

Appraisal reports



Please note this is a legacy feature. To read about the improved performance management features new to Totara 13 please see the [Performance page](#).

View appraisal reports

Appraisal reports are available by going to *Quick-access menu > Appraisals > Reports*.

(The video above is taken from the [Appraisals](#) course in the Totara Academy).

Active appraisals

Name	Overdue	On target	Cancelled	Complete	Reports
Annual Appraisal (Health & Safety Representative)	0	9	0	0	Status report Detail report
Annual Appraisal (Support Advisor)	0	9	0	0	Status report Detail report
Annual Appraisal (Health & Safety Representative)	0	8	0	1	Status report Detail report

Inactive appraisals

Name	Status	Finished	Complete	Incomplete	Reports
Annual Appraisal (Health & Safety Representative)	Closed	10 October 2016	0	8	Status report Detail report

Reports are divided into:

- **Active appraisals:** Meaning the appraisal has been activated and is available to users
- **Inactive appraisals:** Appraisals that have been closed or have passed their due date

Draft appraisals are not displayed here.

Active appraisals

Information about each active appraisal includes:

- **Name:** The linked name of the appraisal. Click on the link to view the appraisal settings.
- **Overdue:** The number of overdue appraisals. An appraisal is considered overdue if the completion date of the current active stage has already passed.
- **On target:** The number of appraisals that are currently on time in terms of completion.
- **Complete:** The number of appraisals that have been completed.

Select the linked number in any cell to view a detailed report about which learner's appraisals currently fall under that status.

Inactive appraisals

Information about inactive appraisals includes:

- **Name:** The linked name of the appraisal. Click on the link to view the appraisal settings.
- **Status:** Displays the overall status of the appraisal.
- **Finished:** Displays the date the appraisal was completed or closed.
- **Complete:** The number of appraisals completed.
- **Incomplete:** The number of appraisals not completed.

Select the linked number in any cell to view a detailed report about which learner's appraisals currently fall under that status.

Status report

Select the **Status report** link to view the report for this appraisal for all statuses.

Annual Appraisal (Health & Safety Representative) status report: 9 records shown

▼ Search by

User's Fullname ⓘ contains

User's Current Stage ⓘ is any value ▼ Annual Appraisal (Health & Safety Repres: ▼

User's Appraisal Status ⓘ is any value ▼ Complete ▼

Search

Clear

Show/Hide Columns

Name	Position(s)	Organisation(s)	Manager(s)	Active stage	Previous stage time completed	Status
Alyana Grace	Support Advisor	Support	Thomas James	Set Up		On Target
Brogan Gordon	Support Advisor Health & Safety Representative	Support -	Thomas James Thomas James	End of Year Review	7 Oct 2016	Complete
Douglas Hawkes	-	-	-	Set Up		On Target
Frank Garner	CEO	Head Office	-	Set Up		On Target
Gavin Williams	Development Manager Health & Safety Representative -	Development - -	Sharon Hawkes Thomas James -	Set Up		On Target
Gordon Donald	Developer	Development	Gavin Williams	Set Up		On Target
Grace Charmaine	Developer	Development	Gavin Williams	Set Up		On Target

Detail report

A **Detail report** link is also available that provides more specific details from the appraisal.

This includes the learner's name, manager, appraisal status, and the questions from the appraisal are listed as column headings.

User's Appraisal Status

is any value Complete

Search Clear

Save this search

Show/Hide Columns

Name	Manager(s)	Status	Enter personal development details (Learner)	Enter personal development details (Manager)	Has this been agreed between learner and manager? (Learner)	Has this been agreed between learner and manager? (Manager)	Overall goal rating (Mid-year) (Learner)	Overall goal rating (Mid-year) (Manager)	Overall goal rating (Mid-year) (Maximum)	Overall competency rating (Mid-year) (Learner)	Overall competency rating (Mid-year) (Manager)	Overall competency rating (Mid-year) (Maximum)	Overall comments (Learner)	Overall comments (Manager)	Overall goal rating (End-year) (Learner)	Overall goal rating (End-year) (Manager)	Overall goal rating (End-year) (Maximum)	Overall competency rating (End-year) (Learner)	Overall competency rating (End-year) (Manager)	Overall competency rating (End-year) (Maximum)	Overall comments (Learner)	Overall comments (Manager)	
Aiyana Grace	Thomas James	On Target							10			10											
Brogan Gordon	Thomas James Thomas James	Complete	Some personal d...	Some personal d...	Yes	Yes	0	0	10	0	0	10	Some mid-year s...	Some mid-year s...	0	0	10	0	0	10	Some end of yea...	Some end of yea...	
Douglas Hawkes	-	On Target							10			10											

Search filters such as the user's name, current stage, appraisal status and manager's name are available at the top of the page.

Enter any search criteria and select the **Search** button to filter results. Report results can be exported using the *Export* drop down at the bottom of the page. See [Viewing reports](#) for more information on searching and filtering reports.

To add columns or modify the reports, select the **Edit this report** button which appears at the top right corner of the report page. These are embedded reports and can be modified to include additional data or reset back to their default settings. See [Creating reports](#) for information on modifying report columns and filters.

Additional reports can be created using Report Builder. See [Creating reports](#) to learn more about creating reports and Report Sources for available appraisal report sources.

Totara Academy



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