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Custom & Scheduled Reports

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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.

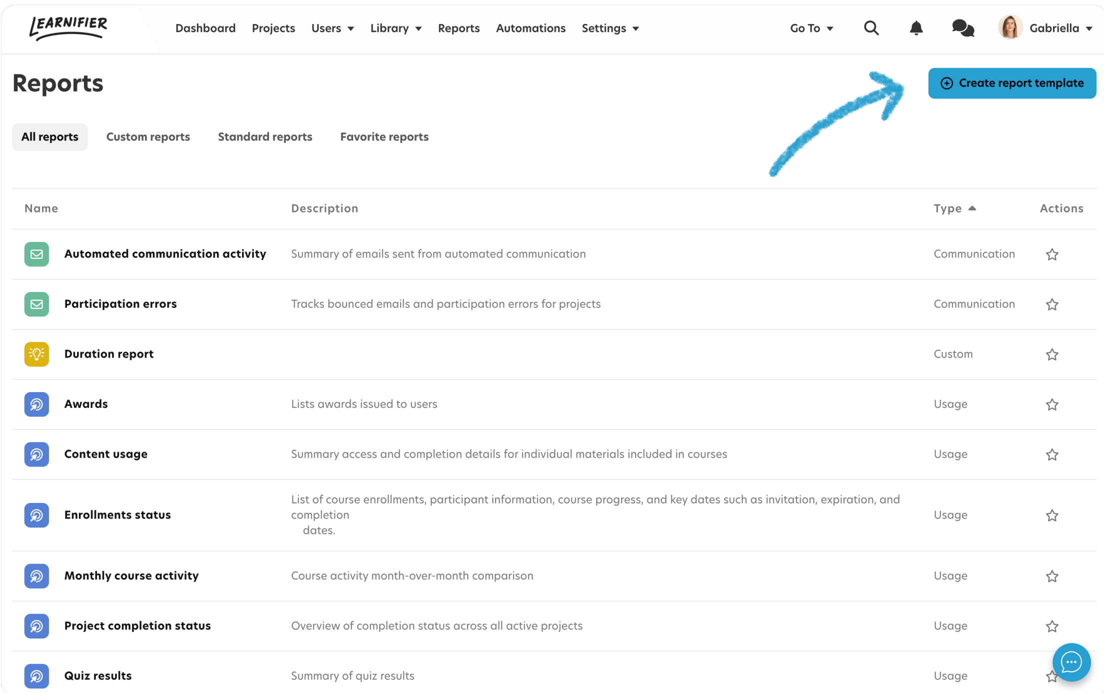
Available from: Enterprise and as an add-on on the Professional plan

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.

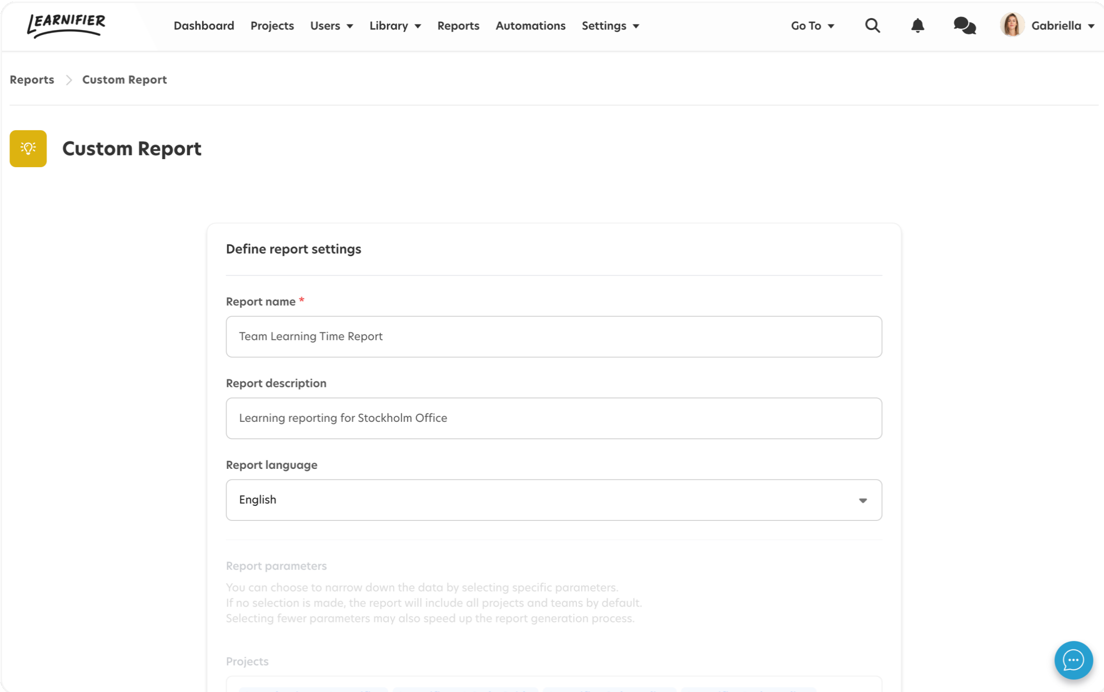


Customizing Your Report

Basic Settings

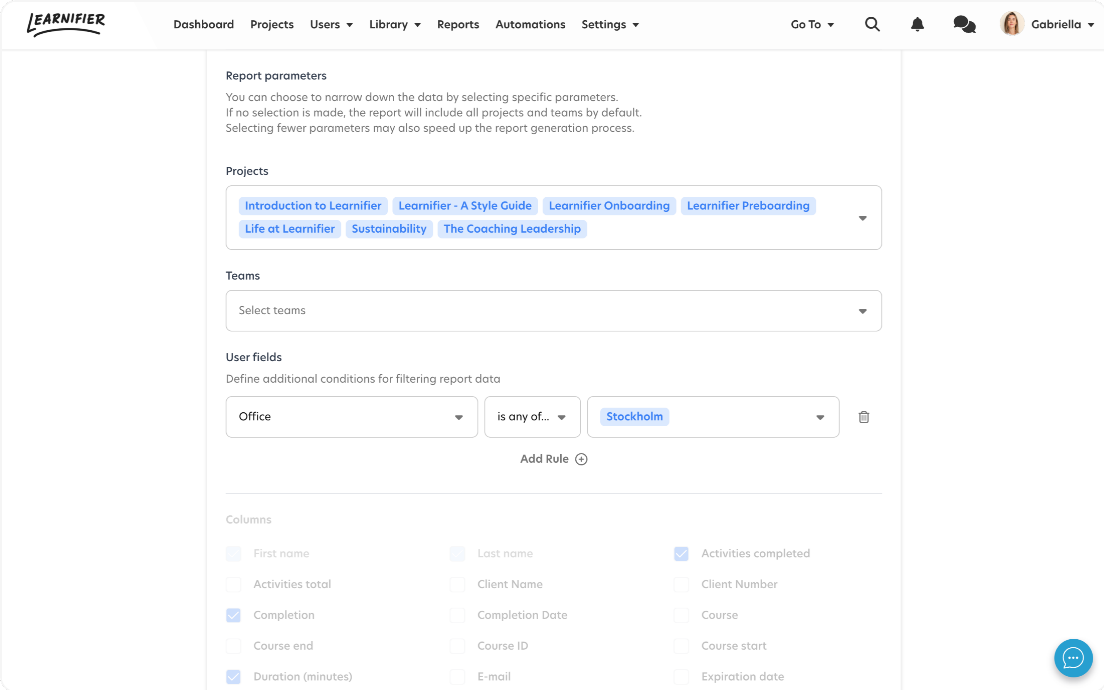
- **Report Name:** Assign an internal name to your report.

- **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

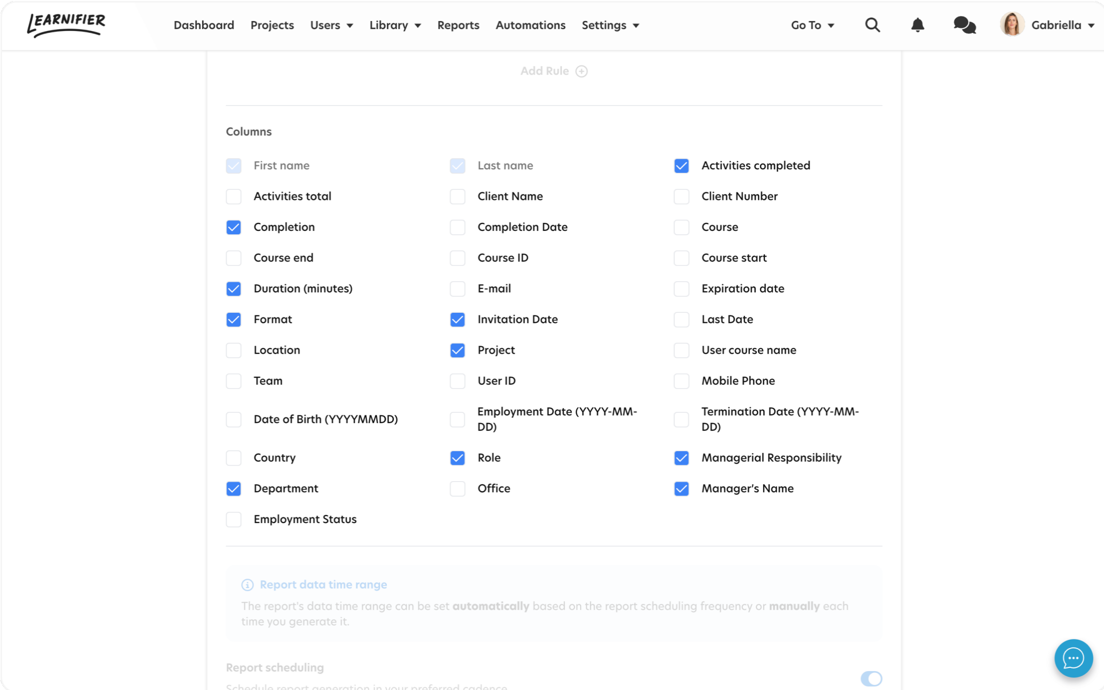


Columns & Filters

- 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:

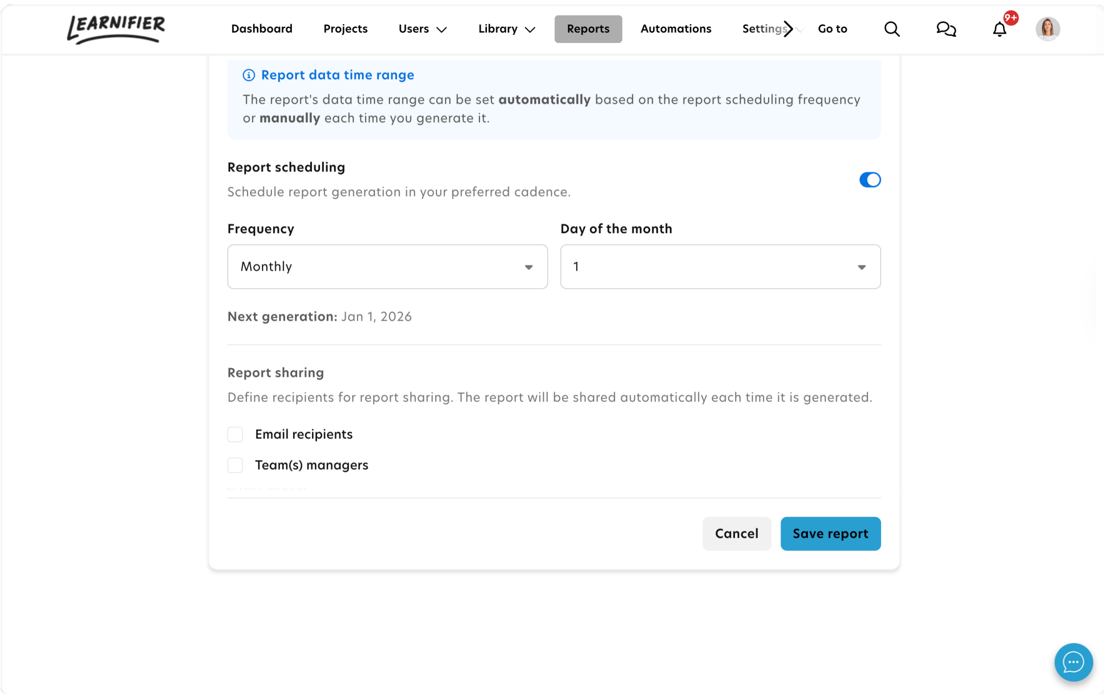
  - View which teams have completed a course: **Project + Completion + Completion Date**
  - Track when participants started and completed a course: **Course Start + Completion Date**



Scheduling & Automation

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

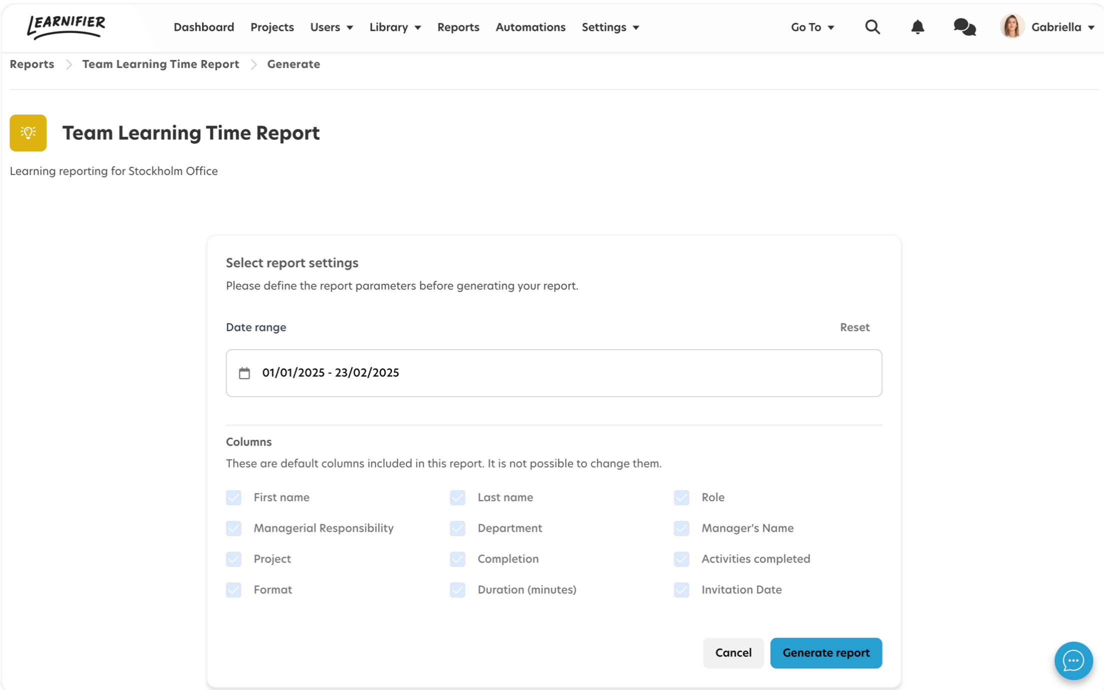
- **Frequency:** Daily, weekly, monthly, or yearly.
- **Recipients:**
    - Specific email addresses.
    - Team Managers in Teamview.



Generating & Managing Reports

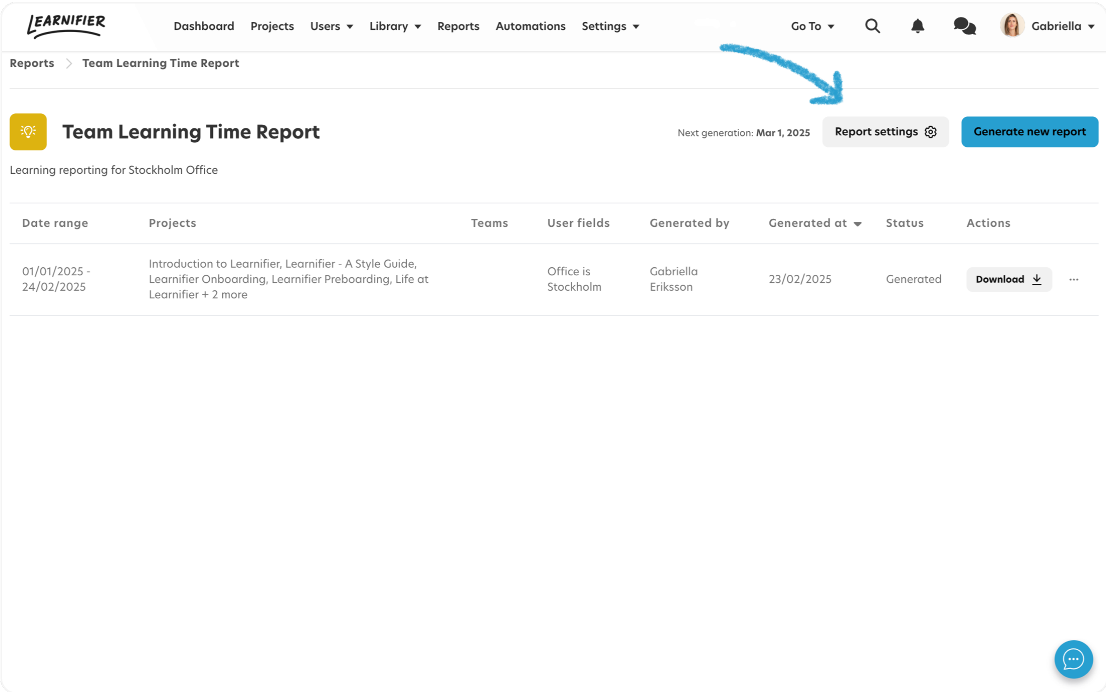
Creating a Report

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!