



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 EARNIFIER interface for configuring a custom report. The navigation bar includes 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The user is logged in as 'Gabriella'. The main content area is titled 'Custom Report' and contains a form with the following sections:

- 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. 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

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

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

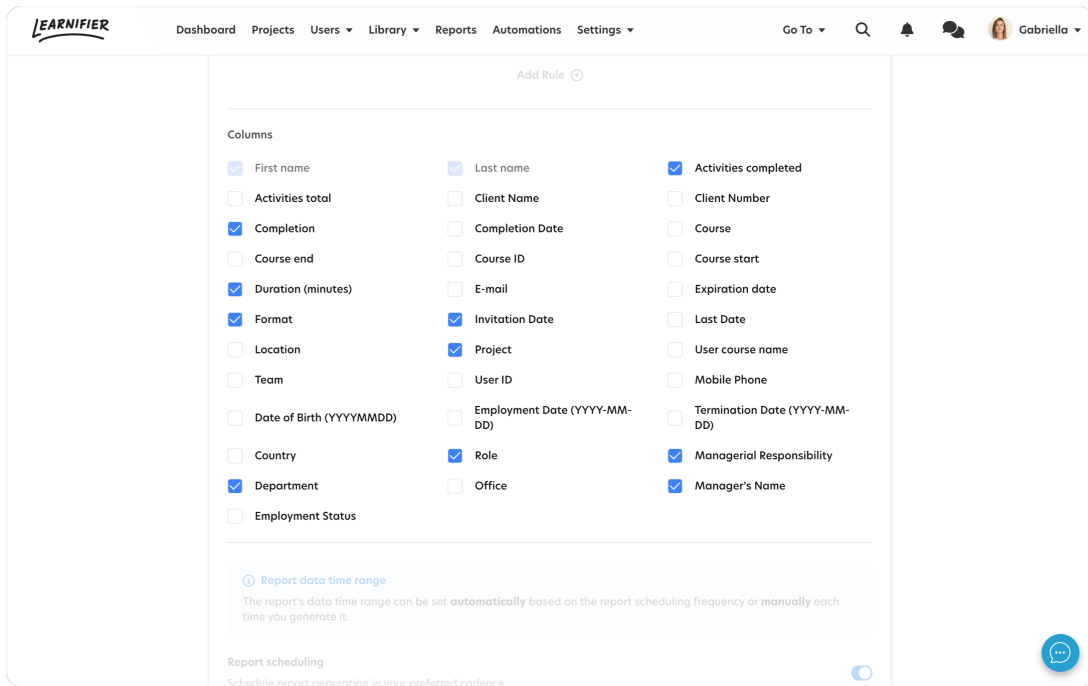
<input type="checkbox"/> First name	<input type="checkbox"/> Last name	<input checked="" type="checkbox"/> Activities completed
<input type="checkbox"/> Activities total	<input type="checkbox"/> Client Name	<input type="checkbox"/> Client Number
<input checked="" type="checkbox"/> Completion	<input type="checkbox"/> 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:

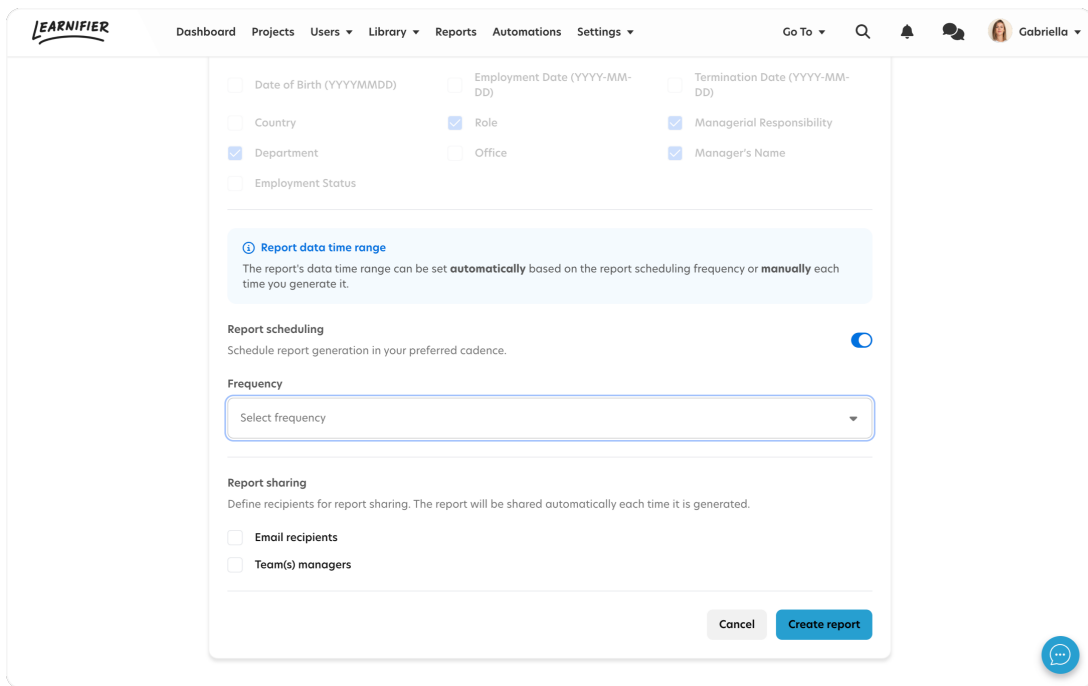
- View which teams have completed a course: **Project + Completion + Completion Date**
- Track when participants started and completed a course: **Course Start + Completion Date**



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.

The screenshot shows the EARNIFIER interface for generating a report. The top navigation bar includes 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The user 'Gabriella' is logged in. The breadcrumb trail is 'Reports > Team Learning Time Report > Generate'. The main heading is 'Team Learning Time Report' with a subtitle 'Learning reporting for Stockholm Office'. A 'Select report settings' dialog box is open, containing a 'Date range' field set to '01/01/2025 - 23/02/2025' and a 'Columns' section with the following checked options: First name, Managerial Responsibility, Project, Format, Last name, Department, Completion, Duration (minutes), Role, Manager's Name, Activities completed, and Invitation Date. 'Cancel' and 'Generate report' buttons are at the bottom of the dialog.

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.

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!