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Creating a Report on Users & Teams

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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:

Quick Report - User

The screenshot shows a web interface for generating a report. It is divided into three main sections:

- Report Format:** Contains two radio buttons for "Show me the responses as:" (Chart is selected) and "I want the report returned in:" (Web Browser is selected). Other options include Tabular Report, PDF, Microsoft Excel, CSV, and XML.
- Data Series (Chart):** Contains two radio buttons for "How do you want to show the data?" (Bar is selected) and "What information to report on?" (Team IDs is selected in a dropdown menu). Other options include Pie.
- Run the Report:** Contains three buttons: "Run", "Manage / Save >>", and "Cancel".

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:

Attributes (Tabular Report)
Select the fields to appear in the report
☒ User Email Address
☒ User Email Address Domain
☒ User First Name
☒ User Last Name
☒ User Name
☒ User Organisation
☒ User Social Contacts (formatted)
☒ Workspace Member Type
☒ Team Names
☒ Is Manager?
☒ Is Moderator?
☒ User Last Activity Date (yyyy mmm dd hh:mm:ss)
☒ Join Date (dd mmm yyyy hh:mm:ss)
☒ Last Invite Date (dd mmm yyyy hh:mm:ss)

Sort by
Group by

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](#)