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
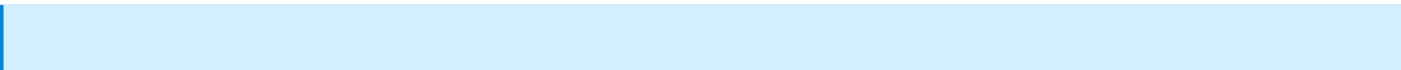
Create Reports

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

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 25 ▾

☐	Username ▲	Last name	First name	Email ▾ ⬍	Last access date ▾ ⬍	Registration date ▾ ⬍
☐	**aayot**	**Ayot**	**Alexis**	AlexisAyot@rhyta.com		17-05-2020 16:18
☐	**abata**	**Bata**	**Amjad**	AmjadAbdul-QadirBata@cuvox.de		17-05-2020 16:04
☐	**admin**	**Smith**	**John**		23-05-2020 07:39	00-00-0000 00:00
☐	**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:** `Sunday ▾` **, at hour** `00:00` 🕐

○ **Every month, on the day:** `1 ▾` **, at hour** `00:00` 🕐

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)	30
Max attached report size (MB)	0
saving path for report recording	/files/common/report/ ⚈

☐ 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`

Revision #3
Created 15 February 2024 15:47:23 by Lorenzo Polizzi
Updated 16 October 2024 16:13:06 by Alberto Pastorelli