Core Charge and Event Reporting

Standard Operating Procedure 153 for Pitt iLab System

iLab Role: Core Administrator, Core Manager **Revision** #: 0 **Date:** 10/2025

Contents

Purpose:

This SOP describes how shared research facilities/cores can use iLab reporting functionality to perform analysis, generate reports and extract monthly or annual report data. The reporting tab in iLab provides access to useful data. The two types of reports highlighted in this document are 1) charges: report on the individual financial charges generated by core facilities and 2) events: report on data related to scheduled events.

Most shared research cores can be categorized as either a scheduling core or a service core, although a few provide both options. Scheduling cores primarily offer equipment reservations, such as booking time to use a wire bonder. Service cores primarily offer specific services, such as a gene sequencing request. The reporting functionality groups a core into one of these general categories.

iLab reports are great for performing a quick check on key performance parameters for your shared research core facility. However, for more detailed analysis and control of the output, excel offers more options. To reduce facility director work, a Pitt-designed Excel template is provided on the shared research facilities website. This Excel template produces graphs for data visualization and simplifies figure generation for analysis and reports. The reporting features and template described in this SOP are intended to enhance business awareness.

Scope:

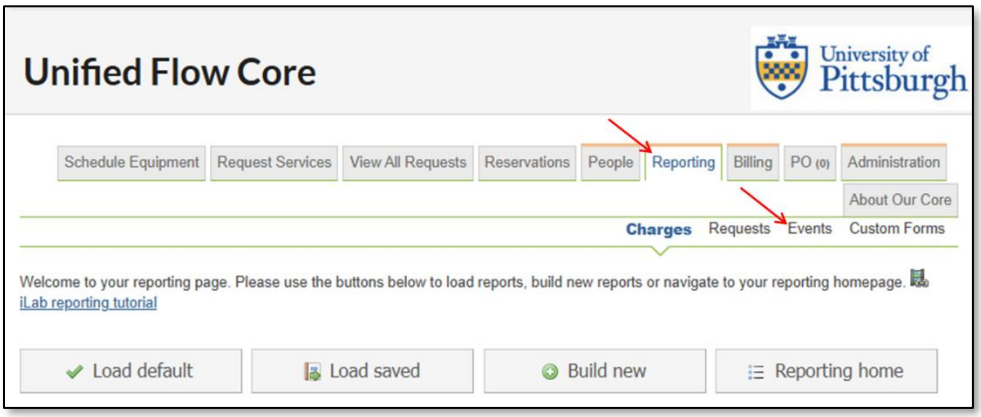
This SOP pertains to the Core Administrator and Core Manager roles in iLab. Institutional administrators also have this capability.

Core Charge and Event Reporting

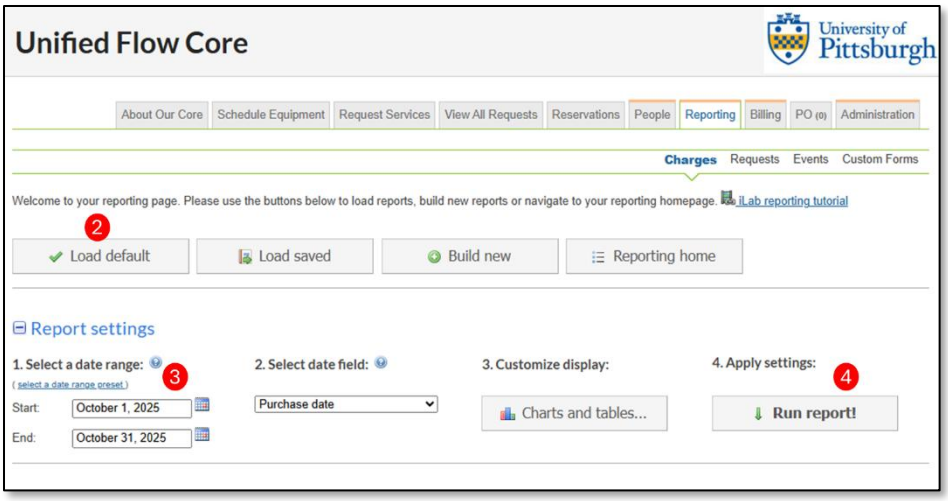
iLab Event Reporting Page for Scheduling Cores

The reports created on the iLab event reporting page can provide visualizations and details about equipment usage for scheduling cores.

1. Navigate to the 'Reporting' tab and 'Events' sub-tab of the core's iLab page.



2. Click on 'Load default'.
3. Set the Date Range for the desired range (e.g. first and last day of the month).
4. Click on 'Run report!'.



The default iLab event report displays an overview of highly used instruments and the most active labs for that core. Additionally, the individual equipment graphs of scheduled vs actual time could provide useful information for a scheduling core.

i. Graph example displaying top users by week:

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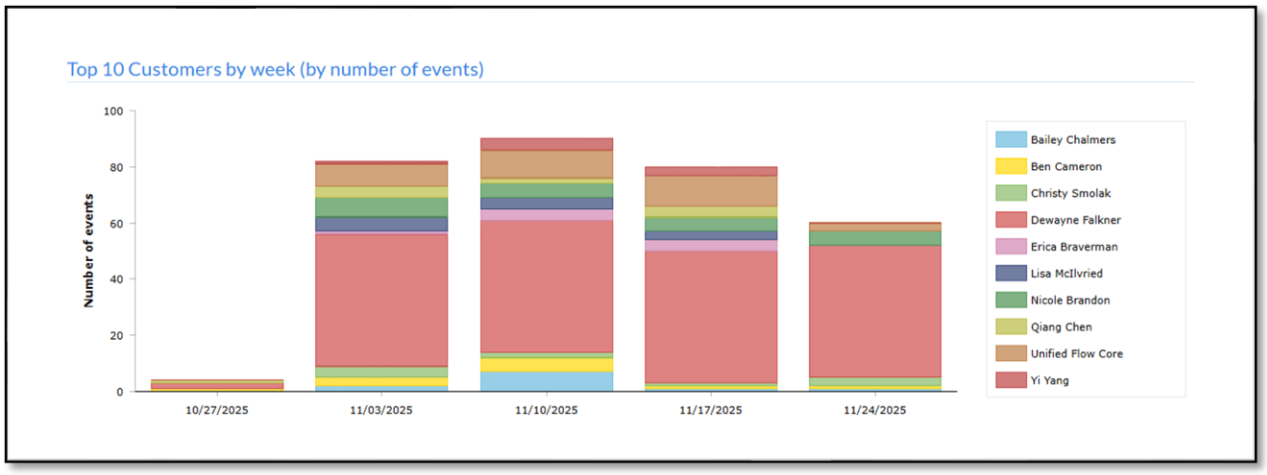
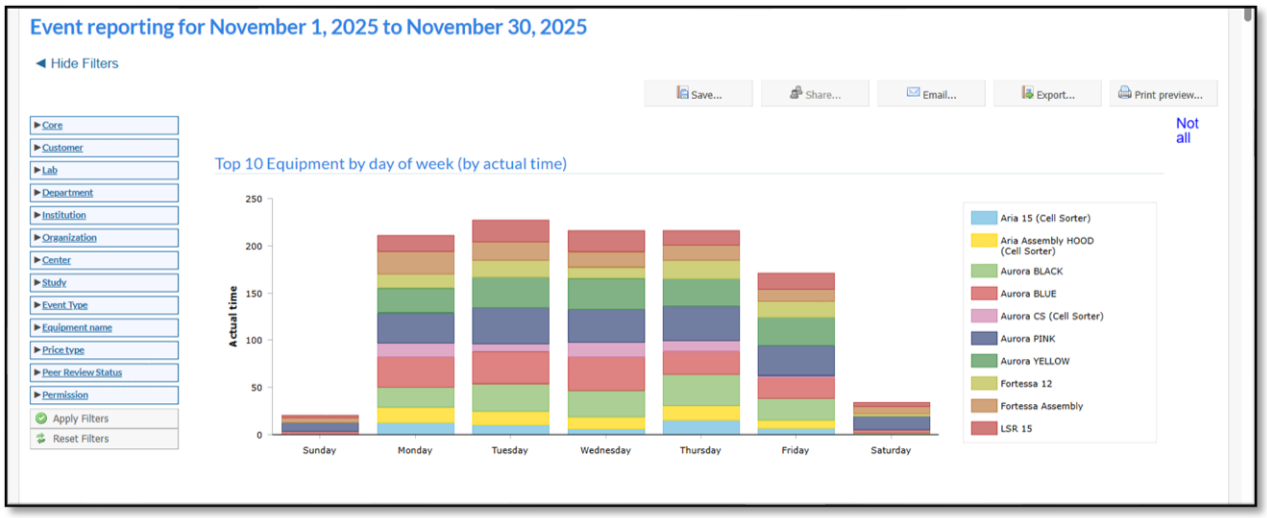
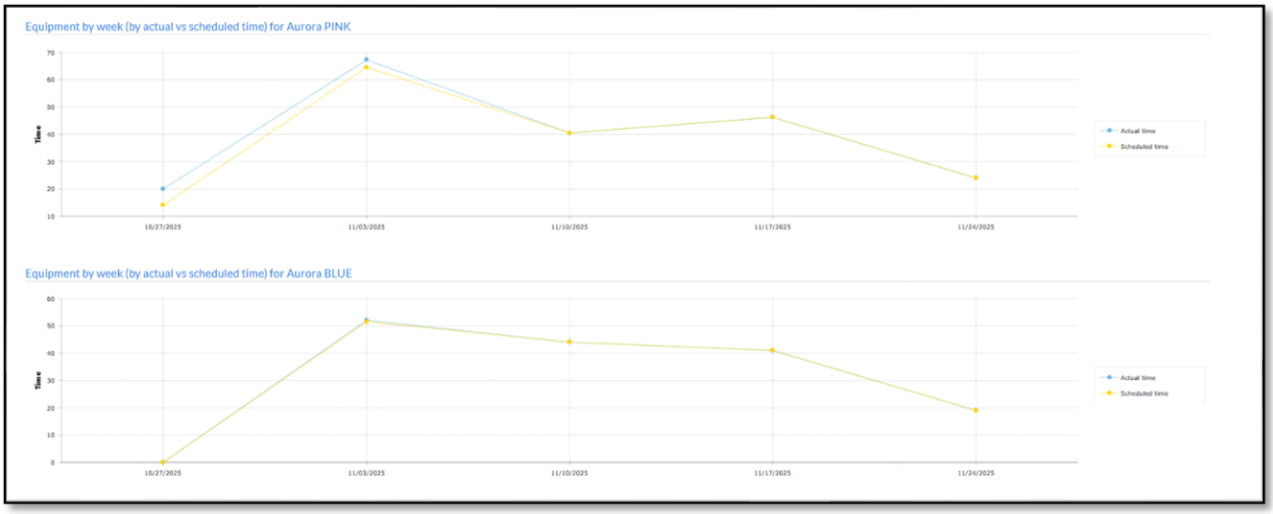


ii. Graph example displaying highly used instruments by day of the week:



iii. Individual equipment graphs of scheduled vs actual time:



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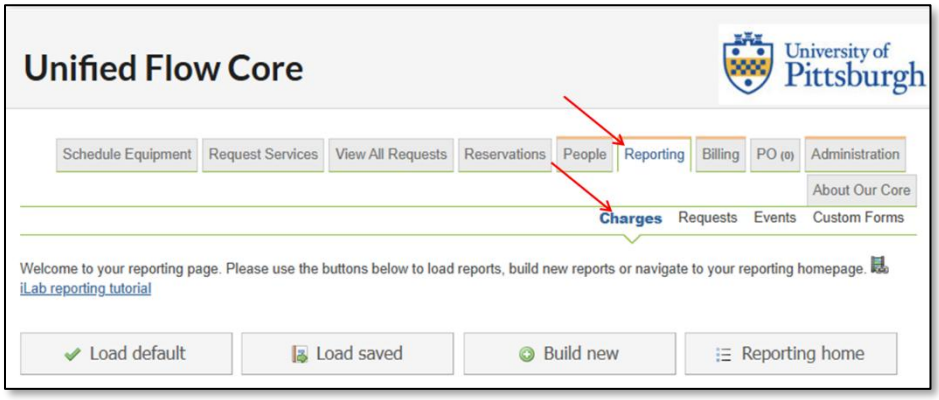
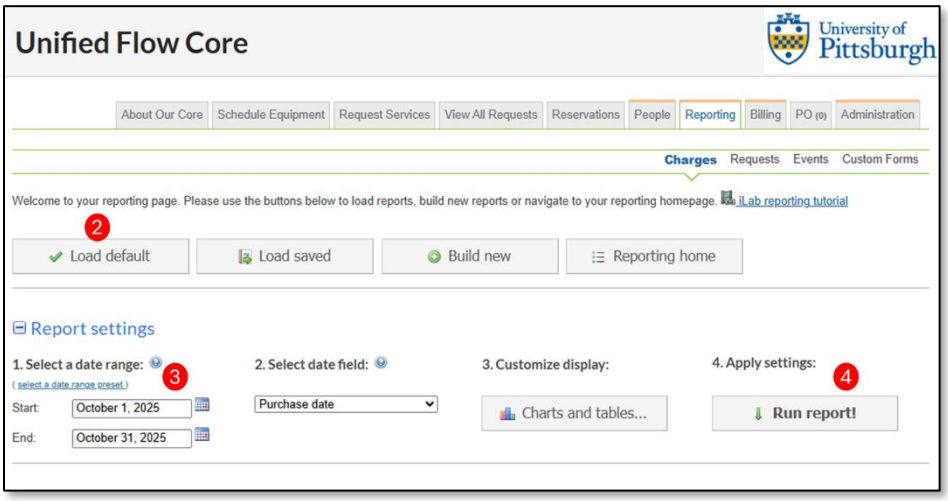
5. The dashboard display may not show all the reportable information, or you may wish to import the reports into a report. The export file that is obtained in the next section includes a comprehensive set of data regarding core use.

Directions for Exporting Data to Excel Template:

1. Navigate to the 'Reporting' tab and 'Charges' sub-tab of the core's iLab page.



2. Click on 'Load default'.
3. Set the Date Range for the desired range (e.g. first and last day of the month).
4. Click on 'Run report!'.



5. Click on 'Export' and select 'Source data as CSV/XLS' to download the CSV file.
6. Open the CSV file and click on the top left corner of the sheet to select all the data. Right click to copy the entire sheet.

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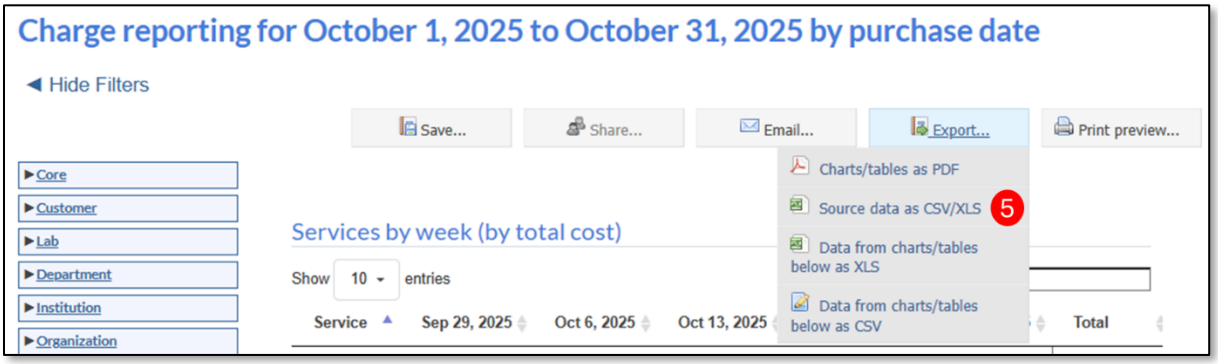
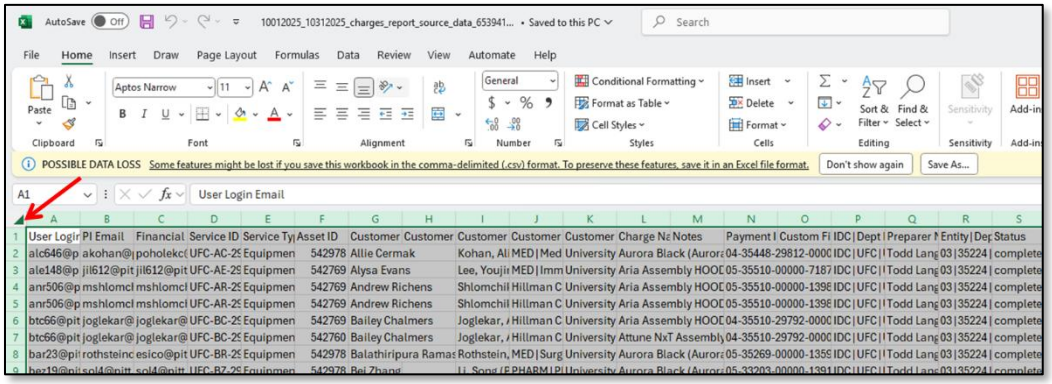
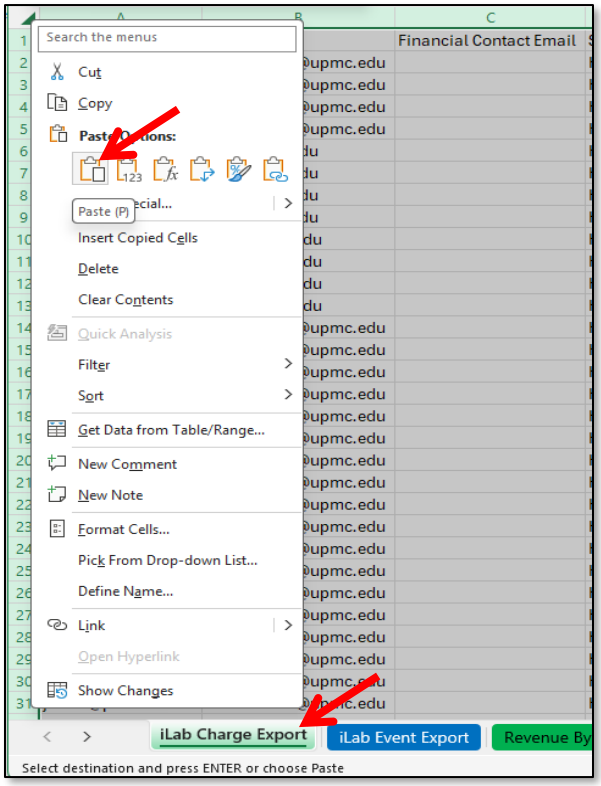




7. Paste the data into the 'iLab Charge Export' sheet of the iLab Charge and Event Report Workbook.



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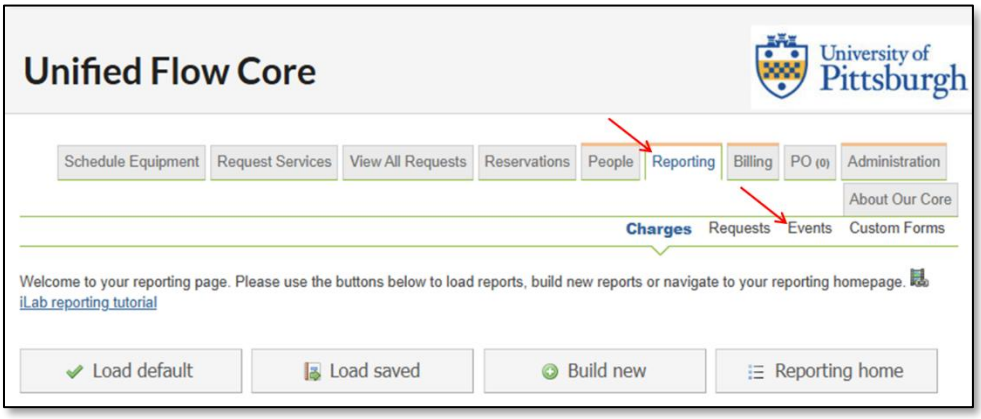
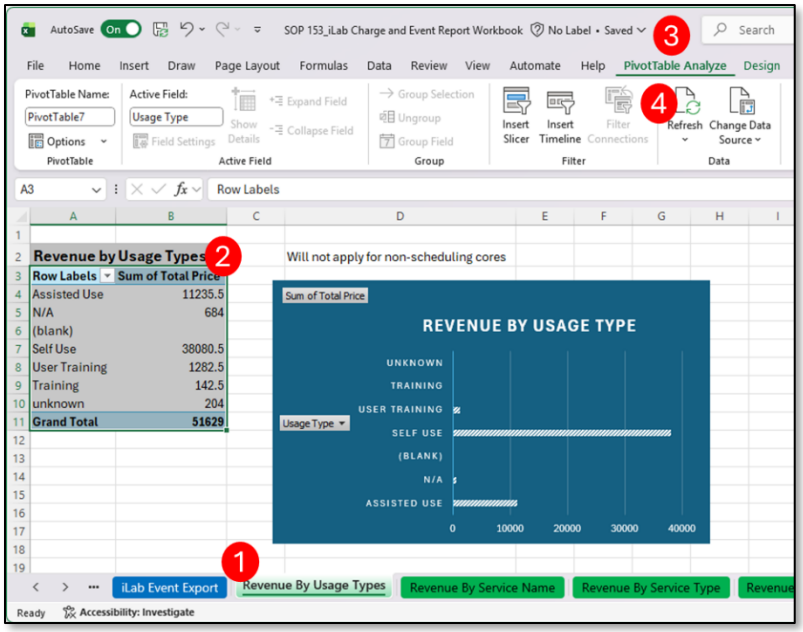
8. Navigate to the 'Reporting' tab and 'Events' sub-tab of the core's iLab page.



9. Follow steps 2-7 as described above but paste the exported data into the 'iLab Event Export' sheet of the workbook.
10. Each subsequent sheet in the excel workbook contains a report. For each report you wish to generate or update:
    i. Click on that tab.
    ii. Highlight the table.
    iii. Click on the 'PivotTable Analyze' tab.
    iv. Click on 'Refresh'.



iLab Charge and Event Report Workbook Template

The template contains multiple sheets/tabs which are described below. Each type of core (scheduling vs service core) will focus on different sheets to perform different types of analysis:

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- **Scheduling Cores**: Revenue By Usage Types, Actual vs Scheduled by Lab, Event Type by Cout by Eq., Actual vs Sched hours by Eq., Eq. Utilization by Lab
- **Service Cores**: Revenue By Service Name, Revenue By Service Type
- **Both types**: Revenue by Dept, Revenue by Lab

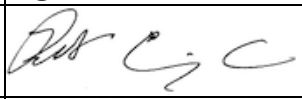
Description of each sheet/tab:

- **iLab Charge Export:** Raw data that is exported directly from the Reporting→Charges section of iLab. Tables and graphs generated in subsequent tabs in gold are generated from the data copied into this sheet.
  - **Revenue By Usage Type**: Displays revenue by usage type, which is a predefined reservation type with specific scheduling and rate parameters (e.g. Assisted Use, Self Use, etc.). This graph shows how much revenue is associated with different usage categories.
  - **Revenue By Service Name**: Displays revenue by the individual service request names (or the individual 'charge' names). These are the services listed in the bottom panel of the 'Request Services' tab in a core's iLab page. This graph is useful to assess what services generate the most revenue.
  - **Revenue By Service Type**: Displays revenue by service request type as listed in the top panel of the 'Request Services' tab in a core's iLab page. These are the umbrella service offerings that cores set up to collect all information needed to start a project and are driven by the specific services listed in the bottom panel of the core's 'Request Services' tab. This provides a high-level view of what service types contribute to overall revenue.
  - **Revenue by Dept**: Displays revenue by department name. This data is useful for assessing a core's customer base by department.
  - **Revenue by Lab**: Displays revenue by lab name. This data is also useful for assessing a core's customer base, but separated by lab.
- **iLab Event Export:** Raw data that is exported directly from the Reporting→Events section of iLab. Tables and graphs generated in subsequent tabs in blue are generated from the data copied into this sheet.
  - **Actual vs Scheduled by Lab:** Displays the proportion of actual total number of hours versus scheduled total number of hours separated by lab. This graph is useful to assess if individual labs are scheduling equipment efficiently.
  - **Event Type by Count by Eq:** Displays the sum of event hours separated by equipment. Event types are: reservation, unavailable (for maintenance scheduling) or cancelled (for cancelled events). This graph is useful for assessing overall equipment usage.

- **Actual vs Sched hours by Eq:** Displays the sum of actual hours versus scheduled hours by equipment. This graph is useful to assess scheduling efficiency and usage separated by equipment.
- **Eq Utilization by Lab:** Displays the total actual usage hours for each piece of equipment, broken down by lab. This graph is useful to assess which equipment is most utilized and which labs are the primary users of specific instruments.

References:

- General Tips on iLab Reporting

Approval Authorizations	Signature	Date
Robert Cunningham, *Vice Chancellor for Research Infrastructure, University of Pittsburgh*		2 Dec 2025
Ashley Zyhowski, *Research Project Manager, University of Pittsburgh*		2 Dec 2025