FAQs for VU Users

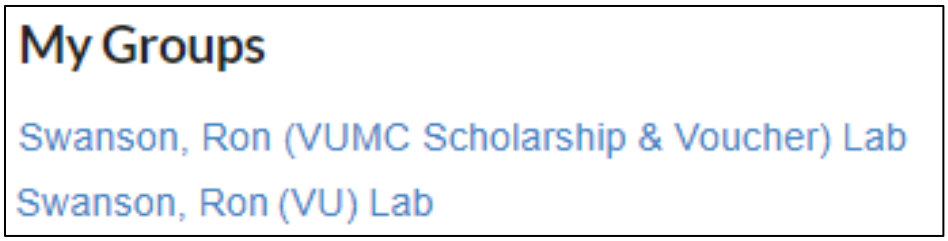
(VU PIs, Lab Managers, and Lab Members)

Working with Scholarships:

Important note regarding Scholarships for VU Users

VU users assigned scholarship funds for use in a VUMC core group will have a separate lab group to spend these funds.

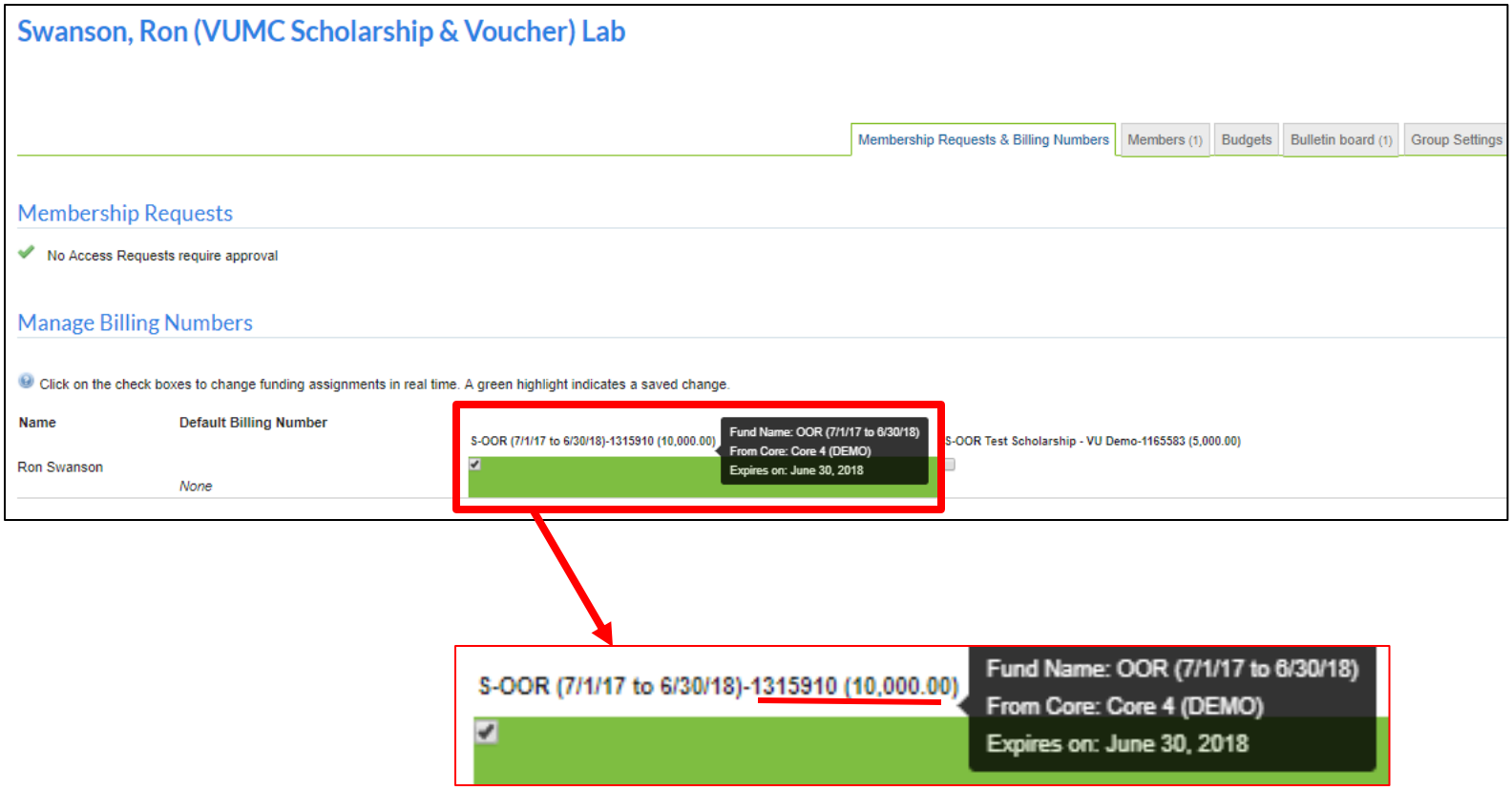
- **(VUMC Scholarship & Voucher) Lab**
  - VU labs should use this lab when managing or using scholarship or voucher funds.
- **(VU) Lab**
  - VU labs should use this lab when using VU funds.



How do I view my scholarship information?

PIs and Lab Managers can view the following information for each awarded scholarship in the PI's fund grid. The PI and lab managers will have access to the PI's fund grid.

- **Scholarship fund number** (i.e, 1315910)
- **Expiration date**
- **Core Name**
- **Awarded amount**



COMING SOON: iLab will be updating the scholarship functionality to display the remaining balance both in the fund grid in lieu of the awarded amount. This document will be updated when the functionality is released.

How do I grant access to scholarship funds for lab members?

Once a scholarship fund has been activated to iLab by the center administrator, the **PI and/ or the Lab Manager** will need to grant access to the scholarship fund for the PI, lab manager, and any lab members.

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

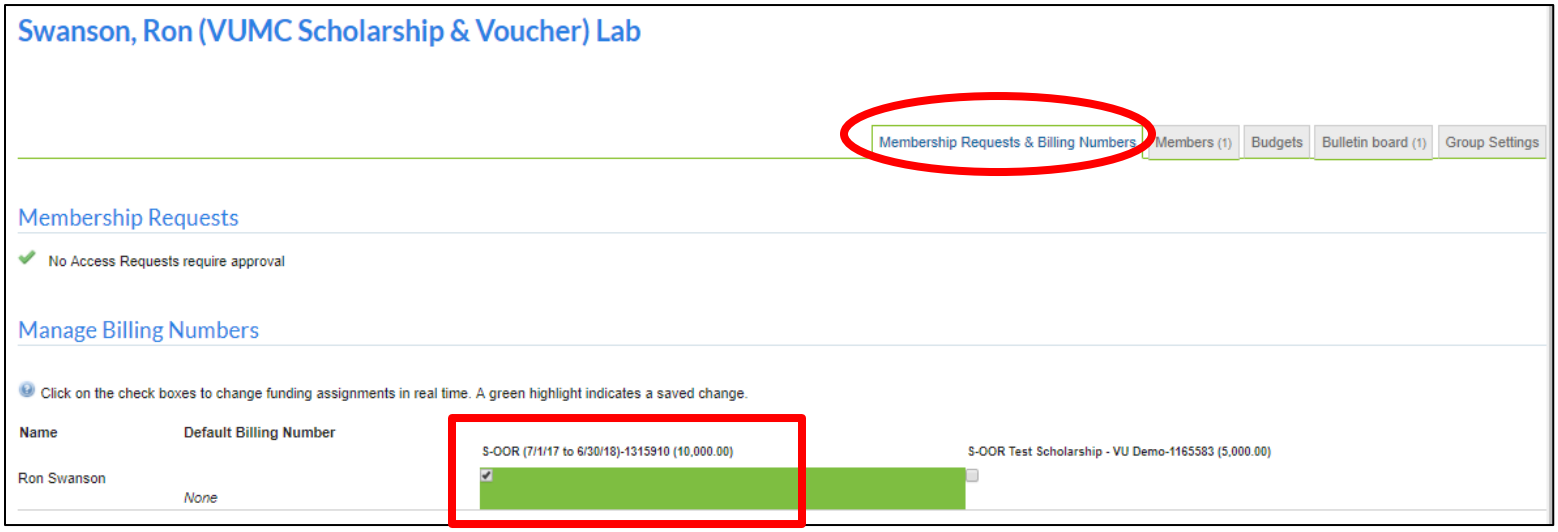
1. Click on ***my groups*** on the left side of the iLab page.

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 scholarship fund number.

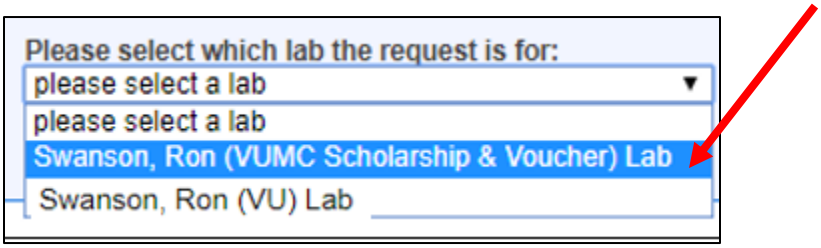
5. The system will **automatically save your changes**.
    a. **All new changes will be highlighted green.**



How do I purchase VUMC core services using scholarship funds?

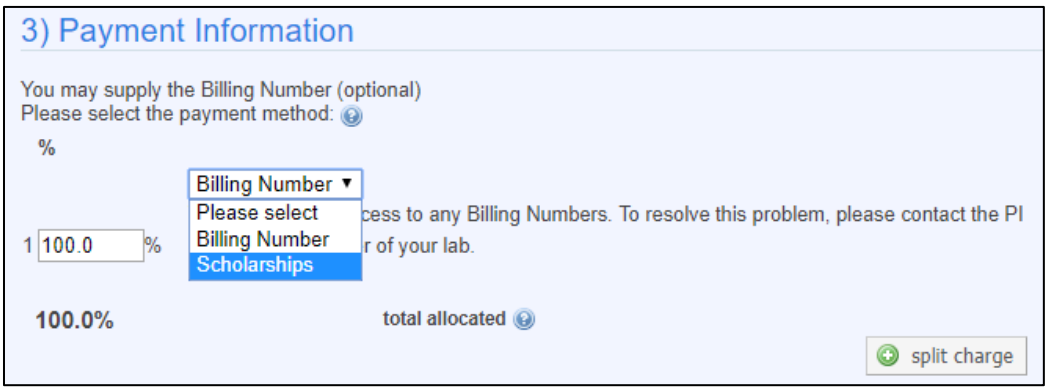
Once a scholarship fund has been activated to iLab by the center administrator and the PI or lab manager has granted a member access to the scholarship fund, the user can submit a reservation or service request with the core's iLab site.

1. When requesting the service or reservation, select the (**VUMC Scholarship & Voucher) Lab**.

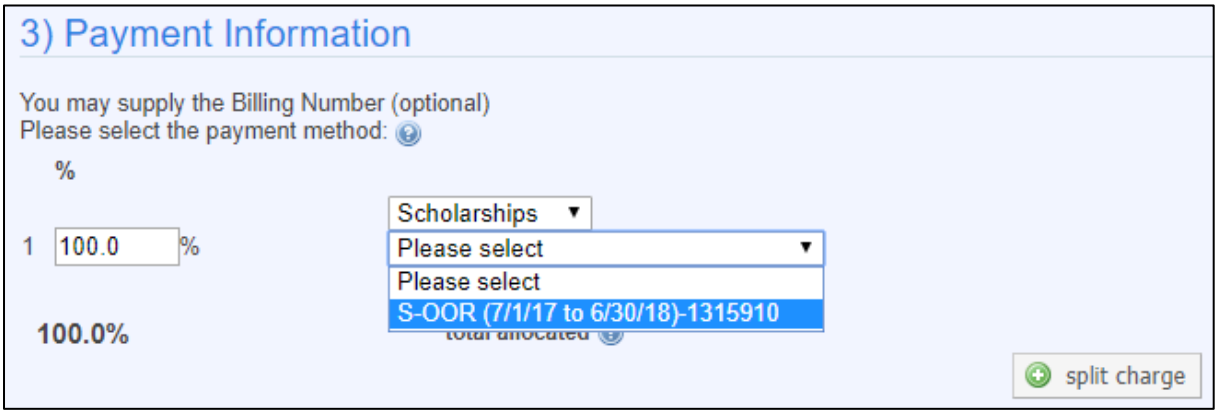


2. Complete the service request or reservation request (i.e, complete the custom form).

3. In the payment information section:
   a. Change **Billing Number** option to **Scholarships**



   b. Use the bottom drop down field to select the **scholarship fund.**



NOTE: Scholarship funds are core specific. You can only use your scholarship to purchase services from the assigned VUMC core facility.

What is the available balance of my scholarship?

The reporting functionality within iLab will allow users to generate reports to see amount spent per scholarship number.

If this is your first time running this report, use the following instructions to generate the report. We recommend **saving** the report as a template so it can be run as needed.

COMING SOON: iLab will be updating the scholarship functionality to display the available balance both in the fund grid and the payment information drop down menu. This document will be updated when the functionality is released.

Running Reports on Scholarship 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**

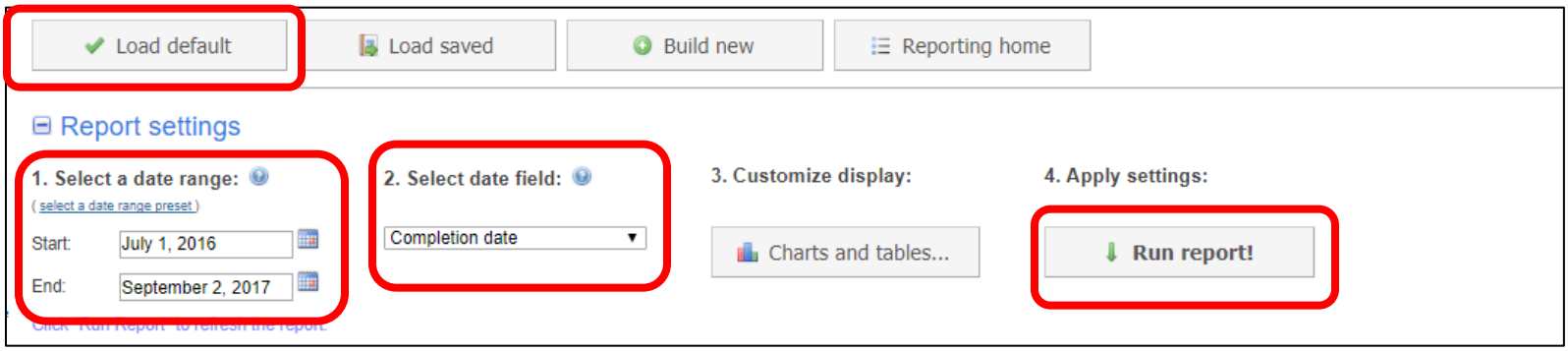
2. Select **Load Default** to load the iLab default report settings (recommended).

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:** Change to **Completion date.**

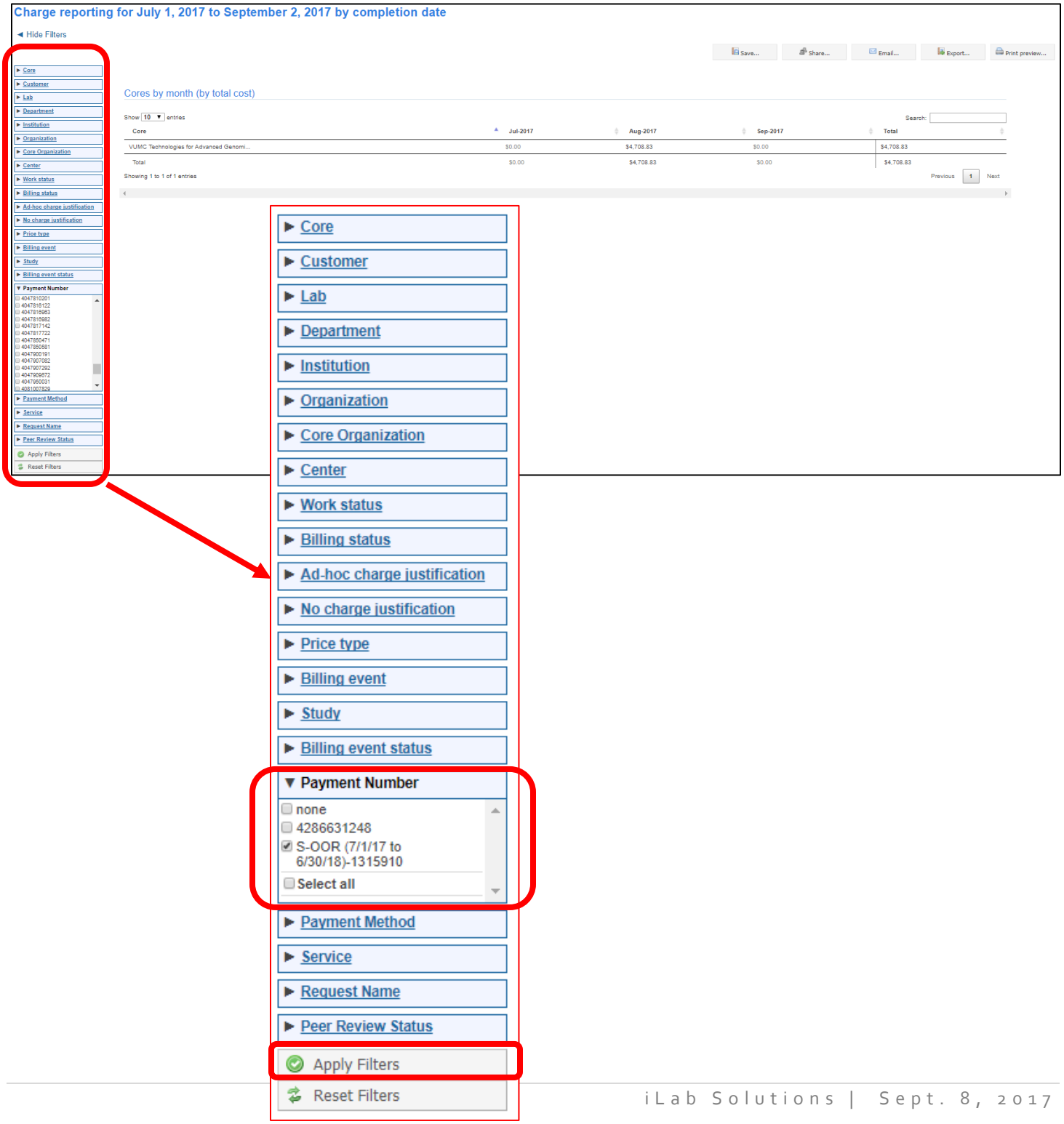
    c. OPTIONAL: Click **Charts & Tables** to adjust and modify the reports that will populate.

4. Click **Run Report**



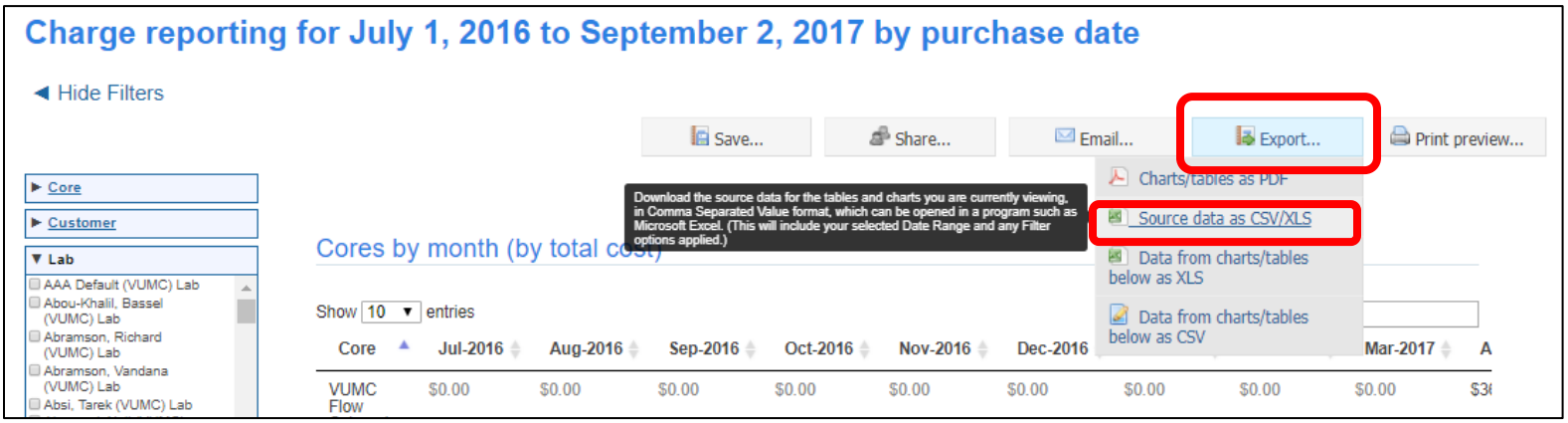
To refine the report and specify the data down to the specific *scholarship fund.*

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 scholarship fund will be included.

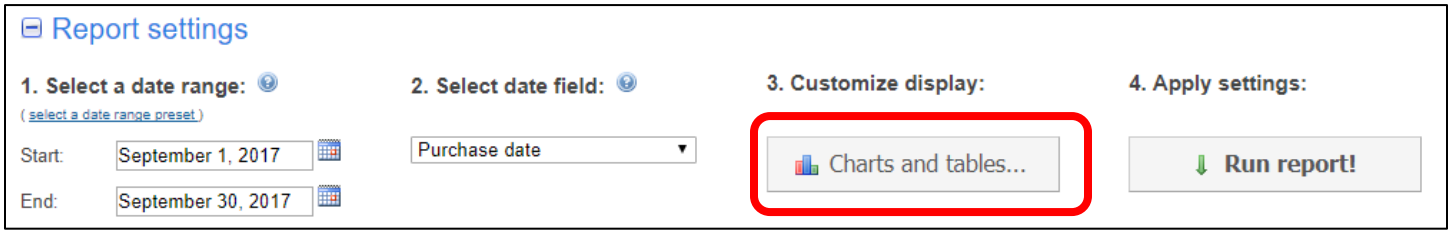
4. Sum the **Total Price** column to calculate the total amount spent on your scholarship fund within the specified date range.

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.

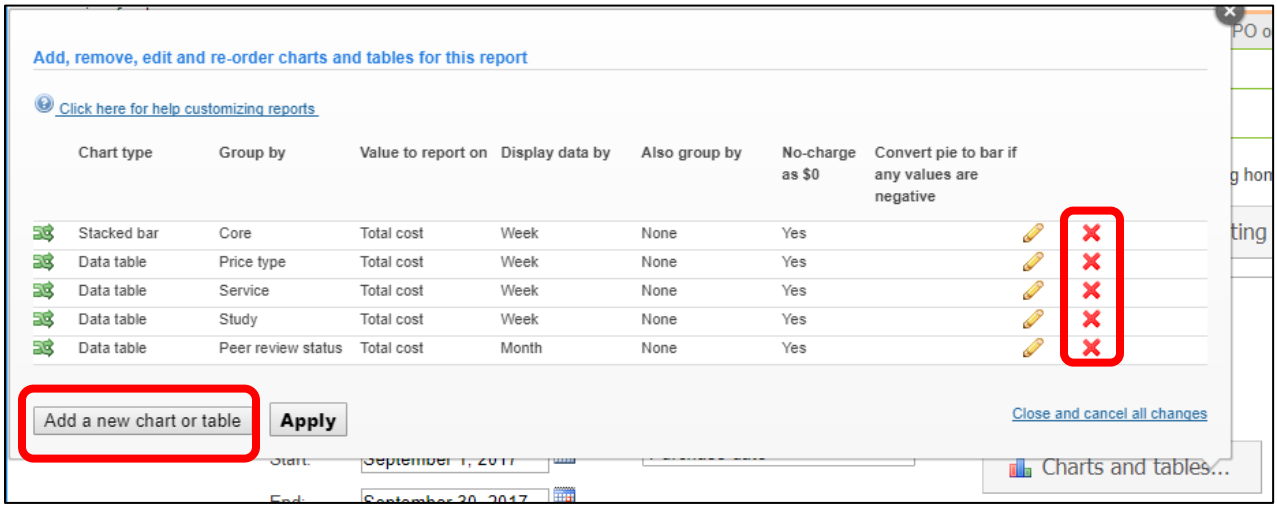
   b. **Date** columns:
      i. **Purchase Date:** Date the service was requested or date of reservation
      ii. **Completion Date:** Date the core completed the work and billed the charge.
      iii. **Billing Date:** Date the core finalized all charges for the period.

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

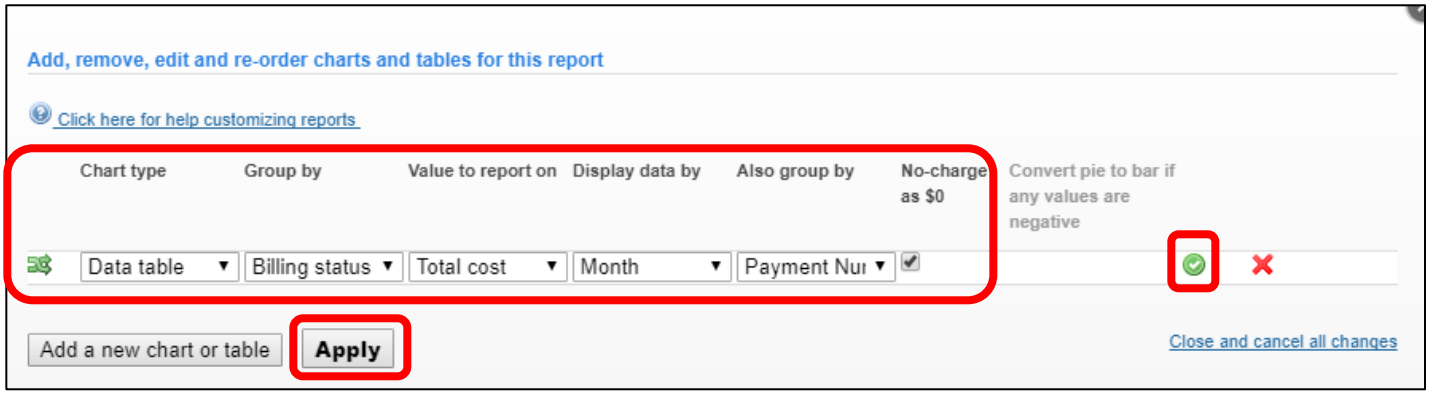
1. In the report settings, click the **Charts and Tables** icon.



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.**



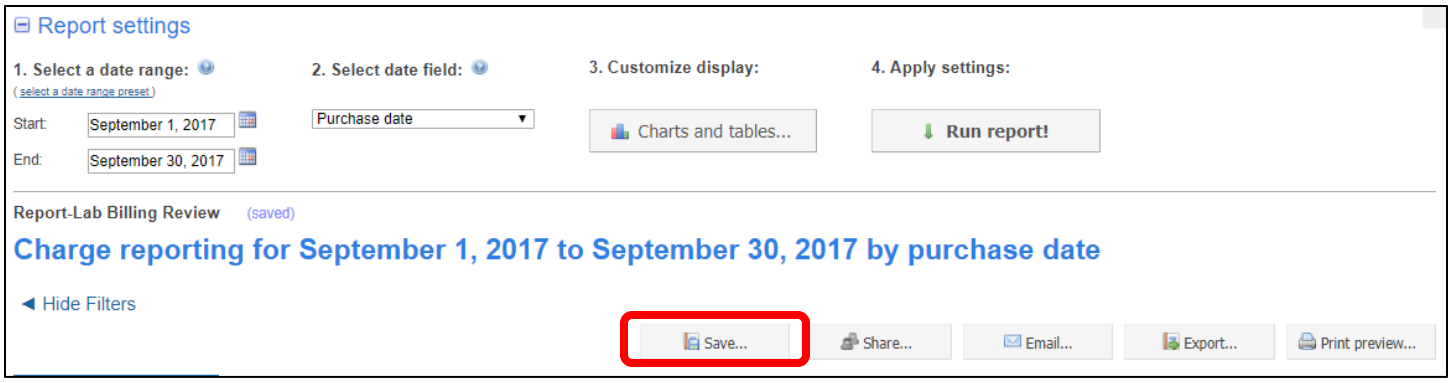
3. Select the following options from the drop down options for each of the fields.
    a. Click the **green check** icon to save the filter choices.
    b. Click **Apply** to save the changes.



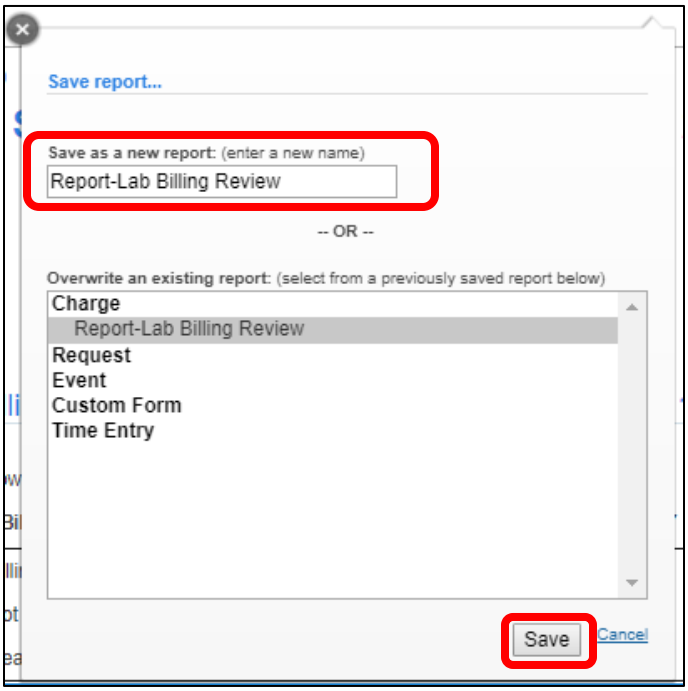
4. A **data table** for each cost center within the user's purview will display.

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.

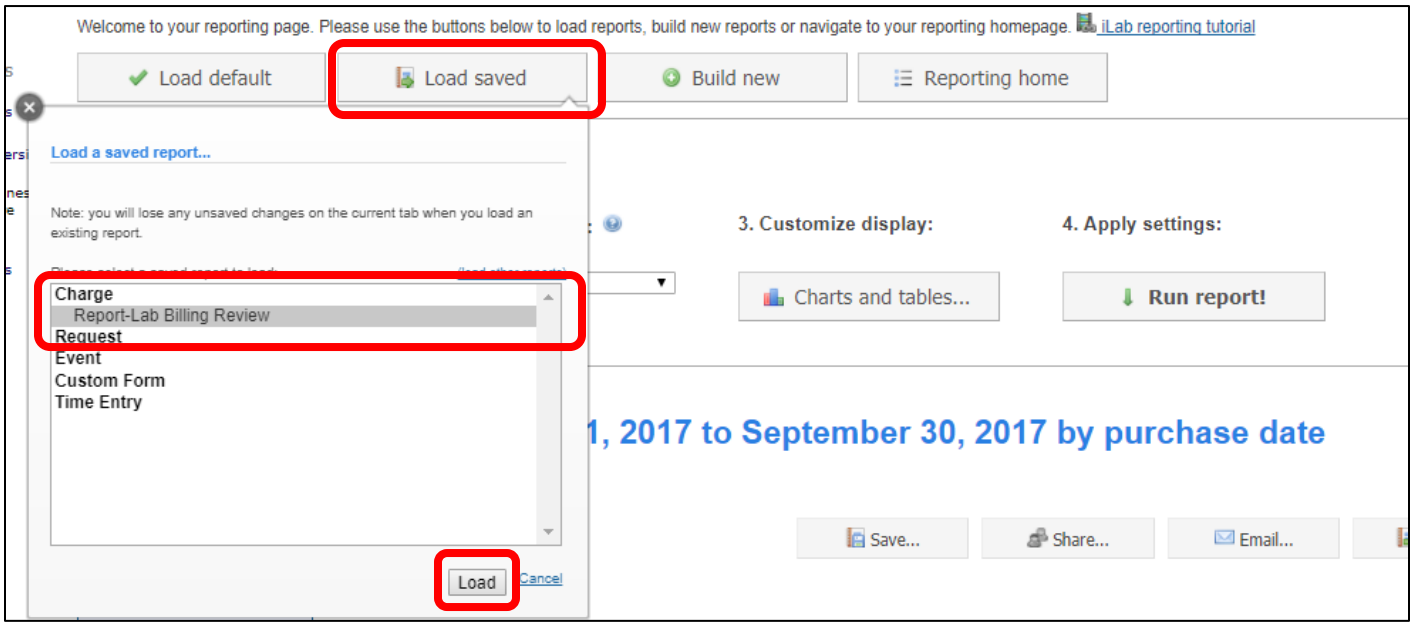


5. **Enter a name** for the report. Click **Save.**



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!**