

TOTARA: **CUSTOMISING AN EMBEDDED REPORT**

*This is a transcript of a video
on the Totara Academy*



WELCOME TO THIS VIDEO ON EMBEDDED REPORTS IN TOTARA LEARN.

In this video, we'll have a quick look at where embedded reports are used, and how to customise them.

You can view a list of embedded reports by accessing report builder through the site administration menu and choosing to **Manage embedded reports**.

Your own system will come with these reports already created. Many of them are used as pages in the user interface, for example the **Browse list of users** report is used to allow administrators to browse and search for users.

I know that this is a report built in report builder because as an administrator I have the option to **Edit this report**.

Selecting this option takes me to the report builder editor, where I can make changes to the report.

Common changes to this report include adding additional columns. For example, some people add the user's organisation. If I return to the report I can see the new column has been added.

Of course, you need to take extra care when editing an embedded report on a live site, because any changes you make will become immediately visible to other users accessing the report.

Our advice is to use the report **clone** function which allows you to copy the report to test out the changes you want to make first.

And if you did make a mistake on a live report, you can easily restore it to the default settings using the **reset** option.

Examples of other embedded reports you will come across include the **seminars sign in sheet** which is a report which exports to a PDF.

Another report that is commonly edited is the report shown on the **Team** tab.

If you manage a large team, you might want to add a search field. You can do this easily by navigating to report builder and adding a filter.

In this case, you might add a search for the user's last name.

Once I've saved my change I can see it immediately on the Team tab, as can all other managers on my site.

So, as you can see, editing embedded reports is just like editing your own user generated reports.

If you haven't already, why not take a look at the user generated reports video?

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