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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.

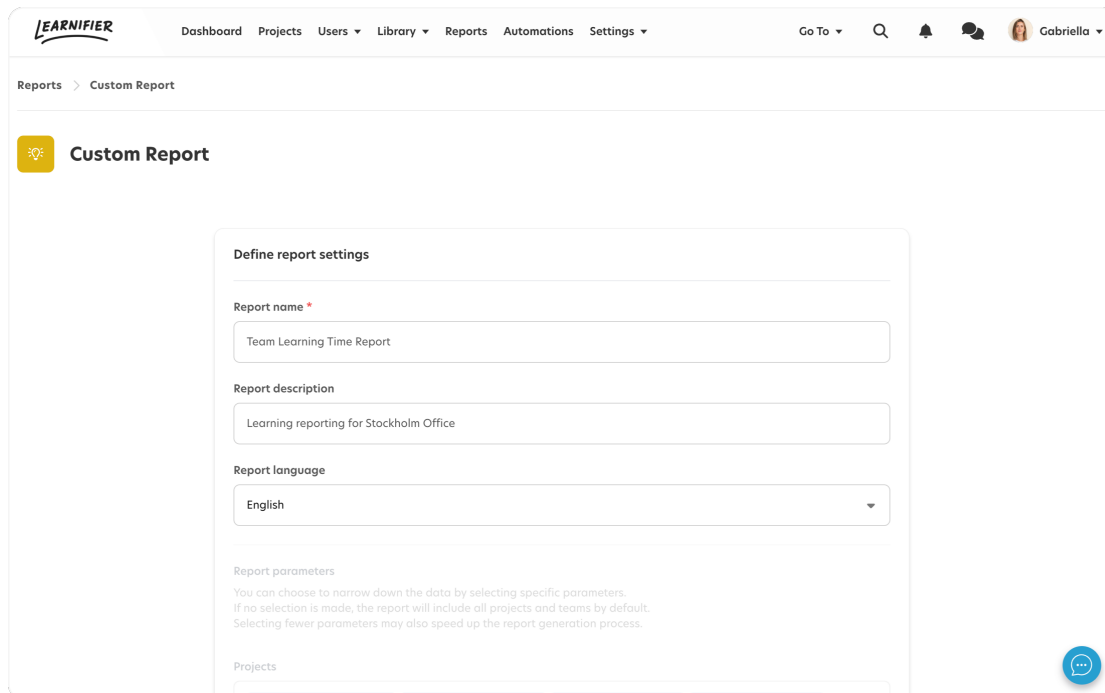
| Name | Description | Type | Actions |
|---|---|---------------|---------|
| Automated communication activity | Summary of emails sent from automated communication | Communication | ☆ |
| Participation errors | Tracks bounced emails and participation errors for projects | Communication | ☆ |
| Duration 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 currently set to 'English'.

Below the form, there is a section for 'Report parameters' 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.' A 'Projects' section with a list of project names is partially visible at the bottom. A blue chat bubble icon is in the bottom right corner.

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

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

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: Monthly
Day of the month: 1

Next generation: Jan 1, 2026

Report sharing

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

☐ Email recipients
☐ Team(s) managers

Cancel Save 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.

Team Learning Time Report

Learning reporting for Stockholm Office

Select report settings

Please define the report parameters before generating your report.

Date range: 01/01/2025 - 23/02/2025 (Reset)

Columns

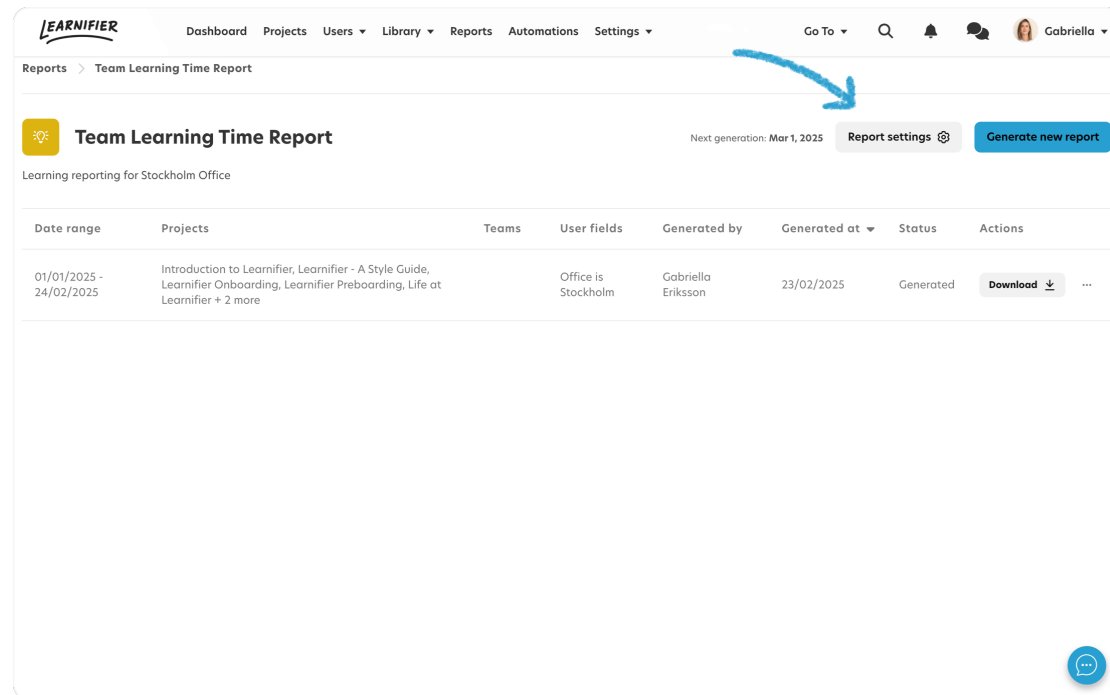
These are default columns included in this report. It is not possible to change them.

| | | |
|---|--|--|
| <input checked="" type="checkbox"/> First name | <input checked="" type="checkbox"/> Last name | <input checked="" type="checkbox"/> Role |
| <input checked="" type="checkbox"/> Managerial Responsibility | <input checked="" type="checkbox"/> Department | <input checked="" type="checkbox"/> Manager's Name |
| <input checked="" type="checkbox"/> Project | <input checked="" type="checkbox"/> Completion | <input checked="" type="checkbox"/> Activities completed |
| <input checked="" type="checkbox"/> Format | <input checked="" type="checkbox"/> Duration (minutes) | <input checked="" type="checkbox"/> 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 dashboard with the 'Reports' menu selected. The 'Team Learning Time Report' is displayed, showing a table of reports for the Stockholm Office. The 'Report settings' button is highlighted with a blue arrow.

Team Learning Time Report

Next generation: Mar 1, 2025 [Report settings](#) [Generate new report](#)

Learning reporting for Stockholm Office

| 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 ... | |

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!