

Kunnskapsbase > Administrasjon > Custom & Scheduled Reports

Custom & Scheduled Reports

Gabriella Eriksson - 2025-03-12 - Administrasjon

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.

LEA	RNIFIER Dashboard Proje	acts Users ▼ Library ▼ Reports Automations Settings ▼ Go To ▼ Q 4	• 🗣 🌘	Gabriella 🔻			
Reports All reports Custom reports Standard reports Favorite reports							
Nam	e	Description	Туре 🔺	Actions			
	Automated communication activity	Summary of emails sent from automated communication	Communication	☆			
	Participation errors	Tracks bounced emails and participation errors for projects	Communication	☆			
Ю:	Duration report		Custom	슙			
୭	Awards	Lists awards issued to users	Usage	☆			
୭	Content usage	Summary access and completion details for individual materials included in courses	Usage	☆			
୭	Enrollments status	List of course enrollments, participant information, course progress, and key dates such as invitation, expiration, and completion dates.	Usage	☆			
ନ୍ଥ	Monthly course activity	Course activity month-over-month comparison	Usage	☆			
ନ୍ଥ	Project completion status	Overview of completion status across all active projects	Usage	☆			
୭	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.

LEARNIFIER Dashb	oard Projects Users - Library - Reports Automations Settings - G	io To 🔻	Q	<u>۽ ج</u>	👔 Gabriella 🗸
Reports \rightarrow Custom Report					
🛛 Custom Report					
	Define report settings				
	Report name *				
	Team Learning Time Report Report description				
	Learning reporting for Stockholm Office				
	Report language				
	English		•		
	Report parameters You can choose to narrow down the data by selecting specific parameters.				
	ir no selection is made, the report will include an projects and teams by default. Selecting fewer parameters may also speed up the report generation process.				

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

Dashb	ooard Projects Users 🔻 Libra	ry - Reports Automations Settin	gs ▼ Go To ▼	Q	÷ 7	
	Report parameters You can choose to narrow down I If no selection is made, the report Selecting fewer parameters may	the data by selecting specific parameters t will include all projects and teams by de also speed up the report generation proc	fault. ess.			
	Projects					
	Introduction to Learnifier Life at Learnifier Sustaina	Learnifier - A Style Guide Learnifier O Ibility The Coaching Leadership	nboarding Learnifier Preboarding	•		
	Teams					
	Select teams			•		
	Select teams User fields Define additional conditions for f	filtering report data	tockholm •	•		
	Select teams User fields Define additional conditions for f Office	filtering report data	tockholm 🔹	•		
	Select teams User fields Define additional conditions for f Office Columns	filtering report data	tockholm 👻			
	Select teams User fields Define additional conditions for f Office Columns First name	filtering report data	tockholm •	•		
	Select teams User fields Define additional conditions for f Office Columns First name Activities total	filtering report data	tockholm ←	•		
	Select teams User fields Define additional conditions for f Office Columns First name Activities total Completion Completion	filtering report data	Cockholm Activities completed Client Number Course	Ĩ		
	Select teams User fields Define additional conditions for f Office Columns First name Activities total Completion Course end	filtering report data is any of Add Rule Last name Client Name Completion Date Course ID	tockholm ▼ Activities completed Client Number Course Course start			

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**

EARNIFIER	Dashboard Projects Users 🕶 Library 🕶	Reports Automations Settings 🕶	Go To 🔻 Q 🌲	🗨 👔 Gabrie			
		Add Rule 📀					
	Columns	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				
	V Format	Invitation Date	Last Date				
	Location	V Project	User course name				
	Team	User ID	Mobile Phone				
	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						
	(i) Report data time range						
		e set automatically based on the report sc	heduling frequency or manually each				
	Report scheduling						

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.

Country Role Department Office Managerial Responsibility Peport data time range Report 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 Report sharing Define recipients for report sharing. The report will be shared automatically each time it is generated.
Pepartment Office Employment Status Report data time range The report's data time range con 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.
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.
Select frequency Report sharing Define recipients for report sharing. The report will be shared automatically each time it is generated.
Report sharing Define recipients for report sharing. The report will be shared automatically each time it is generated.
beine recipients for report sharing. The report will be shared dotoin ducuity each time in its generated.
Email recipients

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.

LEARNIFIER Dashb	oard Projects Users 🕶 Library 💌	Reports Automations Settings	•	Go To 👻 Q	ė 🔹	👔 Gabriella 🗸
Reports $>$ Team Learning Time R	eport 🗦 Generate					
🔅 Team Learning	Time Report					
Learning reporting for Stockholm Offic	ce					
	Select report settings Please define the report parameters be					
	Date range					
	01/01/2025 - 23/02/2025					
	Columns					
	First name	Last name	Role			
	Managerial Responsibility	Department	Manager's N	ame		
	Project	Completion	Activities con	npleted		
	- Format	Duration (minutes)	Invitation Date	te		
			Cancel	Generate report		\bigcirc

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.

LEARNIFIER	Dashboard Projects Users 🕶 Library 💌 Re	ports Autom	ations Settings	-	Go To 👻 (Q 🌲	🗨 👔 Gab	oriella 🔻
Reports > Team Le	carning Time Report							
Team L	earning Time Report			Next generation	: Mar 1, 2025 Report	t settings 🔞	Generate new	report
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 $\underline{+}$	
								\bigcirc

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!