

Reports available within Claromentis

Most popular reports

- Audit logs: Administrators can export a host of information across all applications to gain insight into engagement with the platform as well as investigate issues e.g. user login totals, page views
- Remaining holiday quota for your staff: Within the Holiday Planner application, set your scope of user groups and see a list of all staff's used and remaining holiday quota. A valuable tool for any manager who wishes to remain vigilant against any end-of-year accumulations of holiday days.
- Bradford Factor: The widely used absence management calculation is available as a Holiday Planner report. See the 'Bradford Score' of any staff within the scope you set.
- Document Permissions Report: Working with a document management system can often yield doubts about whether permissions have been correctly set throughout a folder structure. Simply pick a user, and see a report on what they can and can't see within your structure.
- Expenses: Generate a list of all submitted expenses and their important details.
- Craft your own reports: The Reports application is a valuable tool for querying your database's information and fetching bespoke reports that go beyond the standard offerings. Available for Projects, Policy Manager, Courses, Learning and Quiz.

Reports per application

Documents

Workflow report: Generate a list of any documents awaiting workflow approval. If you choose to have documents move through an approvals process, some items can occasionally get held up. This area gives an oversight on which items are awaiting approval, and from whom.

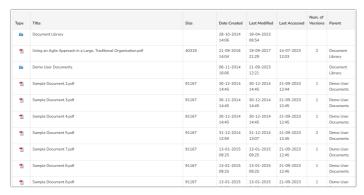


Number/size of documents and electronic records by record type: If you choose to make use of Record Types, this will generate a list summarising the quantity and size of each type.

For example, you may wish to know how many Gigabytes of CAD documents you have stored, or how many scanned document images you have.

Detailed report on documents and folder structure: Generate a list of files and folders that exist, showing their creation, last modified and last accessed dates, together with their size and how many versions exist.

The report can be filtered by folder, creation date range, last modified date range, and users. The report can be downloaded as a CSV, and can include document metadata in the export.



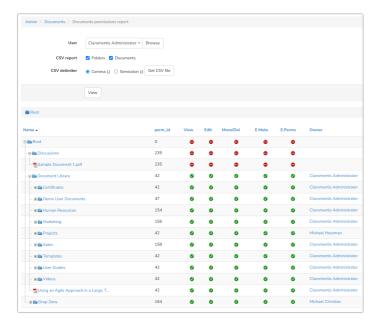
Number and location of folders, documents and records by specific access control markings: If your company deals with secure information, you can make use of access control markings to mark documents as 'Restricted', 'Secret', 'Top Secret' and so on. This report will generate a list of documents, showing their location and access control levels.

Report by review date: generate a list of documents showing their creation, last modified, and review dates. This is useful if your business has a policy to ensure checks are made that review dates are not missed, and that all documents remain relevant.

Documents Permissions Report: Select an individual user, to check what they are able to see within your Documents system.

A useful tool to put at ease any concerns that permissions may have been set incorrectly somewhere within a folder structure. This report will visually show what your chosen user can and cannot achieve.

This report is filterable by user and can be exported to a CSV.

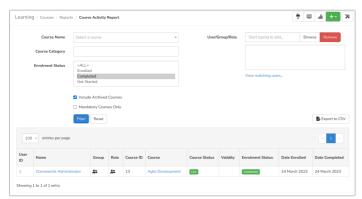


Learning

Course and Module Activity Reports: Generate a list of enrolment and completion activity within the eLearning system.

The lists will show who the users are, the modules they are engaging with, their completion status such as 'Enrolled' or 'Completed', how many times they've accessed the module, and their dates of enrolment and completion if available.

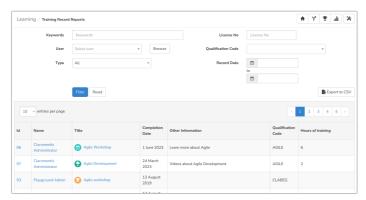
The report can be filtered by individual modules/assessments, users, and user groups. The report can be downloaded as a CSV.



Training Record reports: Generate a list of all forms of training completed by your users.

This can be modules completed, learning events attended, certificates obtained, or learning paths achieved. The report will show the users, the type of learning achieved, the completion date, the qualification code, and any other information.

The report can be filtered by keywords, individual users, learning object type, License number, Qualification code, and record date ranges. The report can be downloaded as a CSV.



Use our Reports application to craft your own report and query the database further than the standard report offering.

Use the interface to build the report that works for your needs, pulling only the columns of data that are relevant to you. For example, you may wish to know of any users who have passed courses, but you would also like the report to show which department those users work in.

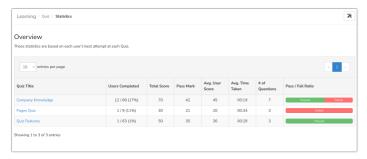
The reports application can be scheduled to run on an interval, for a scope of users of your choosing. Results can be searched and filtered by any column you have chosen to include. The report can be downloaded as a CSV.



Quiz

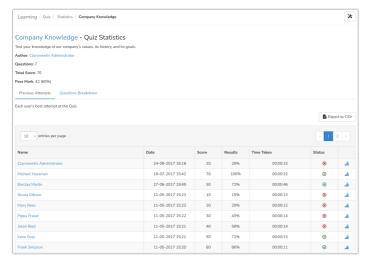
Overview report: Generate a list of all available quizzes.

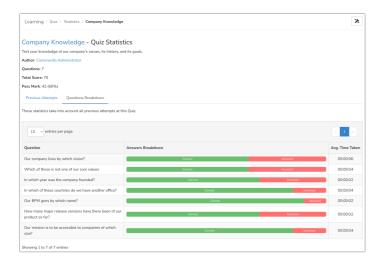
See the number of users completed, the pass mark required and the maximum achievable score, the average user score, the average time taken, the number of questions, and a visual bar chart representation of the pass/fail ratio.



Individual quiz report: Generate a list of all the attempts taken. See the date of the attempt, the score achieved, the time taken, and the pass/fail status.

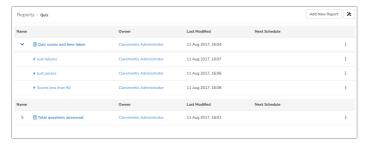
A questions breakdown tab shows a visual representation of the pass/fail ratio of each individual question, which helps to highlight where your users are struggling the most within your quiz.





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Results can be searched and filtered by any column you have chosen to include. The report can be downloaded as a CSV.

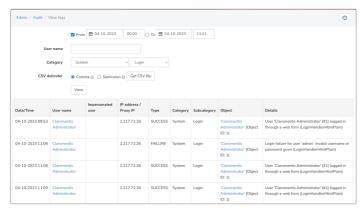


Audit Log

A tool available only to administrators is the Audit Log.

Actions performed across the system are logged in the background, which is useful for problem-solving. e.g. when a document was viewed and by whom, if an InfoCapture notification was sent, records of user logins etc

The report can be filtered by date, individual user, application, or sub-category within an application and be downloaded to a CSV for each searching or record keeping.



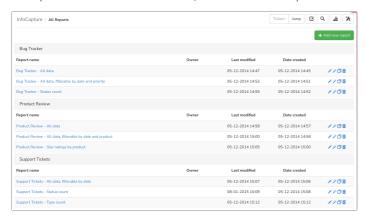
Infocapture

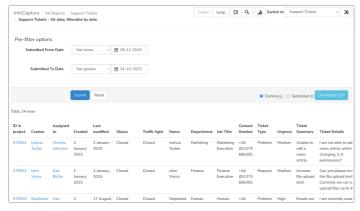
Infocapture's reports are configurable to achieve a list of information relevant to your needs. Lists can be generated of any data from a project, set to filter in advance or allow the generating user to define their own filters.

The report can group together any matching data, for example, you may wish to know the total number of submitted forms that show a particular list value – such as the number of forms submitted specifying 'Region A' and the number with 'Region B' and so on.

The reports can be saved and permission controlled, as you may wish to define that only a certain group of users can re-run your saved report.

The report can be downloaded to a CSV, for further data manipulation within Excel.

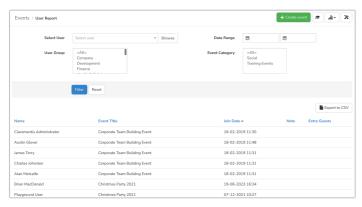




Events

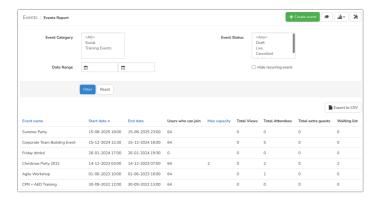
User report: Generate a list of all instances of users joining events. The report will display the user's name, the name of the event they joined, the joining date, the user's "note to organiser" if they left one, and the number of extra guests.

The report can be filtered by individual users, user groups, date ranges, and event categories.



Events Report: Generate a list of all events, showing the start and end dates, the number of users able to join the event, their maximum capacities, the total attendees, users and guests, and the number of users on the waiting list.

The report can be filtered by event category, event status such as Draft, Live, or Cancelled, and by date range. The report can be downloaded as a CSV.

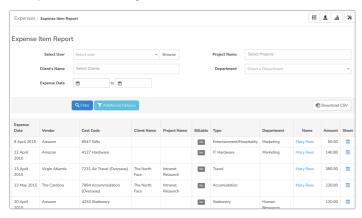


Expenses

Expense item report: Generate a list of all items that have been claimed on expenses.

The report will show the expense date, vendor, cost code, client and project names, the submitting user's name and department, the item cost, and a link to the expense sheet it originates from.

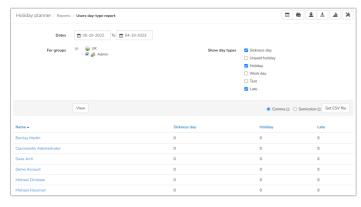
The report can be filtered by all of these, and it can be downloaded as a CSV.



Holiday Planner

Users day-type report: Generate a list counting the number of days of each type used by each user. For example, see how many sickness days, holiday days, and unpaid days a particular user has taken.

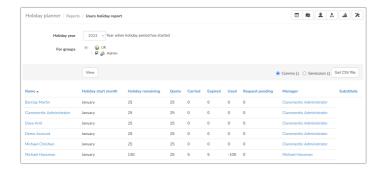
This report can be filtered by date range and holiday user group and downloaded as a CSV.



Users holiday report: Generate a list of users with a breakdown of their holiday usage.

The report will show their remaining holiday, their original quota for the year, the number of days carried from a previous year, the number of days they have used, how many requests they have pending, and who their two holiday approvals managers are.

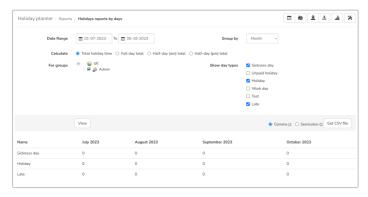
The report is filterable by holiday period year, and by holiday user group. It can be downloaded as a CSV.



Holidays reports by days: Generate a list of Holiday day types, such as sickness day, unpaid holiday, holiday, etc, and show the number of days of those types used within a date range of your choosing. The results can be grouped by week, fortnight, month, or year.

For example you may wish to assess your staff absences over the past year, and group by month, to gain an awareness of which months saw peaks in holidays, sickness, and so on.

The report can be filtered by date range, week/fortnight/month/year grouping, calculation type, holiday user groups, and day types. The report can be downloaded as a CSV.

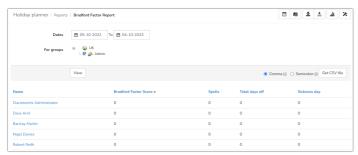


Holidays reports by groups: The same report as Holiday Reports by Days, but showing a breakdown of holiday user groups rather than a breakdown of day types.

Bradford Factor: If you make use of Bradford Factor in your business, a report can be run to make your calculations.

The report will show each user's name, their current Bradford score, the number of absence spells, the total number of days off, and the total number of each day type that you choose to factor into your calculation – by default this is just 'Sickness day'.

The report is filterable by date range and holiday user group, and can be downloaded as a CSV.



Digital Assets Manager

Viewed asset list: Generate a list of your digital assets that have been downloaded or viewed. Filter by category, asset type, and date range. The list can be downloaded as a CSV format.



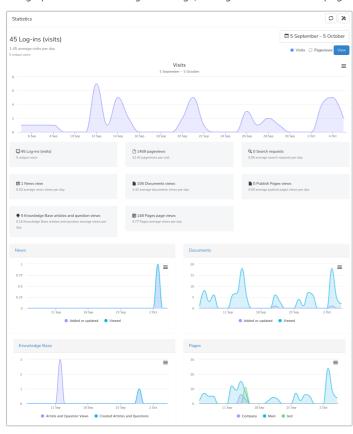
Statistics

Our Statistics application can give administrators a visual representation of user engagement. Three graphs show the number of logins, news added and viewed, and documents added and viewed.

Figures are also provided for the per-day average of news views, logins, document views, search requests, and Publish application page views.

Further information is also available showing a 'top 10' most popular documents and news, as well as your top document and news updaters.

The graphs can be filtered by date range, and by a choice of visits or pageviews. The charts can be downloaded as PNG, JPEG, PDF, or SVG.

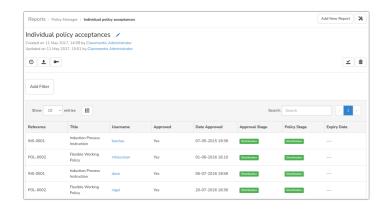


Policy Manager

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