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Institution, Core Facility and Lab Administration Reporting Overview

iLab Solutions provides a tool for institutions and cores to track facility usage and lab spending. iLab’s newly updated reporting feature allows administrators, whether from the institution, lab or facility, to run dynamic reports on usage and lab spending. Below are instructions on how to utilize iLab’s dynamic and flexible reporting tool.
How do I access iLab reports?

Depending on your access level in iLab, there are several different ways to access iLab’s reporting page.

- **Institution Administrators** can access institution wide reports by clicking on a report type from the reporting option on the left-hand side of the iLab page. Administrators can also go to any core’s page and click on the Reporting tab to run core specific reports. **Note:** If you want to see core usage from internal and external customers, click on Cores reports. If you want to see lab spending with internal and external cores for analysis, click on Labs reports.

- **Lab Administrators** can run lab usage and spending reports from the reporting option on the left-hand side of their iLab page.

- **Core Administrators** can access core specific reporting from the Reporting tab on the core’s page. The reporting on the left-hand side of the iLab page will include all reports with which they have access. If a Core Administrator is also a PI of a lab, he or she will have access to core reporting and lab reporting. If an individual is an admin to multiple cores, he or she can run reports for all of his or her cores using the reporting option on the left side of their page.
If you click on the reporting button on the left side of your iLab page, it will take you to your Reporting Home page. On the Reporting Home page, you will have access to all of your saved reports as well as links to any reports you can run. (Figure 2).

**Figure 1.** Administrators will see a reporting link on the left-hand menu, under core facilities. Hover over reporting to choose the report type you want to run.
Figure 2. The Reporting Home page gives you quick links to reports you have saved as well as reports that you can run.
What is the basic functionality of iLab's reporting tool?

When you first land on the reporting page, the Charge reporting will be the information displayed by default (Figure 3). With Charge reporting you can view and analyze data of actual services or charges rendered by the core. You can also click on the Requests tab to run reports on project or service requests. This tab will give general information on who made request and the length of time for overall project completion. On the final tab, the Events tab, you can access information on Equipment or Resource usage. This data is based on iLab’s Scheduling tool.
Building Reports

Charge Reporting

Figure 3. When you first land on the reporting page, the default view will be of the charge reports for the current month. Charge reporting allows you to view services rendered by the core. You can also choose to run Request reports and scheduled Event reports.
At the top of the reporting page you have four options. You can load the default report, load a saved report, build a report or go to your reporting home page. We will go through the steps for each action. First, let's go through building a report.

In order to build a new report, you must click on the Build new button then follow these steps:

- **Step 1:** Choose the date range.
  - You can select a date range by clicking on the calendar icon (□) next to the date field or by clicking on Select a date range and choose a preset date (*Figure 5*).
- **Step 2:** Choose the date field.
  - On charge reporting you can choose to create a report by Service date (the date the service was added to iLab), by Completed date (the date the service was marked completed) or by Billed date (the date that the service was added to a billing event).
- **Step 3:** Choose the kinds of charts and tables with which you would like to display your data (*Figure 7*).
- **Step 4:** Click on Run Report.
  - Running the report will apply any updates that you have made.
Figure 5. Click on **Select a date range preset** to choose a date filter preset.

Figure 6. After click on **Build new**, the report settings will show. Then follow steps 1-4 to build your report.
In step three of build reports, you can click on the *Charts and tables* button to update what charts and tables will be displayed. Below are a series of images describing the tools you have to build your charts and tables.

**Figure 7.** When creating a report you can update each chart and table.

In the *Charts and Tables* pop-up there are several options (*Figure 7*).

1. Click on *Click here for help customizing reports* for help and tips.
2. Use the drag and drop feature (⻋) to change the order the tables will appear.
3. Click on the pencil icon (✏️) to edit the way the chart itself will display. You can also remove the table by clicking on the red X.
4. Add additional charts or tables.
5. *Apply* the changes you have made.
6. Close the window without saving the changes you made.
Each report type will have different options on what you can display on charts and tables. Below is an overview of what your options are for charge reporting.

- **Chart type:** Choose to display your chart as a Stacked bar, Line, Pie or Data table.
- **Group by:** Group the data by Core, Lab, Department, Institution, Center, Work status of the charge, Billing status of the charge, Billing event status of the billing event the charge was included on, Price type (i.e. Internal or External), Customer, Service type or Request name.
- **Value to report on:** Choose if you want the numerical value on the chart to be by Total Money, Average Money or by Quantity.
- **Display data by:** Choose to display the data by Week, Month, Day of Week or by the Hour.
- **Also group by:** You can also group the charts by a second value which will display multiple charts by Core, Lab, Department, Institution, Center, Work status of the charge, Billing status of the charge, Billing event status of the billing event the charge was included on, Price type (i.e. Internal or External), Customer, Service type or Request name. These Also group by options will display multiple tables listed by the second group by option chosen.

After you have set your dates and charts and tables, click on Run report! to have the report displayed.

Figure 8. To edit what is displayed on the chart or table, click on the pencil icon to the right of the chart or table you want to edit. Each column will have a drop down of options to change what is displayed.
On the left side of the reporting page are search and filter options. Depending on the report type you are reviewing, you may see different options. In general you will be able to filter by lab, by core, by service, by payment number and much more. After you choose what you want to filter for, click on **Apply Filters** to update the reports.

**Figure 9.** When on the reports page, click on the filter options to filter for different data to have displayed on your report.

After you choose your report settings and filter, you can then review your charts and tables.

Stacked bar charts display data as a bar chart. You also can choose to display data in a line chart, pie chart or data table. On all of the charts you can hover over the data point to see more information. Each chart will display the top ten results. You can hover over the different sections to see the quantities of each section on the chart (**Figure 10**).
Data tables display as many values you choose to show in the upper right hand corner of the table. You can also search for a specific key word on the table and choose to see the next page of the data at the lower left corner by clicking on Previous or Next.

Figure 10. Choose to display a table by stacked bar graphs. The top ten results will display.
After you have generated the report you desire there are several options for you to do. You can export the data as a CSV, XLS or the charts and tables to a PDF. You can also choose to save the report for future reference. **Note:** If you save the kind of report you will run often, you can open the saved report, update the dates then save the new report. You can also make a saved report the default so any time you land on the reporting page, you can just load the default saved report, update the dates, then run the new report with the saved setting, then save as new.

![Figure 11. The data table will display all values. By default, each page of the data table will show ten entries. You can choose to show more entries per page, search for a specific keyword or choose to view the Next or Previous page on the table.](image)
**Figure 12.** Hover over the Export button to see export options. Note: the export will only include data that is displayed on the report at the time of export.

**Figure 13.** Click on Save to save your new or existing report.
Request Reporting

Unlike Charge Reporting, Request Reporting gives you high-level data about entire projects or project requests made to core facilities. Here you can run reports relevant to requests by status, assigned worker, and current milestone.

Figure 14. Navigate to the Reporting Home page; you can set which save report should load as the default report. You can also delete a saved report by clicking on the red X to the right of the report name.
Each report type will have different options on what you can display on charts and tables. Below is an overview of what your options are for Request reporting.

- **Chart type:** Choose to display your chart as a Stacked bar, Line, Pie or Data table.
- **Group by:** Group the data by Lab, Department, Institution, Center, Customer, Core, State (the status of the request), Worker (the assigned core member), Request Name (ID).
- **Value to report on:** Choose if you want the numerical value on the chart to be by Total projected cost, Average projected cost, Total actual cost, Total projected vs total actual, Number of requests, or Average completion time.
- **Display data by:** Choose to display data by Week, Month, Day or Hour.
- **Also group by:** You can also group the charts by a second value which will display multiple charts. The secondary values include, Lab, Department, Institution, Center, Customer, Core, State (the status of the request), Worker (the assigned core member), and Request Name (ID).

![Figure 15. The Requests reporting allows you to run reports on project requests, not just on the charges within the request.](image-url)
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**Event Reporting**

Event reporting is available for you to report specifically on calendar reservations and resource usage. On this tab you can look at event reservations in the future and the past. You also have calendar specific filters such as filtering for reservations or unavailable (maintenance) events.

Each report type will have different options on what you can display on charts and tables. Below is an overview of what your options are for *Event* reporting.

- **Chart type:** Choose to display your chart as a Stacked bar, Line, Pie or Data table.
- **Group by:** Group the data by Equipment (calendar), Lab, Department, Institution, Center, Customer, Type, or Price Type.
- **Value to report on:** Choose if you want the numerical value on the chart to be by Actual time, Scheduled time, percent scheduled time, Actual cost, Scheduled cost, Actual vs scheduled time, Actual vs scheduled cost, or Number of events.
- **Display data by:** Choose to display the data by Month, Week, or Day.
- **Also group by:** You can also group the charts by a second value which will display multiple charts by Equipment (calendar), Lab, Department, Institution, Center, Customer, Type, or Price Type.

*Figure 16. Use Event reporting to analyze equipment (resource) usage.*
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Revision Date: 12/31/2012

If you have any questions or comments, please contact us at support@ilabsolutions.com.