

# Report General Settings

## Configuring general settings

1. Click *Reports > Report builder > General settings* on the **Site administration** menu.
2. Configure the [settings](#) to your preferences.
3. Click the **Save changes** button.

\*Reports saved to the file system are saved in the name format **Export file system root path/username/report.ext** where **username** is an internal username of the user who owns the scheduled report, **report** is the name of the scheduled report with non-alpha-numeric characters removed, and **ext** is the appropriate export file name extension.

## Settings

Settings	Description	Notes
<b>Format export options</b>	You can decide which formats you wish to enable for exporting results from reports. See you in the <a href="#">Export options section</a> .	-
<b>Export to file system</b>	Exporting to file system allows reports to be saved to a directory on the web server's file system, instead of only emailing the report to the user scheduling the report. This can be useful when the report needs to be accessed by an external system automation, and the report directory might have SFTP access enabled.	Reports saved to the file system are saved as <b>Export file system root path/username/report.ext</b> where username is an internal username of a user who owns the scheduled report, report is the name of the scheduled report with non alpha-numeric characters removed, and ext is the appropriate export file name extension.
<b>File export path</b>	Absolute file system path to a writeable directory where reports can be exported and stored.  Setting executable and local paths need to be enabled first in <b>config.php</b> .	 Make sure to configure a correct system path if you are going to export reports to file system.
<b>Financial year start</b>	This setting allows to set the start date of the financial year which is used in the reports content controls.	-
<b>Global restriction behaviour for users with no active restrictions</b>	Specifies what users will see when viewing a report with global restrictions enabled when they don't have any restrictions applied to them.	-
<b>Enable global restrictions in new user reports</b>	If checked all newly created user reports will have global report restrictions enabled.	-
<b>Global report restrictions number of records per page</b>	Number of records per page allows you define how many records display on a report page.	-
<b>Allow reports to show total count</b>	When enabled Report Builder reports can be configured to show a total count of records, before filters have been applied. Please be aware that getting this count can be an expensive operation, and for performance reasons we recommend you leave this setting off.	-

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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.

<b>Restrict initial display in all report builder reports</b>	<p>This setting controls how the report is initially displayed and is recommended for larger reports where you will be filtering the results (e.g. sitelogs). It increases the speed of the report by allowing you to apply filters and display only the results instead of initially trying to display all the data.</p> <p>When enabled, any embedded reports will not generate results until a filter is applied or an empty search is run. If it is disabled or there are no filters, results will display immediately.</p>	-
<b>Minimum scheduled report frequency</b>	<p>When this is set to <b>Weekly</b> you will see another option <b>Scheduled Reports</b> appear.</p>	-
<b>Schedule Reports</b>	<p>Allows you to set the minimum period a report can be run in, this is useful to prevent reports being run too frequently on larger sites and thus causing slowness for your system. If <b>Minimum scheduled report frequency</b> setting is set to:</p> <ul style="list-style-type: none"> <li>• <b>Every X minutes:</b> No changes, all options are available.</li> <li>• <b>Every X hours:</b> All options are available except <b>Every X minutes</b> option.</li> <li>• <b>Daily, Weekly, and Monthly</b> options are available, <b>Every X minutes</b> and <b>Every X hours</b> are not available.</li> <li>• <b>Weekly:</b> Both the <b>Weekly</b> and <b>Monthly</b> options are available, <b>Daily, Every X minutes</b>, and <b>Every X hours</b> are not available.</li> <li>• <b>Monthly:</b> If this is set then the <b>Monthly</b> option is available, the other options are not available.</li> </ul> <p>All options are available for users with the <b>otara_reportbuilder: overridescheduledfrequency</b> capability.</p>	-
<b>Schedule report recipients</b>	<p>You can decide which recipient options will be available when scheduling reports:</p> <ul style="list-style-type: none"> <li>▪ <b>Audience:</b> Choose an audience to send report(s) to.</li> <li>▪ <b>System users:</b> Browse or search a list of users.</li> <li>▪ <b>External users email:</b> Enter external email address.</li> <li>▪ <b>Send to self:</b> Tick the box to send a copy to yourself.</li> </ul>	-
<b>Default result fetch method</b>	<p>An advanced option that allows you to fine tune how results for the report are fetched from the database when displaying a single page of the table.</p> <p>By default the recommended approach for your database engine will be used. This is determined by the database engine itself.</p> <p>In situations where you are experiencing poor performance for a report changing this setting may result in improved performance.</p>	<p>Setting this to use a standard record set will result in report pages executing two distinct queries. The first to get a single page of results, and the second to get the total count of results for the report.</p> <p>Setting this to use counted recordset will result in a single query being made against the database that will return both a single page of results, and the total count of results.</p>

## Export options

If no options are selected, then the export option for reports will not be available. There are a number of export formats available from Report builder, these are:

- **Excel format:** Microsoft Excel spreadsheet (.xls)
- **CSV format:** Comma-separated values file (.csv)
- **ODS format:** Open Office spreadsheet (.ods)
- **PDF format:** Portable Document Format (.pdf)
- **PDF format (Landscape):** Portable Document Format (.pdf)
- **PDF landscape export (wkhtml2pdf):** This only work if it has been enabled (see [System paths](#)) otherwise it has the prefix Disabled and cannot be used.
- **PDF portrait export (wkhtml2pdf):** This only work if it has been enabled (see [System paths](#)) otherwise it has the prefix Disabled and cannot be used.
- **Export to Google Fusion:** You will need to log into Google Fusion Table for this to work.

It is also helpful to note that where an RTL (right-to-left) language is used this will be supported. When RTL is used as part of an export, not only will the text itself be displayed correctly but so will the column orders.

The only exception is CSV format, as this does not have capabilities to store text direction property. For those, requiring RTL, after importing this CSV in their office suite, they need to enable RTL mode manually.