Graphical reporting

A report graph allows you to provide a visual representation of the data in one of your reports. Totara is not designed as a graphical reporting tool, rather the report graphs are designed to be used in blocks and as an additional complementary feature in your report. To do enhanced graphical reporting you may wish to export your report data and use an external tool.

Create a new report graph

1. Go to **Reports** from the top menu bar.
2. Click **Create report**.
3. Select a report source.
4. Click **Create and edit**.
5. Amend your report settings.
6. Click the **Graph** tab.
7. Select the graph type.
8. Configure the graph settings, ensuring you select a data source.
9. Click **Save changes**.

Add a graph to an existing report

1. Go to **Reports** from the top menu bar.
2. Select the report you wish to add the graph to.
3. Click **Edit this report** (in the top-right corner).
4. Click the **Graph** tab.
5. Select the graph type.
6. Configure the graph settings, ensuring you select a data source.
7. Click **Save changes**.

It is worth noting that not all report data is suited to all graph types, you will need to consider if the graph type you have selected will be right for your data.

You should also note that not all report data can be turned into a report graph in Totara. Columns must contain numeric data to be included in a report and so you may need to add additional columns with this type of data. If there are no suitable columns then when attempting to create the report graph you will see a warning message alongside the **Data sources** setting that informs you there are no suitable columns. If suitable columns are available you will see these in a list and can choose the one you want.

The graphs below are designed as examples to inspire and demonstrate what is possible.

You can find out more about customising graphs through the advanced options in the Developer docs.

Course membership (donut graph)

If you wish to you can produce a donut graph that shows the number of users per course. This allows you to quickly and easily see which courses have the most (and least) users. To do this follow these steps:

1. From the quick-access menu go to *Reports > Report builder > Manage reports*.
2. Create a new report using the **Course membership** Report Source.
3. Then, in the **Columns** tab, ensure there are the following columns; **Course name (linked to course page)** and **User ID** (this may involve removing other columns or adding these in).
4. Set the aggregation for the **User ID** to **Count unique**, but make sure you don't set any other aggregation.
5. Click the **Save changes** button, before moving between tabs.
6. Then in the **Graph** tab, set the **Graph type** to **Donut**.
7. Next set the **Category** to **Course name** and set the **Data sources** to **Count unique values of User ID**. For now you can ignore all other settings.
8. Again, remember to **Save changes** before moving between tabs.
9. In the **Filters** tab, set the **Search** field to **Status**.
10. Scroll to the bottom of the page and click **Save changes**.

To view the donut graph click the link **View this report**, which is found just above the report title.

These settings will produce a graph that looks similar to this:

Show/Hide Columns

Legend: Strategic Management | Health and Safety | Seminar notification | Data Protection | Documenting the Content Marketplace | Company Policies | Orientation | Processes and Forms | Budgeting and Finance Planning | Using the content marketplace | Writing Your Report Video Plus | Effective Writing Video Plus | Expressing Yourself Video Plus

Course Name	Count unique values of User ID
Strategic Management	10
Health and Safety	5
Seminar notification	4
Data Protection	2
Documenting the Content Marketplace	3
Company Policies	4
Orientation	3
Processes and Forms	3
Budgeting and Finance Planning	2
Using the content marketplace	1
Writing Your Report Video Plus	1
Effective Writing Video Plus	1
Expressing Yourself Video Plus	1

Export as [CSV ▼] [Export]

It's also possible to produce tailored reports using the **Filters** and content controls.

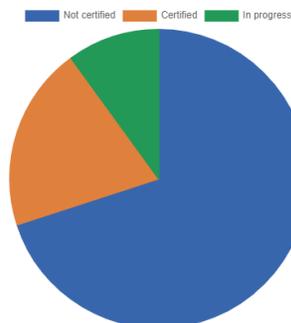# Certification completion status (pie chart)

If you want to you can create a report which displays a pie chart to represent the percentage learner certification completion; so you can see how many learners are certified, not certified, expired, or in progress. To do this follow these steps:

1. From the quick-access menu go to *Reports > Report builder > Manage reports*.
2. Create a new report using the **Certification Completion** Report Source.
3. Then, in the **Columns** tab, ensure there is only the **Status** and **User ID number** columns (this may involve removing other columns or adding these in).
4. Set the aggregation for the **User ID number** to **Count**.
5. Click the **Save changes** button, before moving between tabs.
6. Then in the **Graph** tab, set the **Graph type** to **Pie**.
7. Next set the **Category** to **Status** and set the **Data sources** to **Count of User ID Number**. For now you can ignore all other settings.
8. Scroll to the bottom of the page and click **Save changes**.

To view the pie chart click the link **View this report**, which is found just above the report title.

These settings will produce this graph (based on arbitrary data):

Show/Hide Columns

Status	Count of User ID Number
Not certified	7
Certified	2
In progress	1

Export as   CSV ▼   Export

For a certification status to be **in progress** there must be more than one course in the original certification pathway, of which at least one must be completed (if there is only one course there are only two possible states: **not started** or **complete**).

It's possible to filter the results by a range of metrics, for example by certification name, Manager's name, or you can use date range filters (in this case **Due date**).
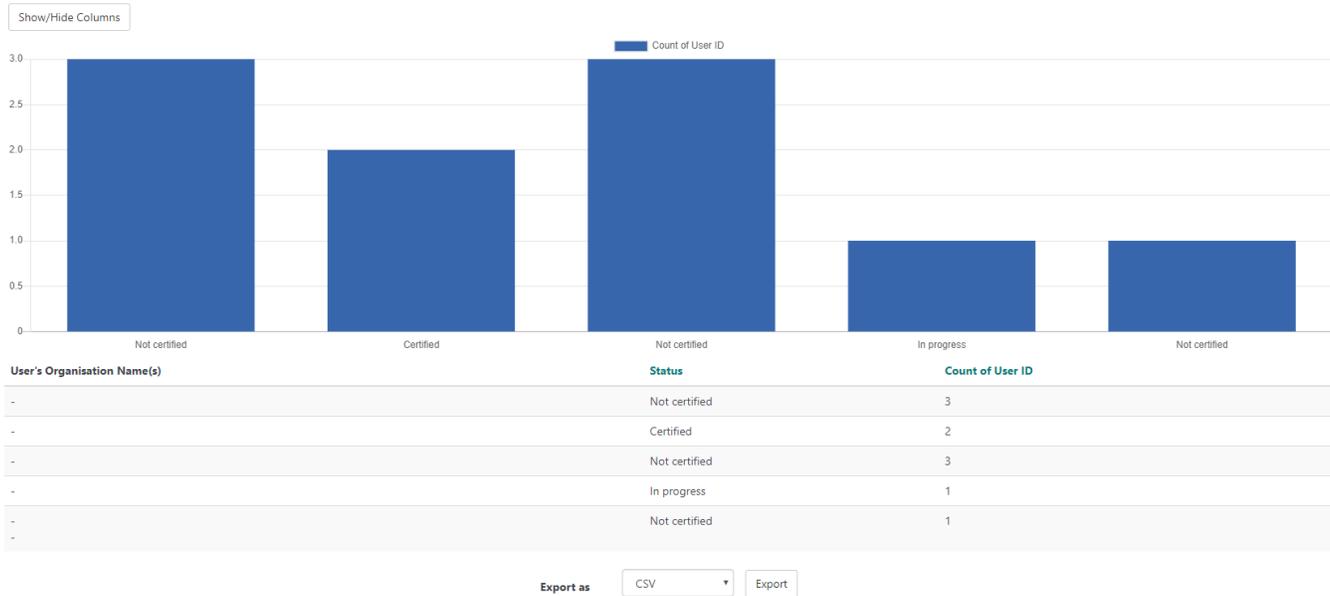
Certification completion comparison (bar chart)

You can report the percentage of users from each organisation who have a certain completion status, so for example, how many users from each organisation are **certified**. This can help you compare performance and training needs across organisations.

1. From the quick-access menu go to *Reports > Report builder > Manage reports*.
2. Create a new report using the **Certification Completion** Report Source.
3. Then, in the **Columns** tab, ensure there are the following columns; **User's Organisation Name**, **Status**, and **User ID number** (this may involve removing other columns or adding these in).
4. Set the aggregation for the **User ID number** to **Count**, but make sure you don't set any other aggregation.
5. Click the **Save changes** button, before moving between tabs.
6. Then in the **Graph** tab, set the **Graph type** to **Column**.
7. Next set the **Category** to **Status** and set the **Data sources** to **Count of User ID Number**. For now you can ignore all other settings.
8. Again, remember to **Save changes** before moving between tabs.
9. In the **Filters** tab, set the **Search** field to **Status**.
10. Scroll to the bottom of the page and click **Save changes**.

To view the bar chart click the link **View this report**, which is found just above the report title.

These settings will produce this graph if the **Status** filter is set to **Certified** (based on arbitrary data):

Show/Hide Columns

User's Organisation Name(s)	Status	Count of User ID
-	Not certified	3
-	Certified	2
-	Not certified	3
-	In progress	1
- -	Not certified	1

Export as CSV ▾ Export

It's also possible to produce tailored reports using the **Filters** and content controls.

Site usage by month (line chart)

You can produce a line graph to show the number of users on the site each month, this could be helpful in analysing peak months where the site is most active.

1. From the quick-access menu go to *Reports > Report builder > Manage reports*.
2. Create a new report using the **Site logs** Report Source.
3. Then, in the **Columns** tab, ensure the **Time** and **User ID number** columns are present (this may involve removing other columns or adding these in).
4. Set the aggregation for **Time** to **Month of year(textual)** and for **User ID number** to **Count**.
5. Click the **Save changes** button, before moving between tabs.
6. Then in the **Graph** tab, set the **Graph type** to **Line**.
7. Next set the **Category** to **Time - month of the year** and set the **Data sources** to **Count of User ID Number**. For now you can ignore all other settings.
8. Scroll to the bottom of the page and click **Save changes**.

To view the line chart click the link **View this report**, which is found just above the report title.

The resulting graph might look something like this (produced using test data):

Show/Hide Columns
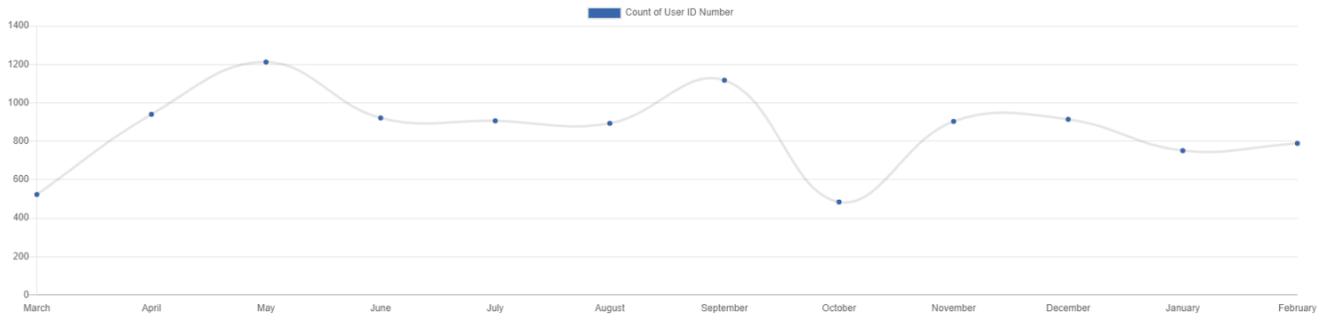
Time - month of year	Count of User ID Number
March	523
April	940
May	1212
June	921
July	906
August	893
September	1117
October	484
November	903
December	914
January	751
February	789

Export as   CSV   ▼   Export

Totara Academy

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.