

Scheduling Reports

Schedule a report

Users may choose to schedule reports to run automatically.

1. Go to the **My Reports** page and scroll down to the **Scheduled Reports** section.
2. A dropdown of reports will be available to choose from. Select the report and click the **Add scheduled report** button.
3. Configure your desired [settings](#).
4. Click the **Save changes** button.



When a report is scheduled which requires a specific item to be selected before the report details are available the scheduled report will still show all items, and not just those selected, as the details are not saved within the scheduled report.

For example, the **Appraisal details** report requires the user to select an appraisal before the report is made available. However, the scheduled report based on the **Appraisal details** report will show all appraisals (without the details) because the selection of the specific appraisal is not saved with the scheduled report.



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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.

Settings

Setting	Description	Notes
Report	The name of the report you are setting up a schedule for. This is not editable.	-
Data	The Data dropdown allows you to select whether to export All data or select a saved search if any have been created.	-
Export	Choose the Export file format that report data will be saved in.	-
Schedule	Schedule allows you to select the frequency for running the report. The report could run every X minutes, every X hours, daily, weekly, or monthly. After selecting the interim, dropdowns for the time of day, the day of the week, or day of the month will be available for selection as well.	-
Audiences	Select Add audiences and choose audience you want to receive the report.	-
System users	Select Add system user(s) and choose system users to receive the report.	-
Send to self	Tick this option to send a copy of the report to yourself, via the email address you have registered on the site.	-
External users email	Select External users email and type in an individual email address and Add email .	-