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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.

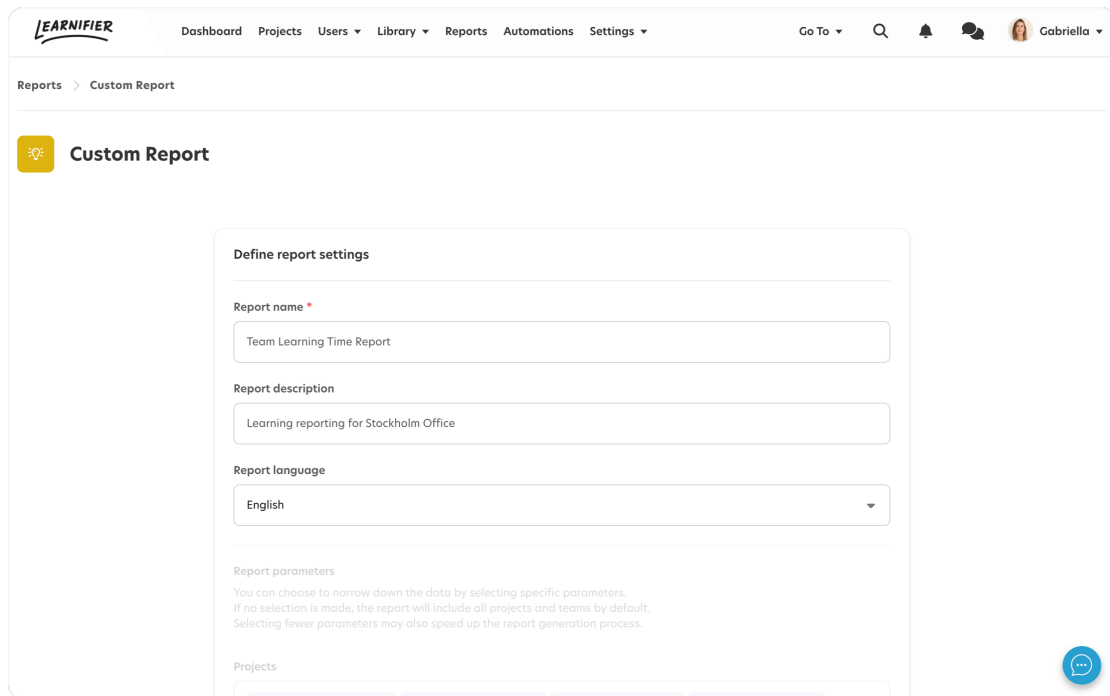
Name	Description	Type	Actions
Automated communication activity	Summary of emails sent from automated communication	Communication	☆
Participation errors	Tracks bounced emails and participation errors for projects	Communication	☆
Duration report		Custom	☆
Awards	Lists awards issued to users	Usage	☆
Content 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'.
- 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 text is a 'Projects' label and a list of project names with checkboxes, including 'Project A', 'Project B', 'Project C', 'Project D', 'Project E', 'Project F', 'Project G', 'Project H', 'Project I', 'Project J', 'Project K', 'Project L', 'Project M', 'Project N', 'Project O', 'Project P', 'Project Q', 'Project R', 'Project S', 'Project T', 'Project U', 'Project V', 'Project W', 'Project X', 'Project Y', 'Project Z', 'Project AA', 'Project AB', 'Project AC', 'Project AD', 'Project AE', 'Project AF', 'Project AG', 'Project AH', 'Project AI', 'Project AJ', 'Project AK', 'Project AL', 'Project AM', 'Project AN', 'Project AO', 'Project AP', 'Project AQ', 'Project AR', 'Project AS', 'Project AT', 'Project AU', 'Project AV', 'Project AW', 'Project AX', 'Project AY', 'Project AZ', 'Project BA', 'Project BB', 'Project BC', 'Project BD', 'Project BE', 'Project BF', 'Project BG', 'Project BH', 'Project BI', 'Project BJ', 'Project BK', 'Project BL', 'Project BM', 'Project BN', 'Project BO', 'Project BP', 'Project BQ', 'Project BR', 'Project BS', 'Project BT', 'Project BU', 'Project BV', 'Project BW', 'Project BX', 'Project BY', 'Project BZ', 'Project CA', 'Project CB', 'Project CC', 'Project CD', 'Project CE', 'Project CF', 'Project CG', 'Project CH', 'Project CI', 'Project CJ', 'Project CK', 'Project CL', 'Project CM', 'Project CN', 'Project CO', 'Project CP', 'Project CQ', 'Project CR', 'Project CS', 'Project CT', 'Project CU', 'Project CV', 'Project CW', 'Project CX', 'Project CY', 'Project CZ', 'Project DA', 'Project DB', 'Project DC', 'Project DD', 'Project DE', 'Project DF', 'Project DG', 'Project DH', 'Project DI', 'Project DJ', 'Project DK', 'Project DL', 'Project DM', 'Project DN', 'Project DO', 'Project DP', 'Project DQ', 'Project DR', 'Project DS', 'Project DT', 'Project DU', 'Project DV', 'Project DW', 'Project DX', 'Project DY', 'Project DZ', 'Project EA', 'Project EB', 'Project EC', 'Project ED', 'Project EE', 'Project EF', 'Project EG', 'Project EH', 'Project EI', 'Project EJ', 'Project EK', 'Project EL', 'Project EM', 'Project EN', 'Project EO', 'Project EP', 'Project EQ', 'Project ER', 'Project ES', 'Project ET', 'Project EU', 'Project EV', 'Project EW', 'Project EX', 'Project EY', 'Project EZ', 'Project FA', 'Project FB', 'Project FC', 'Project FD', 'Project FE', 'Project FF', 'Project FG', 'Project FH', 'Project FI', 'Project FJ', 'Project FK', 'Project FL', 'Project FM', 'Project FN', 'Project FO', 'Project FP', 'Project FQ', 'Project FR', 'Project FS', 'Project FT', 'Project FU', 'Project FV', 'Project FW', 'Project FX', 'Project FY', 'Project FZ', 'Project GA', 'Project GB', 'Project GC', 'Project GD', 'Project GE', 'Project GF', 'Project GG', 'Project GH', 'Project GI', 'Project GJ', 'Project GK', 'Project GL', 'Project GM', 'Project GN', 'Project GO', 'Project GP', 'Project GQ', 'Project GR', 'Project GS', 'Project GT', 'Project GU', 'Project GV', 'Project GW', 'Project GX', 'Project GY', 'Project GZ', 'Project HA', 'Project HB', 'Project HC', 'Project HD', 'Project HE', 'Project HF', 'Project HG', 'Project HH', 'Project HI', 'Project HJ', 'Project HK', 'Project HL', 'Project HM', 'Project HN', 'Project HO', 'Project HP', 'Project HQ', 'Project HR', 'Project HS', 'Project HT', 'Project HU', 'Project HV', 'Project HW', 'Project HX', 'Project HY', 'Project HZ', 'Project IA', 'Project IB', 'Project IC', 'Project ID', 'Project IE', 'Project IF', 'Project IG', 'Project IH', 'Project II', 'Project IJ', 'Project IK', 'Project IL', 'Project IM', 'Project IN', 'Project IO', 'Project IP', 'Project IQ', 'Project IR', 'Project IS', 'Project IT', 'Project IU', 'Project IV', 'Project IW', 'Project IX', 'Project IY', 'Project IZ', 'Project JA', 'Project JB', 'Project JC', 'Project JD', 'Project JE', 'Project JF', 'Project JG', 'Project JH', 'Project JI', 'Project JJ', 'Project JK', 'Project JL', 'Project JM', 'Project JN', 'Project JO', 'Project JP', 'Project JQ', 'Project JR', 'Project JS', 'Project JT', 'Project JU', 'Project JV', 'Project JW', 'Project JX', 'Project JY', 'Project JZ', 'Project KA', 'Project KB', 'Project KC', 'Project KD', 'Project KE', 'Project KF', 'Project KG', 'Project KH', 'Project KI', 'Project KJ', 'Project KK', 'Project KL', 'Project KM', 'Project KN', 'Project KO', 'Project KP', 'Project KQ', 'Project KR', 'Project KS', 'Project KT', 'Project KU', 'Project KV', 'Project KW', 'Project KX', 'Project KY', 'Project KZ', 'Project LA', 'Project LB', 'Project LC', 'Project LD', 'Project LE', 'Project LF', 'Project LG', 'Project LH', 'Project LI', 'Project LJ', 'Project LK', 'Project LL', 'Project LM', 'Project LN', 'Project LO', 'Project LP', 'Project LQ', 'Project LR', 'Project LS', 'Project LT', 'Project LU', 'Project LV', 'Project LW', 'Project LX', 'Project LY', 'Project LZ', 'Project MA', 'Project MB', 'Project MC', 'Project MD', 'Project ME', 'Project MF', 'Project MG', 'Project MH', 'Project MI', 'Project MJ', 'Project MK', 'Project ML', 'Project MM', 'Project MN', 'Project MO', 'Project MP', 'Project MQ', 'Project MR', 'Project MS', 'Project MT', 'Project MU', 'Project MV', 'Project MW', 'Project MX', 'Project MY', 'Project MZ', 'Project NA', 'Project NB', 'Project NC', 'Project ND', 'Project NE', 'Project NF', 'Project NG', 'Project NH', 'Project NI', 'Project NJ', 'Project NK', 'Project NL', 'Project NM', 'Project NN', 'Project NO', 'Project NP', 'Project NQ', 'Project NR', 'Project NS', 'Project NT', 'Project NU', 'Project NV', 'Project NW', 'Project NX', 'Project NY', 'Project NZ', 'Project OA', 'Project OB', 'Project OC', 'Project OD', 'Project OE', 'Project OF', 'Project OG', 'Project OH', 'Project OI', 'Project OJ', 'Project OK', 'Project OL', 'Project OM', 'Project ON', 'Project OO', 'Project OP', 'Project OQ', 'Project OR', 'Project OS', 'Project OT', 'Project OU', 'Project OV', 'Project OW', 'Project OX', 'Project OY', 'Project OZ', 'Project PA', 'Project PB', 'Project PC', 'Project PD', 'Project PE', 'Project PF', 'Project PG', 'Project PH', 'Project PI', 'Project PJ', 'Project PK', 'Project PL', 'Project PM', 'Project PN', 'Project PO', 'Project PP', 'Project PQ', 'Project PR', 'Project PS', 'Project PT', 'Project PU', 'Project PV', 'Project PW', 'Project PX', 'Project PY', 'Project PZ', 'Project QA', 'Project QB', 'Project QC', 'Project QD', 'Project QE', 'Project QF', 'Project QG', 'Project QH', 'Project QI', 'Project QJ', 'Project QK', 'Project QL', 'Project QM', 'Project QN', 'Project QO', 'Project QP', 'Project QQ', 'Project QR', 'Project QS', 'Project QT', 'Project QU', 'Project QV', 'Project QW', 'Project QX', 'Project QY', 'Project QZ', 'Project RA', 'Project RB', 'Project RC', 'Project RD', 'Project RE', 'Project RF', 'Project RG', 'Project RH', 'Project RI', 'Project RJ', 'Project RK', 'Project RL', 'Project RM', 'Project RN', 'Project RO', 'Project RP', 'Project RQ', 'Project RR', 'Project RS', 'Project RT', 'Project RU', 'Project RV', 'Project RW', 'Project RX', 'Project RY', 'Project RZ', 'Project SA', 'Project SB', 'Project SC', 'Project SD', 'Project SE', 'Project SF', 'Project SG', 'Project SH', 'Project SI', 'Project SJ', 'Project SK', 'Project SL', 'Project SM', 'Project SN', 'Project SO', 'Project SP', 'Project SQ', 'Project SR', 'Project SS', 'Project ST', 'Project SU', 'Project SV', 'Project SW', 'Project SX', 'Project SY', 'Project SZ', 'Project TA', 'Project TB', 'Project TC', 'Project TD', 'Project TE', 'Project TF', 'Project TG', 'Project TH', 'Project TI', 'Project TJ', 'Project TK', 'Project TL', 'Project TM', 'Project TN', 'Project TO', 'Project TP', 'Project TQ', 'Project TR', 'Project TS', 'Project TT', 'Project TU', 'Project TV', 'Project TW', 'Project TX', 'Project TY', 'Project TZ', 'Project UA', 'Project UB', 'Project UC', 'Project UD', 'Project UE', 'Project UF', 'Project UG', 'Project UH', 'Project UI', 'Project UJ', 'Project UK', 'Project UL', 'Project UM', 'Project UN', 'Project UO', 'Project UP', 'Project UQ', 'Project UR', 'Project US', 'Project UT', 'Project UY', 'Project UZ', 'Project VA', 'Project VB', 'Project VC', 'Project VD', 'Project VE', 'Project VF', 'Project VG', 'Project VH', 'Project VI', 'Project VJ', 'Project VK', 'Project VL', 'Project VM', 'Project VN', 'Project VO', 'Project VP', 'Project VQ', 'Project VR', 'Project VS', 'Project VT', 'Project VY', 'Project VZ', 'Project WA', 'Project WB', 'Project WC', 'Project WD', 'Project WE', 'Project WF', 'Project WG', 'Project WH', 'Project WI', 'Project WJ', 'Project WK', 'Project WL', 'Project WM', 'Project WN', 'Project WO', 'Project WP', 'Project WQ', 'Project WR', 'Project WS', 'Project WT', 'Project WY', 'Project WZ', 'Project XA', 'Project XB', 'Project XC', 'Project XD', 'Project XE', 'Project XF', 'Project XG', 'Project XH', 'Project XI', 'Project XJ', 'Project XK', 'Project XL', 'Project XM', 'Project XN', 'Project XO', 'Project XP', 'Project XQ', 'Project XR', 'Project XS', 'Project XT', 'Project XU', 'Project XV', 'Project XW', 'Project XX', 'Project XY', 'Project XZ', 'Project YA', 'Project YB', 'Project YC', 'Project YD', 'Project YE', 'Project YF', 'Project YG', 'Project YH', 'Project YI', 'Project YJ', 'Project YK', 'Project YL', 'Project YM', 'Project YN', 'Project YO', 'Project YP', 'Project YQ', 'Project YR', 'Project YS', 'Project YT', 'Project YU', 'Project YV', 'Project YW', 'Project YX', 'Project YY', 'Project YZ', 'Project ZA', 'Project ZB', 'Project ZC', 'Project ZD', 'Project ZE', 'Project ZF', 'Project ZG', 'Project ZH', 'Project ZI', 'Project ZJ', 'Project ZK', 'Project ZL', 'Project ZM', 'Project ZN', 'Project ZO', 'Project ZP', 'Project ZQ', 'Project ZR', 'Project ZS', 'Project ZT', 'Project ZU', 'Project ZV', 'Project ZW', 'Project ZX', 'Project ZY', 'Project ZZ'.

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
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.

DashboardProjectsUsersLibraryReportsAutomationsSettingsGo toSearchHelpNotificationsProfile

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.

DashboardProjectsUsersLibraryReportsAutomationsSettingsGo ToSearchHelpNotificationsProfileGabriella

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

01/01/2025 - 23/02/2025

Reset

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)

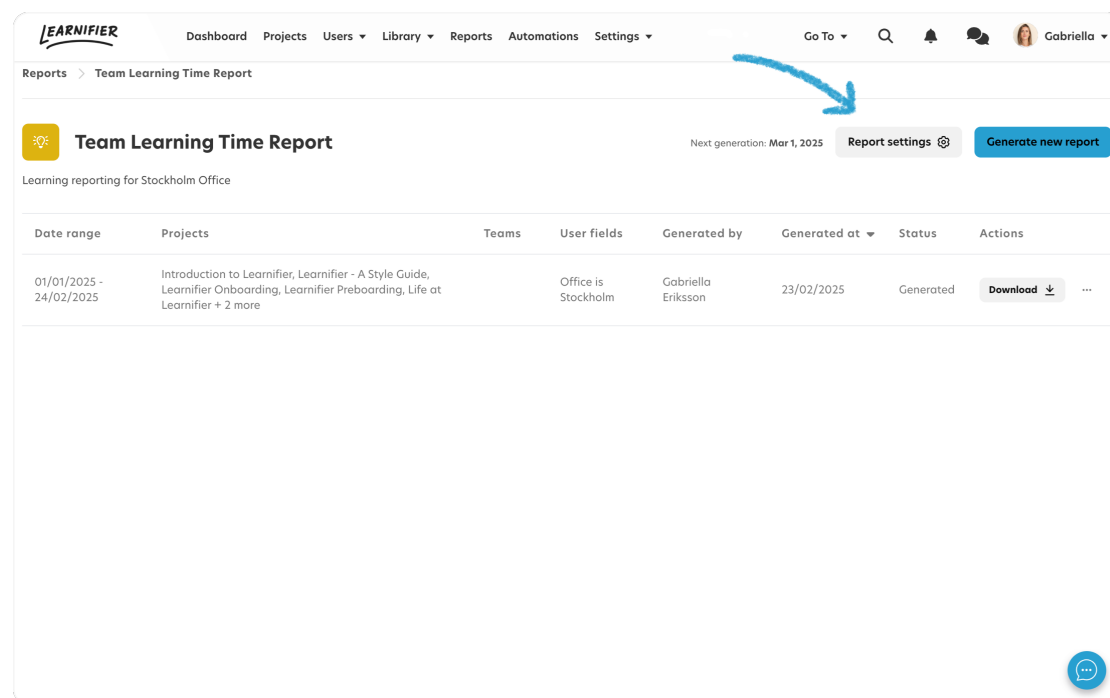
☒ Invitation Date

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 header for the 'Team Learning Time Report' with a yellow icon, a subtitle 'Learning reporting for Stockholm Office', and a 'Next generation: Mar 1, 2025' date. To the right of the header are two buttons: 'Report settings' (with a gear icon) and 'Generate new report'. A blue arrow points from the 'Report settings' button in the header to the 'Report settings' button in the main content area. Below the header is a table with columns: Date range, Projects, Teams, User fields, Generated by, Generated at, Status, and Actions. The table contains one row of data for the date range '01/01/2025 - 24/02/2025'. The 'Actions' column for this row includes a 'Download' button and a three-dot menu icon. At the bottom right of the page, there is a blue circular chat icon.

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!