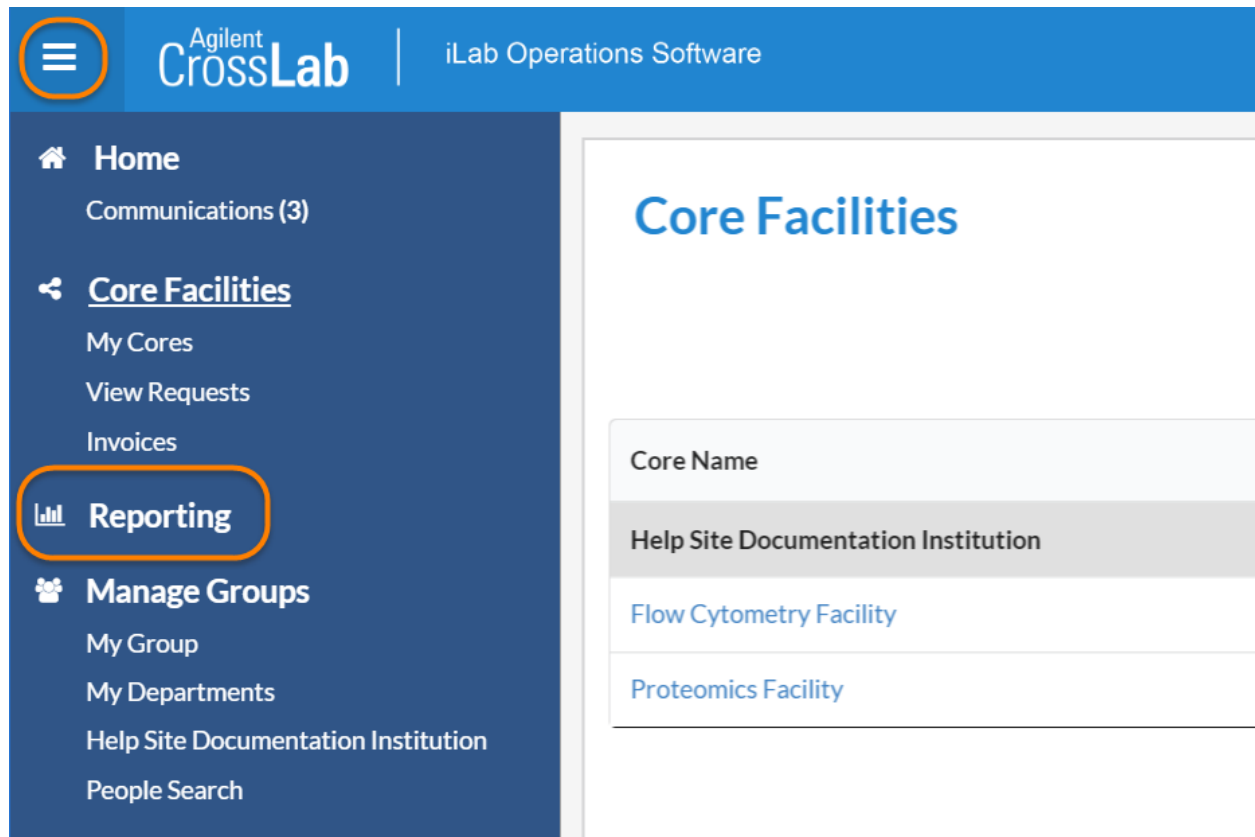


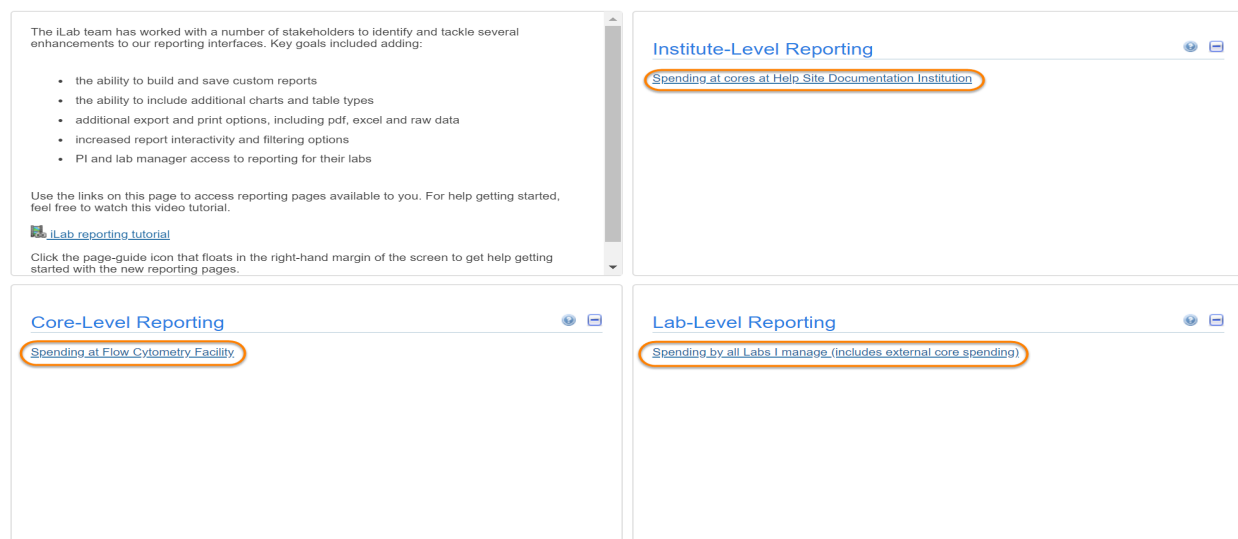
Reporting

Access the Reporting Interface

The reporting interface can be accessed for **all administrative users** from the [left-hand navigation](#):



Reporting Home



As a **Core Administrator**, you can access core reporting directly from your [Core](#) :

Flow Cytometry Facility

Navigation menu: About Our Core | Schedule Equipment | Request Services | View All Requests | Reservations | Samples | People | **Reporting** | Billing | Time Entry | Administration

Charges | Requests | Events | Custom Forms | Time Entries

Welcome to your reporting page. Please use the buttons below to load reports, build new reports or navigate to your reporting homepage. [Lab reporting tutorial](#)

Buttons: Load default | Load saved | Build new | Reporting home

As a **System Administrator**, you can also access institutional reporting directly from your *Institutional Dashboard*:

Help Site Documentation Institution

Summary of Cores | User Management | Billing * | **Reporting *** | Settings

Statistics From All Live Cores from the Past 12 Months

Dashboard information is updated on a daily basis.

Revenues, 12 Months

7.5 K

Users

6

Overview of Reporting

1. Charges | Requests | Events | Custom Forms | Time Entries

2. Welcome to your reporting page. Please use the buttons below to load reports, build new reports or navigate to your reporting homepage. [Lab reporting tutorial](#)

3. Report settings

1. Select a date range:
Start: January 1, 2018
End: March 31, 2018

2. Select date field:
Purchase date

3. Customize display:
Charts and tables...

4. Apply settings:
Run report!

Charge reporting for January 1, 2018 to March 31, 2018 by purchase date

4. Hide Filters

5. Cores by week (by total cost)

6. Save... | Share... | Email... | Export... | Print preview...

4. Filter sidebar:

- Core
- Customer
- Lab
- Department
- Institution
- Organization
- Core Organization
- Center
- Work status
- Billing status
- Ad-hoc charge justification
- No charge justification
- Price type
- Billing event
- Study
- Billing event status
- Payment Number
- Payment Method
- Service
- Request Name
- Peer Review Status
- Apply Filters
- Reset Filters

5. Cores by week (by total cost)

Bar chart showing Total cost (Y-axis, 0 to 3,000) vs. Week (X-axis, 01/01/2018 to 03/19/2018). Legend: Flow Cytometry Facility.

5. Cores by week (by total cost)

Show 10 entries

Core Jan 1, 2018 Jan 8, 2018 Jan 15, 2018 Jan 22, 2018 Jan 29, 2018 Feb 5, 2018 Feb 12, 2018 Feb 19, 2018

1. **Report type:** iLab provides reporting on a range of different data sets, including charges, requests, events, custom forms and time entries and requisitioning, if applicable.
2. **Open report:** Load the default report or a saved report, create a new report or return to the Reporting Home interface.
3. **Report settings:** Configure reporting time frames and the exhibits that show in the report.
4. **Filter data:** Filter the data included in the report.
5. **View exhibits:** View and manage the exhibits included in the report.
6. **Report actions:** Save reports, share access, e-mail the report, export report data and print the report.

Report Types

iLab provides a range of report types:

- *Charges:* report on the individual financial charges generated by core facilities, e.g. quantify, price, type, timing, etc.
- *Requests:* report on data related to service requests, e.g. projected/actual cost, average completion time, etc.
- *Events:* report on data related to scheduled events, e.g. scheduled/actual time, scheduled/actual cost, etc.
- *Custom Forms:* download data captured in [Custom Forms](#).
- *Time Entries:* report on [Time Entry](#) data
- *Requisitioning:* report on data related to requisitioning

The first three report types, *Charges*, *Request* and *Events*, are the core of iLab reporting, and function very similarly. The key difference is the type of data that can be reported on and exported, as discussed in more detail in [Reporting Field Details](#).

The *Custom Forms* report is only available for core-level reporting and provides a mechanism to download the fields of custom forms used by that core:

Charges Requests Events **Custom Forms** Time Entries

Report settings

1. Select a date range:
(select a date range preset)

Start:

End:

2. Select Custom Form:

▼

3. Download Data:

Download custom form source data as CSV

Select a date range under section 1, pick a form used by this core under section 2, and click the "Download custom form source data as CSV" button to download the form fields as completed by the users of the core. Note that currently, only the following data field types are supported for download: small text box, large text box, date, pull-down menu, attachment (name of file only), radio buttons, check boxes, charges, tables.

The *Time Entries* report is another core-level report that provides reporting on [Time Entry](#) data (if enabled for the core):

The screenshot shows the 'Time Entries' report interface. At the top is a navigation bar with tabs: About Our Core, Schedule Equipment, Request Services, View All Requests, Reservations, Samples, People, Reporting, Billing, Time Entry, and Administration. Below this is a sub-navigation bar with links: Charges, Requests, Events, Custom Forms, and Time Entries (highlighted). The main content area has a left sidebar with filters and a main table. Numbered callouts point to specific features: 1. Keywords search box; 2. Filter criteria list (Date, Request ID, Service, Payment number, Owner, Logged By, Billable Type); 3. Apply Filters button; 4. Reset Filters button; 5. Download as CSV button; 6. The main table showing 5 results.

Date	Request	Description	Owner	Logged By	Billable Type	Service	Payment Number	Quantity	Unit Price	Total
Sep 09, 2018	FCF-SM1-23		Sample Member 1	Itzel Jenkins	billable	1-D PAGE		5.00	\$20.00	\$100.00
Sep 10, 2018	FCF-SM1-23		Sample Member 1	Itzel Jenkins	billable	1-D PAGE		0.00	\$20.00	\$0.00
Sep 12, 2018	FCF-SM1-23		Sample Member 1	Itzel Jenkins	billable	1-D PAGE		4.00	\$20.00	\$80.00
Sep 13, 2018	FCF-SM1-23		Sample Member 1	Itzel Jenkins	billable	1-D PAGE		4.00	\$20.00	\$80.00
Sep 15, 2018	FCF-SM1-23		Sample Member 1	Itzel Jenkins	billable	1-D PAGE		7.00	\$20.00	\$140.00

1. **Keywords:** find specific time-entry charges based a keyword that may appear in any of the fields associated with that charge.
2. **Filters:** Select one or more filter criteria to narrow down the time-entry charges included in the report. Expand a criteria by clicking on the little arrow, and then use the check boxes to determine which specific entries to include.
3. **Apply Filters:** Apply the filters selected above to the report.
4. **Reset Filters:** Remove all applied filters.
5. **Download as CSV:** Create a file that includes all the (filtered) time-entry charges.
6. **View charges:** show all the time-entry charges based on the applied filters.

Open a Report

To access or start a report, you have four options:

Welcome to your reporting page. Please use the buttons below to load reports, build new reports or navigate to your reporting homepage. [iLab reporting tutorial](#)

✓ Load default
 Load saved
 Build new
 Reporting home

- **Load default:** Populate a report with default settings and exhibits.

- **Load saved:** Select a previously saved report (see [Report Actions](#)) and click "Load". Note, you can adjust the dates of a saved report to load new data points into your preferred format.

Load a saved report...

Note: you will lose any unsaved changes on the current tab when you load an existing report.

Please select a saved report to load:

[\(load other reports\)](#)



Charge

My report

Request

Event

Custom Form

Time Entry

Load [Cancel](#)

- **Build new:** Clears the current report and start building a new report, using the default report as a starting point.
- **Reporting home:** Go to the Reporting Home page, shown under the [Access Reporting Interface](#).

Report Settings

Most reports require the user to specify the following settings:

Report settings

1. Select a date range:

([select a date range preset](#))

Start: September 1, 2018

End: September 30, 2018

2. Select date field:

Purchase date

3. Customize display:

Charts and tables...

4. Apply settings:

Run report!

1. **Select a date range:** Pick a start and end date you want to use for the report. Alternatively, click on the "select a date range preset" link to open up a number of pre-configured date ranges:

Report settings

1. Select a date range:

([select a date range preset](#))

2. Select date field:

3. Customize display:

Charts and tables...

4. Apply settings:

Run report!

Alternatively, choose a helpful preset:






































- This month (9/1 to 9/30)
- Last month (8/1 to 8/31)
- July (7/1 to 7/31)
- June (6/1 to 6/30)
- May (5/1 to 5/31)
- April (4/1 to 4/30)
- March (3/1 to 3/31)
- February (2/1 to 2/28)
- January (1/1 to 1/31)
- December (12/1 to 12/31)
- November (11/1 to 11/30)
- October (10/1 to 10/31)
- This week (9/10 to 9/16)
- Last week (9/3 to 9/9)
- Last three months (6/10 to 9/10)
- Last six months (3/10 to 9/10)
- This half (7/1 to 12/31)
- Last half (1/1 to 6/30)
- Year to date (1/1 to 9/10)
- This quarter (7/1 to 9/30)
- Last quarter (4/1 to 6/30)
- Q1 (1/1 to 3/30)
- Q4 (10/1 to 12/30)
- Today (9/10 to 9/10)
- Yesterday (9/9 to 9/9)

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2. **Select date field:** For *Charge* and *Requests* reports, this field lets you select the date to used for each item in the report. For a *Charge* report, you can choose to show the charges by *purchase date* (when the charge was created), *completion date* (when the work the charge is associated with was marked as completed) and *billing date* (when the billing event the charge is included in was created). For *Requests* report, you can choose the *Submission date* (when the request was submitted) and the *Completion date* (when the request was marked as complete).
3. **Customize Display:** This option allows you to fully customize the exhibits you want to include in the report, as discussed in more detail under [Configure Exhibits](#).
4. **Apply settings:** Click the "Run report!" button to apply the previous settings and generate/update the report. This will show any applicable panels that were not yet visible.

Configure Exhibits

Each exhibit in the report can be fully configured, and exhibits can be easily added and deleted. Note that to change an existing exhibit, you need to first click on the pencil icon in column 9:

Chart type	Group by	Value to report on	Display data by	Also group by	No-charge as \$0	Convert pie to bar if any values are negative			
1 	2 	3 	4 	5 	6 	7 	8 	9 	10 
 Data table	Status	Total project	Week	None	<input checked="" type="checkbox"/>				
 Data table	Status	Number of requests	Week	None	Yes				
 Stacked bar	Status	Number of requests	Week	None	Yes				
 Stacked bar	Core	Number of requests	Week	None	Yes				
 Stacked bar	Core	Total projected cost	Week	None	Yes				
 Data table	Lab	Average completion time	Week	None	Yes				
 Data table	Study	Total cost	Week	None	Yes				
 Data table	Peer Review Status	Total cost	Month	None	Yes				
11  Add a new chart or table	12  Apply					13  Close and cancel all changes			

1. **Move exhibit:** The green arrows can be dragged up and down to change the order of the exhibits in the report.
2. **Chart type:** You can choose from a number of typical chart types: stacked bar, line, stacked line, pie, data table.
3. **Group by:** The first grouping applied to the data in the exhibit. For example, select *lab* to first group charges or requests by the requesting lab.
4. **Value to report on:** Choose the value to show in the report. The options available here are based on the report type, as discussed in more detail in [Report Types](#).
5. **Display data by:** Choose the time frame you would like to use to consolidate data into (e.g. week, month, quarter, day of week, hour).
6. **Also group by:** Apply a second grouping to the data (incremental to item 3). This will create a sub-panel for the second grouping, up to a maximum of 10.
7. **No-charge as \$0:** When set to "yes", non-billable and pro-bono charges will be included at \$0. Also, no-charge events will be considered to have a price of \$0 when calculating scheduled cost. When set to "no", reported totals will include the full value of costs and services provided, even if the customer was not billed for them.
8. **Convert pie to bar if any values are negative:** Only applies to bar charts. When checked, any pie chart with negative value will be converted to a bar chart (so negative values can be shown). When not checked, any negative slices will be excluded.
9. **Edit exhibit:** Click the pencil icon to make edits to the selected exhibit (drop-down options appear in each column that allow the user to change the settings).
10. **Delete:** Delete the selected exhibit (note: you will NOT be prompted for confirmation)
11. **Add a new chart or table:** Adds a new exhibit at the bottom the the exhibit list (can be moved as discussed under item 1)

12. **Apply:** Once you have made any changes to the exhibit you MUST click the *Apply* button to effect any changes.
13. **Close and cancel all changes:** click this link to close the panel and cancel any changes.

Filter Report Data

The data in most reports can be filtered down to very specific criteria. As an example, the filters for a *Charges* report are shown below:

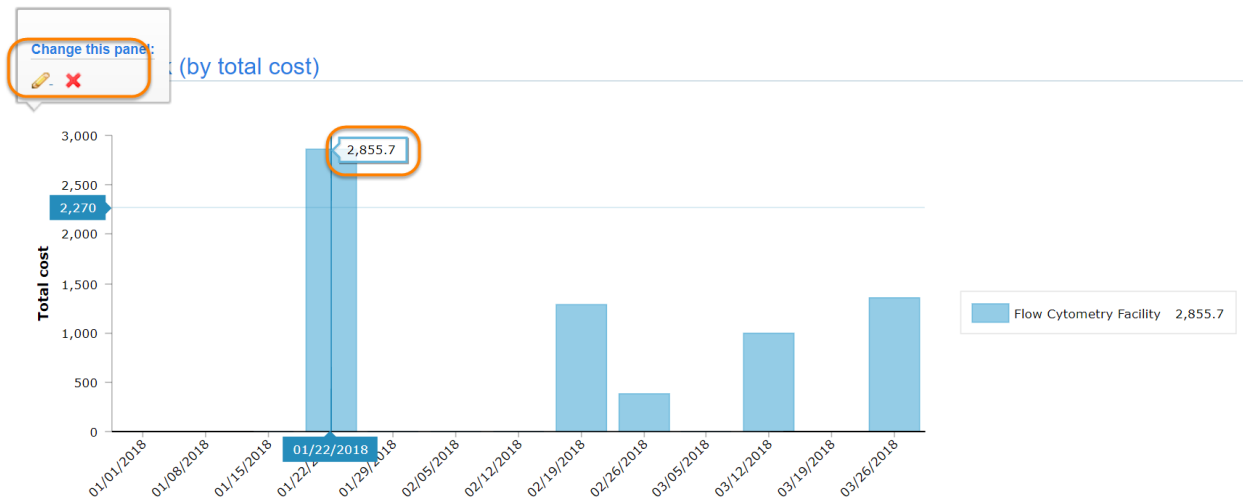
▼ Core
<input type="checkbox"/> Flow Cytometry Facility
<input type="checkbox"/> Product Cores
<input type="checkbox"/> Select all
▶ Customer
▶ Lab
▶ Department
▶ Institution
▶ Organization
▶ Core Organization
▶ Center
▶ Work status
▶ Billing status
▶ Ad-hoc charge justification
▶ No charge justification
▶ Price type
▶ Billing event
▶ Study
▶ Billing event status
▶ Payment Number
▶ Payment Method
▶ Service
▶ Request Name
▶ Vendor
▶ Peer Review Status
 Apply Filters
 Reset Filters

Select one or more filter criteria to narrow down the data included in the report. Expand a criteria by clicking on the little arrow, and then use the check boxes to determine which specific entries to include. For more information on the fields available for each report type, see [Reporting Field Details](#) .

Once done configuring the filter, click "Apply Filters". To remove all filters, click "Reset Filters".

View Report Exhibits

The main Exhibit panel shows all the exhibits in the report. An exhibit might look like:



Hover over each exhibit to show a small panel in the upper-left corner with the option to edit the exhibit (this brings up the panel discussed under [Configure Exhibits](#)) or to delete it (red X icon). You can also move the mouse over the exhibit to get more detailed information about specific data points.

Report Actions

You have a range of options to further manage the current report and its underlying data:



- **Save:** Save this report within iLab, so it can be easily recalled later and be shared with other iLab users. When prompted, provide a name, click "Save", and the report will be saved under the appropriate category. You can also select an existing report to overwrite. To load this same report in the future, you would

click on 'Load Saved'.

Save report...

Save as a new report: (enter a new name)

-- OR --

Overwrite an existing report: (select from a previously saved report below)

Charge

My report

Request

Event

Custom Form

Time Entry

Save

[Cancel](#)

- **Share:** Once a report has been saved, it can be shared with other who also have access to the underlying data. For example, for a core-level report, you might

share the report with the other core managers, or with the core's institutional

Sharing options for report “My report”

☐ Share with managers of this core

☐ Share with managers of this core's institution

[Save changes](#) [Cancel](#)

administrators:

- **Email:** The e-mail option let's you send a copy of the report by e-mail. You can select the recipients and Subject, and also indicate what information to include as an attachment (a PDF version of the report, the underlying source data and/or the data from the individual exhibits as XLS or CSV files). You can customize the message and indicate if you would like a copy sent to yourself.

Email this report

To:

Subject:

Attachments to include: ☒ PDF ☐ Summarized data from charts and tables as XLS ☐ Source data as CSV/XLS ☐ Summarized data from charts and tables as CSV

Message:

Send me a copy: ☐

[Send emails](#) [Cancel](#)

- **Export:** The export option let you download report data in various formats. You can download the charts and tables as a PDF file or you can download the data shown in the various exhibits as either XLS or CSV files. You can also download all of the source data (not just what is shown in the exhibits) in the report date range to a CSV file. This option is typically the most useful for those who are comfortable analyzing full data sets in other applications (e.g. Excel).

See [Reporting Field Details](#) for more information about which fields are



included in which report.

- **Print preview:** This option opens up the report in a view that only shows the exhibits, for easy printing directly from your browser.