



[Knowledge base](#) > [Administration](#) > [Custom & Scheduled Reports](#)

## Custom & Scheduled Reports

Gabriella Eriksson - 2026-05-11 - [Administration](#)

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
<b>Automated communication activity</b>	Summary of emails sent from automated communication	Communication	☆
<b>Participation errors</b>	Tracks bounced emails and participation errors for projects	Communication	☆
<b>Duration report</b>		Custom	☆
<b>Awards</b>	Lists awards issued to users	Usage	☆
<b>Content usage</b>	Summary access and completion details for individual materials included in courses	Usage	☆
<b>Enrollments status</b>	List of course enrollments, participant information, course progress, and key dates such as invitation, expiration, and completion dates.	Usage	☆
<b>Monthly course activity</b>	Course activity month-over-month comparison	Usage	☆
<b>Project completion status</b>	Overview of completion status across all active projects	Usage	☆
<b>Quiz results</b>	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 'Custom Report' configuration interface in the LERNIFIER system. The navigation bar at the top includes 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The user 'Gabriella' is logged in. The main content area is titled 'Custom Report' and contains a form with the following sections:

- Define report settings:**
  - Report name \***: Text input field containing 'Team Learning Time Report'.
  - Report description**: Text input field containing 'Learning reporting for Stockholm Office'.
  - Report language**: Dropdown menu set to 'English'.
- Report parameters:**
  - 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.'
  - Projects**: A section for selecting specific projects, which is partially obscured by a blue chat bubble icon 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**

The screenshot shows the 'Report parameters' section of the Learnifier dashboard. At the top, there is a navigation bar with 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The user's name 'Gabiella' is visible in the top right corner. Below the navigation bar, the 'Report parameters' section includes a brief explanation: '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.'

The configuration options are as follows:

- Projects:** A dropdown menu with selected items: 'Introduction to Learnifier', 'Learnifier - A Style Guide', 'Learnifier Onboarding', 'Learnifier Preboarding', 'Life at Learnifier', 'Sustainability', and 'The Coaching Leadership'.
- Teams:** A dropdown menu labeled 'Select teams'.
- User fields:** A section for defining additional conditions for filtering report data. It shows a rule: 'Office' is any of... 'Stockholm'. There is an 'Add Rule' button below.
- Columns:** A grid of checkboxes for selecting data fields to include in the report. The selected fields are 'Activities completed', 'Completion', and 'Duration (minutes)'. Other available fields include 'First name', 'Last name', 'Activities total', 'Client Name', 'Client Number', 'Completion Date', 'Course', 'Course end', 'Course ID', 'Course start', 'Course', and '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**

**Columns**

<input checked="" type="checkbox"/> First name	<input checked="" 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
<input checked="" type="checkbox"/> Format	<input checked="" type="checkbox"/> Invitation Date	<input type="checkbox"/> Last Date
<input type="checkbox"/> Location	<input checked="" type="checkbox"/> Project	<input type="checkbox"/> User course name
<input type="checkbox"/> Team	<input type="checkbox"/> User ID	<input type="checkbox"/> Mobile Phone
<input type="checkbox"/> Date of Birth (YYYYMMDD)	<input type="checkbox"/> Employment Date (YYYY-MM-DD)	<input type="checkbox"/> Termination Date (YYYY-MM-DD)
<input type="checkbox"/> Country	<input checked="" type="checkbox"/> Role	<input checked="" type="checkbox"/> Managerial Responsibility
<input checked="" type="checkbox"/> Department	<input type="checkbox"/> Office	<input checked="" type="checkbox"/> Manager's Name
<input type="checkbox"/> 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

## 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** **Day of the month**

Monthly 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** 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

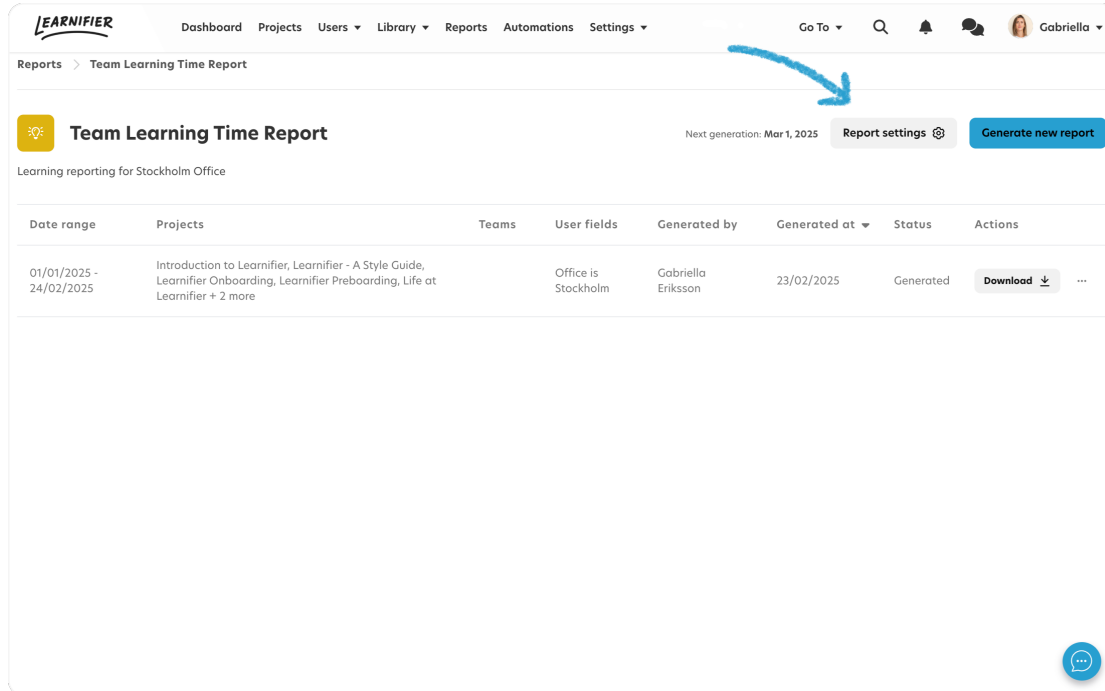
Project  Completion  Activities completed

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 dashboard for the 'Team Learning Time Report'. The navigation bar includes 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', and 'Settings'. The user's name 'Gabriella' is visible in the top right. The report title is 'Team Learning Time Report' with a subtitle 'Learning reporting for Stockholm Office'. A 'Next generation: Mar 1, 2025' notice is present. A blue arrow points to the 'Report settings' button. A 'Generate new report' button is also visible. Below the header is a table with columns: Date range, Projects, Teams, User fields, Generated by, Generated at, Status, and Actions.

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!