

## iLab Reporting for PI Labs

1. Log in to [iLab](#). Click on the reporting link in the left menu bar in iLab.



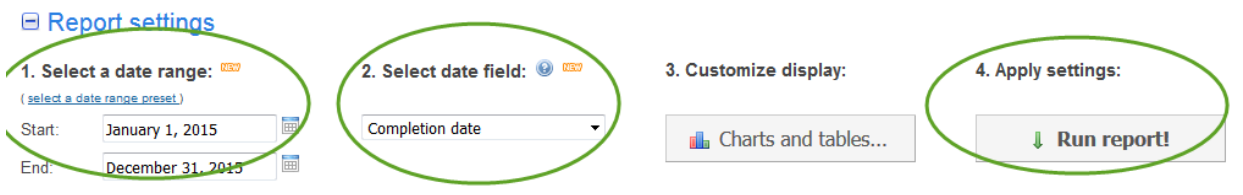
2. Depending on your role in iLab you will may see different options.

If “Standard Lab Report” shows up under Lab-Level Reporting, click the link to be taken to a pre-defined report that you can modify. If the report does not load up automatically, click the “Load Saved” button, select “Standard Lab Report” and click “Load.”



If you do not see the Standard Lab Report, click on “Spending by all Labs I manage” to be taken to the report tool where you can build a report (*please see the last page of this file for recommended settings when building a report*).

3. Select the date range and date field (purchase date is when the service was entered in the system, completion date is when the core marks the project complete for billing). Then hit run report.

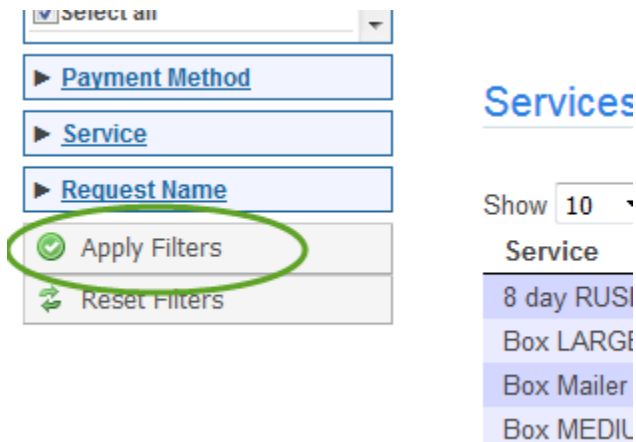


4. Use the filters on the left to obtain the data output you are looking for. Some key options to consider:

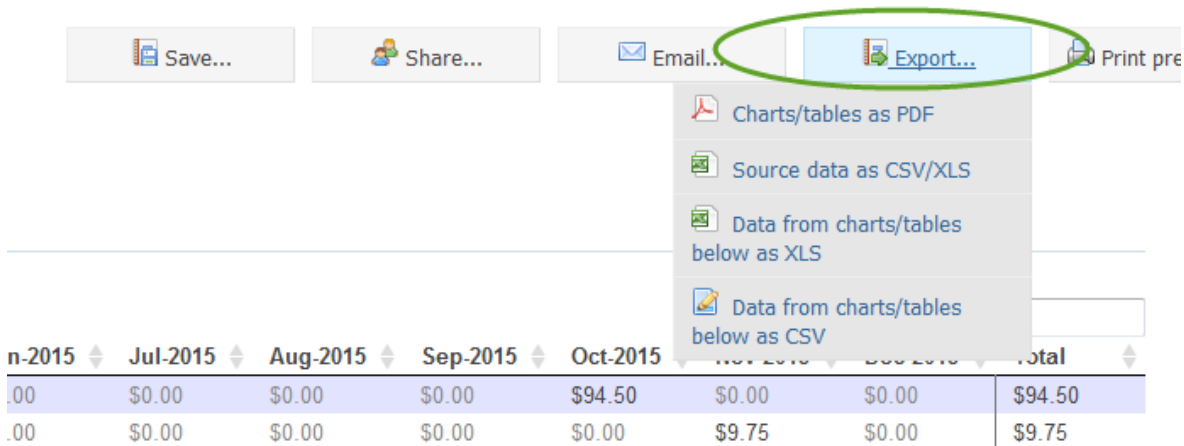
- a) Billing Event Status = select file\_sent to only show data for projects that have been billed.
- b) Institution = select Einstein and Monte (if present in the list of institutions) to get internally billed projects.
- c) Works Status = filter out cancelled or completed projects (Note: you may need to change the date field from step #3 to Purchase Date).
- d) Billing Status = use to see projects that have not yet been billed (**Important: you will want to change the date field from step #3 to Purchase Date**).

e) Payment Number = to filter out any subsidies from the billing info (**this gets you to the actual amount the PI grant/fund was billed by the core**), click on the Select All box, then scroll toward the bottom of the box and uncheck any of these that appear: AECC00, CFAR000, DEAN00, DRC000, IAR000, ICTR00, IDDRCO, LRC000, NEURO0, SCIO00

5. After setting your filters, hit the Apply Filters button.



6. Export your report in various formats using the Export button toward the top of the page.



**IMPORTANT: It is not recommended to save reports with filters applied from step #4. It is better to apply filters each time you want to run a report as new data is constantly entering the iLab system and filters that were applied in the past may exclude new data that you want to see in your reports.**

If you need help with your report or have any questions about how to structure or interpret your report, please email [ilabadministrator@einstein.yu.edu](mailto:ilabadministrator@einstein.yu.edu).

## \*\* Appendix - Building Your Own Report \*\*

### 1. Click the Build New Button.

Welcome to your reporting page. Please use the buttons below to load reports, build new reports or navigate to your reporting homepage.



### 2. Select your date range (you can modify this later), select the date field to use from iLab (purchase date is when the service was entered in the system, completion date is when the core marks the project complete for billing), then click the Charts and tables button to pick the fields you will include in the report.

#### Report settings

##### 1. Select a date range:

(select a date range preset)

Start: January 1, 2016

End: January 31, 2016

##### 2. Select date field:

Purchase date

##### 3. Customize display:

Charts and tables...

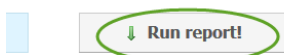
### 3. The image below includes all recommended fields for a report (these are the fields used in the Standard Lab Report noted in step 2 on page 1 of this document). You can make edits to the defaults provided by iLab by clicking on the pencil icon to the right. In general, it is best to select "Month" for the "Display data by" column. Hit apply when you are finished.

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		
	Institution	Total cost	Month	None	Yes			
	Core	Total cost	Month	None	Yes			
	Payment number	Total cost	Month	None	Yes			
	Customer	Total cost	Month	None	Yes			
	Service	Total cost	Month	None	Yes			
	Work status	Total cost	Month	None	Yes			
	Billing status	Total cost	Month	None	Yes			
	Price type	Total cost	Month	None	Yes			
	Request name	Total cost	Month	None	Yes			

Add a new chart or table    **Apply**    [Close and cancel all changes](#)

### 4. Click Run Report! then click the Save Button to name and save your report. Go to step 4 on page 1 to customize your output.

4. Apply settings:



by purchase date

