

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:

Quick Report - User

Report Format

Show me the responses as:

Chart Tabular Report

I want the report returned in:

Web Browser PDF Microsoft Excel CSV XML

Data Series (Chart)

How do you want to show the data?

Bar Pie

What information to report on?

Run the Report

Click on the "Run" button to generate the report in a new window. Click on the "Manage / Save >>" button to add further options or save the report.

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](#)