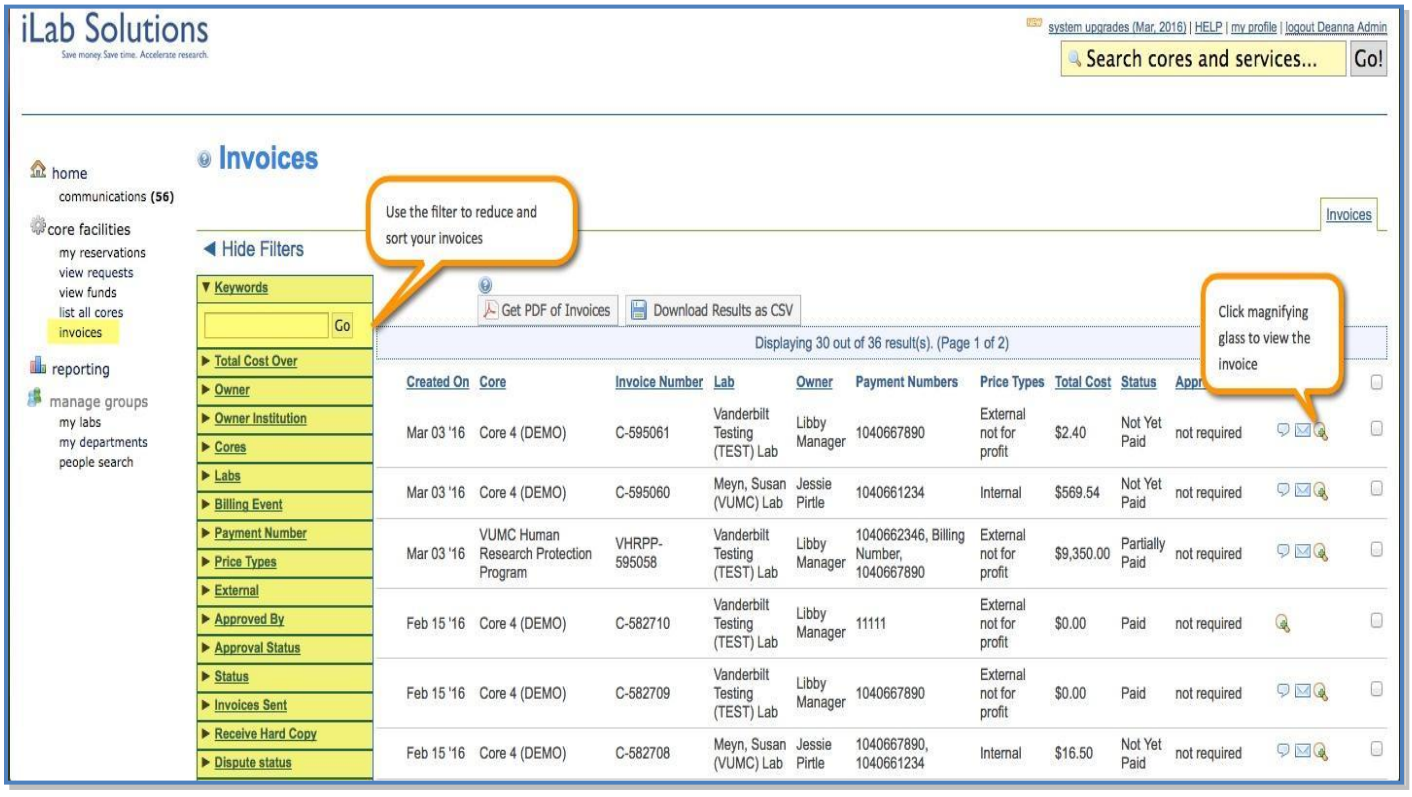
From the left menu, click the **Invoices** label to access invoice and pre-invoice reports. Users can view all invoices created by any core for any billing number connected to the user's department.

1. Click on **Invoices** in the left hand menu.

2. A **list of invoices will appear**.

3. **Use the filter panel on the left** to reduce and sort the invoices that display.
   a. **Example:** Use the '**payment number'** filter and select the invoice number. Click '**Apply Filters**'.
   b. **Example:** Use the '**keyword search**' and type in the invoice number. Click '**Apply Filters**'.

4. On the far right, click the **magnifying glass** to view the actual invoice.



What reports are available in iLab?

The reporting functionality within iLab will allow users to generate reports to see amount spent across billing numbers, PIs and cores.

1. Click on the **My Departments** label in the left menu to navigate to your department module.

2. Once your department module displays, click the **Reporting** tab.

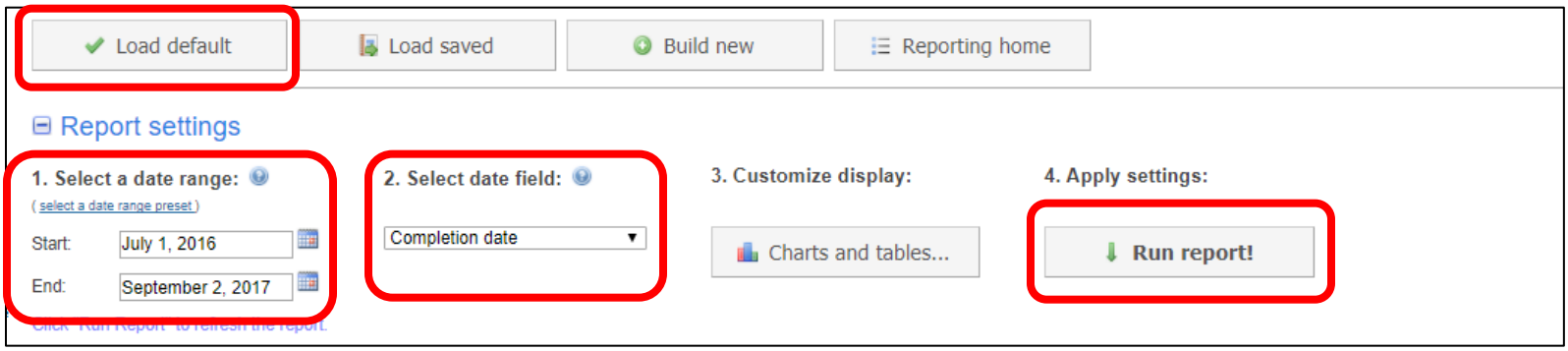
3. The reporting module will display. Select **Load Default** to load the iLab default report settings (recommended).

4. Enter the **Report Settings:**
    a. Select the **date range** for the report.

    b. Select the **date field:** Change to **Completion date.**

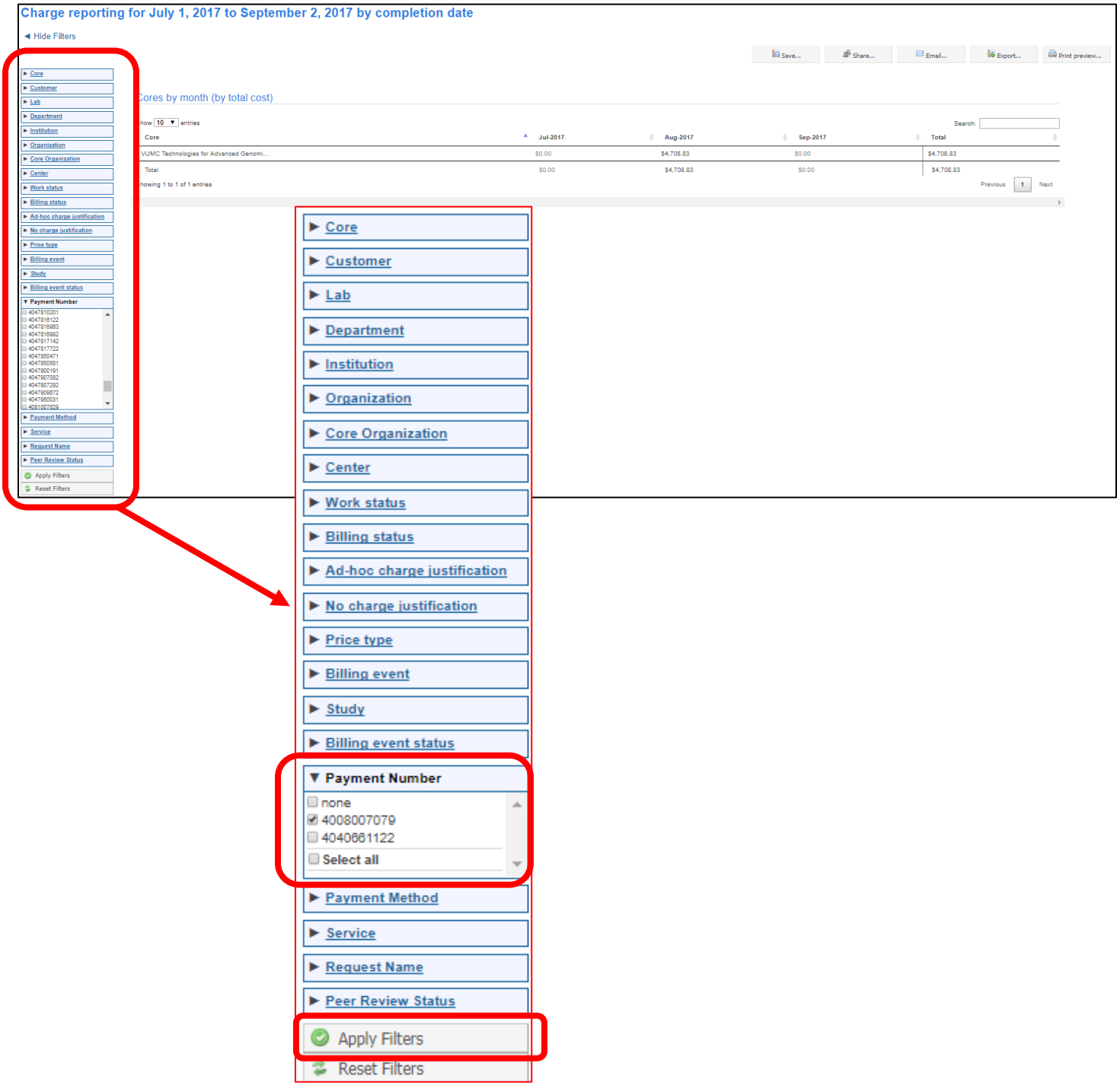
    c. OPTIONAL: Click **Charts & Tables** to adjust and modify the reports that will populate.

5. Click **Run Report**
    a. This will generate a high level report that will include charges across billing numbers, PIs and cores.



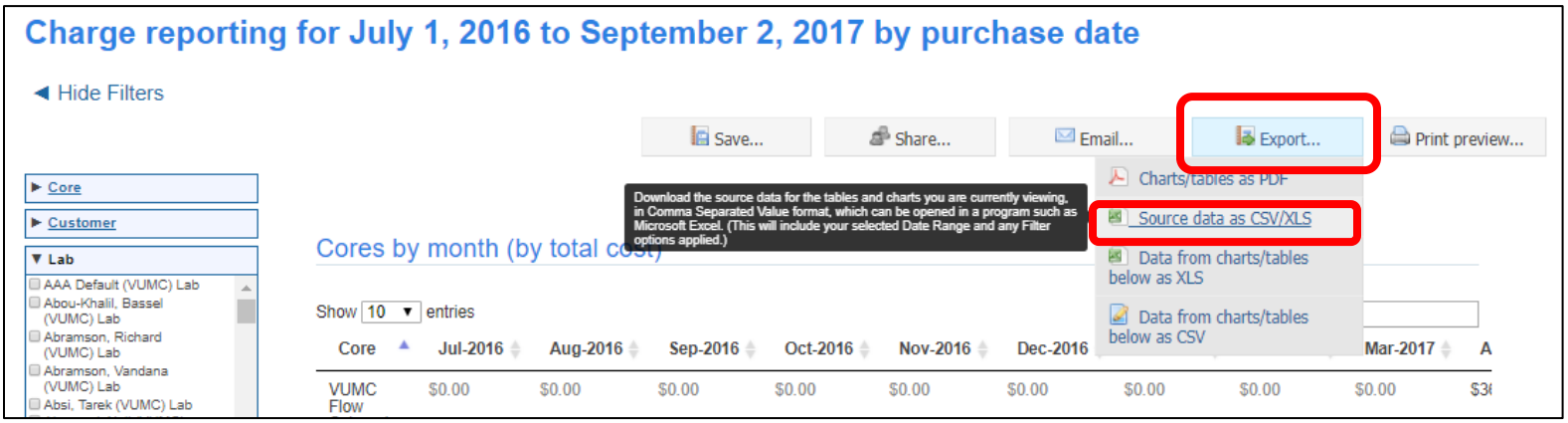
To refine the report and specify the data down to a certain PI, billing number (*VUMC center number*), and/or core.

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.**

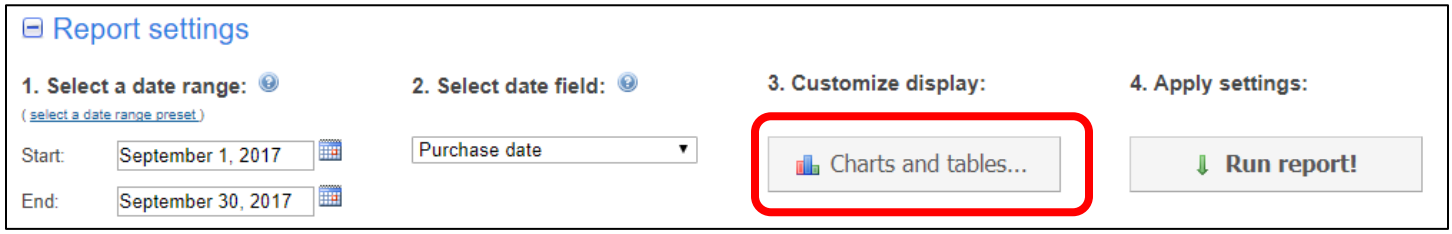
Report Export Notes

1. **Billing Status** column:
    a. **ready_to_bill:** Charge is included in either a pre-invoice or a final invoice
    b. **billing_initialized:** Charge has been completed for billing. An invoice will be generated at month-end.
    c. **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.
        i. **NOTE**: This activity is only displayed if the "purchase date" is used in the report filters.

2. **Date** columns:
    a. **Purchase Date:** Date the service was requested or date of reservation
    b. **Completion Date:** Date the reservation occurred or the date the core completed the work and billed the charge.
    c. **Billing Date:** Date the core finalized all charges for the period.

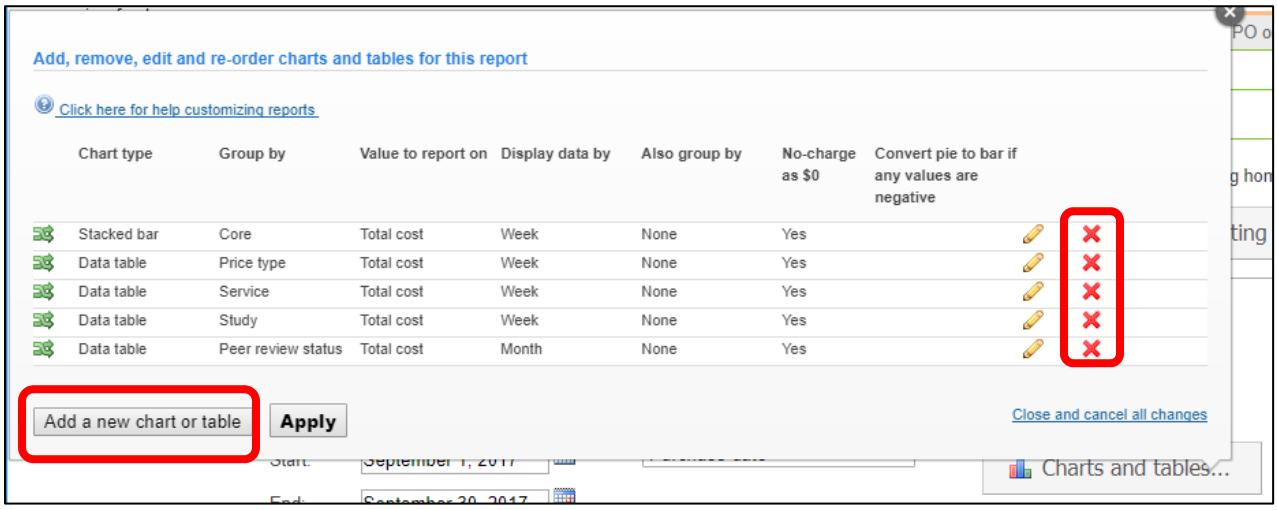
Charts & Tables: This information can also be viewed without generating an export file through the Charts and Table option.

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

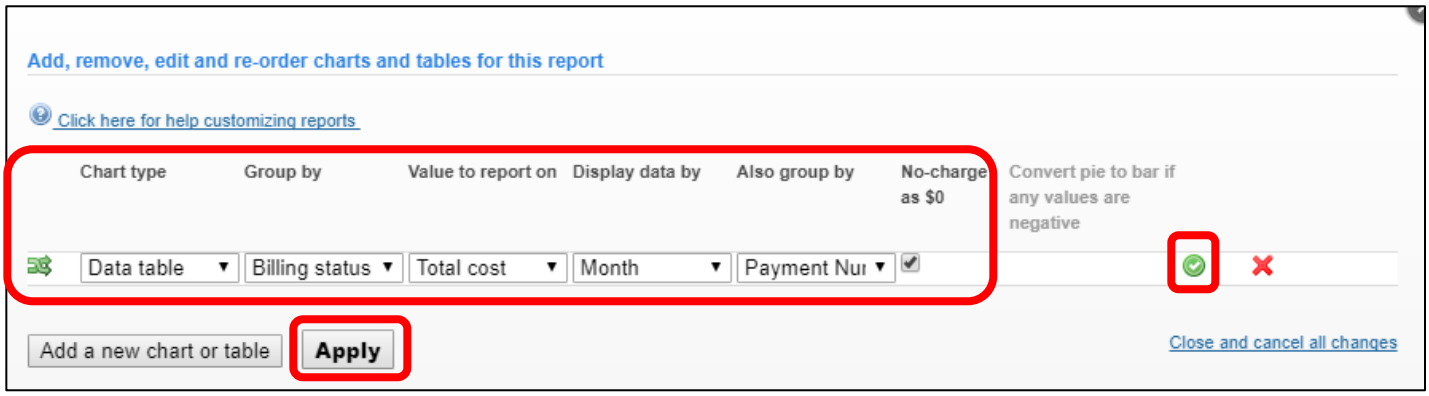


2. TIP: Click the red x to remove all the pre-populated charts.

3. Click **Add a new chart or table.**



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.

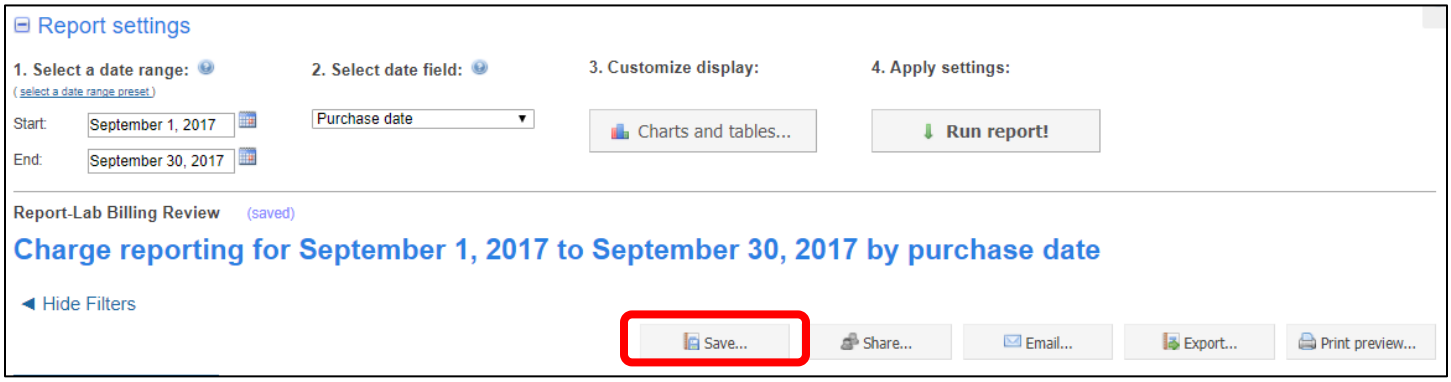


4. A **data table** for each cost center within the user's purview will display.
    a. Tip: Use the filter panel to drill down to a specific center number.

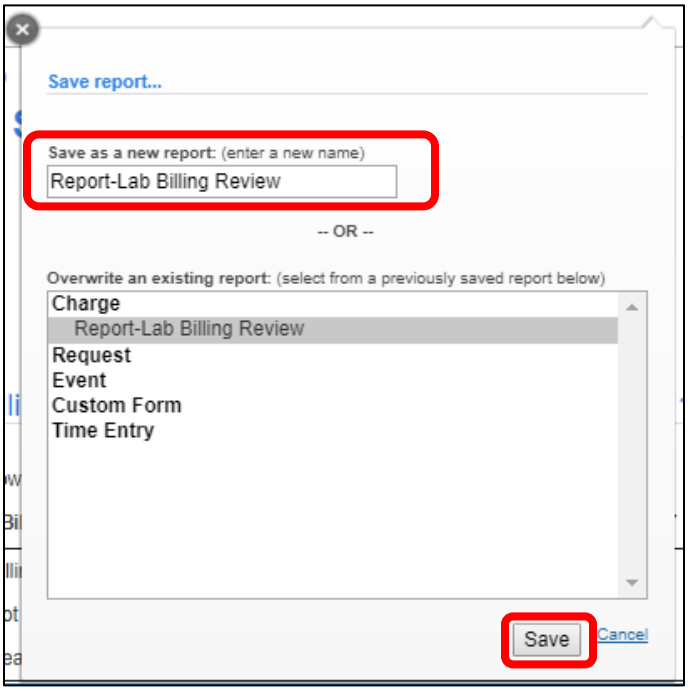
How can reports be saved so that the same report be generated again?

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.**

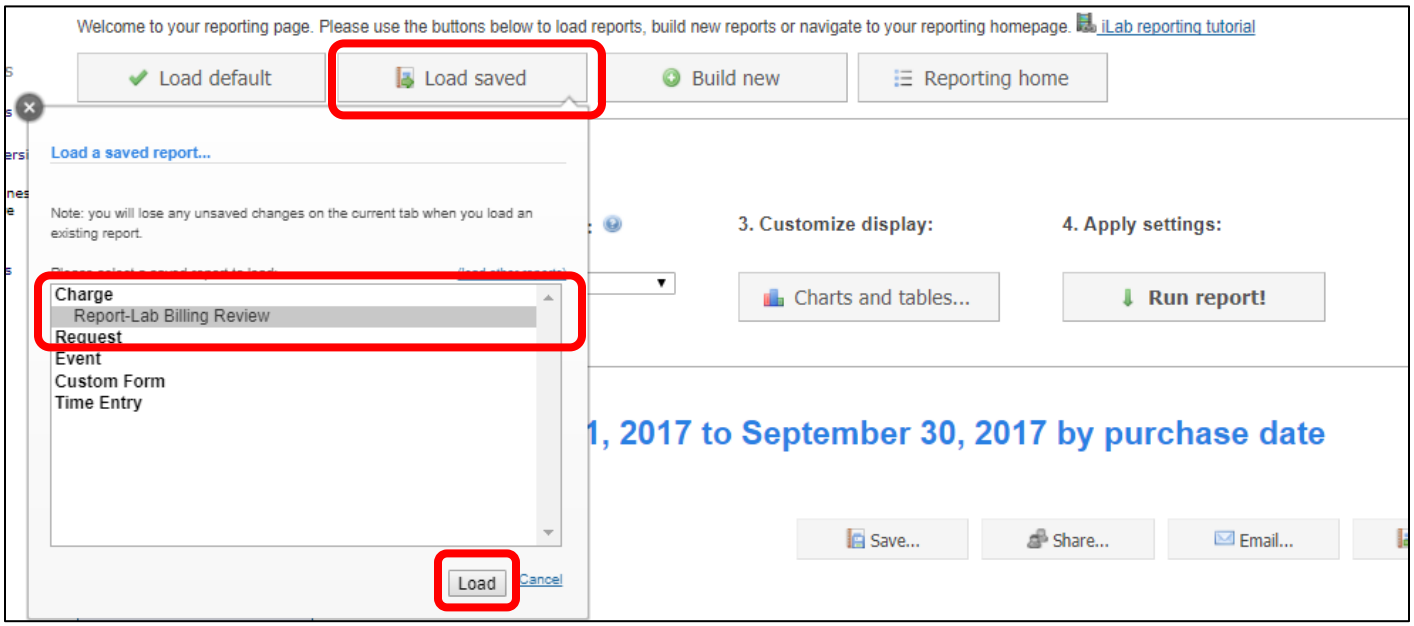


To run a saved report:

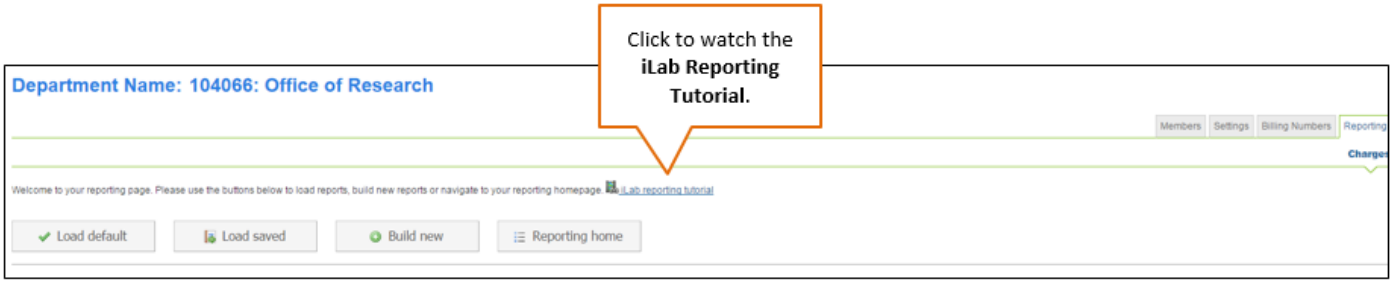
1. Click **Load saved**

2. Select the saved report.

3. Click **Load**



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

Reporting Tutorial

For additional details on available reporting tools in iLab, view the **iLab reporting tutorial**.