

Appraisal Reports

View appraisal reports

Appraisal reports are available by going to *Site administration > Appraisals > Reports*.

Name	Overdue	On target	Completed	Complete	Reports
Annual Appraisal (Health & Safety Representative)	0	0	0	0	Status report Detail report
Annual Appraisal (Support Manager)	0	0	0	0	Status report Detail report
Annual Appraisal (Health & Safety Representative)	0	0	0	1	Status report Detail report

Name	Status	Finished	Complete	Incomplete	Reports
Annual Appraisal (Health & Safety Representative)	Closed	18 October 2016	0	0	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.

Name	Position(s)	Organisation(s)	Manager(s)	Active stage	Previous stage time completed	Status
Alpine Crane	Support Advisor	Support	Thomas James	Set Up		On Target
Bryden Gordon	Support Advisor Health & Safety Representative	Support	Thomas James Thomas James	End of Year Review	7 Oct 2016	Complete
Douglas Hewson	-	-	-	Set Up		On Target
Frank Garner	CEO	Head Office	-	Set Up		On Target
Gavin Williams	Development Manager Health & Safety Representative	Development	Stuart Hewson Thomas James	Set Up		On Target
Gordon Donald	Developer	Development	Gavin Williams	Set Up		On Target
Grace Chalmers	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.

On this page



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

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

The screenshot shows a web interface for managing appraisals. At the top, there are search filters for 'User's Full Name' (set to 'Thomas James') and 'User's Appraisal Status' (set to 'Complete'). Below these filters is a table with the following columns: Name, Manager(s), Status, and a series of appraisal questions. The table contains two rows of data for 'Thomas James'.

Name	Manager(s)	Status	Have you been agreed business issues and targets? (Learner)	Have you been agreed business issues and targets? (Manager)	Overall personal development needs (Learner)	Overall personal development needs (Manager)	Overall personal development needs (Learner)	Overall personal development needs (Manager)	Overall personal development needs (Learner)	Overall personal development needs (Manager)	Overall personal development needs (Learner)	Overall personal development needs (Manager)
Thomas James	Thomas James	Complete	Some personal d...	Some personal d...	Yes	No	0	0	10	0	0	10
Thomas James	Thomas James	Complete	Some personal d...	Some personal d...	Yes	No	0	0	10	0	0	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.