Creating a Report on Users & Teams

Software Support - 2019-04-11 - Reports

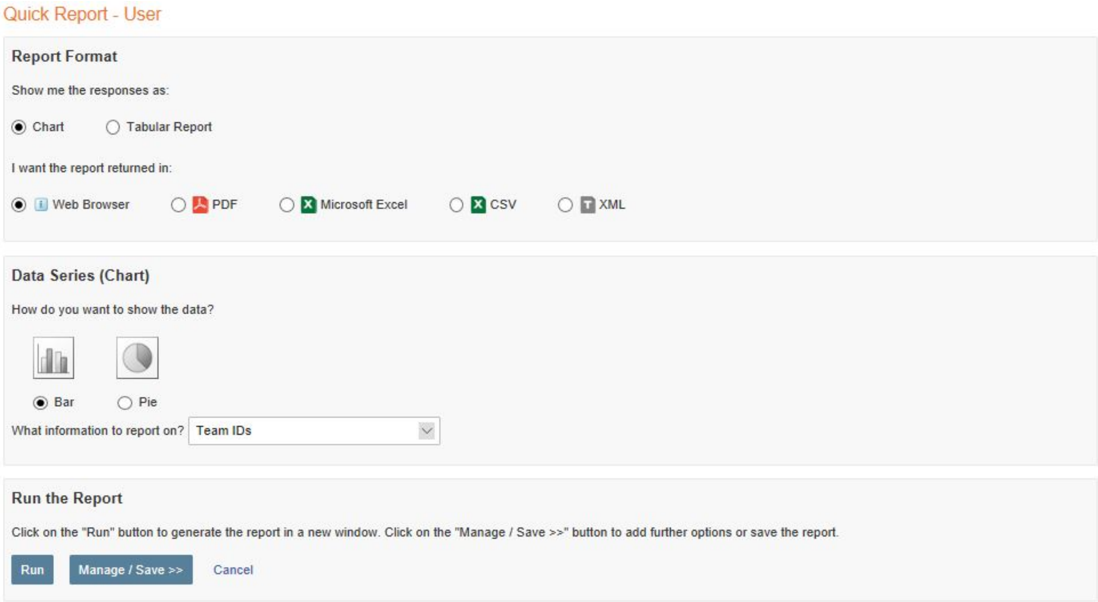
This KB article has step-by-step instructions in order to provide a detailed report on all users & teams within a workspace.

1. Open the workspace that you wish to report on.

2. Click "manage workspace" and select "members" from the drop-down.

3. Select "Report on these members" from under the "actions" list at the bottom.

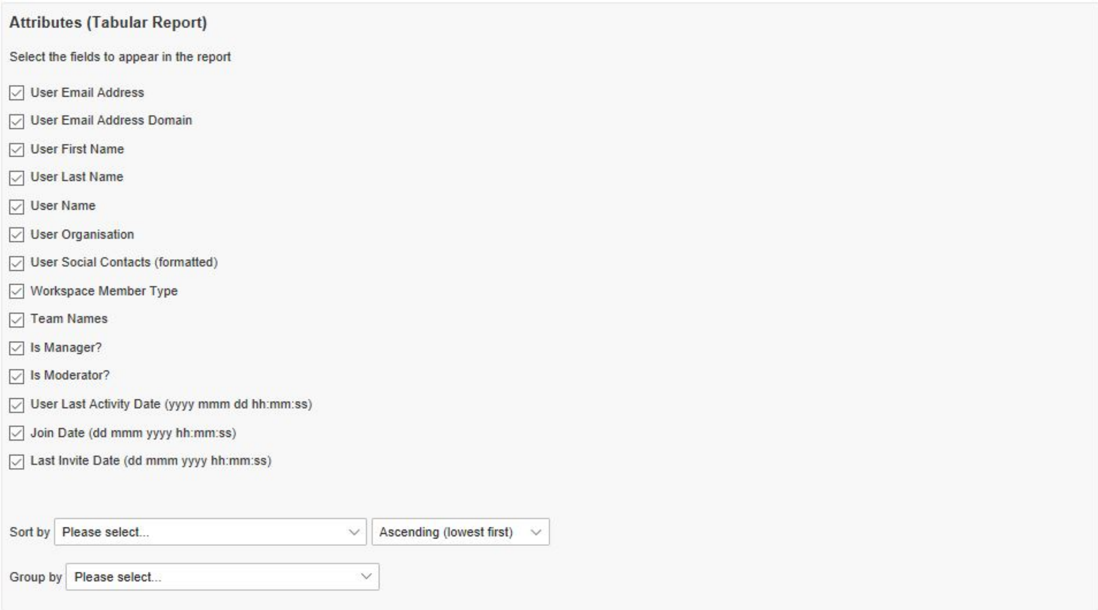
This will display a quick report - user, as shown below:



You can either choose the following formats chart or tabular report.
The chart will display the data in a graph whereas the tabular report will display much more data within a table.
You also then have the choice to display the results in the web browser or export them to PDF, Microsoft Excel, CSV or XML files.

In this example, I'm creating a detailed report so therefore we'll continue to use a tabular report.

4. Change the responses from "chart" to "tabular report" which will provide much more in-depth details as shown below:



5. All attributes are ticked by default, remove any if not required.

6. Select how you would like them "sorted by" from the drop-down.

7. Select "team names" from the "grouped by" drop-down.

8. Either "run" the report or you can "manage/save" the report for a later date

This report will now provide all the information you require regarding the users and teams within the workspace.

Related Content

- Report Attributes List for each Data Type to Report on (Full List)
- Creating a Report - Full Wizard Breakdown for Workspace Managers
- Creating a Report - Total Workspace Items (Docs, Databases etc.)
- Creating a Report - Full Wizard Breakdown for Site Owners
- Creating a Report