

# Software Support

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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:** This section asks "Show me the responses as:" with two radio buttons: "Chart" (selected) and "Tabular Report". Below this, it asks "I want the report returned in:" with five radio buttons: "Web Browser" (selected), "PDF", "Microsoft Excel", "CSV", and "XML".
- Data Series (Chart):** This section asks "How do you want to show the data?" with two icons: a bar chart (selected) and a pie chart. Below this, it asks "What information to report on?" with a dropdown menu currently showing "Team IDs".
- Run the Report:** This section contains a paragraph of instructions: "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." Below the text are 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.