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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.

**Reports**

[All reports](#) [Custom reports](#) [Standard reports](#) [Favorite reports](#)

[Create report template](#)

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 EARNIFIER interface for creating a custom report. The top navigation bar includes links to 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 'Define report settings' section. This section has three input fields: 'Report name' (filled with 'Team Learning Time Report'), 'Report description' (filled with 'Learning reporting for Stockholm Office'), and 'Report language' (a dropdown menu set to 'English'). Below these fields is a 'Report parameters' section with a note: '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.' There is a 'Projects' field with a placeholder text 'Select projects to include in the report'.

## 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**

**LERNIFIER** 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 LERNIFIER Learnifier - A Style Guide Learnifier Onboarding Learnifier Preboarding  
 Life at LERNIFIER 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**

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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.

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☐ 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

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.

☐ Email recipients
☐ Team(s) managers

Cancel

Create 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 EARNIFIER web interface. 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 modal window titled 'Select report settings' is open, containing a 'Date range' field set to '01/01/2025 - 23/02/2025' and a 'Columns' section with a grid of checkboxes for report fields. The 'Generate report' button is highlighted in blue.

**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.

<input checked="" type="checkbox"/> First name	<input checked="" type="checkbox"/> Last name	<input checked="" type="checkbox"/> Role
<input checked="" type="checkbox"/> Managerial Responsibility	<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Manager's Name
<input checked="" type="checkbox"/> Project	<input checked="" type="checkbox"/> Completion	<input checked="" type="checkbox"/> Activities completed
<input checked="" type="checkbox"/> Format	<input checked="" type="checkbox"/> Duration (minutes)	<input checked="" type="checkbox"/> 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 'Team Learning Time Report' page in the Learnifier application. The top navigation bar includes links for Dashboard, Projects, Users, Library, Reports, Automations, and Settings. A blue arrow points from the 'Go To' dropdown in the top right to the 'Report settings' button. The report title is 'Team Learning Time Report' with a subtitle 'Learning reporting for Stockholm Office'. It shows the next generation date as 'Mar 1, 2025' and buttons for 'Report settings' and 'Generate new report'. Below this is a table with columns: Date range, Projects, Teams, User fields, Generated by, Generated at, Status, and Actions. One report is listed for the date range '01/01/2025 - 24/02/2025', generated by 'Gabriella Eriksson' on '23/02/2025' with a status of 'Generated'. A 'Download' button is available for this report. A chat icon is in the bottom right corner.

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!