

# Report Builder

Content management and assignment of learning to staff and users of a system is only part of the picture when it comes to learning management. The ability to record and track employee training is necessary to get a full picture of the results of current training programs and to provide assessable goals to improve the training that is available.

Totara Learn provides a custom report builder that allows site administrators to create custom site-wide reports that are then distributed to users such as managers and trainers so that they can review and manage employee training programs.

## Benefits of using Totara report builder

The Report Builder sources data from many features in Totara Learn to provide reporting on such areas as learner completion, face-to-face session attendance and can be used to validate data imported using HR import.

### Learner completion and competencies

Learners can complete activities, courses, programs, certifications, and receive marks towards proficiency in competencies and objectives. Reports built to display completion and competency information can inform staff managers of the work that learners have yet to complete and can also be used to find learners who are competent in particular areas. This information can be used to source talent within your company for internal promotion and for filling temporary knowledge gaps within your organisation.

### Seminar attendance

The seminar activity allows learners to sign up for instructor-led training sessions. Managers or trainers can use custom built reports to review learner interest and registration across multiple sessions. After a session has occurred, trainers can take attendance, marking whether a learner fully or partially attended a session or if they did not attend. Attendance may be required for course completion and can be tracked using custom built reports.

### Data validation

[HR import](#) allows site administrators to import data from HR or other systems to automatically populate user accounts, organisation and position hierarchies. Custom built reports can be used to allow an HR representative or staff manager to review the data that has been imported to verify it for accuracy, without requiring that they have access to edit or view user accounts directly.

## How report builder works

### Creating custom reports

Totara Learn contains user roles that are granted permissions to perform parts of the process of creating and viewing custom built reports. A report can be built by a site administrator and made available to other users based on the role that they have been assigned on the system.

Building a report allows site administrators to select:

- The columns of data that will be available.
- The filters a user can use to search with.
- Content controls that restrict the records that are available when a report is viewed.
- The user role(s) that will be given permission to access the report.
- Performance settings such as restricting reports to run with search criteria entered and caching versions of the report.



Please note that text area custom fields are unsupported as they break the formatting of concatenated columns.

### Running custom reports

Users granted access to reports will see the **My reports** menu option in the navigation menu. Users can run select a report, add search criteria to filter for particular records, and export data into files. Reports that need to be run regularly can be scheduled to so that they are automatically run and sent as file attachments to users.

#### On this page

#### Related pages



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.

Based on the content controls that have been setup, the report may be pre-filtered to only display records for staff at or below a user's position, within or under a user's organisation, or other details depending on the report source that was chosen.

## Developing custom report sources

A report source defines the primary type of data that will be used in a report. Each report can have one report source. The set of default report sources includes data like user profile information, course completion, competencies, seminar session details, and attendance. Additional report sources can be created by Totara developers programmatically which is described in detail in the developer documentation.

## Report types

Within Totara Learn there are two types of reports:

- **Embedded reports:** System generated reports
- **User reports:** Created by individual users

## Embedded reports

Every installation of Totara Learn comes with a set of Embedded reports ( a list of which can be found on the [report sources](#) page). These can be edited and managed by a Site administrator and anyone who has been given the `totara/reportbuilder:manageembeddedreport` capability.

Embedded reports are used throughout the system, for example the Browse list of users page is actually an embedded report, and can therefore be customised to suit your organisation. It is possible to duplicate an embedded report and then edit the copy to better suit your requirements without changing the default report. If you do decide to edit an embedded report then this will cause changes for everyone across the site accessing that report.

You can read more about embedded reports on the [managing reports](#) help page.