

Form Reports

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With the appropriate permissions, you can generate two form reports:

- Form Detail, showing every instance that form was completed during the specified date range, and including when activated, who submitted it and when, who it was delivered to, and more.
- Form Summary, including when activated, who completed it and when, who acknowledged it and when, read receipt information, and more.

When generating these reports, you can set specific filters to narrow your results based on a participating user or resource as well as a date range. In addition, you can generate the detail report in PDF or as a spreadsheet that you can open using a text editor or Microsoft® Excel®. The summary report can only be generated in Excel report format (.xlsx).

To generate a Form Detail report

1. In the main menu, click **Report** and then click **Form Detail**. The *Form Detail Report* page opens.
2. In **Start Date** and **End Date**, enter the date range that you want to include in the report.
3. For **Report Format**, click **Web Browser** (HTML) or **Excel** (XLSX).
4. In the **Form** list, select the form.
5. If appropriate, click Filter and select the filter you want to apply.
6. Click **Generate Report**. Your report opens or downloads.

To generate a Form Summary report

1. In the main menu, click **Report** and then click **Form Summary**. The *Form Summary Report* page opens.
2. In **Start Date** and **End Date**, enter the date range that you want to include in the report.
3. For **Report Format**, click **Web Browser** (HTML) or **Excel** (XLSX).
4. In the **Form** list, select the form.
5. Click **Generate Report**. Your report opens or downloads.