iLab Reporting for Lab and Department Managers

How do I access reporting in iLab?

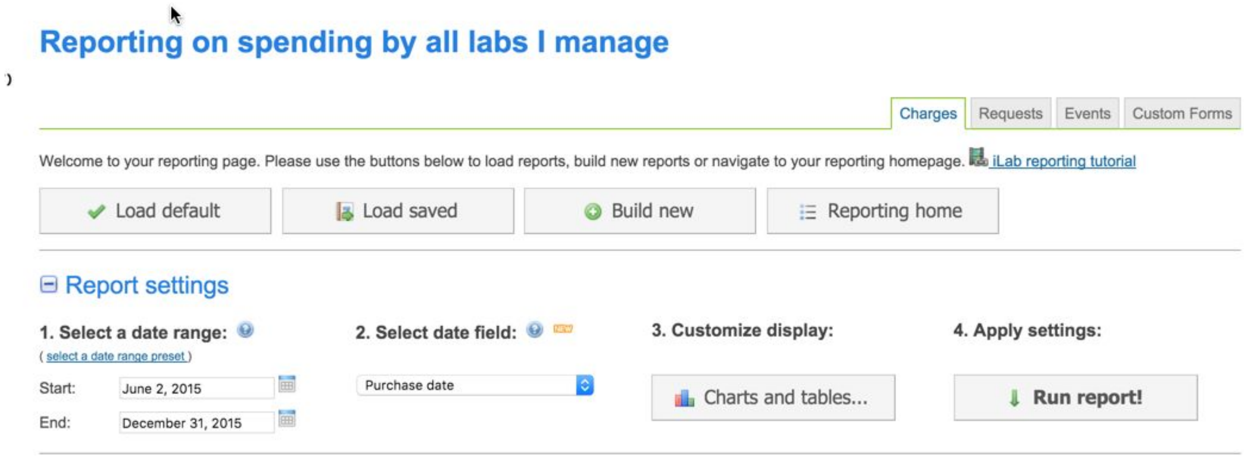
You must be logged in to your iLab account to access reports on your lab(s). Navigate to the Reporting home page from the “reporting” link in the left menu. On the left hand side of the screen you will see a menu of all reports you have created or that have been shared with you by other iLab users.

Reporting - General Functionality

iLab Reporting offers three overall categories for reports; Charges, Requests, and Events.
As a lab administrator or Primary Investigator you are able to see reporting on any lab(s) you manage under each of these umbrella categories.
Within each of these categories a lab manager or PI has the ability to create and save custom reports based on time ranges and specified data sets. You can further customize these reports by defining how the data sets or report results are visually displayed.

When viewing any reporting page your first set of options is a navigation menu.
You will see four buttons across the top; Load Default, Load Saved, Build New.
The Load Default option allows you to start with a base of data sets and displays to manipulate and customize the data groups and how they are visually displayed.
Load Saved accesses a pop up menu of any report created previously or shared with you.

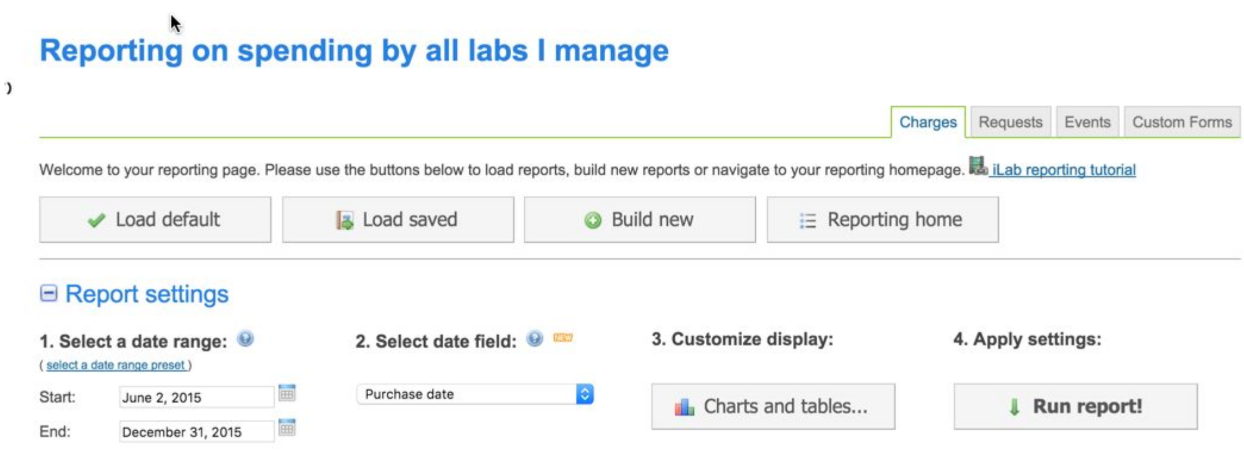
Build New provides the option of creating a report from scratch, including data set parameters and visual display. Finally, the **Reporting home** button navigates back.



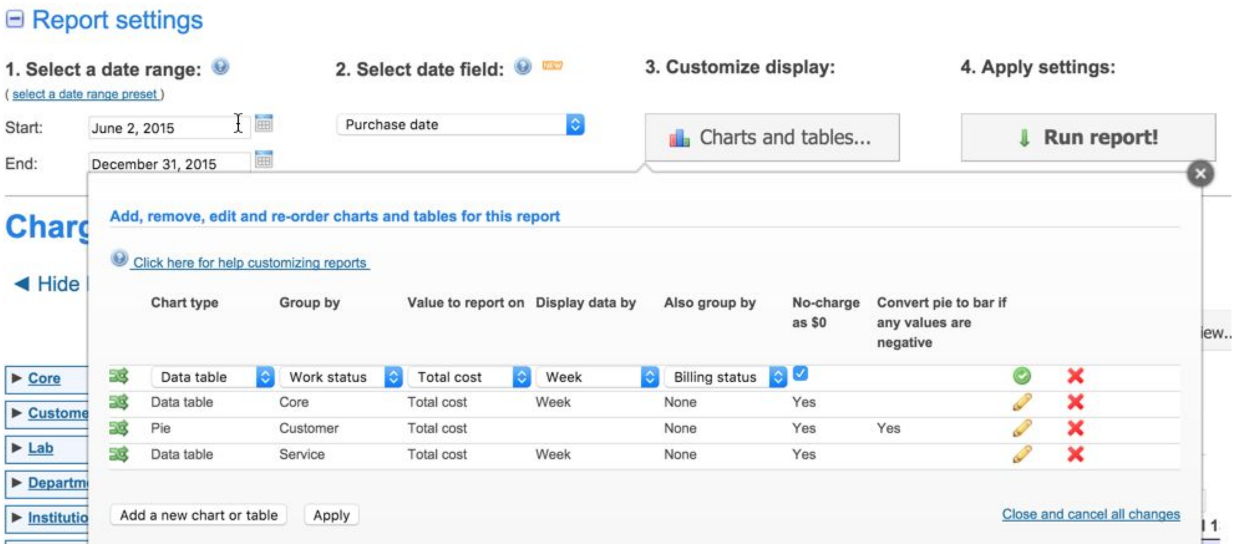
How do I Build Reports in iLab?

Charge Reporting

The first step when building a charge report is to set your date range - you can do this manually or select from a date range preset.
Once you have selected a date *range* you must establish your date *field*.
The date field has three options; purchase date, completion date, and billing date - these are all contingent on when and how the charge interacted with the project.

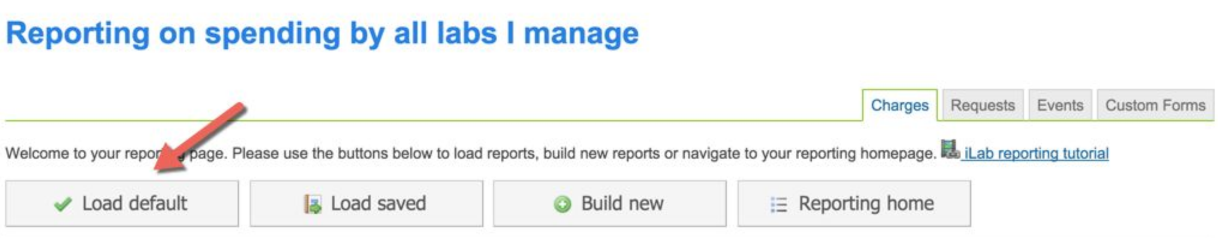


Next you can customize the display by clicking on the Charts and Tables button. Clicking here opens a popup that enables the user to edit, add or remove charts and tables to customize data grouping and presentation.

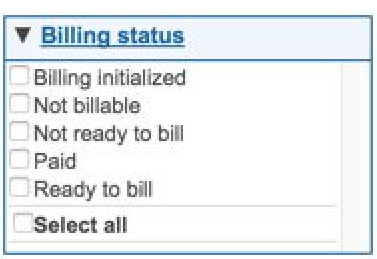


In order to see only the outstanding charges for your lab follow these steps.

1. **Load the default report**



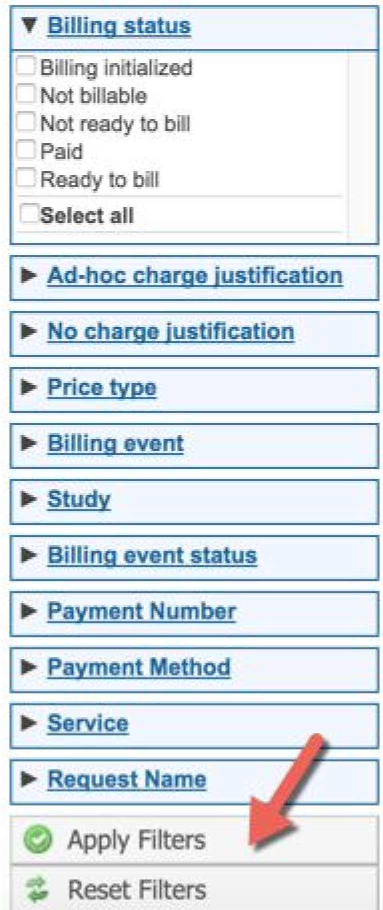
2.From the filter menu on the left, choose “Billing Status” and then select from the following choices.



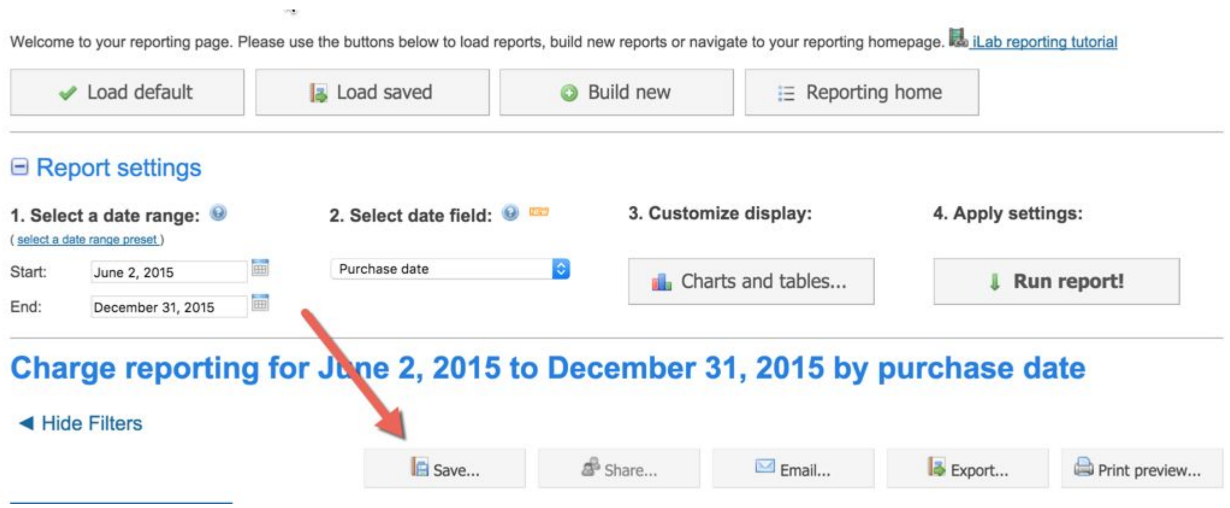
- **Billing Initialized- Core has captured this charge in a billing event that is currently in process.**
- **Not Billable-You will not be Charged**
- **Not Ready to Bill- This charge will be included in a future billing event.**

- **Paid- No further action required, charge has passed through Advantage.**
- **Ready to Bill- Charge will be included in the core's next billing event.**

3. Click Apply Filters at the bottom of the filter menu-



Once you have built the desired report, you can save the report parameters for easy access.



Request Reporting

The first step when building a project report is to set your date range - you can do this manually or select from a date range preset.

Once you have selected a date *range* you must establish your date *field*.

The date field has two options; submission date and completion date, and billing date.

Next you can customize the display by clicking on the Charts and Tables button. Clicking here opens a popup that enables the user to edit, add or remove charts and tables to customize data grouping and presentation.

Event Reporting

The first step when building an event report is to set your date range - you can do this manually or select from a date range preset.

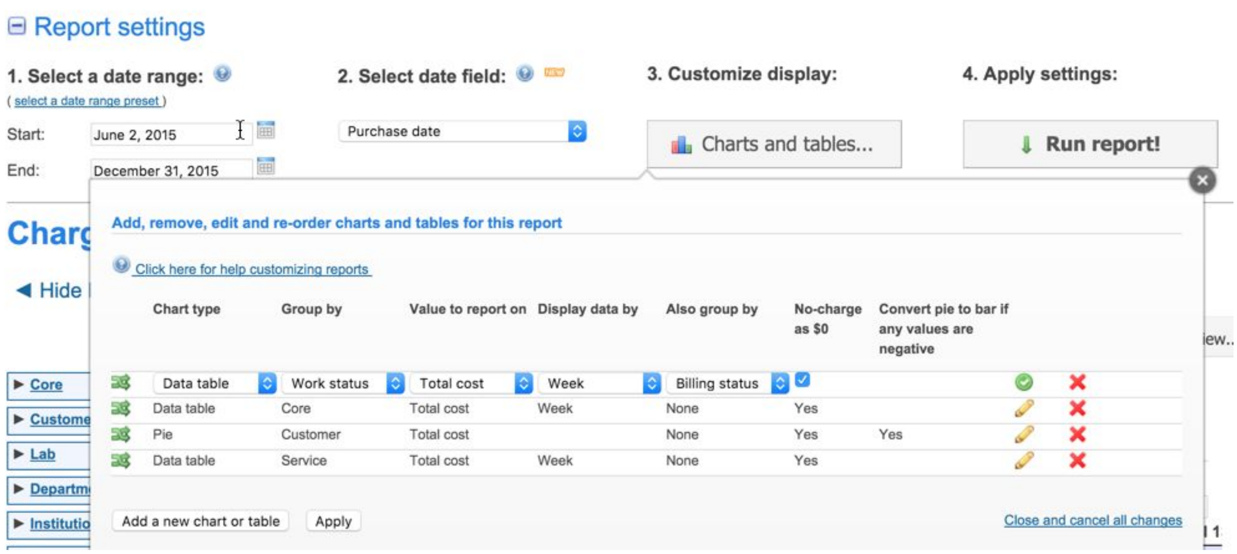
Next you can customize the display by clicking on the Charts and Tables button. Clicking here opens a popup that enables the user to edit, add or remove charts and tables to customize data grouping and presentation.

How do I customize the display or data grouping of my reports in iLab?

To edit the visual display of a data set you must click on the pencil on the right side of the chart/table line - this opens a series of dropdowns that you can use to refine the display. The first of these is a Chart type selection, followed by the first grouping of data. The third column gives you value options, the next column is a selection of display options for defining how the grouped data is organized into the charts or graphs and finally we have a some columns that allow you to define how the report will interact with $0 charges.

You can save changes by clicking on the green check mark on the right hand side. There is also a red “x” here that allows the user to remove a data grouping/display. Once edits are complete you can apply the changes by clicking on the Apply button on the bottom left of the Charts and

Tables pop up. You will also find the ability to cancel changes and add a new chart or table at the bottom of this pop up.



Once you have finished establishing the parameters of your report and defining the display you can run the report by clicking on the Run Report button.

How do I save a report?

Once you have defined the parameters and display of a report you can save those settings for future use. You can do this by clicking on the Save button between the title/header of your report and the first data grouping/display.

How do I share or email a report?

Once a report has been saved you have the option to share it either with core or institution managers. If you wish to share it with specific users you can use the email functionality, this allows you to add an email address and determine how you want the data from the report to be attached. Users have the option of selecting any or all of the following; PDF, XLS, or CSV. You can also attach the source data as a CSV or XLS file.

Is report data exportable?

A PI or lab administrator can export data from the system in a range of formats.
By clicking on the Export button on the top of the report results display you will see a pop-up menu. Within this menu you have the option to select your format; report data as a PDF will capture all the visual display and graphic representation of your data sets, source data will generate a .csv file that contains all the underlying data about all the charges in the system, and

the last two options allow you to select only the data from this specific report as either .csv or an Excel file.