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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.

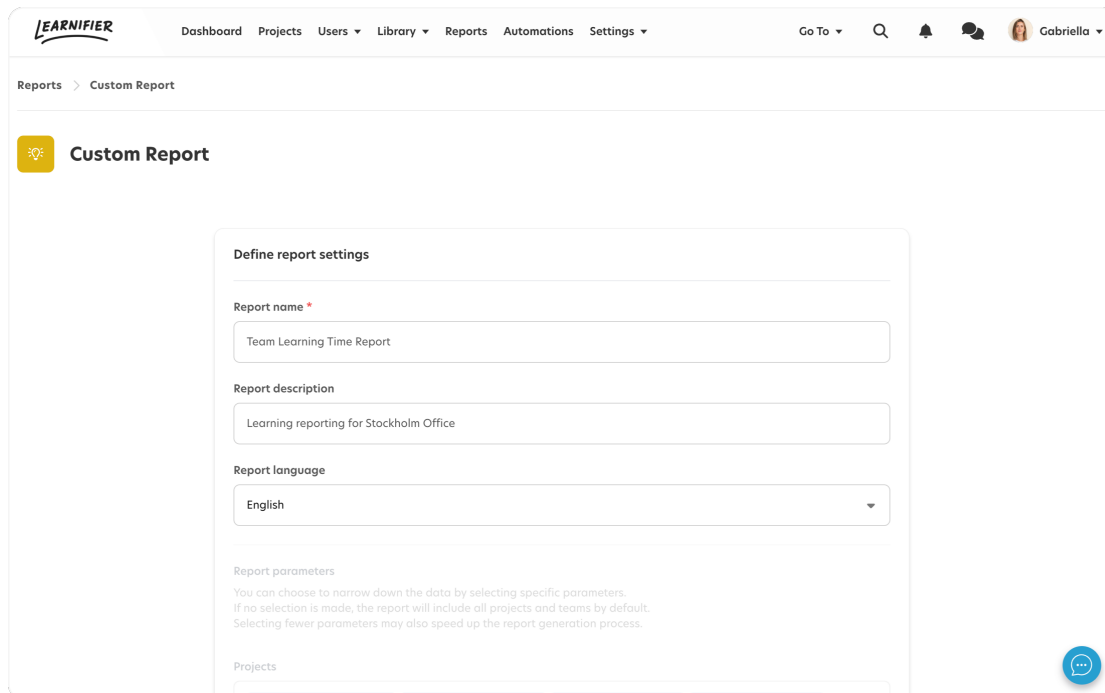
Name	Description	Type	Actions
Automated communication activity	Summary of emails sent from automated communication	Communication	☆
Participation errors	Tracks bounced emails and participation errors for projects	Communication	☆
Duration report		Custom	☆
Awards	Lists awards issued to users	Usage	☆
Content usage	Summary access and completion details for individual materials included in courses	Usage	☆
Enrollments status	List of course enrollments, participant information, course progress, and key dates such as invitation, expiration, and completion dates.	Usage	☆
Monthly course activity	Course activity month-over-month comparison	Usage	☆
Project completion status	Overview of completion status across all active projects	Usage	☆
Quiz results	Summary of quiz results	Usage	☆

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.



The screenshot shows the LERNIFIER dashboard with a navigation bar at the top containing links for Dashboard, Projects, Users, Library, Reports, Automations, and Settings. The user profile 'Gabriella' is in the top right. The main content area is titled 'Reports > Custom Report'. A yellow icon with a lightbulb is next to the 'Custom Report' title. Below this is a 'Define report settings' form with the following fields:

- Report name ***: A text input field containing 'Team Learning Time Report'.
- Report description**: A text input field containing 'Learning reporting for Stockholm Office'.
- Report language**: A dropdown menu set to 'English'.
- Report parameters**: A section with explanatory text: '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.' Below this is a 'Projects' label and a list of project names with checkboxes.

A blue circular chat icon is located in the bottom right corner of the form area.

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

LEARNIFIER Dashboard Projects Users Library Reports Automations Settings Go To Search Notifications Chat Gabriella

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

<input type="checkbox"/> First name	<input type="checkbox"/> Last name	<input checked="" type="checkbox"/> Activities completed
<input type="checkbox"/> Activities total	<input type="checkbox"/> Client Name	<input type="checkbox"/> Client Number
<input checked="" type="checkbox"/> Completion	<input type="checkbox"/> Completion Date	<input type="checkbox"/> Course
<input type="checkbox"/> Course end	<input type="checkbox"/> Course ID	<input type="checkbox"/> Course start
<input checked="" type="checkbox"/> Duration (minutes)	<input type="checkbox"/> E-mail	<input type="checkbox"/> 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**

Dashboard
Projects
Users
Library
Reports
Automations
Settings
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Gabiella

Add Rule

Columns

☒ First name
☐ Activities total
☒ Completion
☐ Course end
☒ Duration (minutes)
☒ Format
☐ Location
☐ Team
☐ Date of Birth (YYYYMMDD)
☐ Country
☒ Department
☐ Employment Status

☐ Last name
☐ Client Name
☐ Completion Date
☐ Course ID
☐ E-mail
☒ Invitation Date
☒ Project
☐ User ID
☐ Employment Date (YYYY-MM-DD)
☒ Role
☐ Office

☒ Activities completed
☐ Client Number
☐ Course
☐ Course start
☐ Expiration date
☐ Last Date
☐ User course name
☐ Mobile Phone
☐ Termination Date (YYYY-MM-DD)
☒ Managerial Responsibility
☒ Manager's Name

Report data time range

The report's data time range can be set automatically based on the report scheduling frequency or manually each time you generate it.

Report scheduling

Schedule report generation in your preferred cadence

☒

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.

Dashboard Projects Users Library Reports Automations Settings
Go To Search Notifications Chat Profile Gabriella

☐ Date of Birth (YYYYMMDD)
☐ Employment Date (YYYY-MM-DD)
☐ Termination Date (YYYY-MM-DD)

☐ Country
☒ Role
☒ Managerial Responsibility

☒ Department
☐ Office
☒ Manager's Name

☐ Employment Status

Report data time range

The report's data time range can be set **automatically** based on the report scheduling frequency or **manually** each time you generate it.

Report scheduling

Schedule report generation in your preferred cadence.

Frequency

Select frequency

Report sharing

Define recipients for report sharing. The report will be shared automatically each time it is generated.

☐ Email recipients
☐ Team(s) managers

Cancel Create report

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.

Dashboard Projects Users Library Reports Automations Settings
Go To Search Notifications Chat Profile Gabriella

Reports > Team Learning Time Report > Generate

Team Learning Time Report

Learning reporting for Stockholm Office

Select report settings

Please define the report parameters before generating your report.

Date range
Reset

01/01/2025 - 23/02/2025

Columns

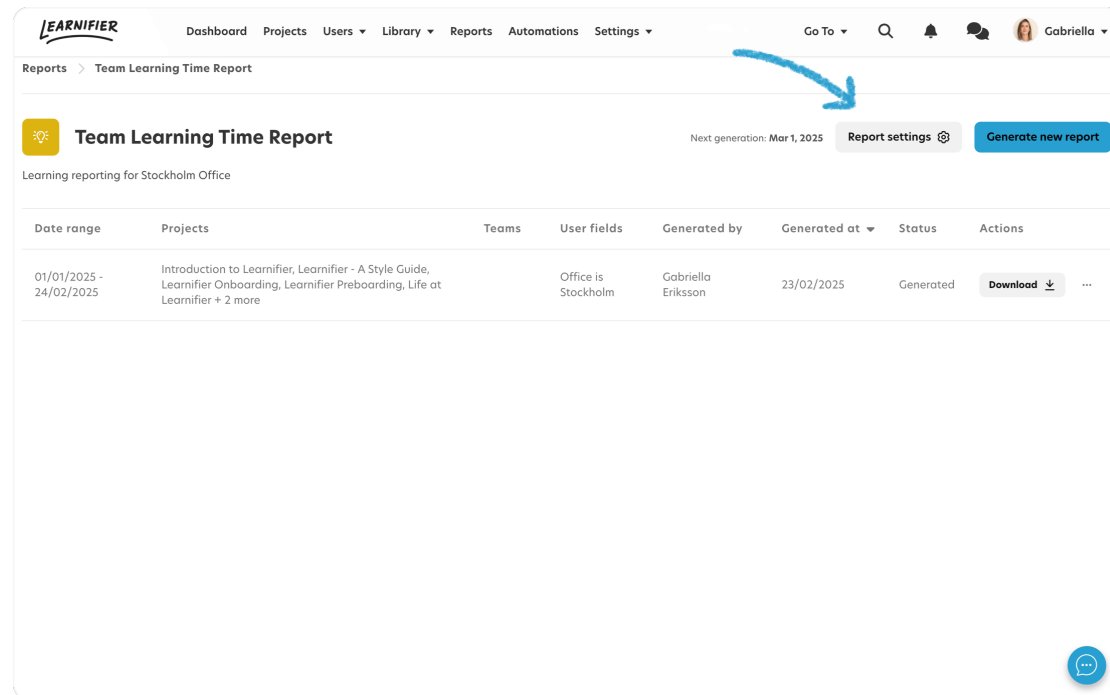
These are default columns included in this report. It is not possible to change them.

☒ First name
☒ Last name
☒ Role
☒ Managerial Responsibility
☒ Department
☒ Manager's Name
☒ Project
☒ Completion
☒ Activities completed
☒ Format
☒ Duration (minutes)
☒ Invitation Date

Cancel Generate report

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.



The screenshot shows the Learnifier web application interface. At the top, there's a navigation bar with the Learnifier logo and menu items: Dashboard, Projects, Users, Library, Reports, Automations, and Settings. On the right of the navigation bar are links for 'Go To', a search icon, a bell icon, a chat icon, and a user profile for Gabriella. Below the navigation bar, the breadcrumb trail reads 'Reports > Team Learning Time Report'. The main content area features a report card for 'Team Learning Time Report' with a yellow icon. It includes the text 'Next generation: Mar 1, 2025', a 'Report settings' button with a gear icon, and a 'Generate new report' button. Below the report card, there's a table with the following data:

Date range	Projects	Teams	User fields	Generated by	Generated at	Status	Actions
01/01/2025 - 24/02/2025	Introduction to Learnifier, Learnifier - A Style Guide, Learnifier Onboarding, Learnifier Preboarding, Life at Learnifier + 2 more	Office is Stockholm	Gabriella Eriksson	23/02/2025	Generated	Download Download ...	

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!