

# Reports

Administration reports creation and management

- [Report Management](#)
- [User Reports](#)
- [Course Reports](#)
- [Aggregated Report](#)

# Report Management

## Overview

Forma LMS provides a powerful and flexible report generation system, with these features:

- Create unlimited custom report
- Report generation wizard
- Automatically filter reports for assigned users and course
- Scheduling

### Reports

 [New](#)

(All) 

Name	Created by	Creation date	Public						
Courses - Users	Anonymous	00-00-0000 00:00							
Users - Courses	Anonymous	00-00-0000 00:00							
Users - Learning Objects	Anonymous	00-00-0000 00:00							
Users - 30 Days Delay	Anonymous	00-00-0000 00:00							

 [New](#)

**Public:** when a report is flagged as “public” it will be visible to all administrators and superadministrators. Non public reports can be viewed only by superadministrators and by the administrator that created the report

**View:** view the report

**Export** in CSV or XLS format

**Schedule** the report to be automatically sent by email to selected users

**Edit:** modify configuration options for the report



**NOTE:** Users with level **Administrator** will be allowed to see and edit only report flagged as “public”, or created by themselves. Within the reports, administrator will see users and courses based on their user assignments. See [Administrators management guide](#) for details

# Create Reports

A four-steps wizard will guide you in report creation:

1. Select the report category
2. Select filter on the rows to display or data aggregation mode
3. Select the report type: please note that it won't be possible to change the report type once saved
4. Select column and criteria for the selected report type

## Report Category

Forma natively provides three report “categories”, each based on a different logic for data displaying, and providing different report types.

Available categories are:

1. Users-Courses: will display different data type for a list of users.
2. Courses-Users: will display different data type for a list of courses.
3. Aggregated: shows aggregated information for selected users and courses

### Reports

New

Name

My Report

Select report category:

Users

Users

Courses report

Data aggregation on users and course

Next

Undo

## User Selector

For each category, it is possible to select the users to be included in the report.

In most cases, the best option is including "all users" and simply filter by course:

## Reports

New / Rows filter's settings

Report for all the users

**USERS**   **GROUPS**   **ORGANIZATION CHART**   **COMPANY ROLES**

Show also suspended users

Advanced search

0 Selected elements Select: [All pages](#) , [None](#)   « Start < Previous 1 **2** 3 Next > End » 1 - 25 of 67

<input type="checkbox"/>	Username ▲	Last name	First name	Email ▼	Last access date ▼	Registration date ▼
<input type="checkbox"/>	aayot	Ayot	Alexis	AlexisAyot@rhyta.com		17-05-2020 16:18
<input type="checkbox"/>	abata	Bata	Amjad	AmjadAbdul-QadirBata@cuvax.de		17-05-2020 16:04
<input type="checkbox"/>	admin	Smith	John		23-05-2020 07:39	00-00-0000 00:00
<input type="checkbox"/>	ajordan	Jordan	Alisha	AlishaJordan@gustr.com		17-05-2020 16:17

# Report Scheduling

Reports can be automatically generated and sent by email to some users

You can create an unlimited number of schedules:

## Reports

Schedule "Courses - Users"

**⚠** Beware, users will see the report as well as the user who generated it

 Add

Name	Created by	Creation date	Send	Recipients	Active		
Weekly status report	admin	23-05-2020 08:28	Every week, monday, at hour 08:00:00	1			

 Add

Upon schedule creation and edit, it will be possible to choose the users that will receive the report and set the date/frequency and time with the following settings:

## Schedule

Description:

Everyday, at hour

report now

Every week, on the day:  , at hour

Every month, on the day:  , at hour

## Advanced Settings (Report Attachment)

Further settings to configure how the scheduled report might be attached to the sent email can be configured under:

Adm > Settings > System Configurations > Settings > Advanced

### Report Settings

Report download availability (number of days)

Max attached report size (MB)

saving path for report recording



Create report and send it by email as soon as it is ready (report execution must be enabled in crontab)

Set the "Max attached report size" according to your intranet or email account limits. If value is set to zero, users will always receive a link to the stored file.

## Cron setting

For the file to be sent, you will need to set up a cron-job on your server, calling the file:

```
[root]/cron/cron.report.php
```

# User Reports

Reports in this category will show a list of users and their status on different items

## Relates users to courses

This is the most commonly used report, that shows the status of each user on each course, based on the filters defined for users and courses.

Export as HTML   Export as CSV   Export as XLS   << back to report list

Creation date: 24/05/2020 10:26:30

User courses details

Users		Courses												Progress
Username	Code	Course name	Subscribed date	First access date	Completed	Last access date	Status	Start score	Final score	Course score	Number of sessions	Total time	Estimated time	graphic report
admin	L001	Business English	00-00-0000 00:00	04-05-2020 12:22		05-05-2020 16:18	In progress				2	00h 10m 46s	0h	
admin	S001	Leadership Program	24-05-2020 10:16				Subscribed						0h	
admin	T001	Welcome Kit	00-00-0000 00:00	04-05-2020 16:48		22-05-2020 18:13	In progress			100.00 / 100	22	07h 18m 00s	0h	
admin	T002	Basic Compliance Procedures	00-00-0000 00:00	03-05-2020 11:55		03-05-2020 11:55	In progress				1	00h 00m 37s	0h	
awall	S001	Leadership Program	24-05-2020 10:16				Subscribed						0h	
baswad	L001	Business English	02-05-2020 14:45				Subscribed						0h	
baswad	T001	Welcome Kit	05-05-2020 16:23				Subscribed			0.00 / 100			0h	
bjamison	L001	Business English	02-05-2020 14:45				Subscribed						0h	
bjamison	T001	Welcome Kit	05-05-2020 16:23	13-05-2020 08:24		13-05-2020 08:25	In progress			0.00 / 100	1	00h 00m 57s	0h	
gboni	L001	Business English	02-05-2020 14:45				Waiting users						0h	

Example of report relating users to courses

## Report Options

**Select Courses:** select to include all courses or only some courses

**Conditions on selected courses:** apply filters to display only users with specified conditions date or score conditions (i.e., filter only users subscribed after a certain date)

**Show users custom fields:** select which user personal information will be shown in the report

**Custom Org:** show data from the user org-chart custom fields

**Display courses information:** select which course information to show

**Additional fields for courses:** show data from the course custom fields

**Classroom fields:** show specific course information for classroom courses

**Display user's information** about courses: choose which information display about the user status on the course: status (i.e., completed, in progress), dates, scores, etc.

**Progress:** display user progress as percentage or progress bar

**Other options:** exclude suspended users, ordering options

## Make delay analysis

This report will filter only users with specified completion status in a defined time range, to monitor user delays and send reminders.

### Filter Options

It is possible to select users based on their status on the course:

- Users that haven't completed the course
- Users who haven't started the course
- All conditions must be satisfied

And based on the time condition of course and subscription:

- After (specify number) days from their subscription
- Course expiring in (specify number) days
- Course expiring on (specify date)

## Relates users to Learning Objects

This report displays the status and progress of each user on the learning objects of one or more courses.

### Report Options

**Learning Objects types:** choose which types of LO to include in the report

**Select milestones:** select to include or exclude milestones LO

**Show users fields:** show some information about the user

**Display courses information:** show some information about the user

**Learning Objects Info:** include information about the LO

## Relates users to tests

Like the Learning Objects report, but filtered on test LO

## Relates users to communications

Show if users have viewed communications

## Relates users to corporate contests

Show user status on corporate contests

# Course Reports

## Relates courses to users

Export as HTML Export as CSV Export as XLS

<< back to report list

Creation date: 24/05/2020 11:10:01

Course				Users								Time
Course code	Course name	Status	Date begin	Subscribed		To begin		In progress		Completed		
				Num.	Perc.	Num.	Perc.	Num.	Perc.	Num.	Perc.	
L001	Business English	Confirmed	00-00-00 00:00	6	-	3	50.00%	1	16.67%			0h 10m 46s
S001	Leadership Program	Confirmed	00-00-00 00:00	2	-	2	100.00%					
T001	Welcome Kit	Confirmed	00-00-00 00:00	5	-	3	60.00%	2	40.00%			7h 18m 57s
T002	Basic Compliance Procedures	Confirmed	00-00-00 00:00	1	-			1	100.00%			0h 00m 37s
<b>Total</b>				<b>14</b>	<b>-</b>	<b>8</b>	<b>57.14%</b>	<b>4</b>	<b>28.57%</b>		<b>n.d.</b>	<b>7h 50m 20s</b>

Example of Courses Report

## Report Options

**Time period:** filter data from a selected period or time range

**Other options:**

- Group data per orgchart: will produce separate report tables for each orgchart node
- Show also suspended users
- Show only: Students — Filters count on users with level “student”
- Show: Assessments — related to the removed “assessment” feature — don't use

**Display courses information:** show information about the course

**Additional fields for courses:** show data from the course custom fields

**Classroom fields:** show specific course information for classroom courses

**Display user's information** about courses: shows further information about the course

**Show statistics about courses:** calculate course stats about user status and progress in each course

Relates courses with the teachers  
votes

Relates courses with users votes

# Aggregated Report

This report will display aggregated data about users and courses

The following report types are available:

- Relates users to courses
- Course categories
- Years
- Relates users to communications
- Relates users to corporate contests