LEARNIFIER

Custom & Scheduled Reports

Gabriella Eriksson - 2025-03-12 - Administration

With **Custom & Scheduled Reports**, you can create tailored reports to fit your needs, whether for your entire client portal or a specific project. By filtering and automating reports, you quickly and easily gain insights that help you make informed decisions.

Available from: Enterprise and as an add-on on the Professional plan

Getting Started

Accessing Custom Reports

You can access Custom Reports in two ways:

1. Click **"Reports"** in the top menu.

2. Click **"Reports"** within a specific project.

3. On the next page, select **"Create report template"** in the upper right corner.
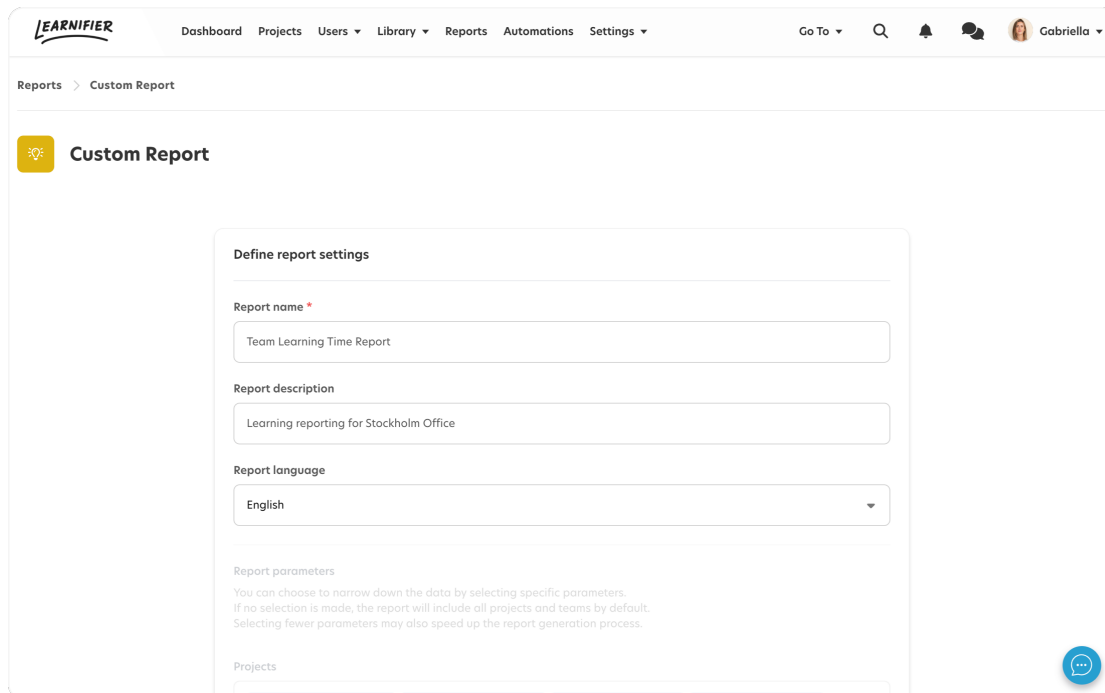

Customizing Your Report

Basic Settings

- **Report Name:** Assign an internal name to your report.

- **Description:** Provide a brief summary of what the report is about.

- **Language:** Select the language for the report.

Data Selection

- **Projects:** Select specific projects to include or let the report cover all projects.

- **Teams:** Filter by teams within Teamview.

- **User Fields:** Use custom fields to create filtering rules.

    - *Example:* Filter a report for the IT department:
      Department (Custom Field) → Is any of… → IT

Report parameters

You can choose to narrow down the data by selecting specific parameters.
If no selection is made, the report will include all projects and teams by default.
Selecting fewer parameters may also speed up the report generation process.

Projects

Introduction to Learnifier   Learnifier - A Style Guide   Learnifier Onboarding   Learnifier Preboarding
Life at Learnifier   Sustainability   The Coaching Leadership

Teams

Select teams

User fields
Define additional conditions for filtering report data

Office   is any of...   Stockholm

Add Rule ⊕

Columns

☐ First name   ☐ Last name   ☑ Activities completed
☐ Activities total   ☐ Client Name   ☐ Client Number
☑ Completion   ☐ Completion Date   ☐ Course
☐ Course end   ☐ Course ID   ☐ Course start
☑ Duration (minutes)   ☐ E-mail   ☐ Expiration date

Columns & Filters

- Choose which data fields to include, such as **completion date, project, email**.

- Default fields like **first name and last name** are always included.

- Select multiple columns for more detailed reports.

  Examples:

  - View which teams have completed a course: **Project + Completion + Completion Date**

  - Track when participants started and completed a course: **Course Start + Completion Date**

Scheduling & Automation

Do you want reports to be sent automatically? Enable **Report Scheduling** and select:

- **Frequency:** Daily, weekly, monthly, or yearly.

- **Recipients:**

  - Specific email addresses.

  - Team Managers in Teamview.

Generating & Managing Reports

Creating a Report

1. Once settings are saved, click **"Generate New Report"**.

2. Select a date range if you want to filter data.

3. Click **"Generate Report"** to finalize.

Editing an Existing Report

1. Go to **Reports**.

2. Select the report you want to update.

3. Click **"Report Settings"** in the upper right corner and make your changes.

FAQs & Tips

Can I modify a report after it has been generated?
Yes! You can adjust the settings and create a new version of the report.

How can I ensure the report includes the correct data?
Double-check your selection of projects, teams, and custom fields before generating the report.

Is there a limit to the number of reports I can create?
No, you can create as many report templates as needed!

Summary & Next Steps

With **Custom & Scheduled Reports**, you can easily create, filter, and schedule reports to gain insights into your projects and users. Try creating your first report today and customize it to fit your needs!