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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 'Custom Report' settings page in the LEARNIFIER software. The top navigation bar includes 'Dashboard', 'Projects', 'Users', 'Library', 'Reports', 'Automations', 'Settings', 'Go To', a search icon, and a user profile for 'Gabriella'. The main content area is titled 'Custom Report' and contains the following fields:

- Report name ***: Team Learning Time Report
- Report description**: Learning reporting for Stockholm Office
- Report language**: English
- Report parameters**: A note stating you can choose parameters to narrow down data, with a default of all projects and teams. It also mentions selecting fewer parameters may speed up the process.
- Projects**: A dropdown menu with many project names listed.

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 LEARNIFIER platform's report parameters configuration screen. At the top, there is a navigation bar with links for Dashboard, Projects, Users, Library, Reports, Automations, and Settings. On the far right, there are icons for Go To, a search bar, a bell, a message bubble, and a user profile for 'Gabriella'.

The main area is titled 'Report parameters' and contains the following sections:

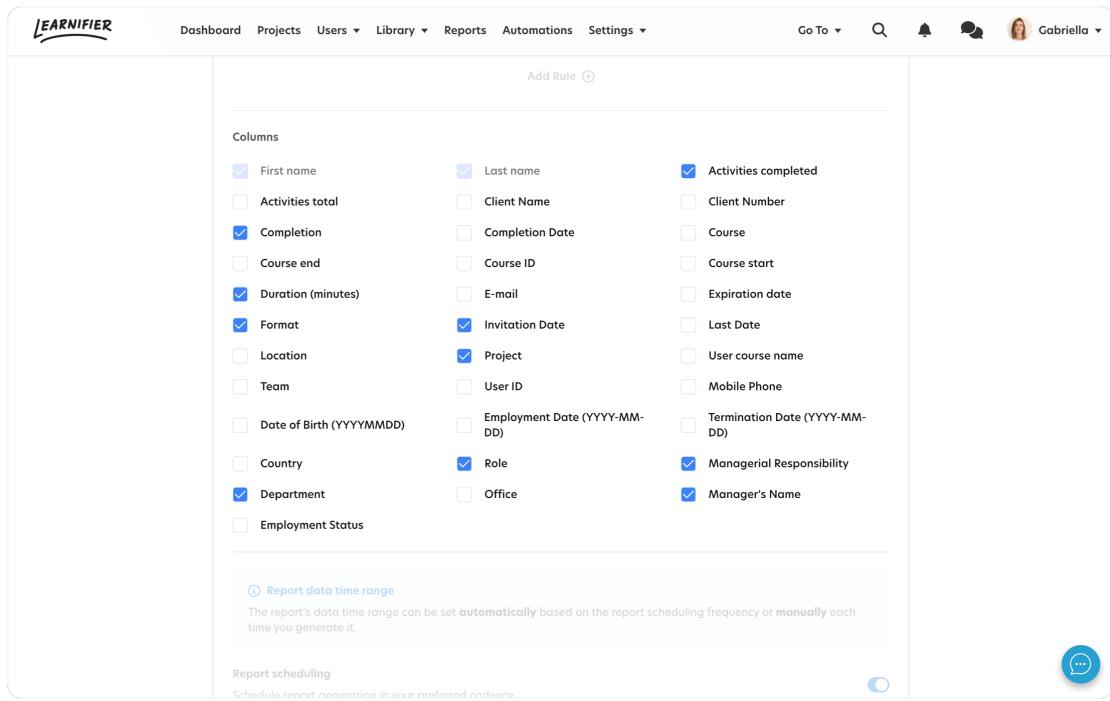
- Projects:** A dropdown menu showing several project names: 'Introduction to Learnifier', 'Learnifier - A Style Guide', 'Learnifier Onboarding', 'Learnifier Preboarding', 'Life at Learnifier', 'Sustainability', and 'The Coaching Leadership'.
- Teams:** A dropdown menu labeled 'Select teams'.
- User fields:** A section for defining additional conditions for filtering report data. It includes a dropdown for 'Office' (set to 'Stockholm'), a dropdown for 'is any of...', and a text input field containing 'Stockholm'. There is also a 'Add Rule' button.
- Columns:** A grid of checkboxes for selecting data fields. The checked fields are: 'Completion' (checked), 'Duration (minutes)' (checked), 'First name', 'Last name', 'Activities completed', 'Client Name', 'Client Number', 'Course', 'Course end', 'Course ID', 'Course start', 'E-mail', 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**



The screenshot shows the LEARNIFIER software interface. At the top, there is a navigation bar with links for Dashboard, Projects, Users, Library, Reports, Automations, and Settings. On the far right, there are icons for Go To, a search bar, a bell, a message bubble, and a user profile for 'Gabriella'.

The main area is titled 'Columns' and contains a grid of checkboxes for selecting report fields. The fields are grouped into three columns:

- First column: First name, Activities total, Completion, Course end, Duration (minutes), Format, Location, Team, Date of Birth (YYYYMMDD), Country, Department, Employment Status.
- Second column: Last name, Client Name, Completion Date, Course ID, E-mail, Invitation Date, Project, User ID, Employment Date (YYYY-MM-DD), Role, Office.
- Third column: 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.

Below the columns, there is a section titled 'Report data time range' with a note: 'The report's data time range can be set automatically based on the report scheduling frequency or manually each time you generate it.' At the bottom left, there is a 'Report scheduling' section with the text 'Schedule report generation in your preferred cadence...' and a blue circular button. On the right side, there is a blue circular icon with a white speech bubble and three dots.

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.

The screenshot shows the LEARNIFIER platform interface. At the top, there are navigation links: Dashboard, Projects, Users, Library, Reports (which is the active tab), Automations, Settings, Go to, and a search bar. On the far right, there are icons for notifications (9+), user profile, and a help bubble.

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) and **Day of the month** (1) are selected. A blue circular icon with a dot is to the right of the scheduling section.

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.

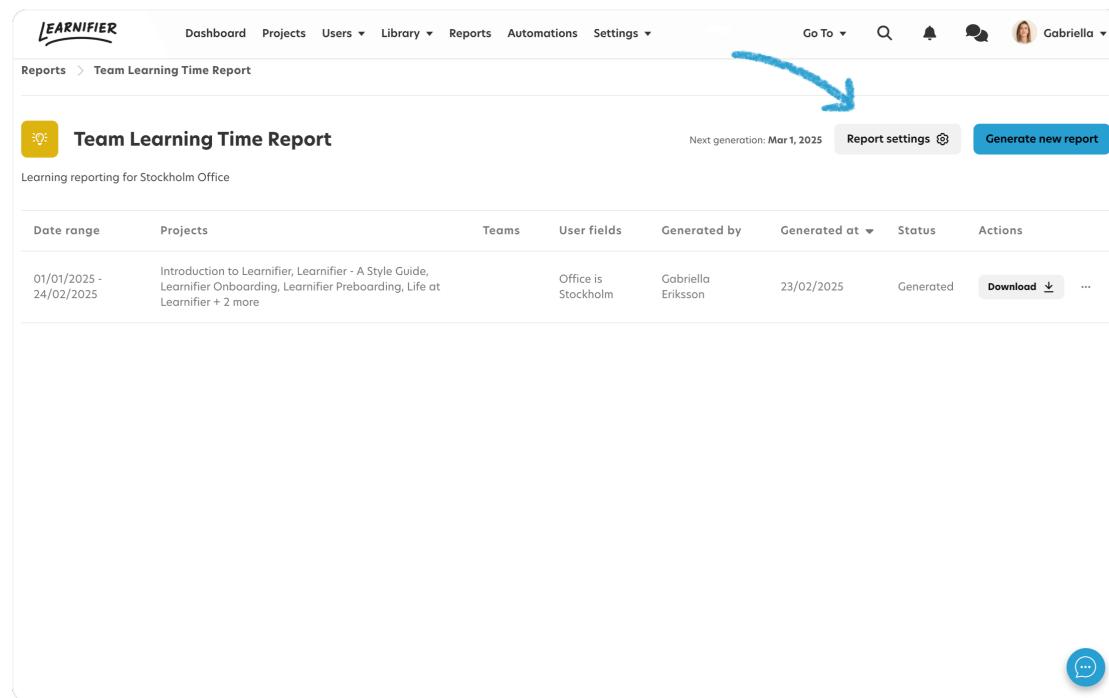
The screenshot shows the Learniifier application interface. At the top, there is a navigation bar with links for Dashboard, Projects, Users, Library, Reports, Automations, and Settings. On the far right, there are icons for 'Go To', a magnifying glass (Search), a bell (Notifications), a message bubble (Messages), and a user profile for 'Gabriella'.

The main content area shows the 'Reports' section, specifically 'Team Learning Time Report > Generate'. Below this, a yellow icon with a gear and a lightbulb is followed by the title 'Team Learning Time Report'. A sub-header 'Learning reporting for Stockholm Office' is present.

The central part of the screen is a form titled 'Select report settings' with the sub-instruction 'Please define the report parameters before generating your report.' It includes a 'Date range' section with a date range selector showing '01/01/2025 - 23/02/2025' and a 'Reset' button. Below this is a 'Columns' section listing various data points with checkboxes, all of which are checked: First name, Last name, Role, Managerial Responsibility, Department, Manager's Name, Project, Completion, Activities completed, Format, Duration (minutes), and Invitation Date. At the bottom right are 'Cancel' and 'Generate report' buttons.

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 interface with the following details:

- Header:** LEARNIFIER, Dashboard, Projects, Users, Library, Reports, Automations, Settings.
- Breadcrumbs:** Reports > Team Learning Time Report.
- Title:** Team Learning Time Report.
- Subtitle:** Learning reporting for Stockholm Office.
- Report Content:** A table with the following data:

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	...
- Top Right:** Go To, Search, Notifications, User Profile (Gabriella), Report settings (with a blue arrow pointing to it), Generate new report.

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!