

# Viewing Reports

Totara Learn site administrators create custom reports and then grant access to other users to run, or view, the reports. Access to reports is based upon the user's role in the system. Users can access reports through their **Reports** page. The **Reports** option will appear in the navigation menu if the user has been assigned a role that has been permitted access to any reports.

To run a report, click on the title of the report under the **Reports** section.

## Searching for results

Search filters will appear at the top of the page. Use the filters to help search the report for specific data, such as a particular learner or date range. Click **Show Advanced** to show all available filters.

There are different types of filters available, based on the field. Text fields like the **User's Fullname** will allow you to enter text. Dates will allow you to enter a specific date to search before, after, or within a date range. Filters often have a dropdown that allows you to select options around data filtering.

After entering any search filters, click the **Search** button. Results of the report will appear at the bottom of the page.

Read more about filter types below.

### Text filter

This filter allows you to search for information based on free form text. The filter has the following options:

- **Contains:** Search for records that contain the text entered (if no text is entered, then the filter is disabled).
- **Doesn't contain:** Search for records that do not contain the text entered.
- **Is equal to:** Search for records that are equal to the text.
- **Starts with:** Search for records that start with the text entered.
- **Ends with:** Search for records that end with the text entered.
- **Is empty:** Search for records that are equal to an empty string.

### Select filter

This filter allows you to filter information based on a dropdown list. The values in the dropdown will be the same as the list seen elsewhere in Totara Learn. For example, the attendance status will contain the same status options as seen in the Face-to-face activity. The filter has the following options:

- **Is any value:** This option disables the filter (i.e. all information is accepted by this filter).
- **Is equal to:** This option allows only information that is equal to the value selected from the list.
- **Is not equal to:** This option allows only information that is different from the value selected from the list.

### Date filter

This filter allows you to search for records by date. You can choose to search for records from before and/or after selected dates, as well as search for records that are a certain number of days before and/or after the date of the report generation. To apply a date filter, place a tick in the checkbox next to the date and enter the day, month, and year.

You can also **Include record when date is missing** if you want to ensure these records are not missed (as they could be a match to what you are searching for but are missing the relevant data).



The timezone of the user viewing the report can affect the records displayed with certain date filters applied e.g. Course Start Date.

For example, if User A in New Zealand creates (or edits) a course and sets the start date to 19th January, User B in an earlier timezone e.g. California may not see the course if the report filter is set to "Start date is after 18th January". This is because User B is in a timezone that could still be in the previous day.

#### On this page



The Totara Academy has a whole course dedicated to using [Reports](#) in Totara Learn. Here you can learn more on how to use reports, see best practice, and give it a go yourself.

## Report data

Report data will appear in columns. Clicking on a column heading will sort the data by that column. An arrow will appear next to the column heading to show whether the data is sorted in ascending (A-Z). Click on the title again to sort in descending order (Z-A).

Click the **Show/Hide Columns** button. The columns available are those that have already been added to the report by a site administrator. The user can choose to show/hide columns from their own view. Check the tick box next to any columns that should appear on the report and click the **Ok** button.

At the bottom of the page, click the page numbers or the **Next** link to view the next page of data.

Data can also be exported to a file by selecting the export format in the dropdown. Click the **Export** button and the file will be immediately created.



Note that when exporting reports, all of the columns of the report will be exported. Columns hidden using the **Show/Hide Columns** option will also be included.

## Save search filters

If you have selected filters and searched for specific records, a **Save this search** button will appear on the right side of the screen. This allows you to save a common search to run again and make available to other users. Saved searches can also be used when setting up [scheduled reports](#).

1. Click the **Save this search** button to save the filters that have been selected. The filter options that will be saved are displayed in the *Settings to be saved* section.
2. Enter a name for the query in the *Search Name* field.
3. If this query should be available to other users (public), place a tick in the **Let other users view** check box. A public saved search can be viewed by any user that has access to the report it is saved for, however it is only editable by the user that created it.
4. Click the **Save changes** button. When the report is accessed in the future, a new dropdown called **View a saved search** will appear on the right-hand side of the page below the **Search** button. Select the saved search from the list to run the search.

## Viewing email addresses

It is possible to view email addresses in Report Builder, although you might receive the value **Email is private** when viewing the **User's Email** column in a report.

If you are having problems with the visibility of the user email field then you will need to check a few settings and capabilities.

To grant visibility to email address you need to ensure that visibility is enabled:

1. From the **Administration menu** go to *Users > Permissions > User policies*.
2. For the setting **Show user identity** ensure that **Email address** is checked (this is normally enabled by default).
3. Click the **Save changes** button.

The **site:viewuseridentity** capability will also need to be enabled (set to **Allow**) for the relevant role. By default this is enabled for the Trainer, Editing Trainer and Manager (not Staff Manager) roles, however it's a course context capability, so you need to assign the users the role in the system context to grant visibility in Report Builder.

It is also important to note that the column **User's Email (ignoring user display setting)** should be added to the report. The **Email** column respects email visibility regardless of permissions, which could lead to the warning that **Email is private**, even if you are viewing as a Site Administrator.

A workaround (if you're not keen on assigning a role in the system context) might be to allow the **site:viewuseridentity** setting for the **Authenticated User** role and then restrict the report to the Trainer role in any context. This means that they would then be able to view the user's email address in the report. The only downside to that is that user emails would be exposed to enrolled users in the course context, however you could get around that with a role override.

## Performance related data

Site managers can not access report columns relating to a user's performance by default. This include the following columns:

- **Appraisal Answers:** Learner's Answers, Learner's Rating Answers, Learner's Score, Manager's Answers, Manager's Rating Answers, Manager's Score, Manager's Manager Answers, Manager's Manager Rating Answers, Manager's Manager Score, Appraiser's Answers, Appraiser's Rating Answers, Appraiser's Score, All Roles' Answers, All Roles' Rating Answers, All Roles' Score.
- **Goals:** Goal Name, Goal Description

To give site managers access to this data the role must be updated with the following [permissions](#):

- **totara/appraisal:viewallappraisals**
- **totara/hierarchy:viewallgoals**