CORES Quick Guide

Reports That Can Be Generated – SBO

1. Log in to CORES: [https://cores-usc.mis.vanderbilt.edu](https://cores-usc.mis.vanderbilt.edu). Enter your USC (Shibboleth) user name and password.

2. In the Sr. Business Officer Portal, click on Reports Menu. Dropdowns will illustrate the kinds of reports available.

   Reports can also be viewed in Excel/PDF.

3. The reports shown in the dropdown list are:

   - **Disputed Invoices** – Enables the user to locate disputed invoices by inputting information into required fields. Click [Submit](#) to view invoices.

   To search for invoices, fill out fields and click. To access invoices listed, click on an invoice number link. To print an invoice, check the box of the invoice to be printed and click on [Print Invoices](#).

   - **Invoice Report** – Enables the user to locate disputed invoices by inputting information into required fields. Click [Submit](#) to view invoices.

   To search for invoices, fill out fields and click. To access invoices listed, click on an invoice number link. To print an invoice, check the box of the invoice to be printed and click on [Print Invoices](#).
Pre-Invoice Report –

Choose a red PI link and click on it to view their Pre-Invoice Detail reports ↓.

PI Inactivity –

To check on invoice activity of any PI, fill out the needed information and click Submit.
PI/Accounts –

Clicking on PI/Accounts in the Sr. Business Officer Portal will bring up all of the accounts of the user whose name was selected in the Sr. Business Officer User Selection screen.

To locate a Query report, fill out all blank fields, including Group and Subtotal by, and Display.

Click .

The Reports – Query Results screen displays the search results.
Refund Report –

To generate a Refund Report, designate the search period, choose other details using radio buttons, then click Submit.

Account Number Summary Report –

To generate a Summary Report for an account, provide the PI’s name and click Submit.

Usage Reports –

To produce a Usage Report, select from the dropdown list/radio button choices and click Submit.
An example of a Usage Report organized by Service Cores and PI:

The report (in Excel) will look like this:

PI’s can generate a detailed usage report by selecting from the dropdown list/radio button choices and clicking .

The report (in Excel) will look like this: