Report builder

Within Totara there are Site reports, which can only be accessed by Site Administrators and are not customisable, and then there are reports created and managed using the Report builder. Most reports fall under the latter, so we will focus on reports using the report builder.

You can also find more about reporting on our website.

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 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 to provide reporting on such areas as Learner completion and seminar attendance, and can also 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, if they were unable to attend, if they were a no show, or if attendance is not set for the user. 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 systems (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 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.

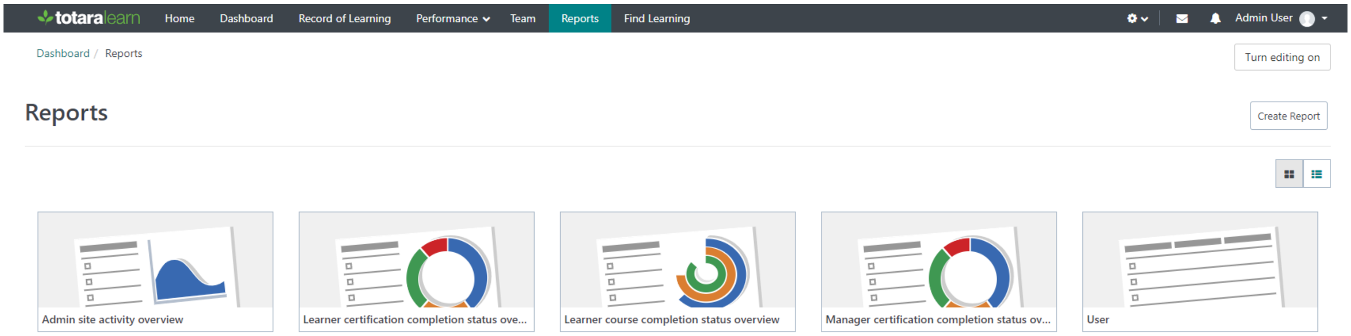
Building a report allows Site Administrators to select:

- 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

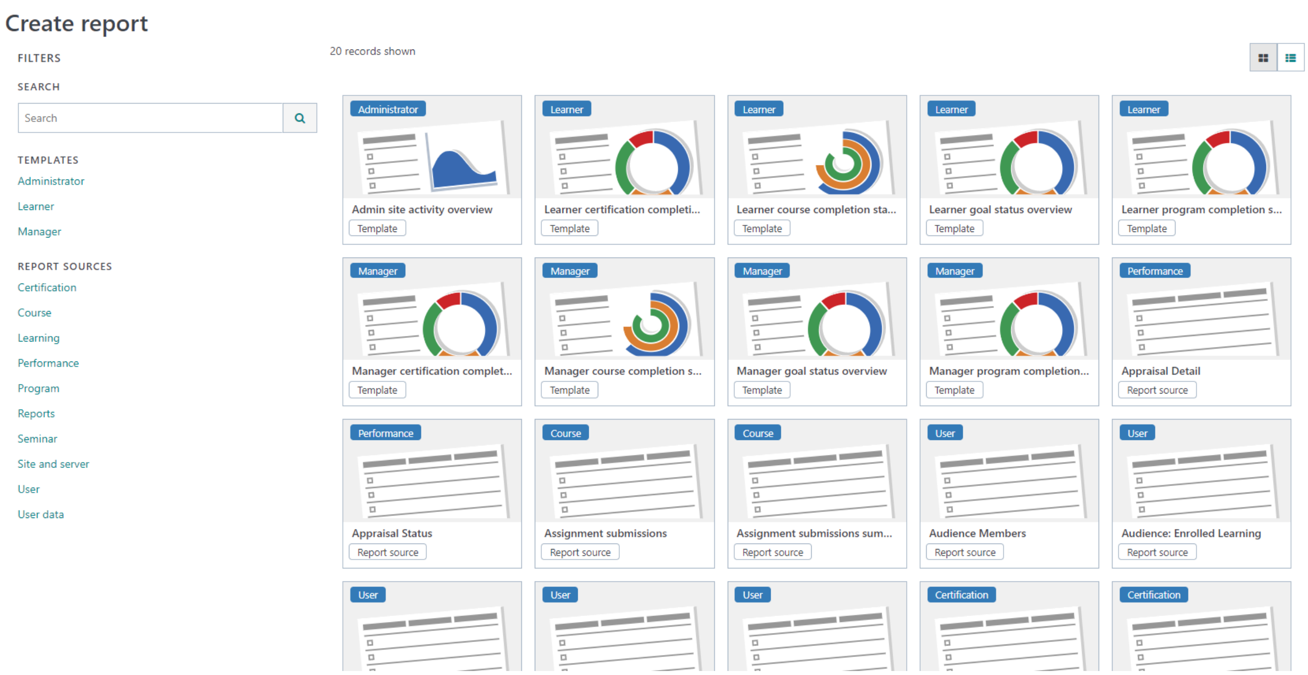
> Report builder caching will not function if you have multitenancy enabled on your site.

Selecting the **Reports** tab from the navigation menu will take you to the reports dashboard. Here you can see your created reports (and any scheduled reports, if applicable), and you can determine what is displayed on the reports dashboard by selecting **Turn editing on**.

You can start creating a report by selecting **Create Report** in the top-right corner.



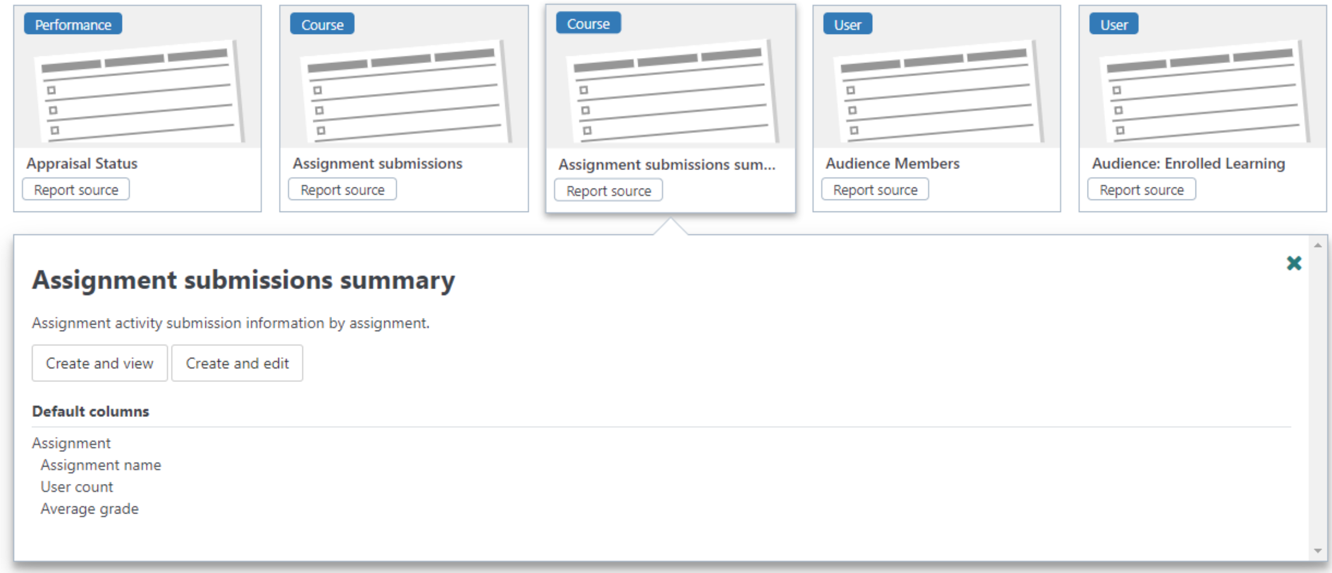
When you start creating a report you can see all of the available report sources and report templates. If you are looking for a specific report source or template you can use the **Search** feature in the left-hand panel. Under the search bar are a number of filters you can apply to the list. You can also select the **Load more** button at the bottom of the page to display more report sources and report templates. The report sources and templates can be displayed in a grid-based layout or in a list. You can toggle between the two options using the buttons in the top-right corner.



When you select a report source or template a pop-up window will display a brief description and the default columns used. Here you can select one of the following options:

- **Create and view:** Creates and immediately displays the selected report
- **Create and edit:** Creates the report and allows the user to edit its settings

If you select **Create and edit** for a report template, you will create a new report based on the template and edit the new report's settings. This option does not edit the template itself.



Alternatively, you can manage and create user reports by selecting **Reports** from the quick-access menu.

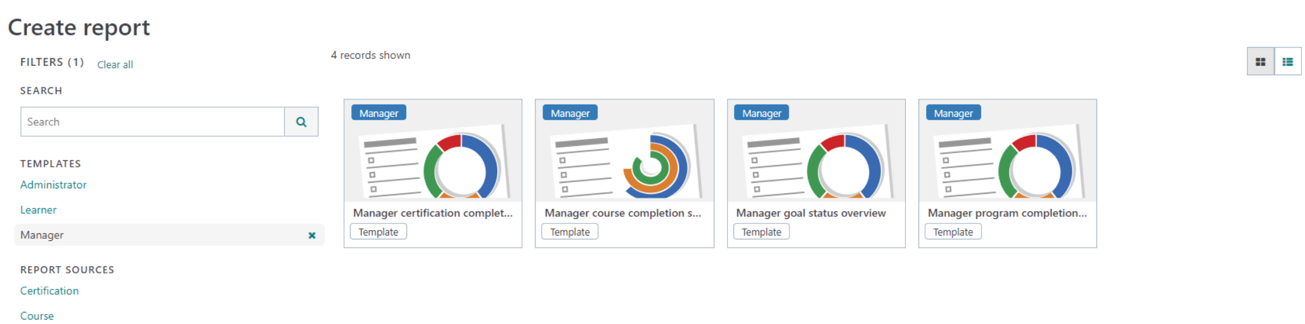
Report sources

If you have selected a report source, you will need to configure the report so that you can adjust it to suit your needs. It is therefore recommended that when using a report source (rather than a report template) you select **Create and edit**. You can find out more about how to configure user-generated reports on the Creating reports help page.

You can find out more about the report sources available in the report builder on the Report sources help page.

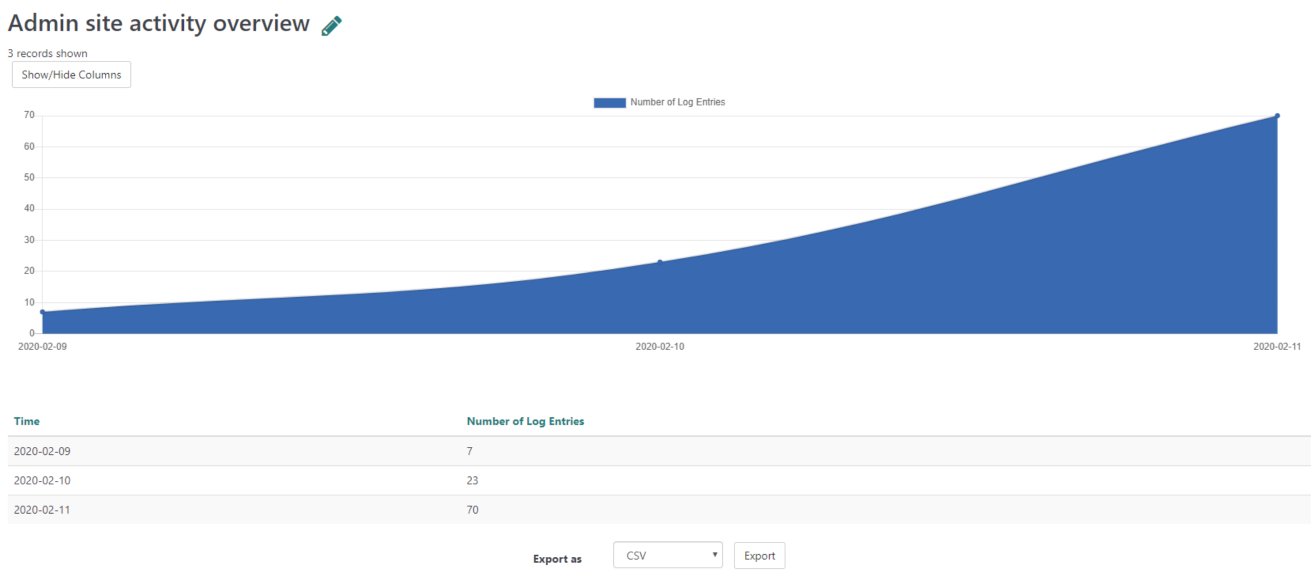
Report templates

When creating new reports, you can use report templates to quickly build useful reports. These provide a starting point which you can edit to fit your exact requirements. Note that when creating and editing a report from a template you will not be editing the template itself.



For example, if the user selected the **Manager program completion status overview** template, the user would see a simple report allowing managers to monitor which programs members of their team have completed. By default, managers can either search for specific users to see which programs they have completed, or to search for specific programs to see which users have completed them.

These report templates can start giving you useful information right away. For example, the **Admin site activity overview** report template shows the number of log entries for the site over time, without any need to configure additional settings:



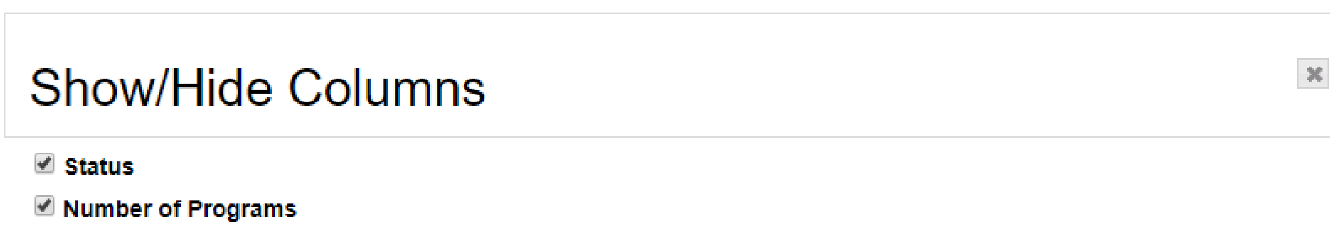
Different templates are aimed at different roles. The following templates are currently available for these roles:

- **Administrator**
    - Admin site activity overview
- **Learner**
    - Learner certification completion status overview
    - Learner course completion status overview
    - Learner goal status overview
    - Learner program completion status overview
- **Manager**
    - Manager certification completion status overview
    - Manager course completion status overview
    - Manager goal status overview
    - Manager program completion status overview

As with reports created from a report source, each report created from a template can be fully customised by selecting **Edit this report**. You can add or remove columns, change the order of columns, display a graph, add filters, and more.

Viewing reports

When using a report, users can determine which columns are shown by selecting **Show/Hide Columns**. In this pop-up window report users can decide which columns to show (ticked) and which columns will be hidden (unticked) in the report. Select **Ok** to confirm your selections.



Running custom reports

Users granted access to reports will see the **My reports** menu option in the navigation menu. Users can run 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 so that they are automatically run and sent as file attachments to users.

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 your Totara partner. This process is described in detail in the developer documentation.

Report types

Within Totara there are two types of reports:

- **Embedded reports:** System-generated reports
- **User reports:** Created by Site Administrators and made available to other users

Embedded reports

Every installation of Totara 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.

> If you want to repurpose any embedded reports it is strongly recommended that you do not edit the embedded reports themselves, as these are typically used in multiple places across the system and editing these reports can have unintended consequences. Instead, you should duplicate the embedded report if you want to use it for another purpose.

You can read more about embedded reports on the managing reports help page.

Totara Community

Get involved in the conversation about Reporting on the Totara Community.

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