Creating and Editing Reports

Creating Reports

Create a report

1. Click Reports > Report builder > Manage reports on the Site administration menu.

2. There are two types of reports:

- User Generated Reports: User generated reports are the reports that site administrators create and make available to other users. Once a report has been created, it can be viewed by clicking on the title or view link. To update a report, click the Settings icon button under the Options column or remove it using the delete button.

- Embedded Reports: Embedded reports are used throughout Totara LMS to display data. The Alerts panel shown in the screenshot below displays the Alerts report. Click the Settings button under the Options column to modify an embedded report. To reset the report back to its default settings, click the Restore Default Settings button under the Options column.

3. To create a new report, scroll to the bottom of the Manage reports page and enter the following:

- Report Name: Enter a name for the report that the user will use to run the report.
- Source: Select the data source for the report. See Report Sources for more information on available data sources and options. A list of sources and descriptions can be found at https://help.totaralearning.com/display/TL9/Report+Sources
- Hide in My Reports: When checked, this report will not be displayed on the My Reports page for users, but will be accessible via its URL.

4. Click the Create report button.

Editing Existing Reports

In the manage reports menu you can not only create new reports, but you can also edit existing user generated and the embedded system reports.

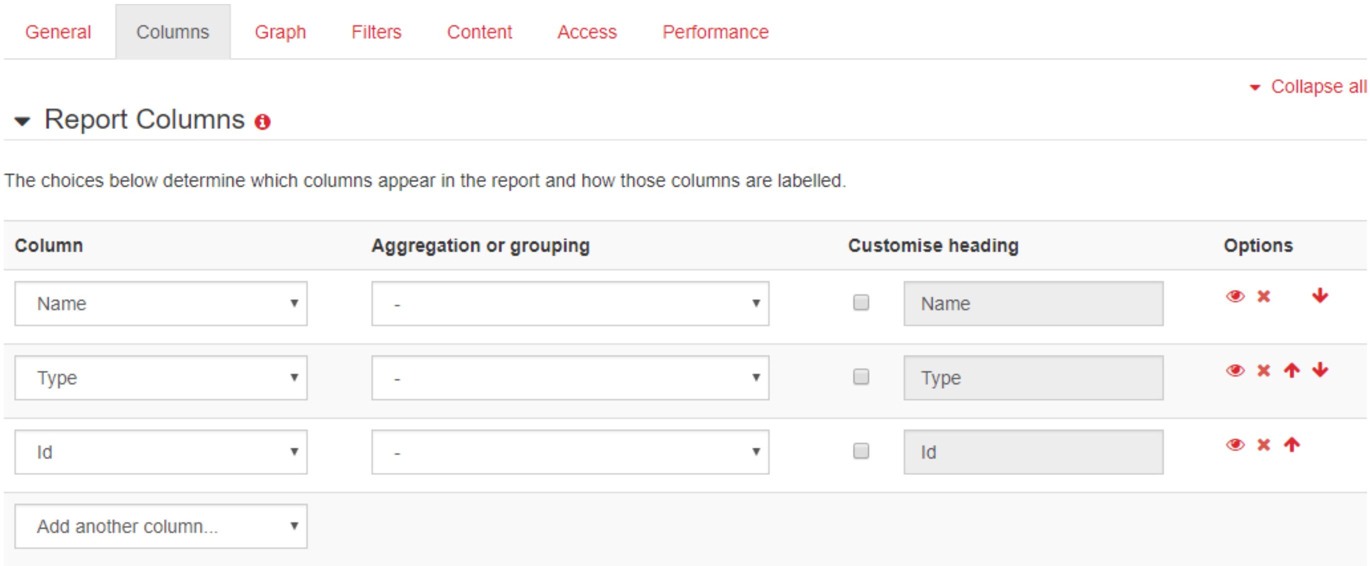
You can either edit them directly by clicking the cog symbol or, if you would like to preserve the system version, you can duplicate the report by clicking the overlapping pages symbol and editing the duplicate.

Additionally, if an error is made when making amendments to an embedded report you can click the button with two arrows to reset the report to its default.

However, if an embedded report is duplicated the duplicate may lose some of the system functionality that is embedded within the report.

Columns

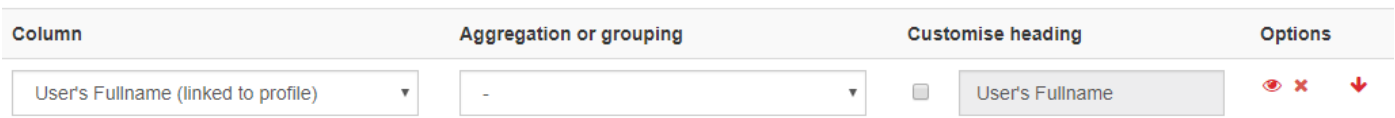
The Columns tab allows you to select the columns that will be available on the report.



New columns can be added using the drop-down box labelled "Add another column". This will display all of the relevant and related columns that can be displayed from the report source.

Once the column has been added there are a number of configurations that can be applied.

For more info on how aggregation displays the values go to: https://help.totaralearning.com/display/TL9/Creating+Reports#CreatingReports-AggregationorGrouping



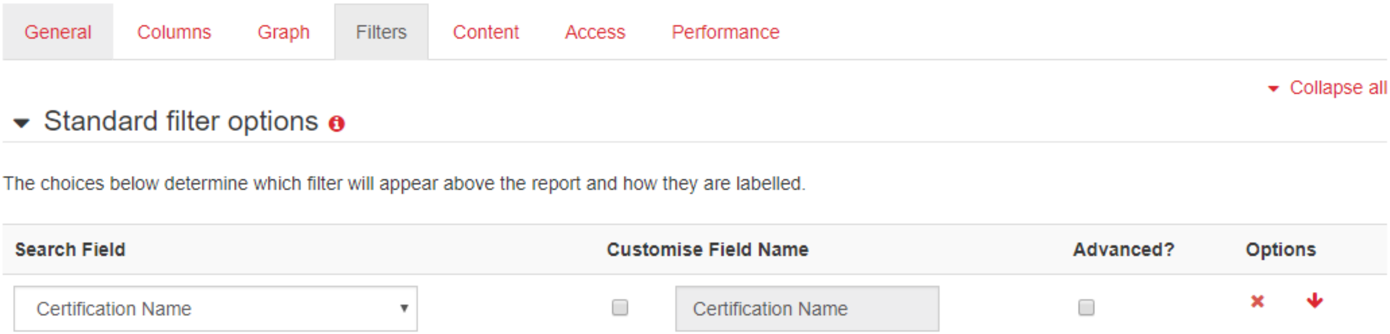
The customise heading setting allows you to configure how the heading displays in the report.

Filters and Content

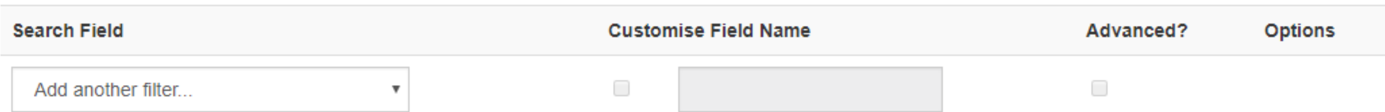
The filters tab allows you to customise and select which content filters will be available when viewing the report. The customise field name option allows you to rename the filter which will replace the label when a user views the report.

Checking the "Advanced?" box allows you to decide whether the filter is hidden under the advanced section when the report loads.

To delete the filter click the "X" and to reorganise the filters use the arrows to change the order.



The search field option allows you to select the fields that users will be able to search by



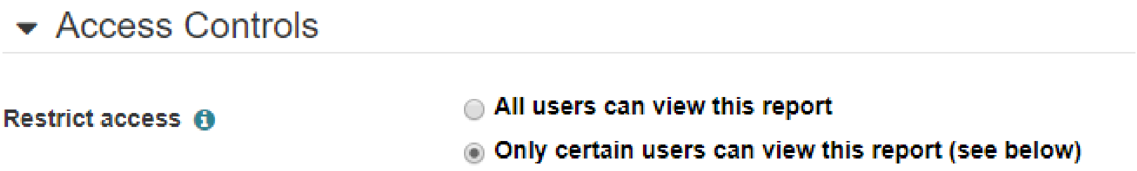
Content controls allow you to restrict report content based on the user who is running the report. This allows site administrators to pre-filter the report so that one report can be run by many users on the system by only showing the data most pertinent to the user. For example, a report can be designed for managers to run that will only display data for their direct reports.

Access

The access tab allows you to grant permission to the report based on a user's role. There are two options on this page:

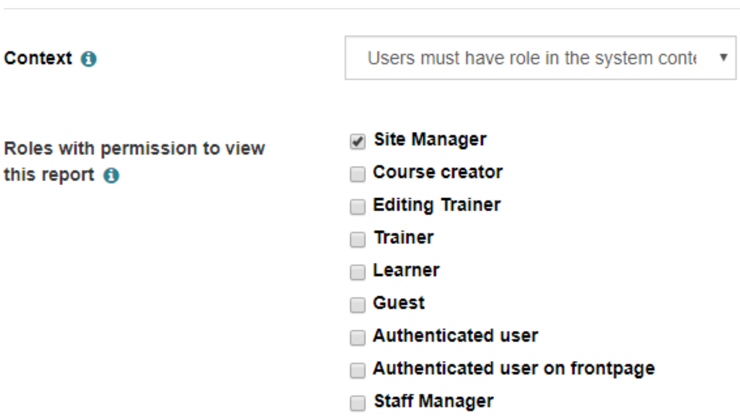
Restrict Access

This setting allows you to set whether anyone on the site can view the report or whether only specific users (based on role) can see it.



Restrict Access by Role

The context option allows you to specify the context in which users can view the report. For example a site administrator would have system level access (context), while a learner may only have course level access (context). Context allows you to set the context in which a user has been assigned a role to view the report.



Roles with permission to view this report: Restrict the visibility of a report to specific system roles. Only when the user possess the correct system roles (e.g. Learner) at the time the report is to be viewed will the Reports tab appear in the Totara menu.

For more details on the settings visit: https://help.totaralearning.com/display/TL25H/Creating+Reports#CreatingReports-Content