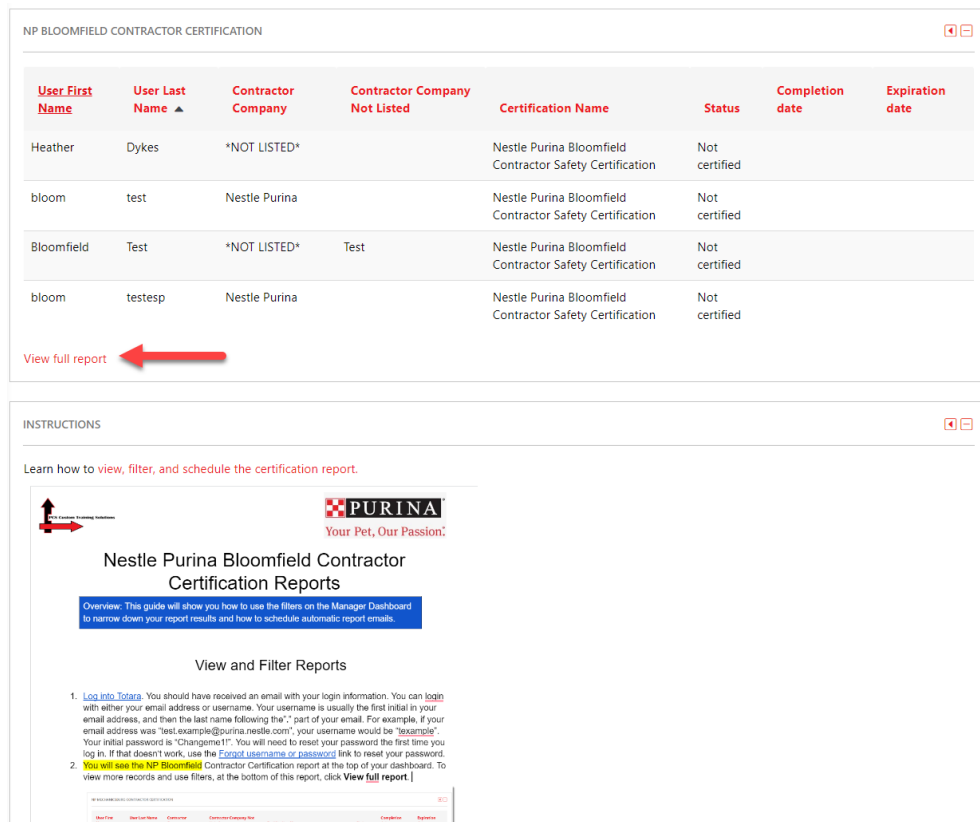


# Nestle Purina Bloomfield Contractor Certification Reports

Overview: This guide will show you how to use the filters on the Manager Dashboard to narrow down your report results and how to schedule automatic report emails.

## View and Filter Reports

1. [Log into Totara](#). You should have received an email with your login information. You can login with either your email address or username. Your username is usually the first initial in your email address, and then the last name following the "." part of your email. For example, if your email address was "test.example@purina.nestle.com", your username would be "texample". Your initial password is "Changeme1!". You will need to reset your password the first time you log in. If that doesn't work, use the [Forgot username or password](#) link to reset your password.
2. You will see the NP Bloomfield Contractor Certification report at the top of your dashboard. To view more records and use filters, at the bottom of this report, click **View full report**.





NP BLOOMFIELD CONTRACTOR CERTIFICATION

User First Name	User Last Name	Contractor Company	Contractor Company Not Listed	Certification Name	Status	Completion date	Expiration date
Heather	Dykes	*NOT LISTED*		Nestle Purina Bloomfield Contractor Safety Certification	Not certified		
bloom	test	Nestle Purina		Nestle Purina Bloomfield Contractor Safety Certification	Not certified		
Bloomfield	Test	*NOT LISTED*	Test	Nestle Purina Bloomfield Contractor Safety Certification	Not certified		
bloom	testesp	Nestle Purina		Nestle Purina Bloomfield Contractor Safety Certification	Not certified		

[View full report](#)

INSTRUCTIONS

Learn how to [view, filter, and schedule the certification report](#).

   
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### Nestle Purina Bloomfield Contractor Certification Reports

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3. The most common and reliable way to search for a contractor is by name. You can enter any part of a contractor's name in the **User's Fullname** field. Then press **Search**.


## NP Bloomfield Contractor Certification

4 records shown

▼ Search by

User's Fullname 

contains


Contractor Company 

any value

Status 

is any value

Unset

Due Date 

is after April 18 2023 

is before April 18 2023 

is between start of today and days before today (date of report generation)

is between start of today and days after today (date of report generation)

Show more...

Search

Clear

4. Press **Clear** between searches to show the full list and reset the search conditions.

Search

Clear

5. You can also filter by contractor companies. To run a report on all of the contractors who have completed the course from a specific company, use this filter.

▼ Search by

User's Fullname ⓘ contains

Contractor Company ⓘ **any value**

- terracon
- The Haskell Company
- The Process Group, LLC
- Triad electrical & control
- tuffwrap installations
- turner mechanical
- United Maintenance
- united rentals
- vector
- videojet technologies
- Viozzi
- W & A Engineering
- waldner
- Waste Management
- Watco**
- wayne brother companies
- woodard & curran
- wurster engineering & construction, inc
- Zacmi
- Zefco Industrial Flooring, Inc.
- Nestle Durice

Status ⓘ

Due Date ⓘ

Contractor Company Not Listed ⓘ

Show/Hide Columns

Note that contractors select the company for themselves during registration. If they select the wrong company, they may not show up in a filtered search. Therefore, if you can't find someone when searching by their contractor company, try searching by name instead.

6. The **Status** filter is based on the certification status. When contractors take the training, they are certified for 1 year. After 1 year, the certification expires, and they must retake the training. Select **is equal to**, then filter for any of these statuses.

- **Not certified:** The contractor has registered but hasn't started the training yet.
- **In progress:** The training is in progress but not completed yet.
- **Certified:** The contractor has completed the training in the past year.
- **Expired:** The contractor completed the training over a year ago, but they should retake it because their certification is expired now.

The screenshot shows a search filter interface with the following elements:

- A dropdown menu labeled "Search by" is expanded.
- Four filter fields are visible:
  - User's Fullname** (with an information icon): Operator is "contains", followed by an empty text input field.
  - Contractor Company** (with an information icon): Operator is "any value", followed by an empty text input field.
  - Status** (with an information icon): Operator is "is equal to". A red arrow points to this field. The dropdown menu is open, showing options: "Certified", "Unset", "Not certified", "In progress", "Certified" (highlighted), and "Expired".
  - Contractor Company Not Listed** (with an information icon): Operator is "contains", followed by an empty text input field.
- A "Show more..." link is located below the filter fields.
- At the bottom, there are "Search" and "Clear" buttons.

7. At the top of the report are several saved searches. These are searches that have already been set up for you for quick access.

- Due to expire within 30 days
- Due to expire within 60 days
- Training Status: Currently Certified
- Expired within the last 180 days (6 months)
- Expired within the last Year
- Training Status: Expired

# NP Bloomfield Contractor Certification

4 records shown

▼ Saved searches

View a saved search

Choose... ▼

Set as your default view

Choose...

Due to Expire within 30 Days

Due to Expire within 60 Days

Expired within the last 180 days

Expired within the last Year

Training Status: Currently Certified

Training Status: Expired

▼ Search by

# Advanced Filters

Click **Show More...** This will give you an extra field: **Contractor Company Not Listed**. You can use this field and drop-down boxes to narrow your results.

These advanced filters are best used when

- You want to filter based on a specific date range.
- You're looking for information typed by users who selected **Not Listed** as their company.

For example, if you're working with a new vendor who hasn't been added to the company list yet, you could search for that name in the **Contractor Company Not Listed** field. However, this is a text entry field, and contractors may not type the company name the same way (e.g., Nestle Purina versus NP).

When you are done setting the filters, click **Search** to display your results. Click **Clear** between searches to reset your filters.

▼ Search by

**User's Fullname** ⓘ contains

**Contractor Company** ⓘ any value

**Status** ⓘ is equal to Certified

**Due Date** \* ⓘ

is after October 27 2022


is before October 27 2022

is between start of today and  days before today (date of report generation)

is between start of today and  days after today (date of report generation)

**Contractor Company Not Listed** ⓘ contains

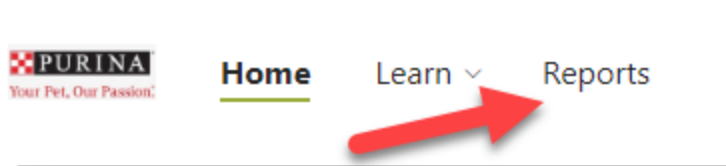
Show less...



# Scheduled Reports

If you would prefer to have reports automatically emailed to you, rather than logging into the system, you can schedule them.

8. Click **Reports** in the top menu.



9. Initially, you will see this message: "There are no scheduled reports."

10. Select **NP Bloomfield Contractor Certification** in the drop-down menu, and then click **Add scheduled report**.

### Scheduled Reports

Report Name	Saved Search	Format	Schedule	Options
NP Mechanicsburg Contractor Certification	Training Status: Currently Certified	Excel	Weekly on Sunday Sunday, April 23, 2023, 12:00 AM	⚙️ ×
NP Mechanicsburg Contractor Certification	Firs		Monthly on the 1 Monday, May 1, 2023, 12:00 AM	⚙️ ×
NP Mechanicsburg Contractor Certification	All		Daily at 12:00 AM Wednesday, April 19, 2023, 12:00 AM	⚙️ ×

Add a new scheduled report to the list:

- Learner certification completion status overview
- Learner program completion status overview
- My certification completion status overview
- My course completion status overview
- NP Allentown Contractor Certification
- NP Bloomfield Contractor Certification**
- NP Hartwell Contractor Certification
- NP Mechanicsburg Contractor Certification
- Learner certification completion status ov

**Add scheduled report**

Activate Windows

11. Select the data to include from the list of saved searches. If you want everything, select **All Data**.

## Add scheduled report

▼ Scheduled report settings

**Report** NP Bloomfield Contractor Certification

**Data** Due to Expire within 30 Days

**Export**

**Schedule** All data

1

12. Select the format to **Export**. Usually, you will pick CSV or Excel so you can work with the data easily.

▼ Scheduled report settings

Report NP Bloomfield Contractor Certification

Data Due to Expire within 30 Days

Export CSV, CSV, **Excel**, PDF landscape, PDF portrait

Schedule :00 Sunday 1

13. Set the **Schedule**. You can choose to receive the report daily, weekly, or monthly.

- If you select **Daily**, you can also select the time.
- If you select **Weekly**, you can also select the day of the week.
- If you select **Monthly**, you can also select the day of the month (e.g., send the report on the 1st day of each month).

Export CSV

Schedule **Weekly**, Daily, Monthly

Recipients of this report will be sent the report as YOU see it. If you have access to different data, ensure you are happy for recipients to see what you see.

14. If you want to email the report to yourself, double-check that the **Send to self** option is selected. Then, click **Save changes**.



15. If you also want to email the report to someone else, enter their email address and click **Add email**. Then, click **Save changes**.

▼ Email Settings

Recipients of this report will be sent the report as YOU see it. If you have access to different data, ensure you are happy for recipients to see what you see.


Send to self  ←

External users email ⓘ  [Add email](#)

→ [Save changes](#) [Cancel](#)

16. Your scheduled report will appear on the list. If you need to adjust the schedule, you can select the gear button under **Options** to make changes at any time.

### Scheduled Reports

Report Name	Saved Search	Format	Schedule	Options
NP Bloomfield Contractor Certification	All data	CSV	Daily at 12:00 AM Wednesday, April 19, 2023, 12:00 AM	 ×

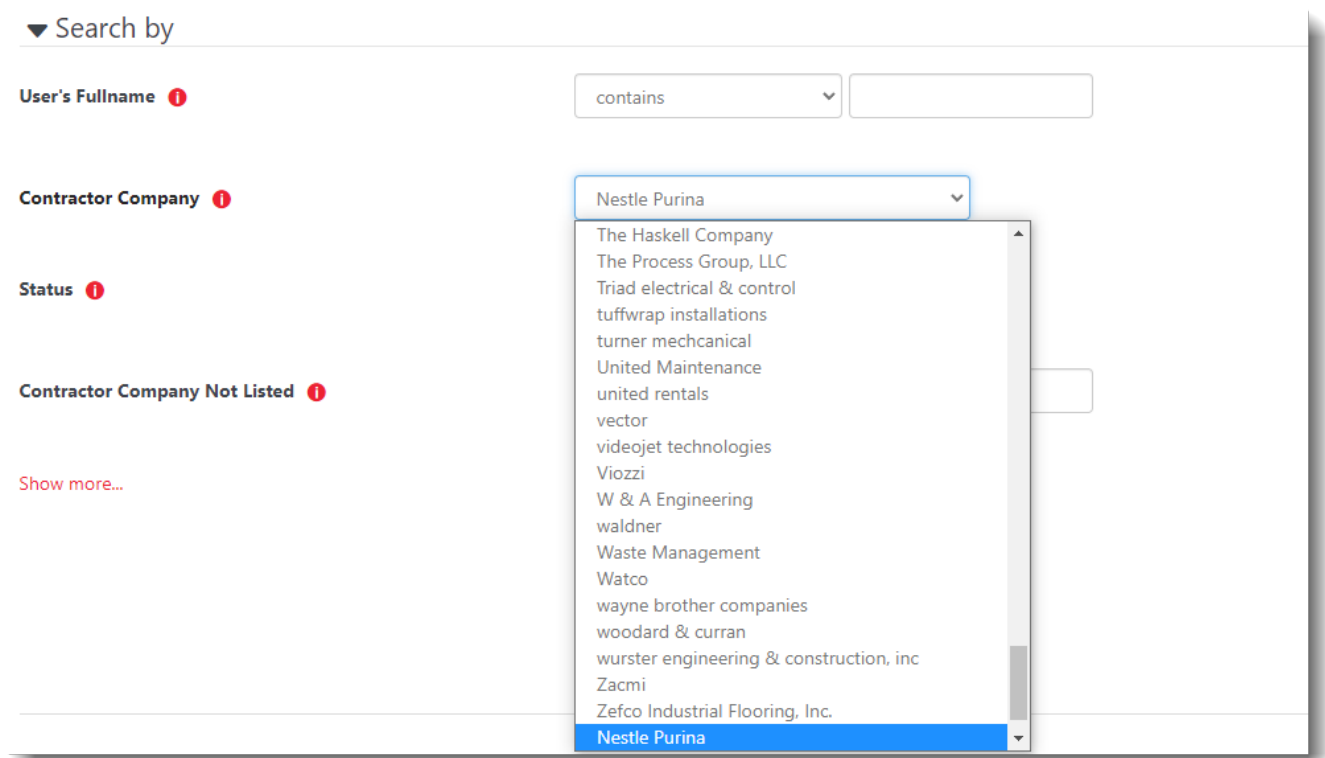
# Scheduled Reports by Contractor Company

If you want to schedule a report for contractors from a specific company (for example, to send it automatically to someone at that company), you need to do two things. First, save the search conditions you want. Second, schedule the report.

## Part 1: Create a Saved Search

In this example, I'll use Nestle Purina as the contractor company.

1. Search for the data you want, following the instructions above. Select the Contractor Company, then select **Search**.



The screenshot shows a search interface with the following elements:

- A search filter dropdown menu labeled "Search by" is open.
- The "User's Fullname" field has a dropdown menu set to "contains" and an empty text input box.
- The "Contractor Company" field has a dropdown menu open, displaying a list of company names. "Nestle Purina" is selected and highlighted in blue.
- The "Status" field has a dropdown menu.
- The "Contractor Company Not Listed" field has a dropdown menu.
- A "Show more..." link is visible below the "Contractor Company Not Listed" field.

2. Select **Save this search.**

▼ Search by

User's Fullname ⓘ contains

Contractor Company ⓘ Nestle Purina ▼

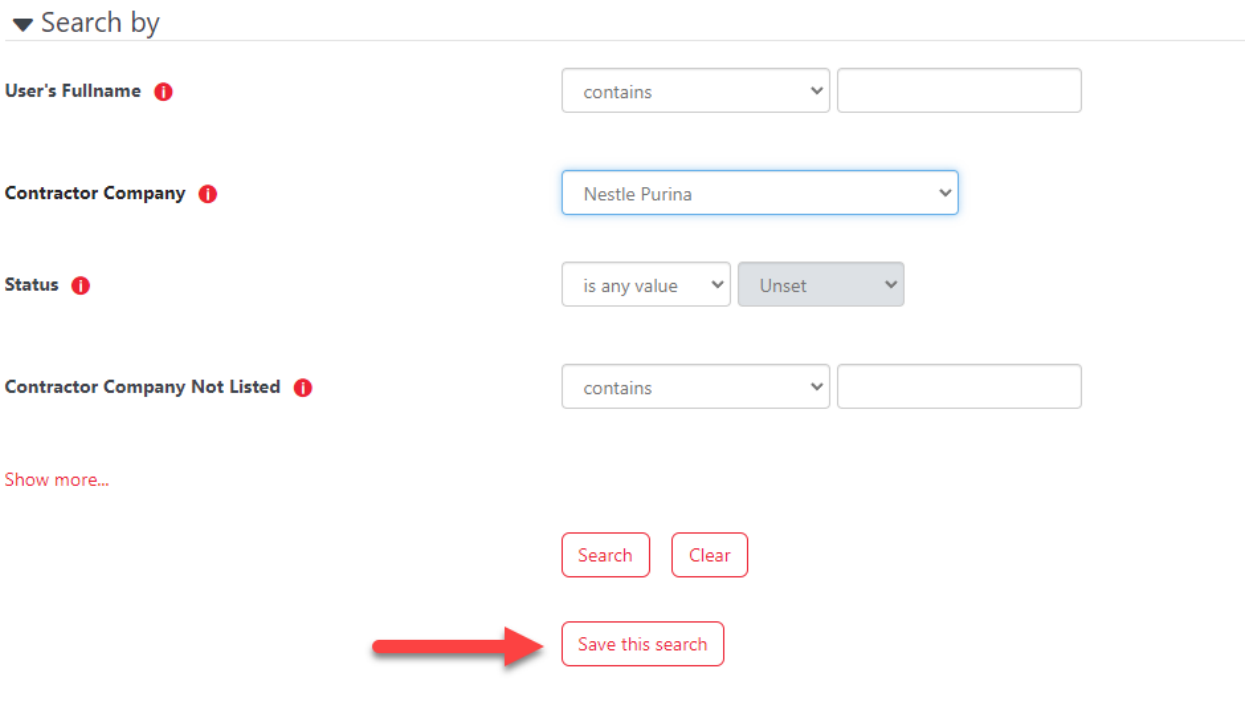
Status ⓘ is any value ▼ Unset ▼

Contractor Company Not Listed ⓘ contains

Show more...

Search Clear


Save this search



3. Type a name for your search. This name is how it will appear in the dropdown menu.

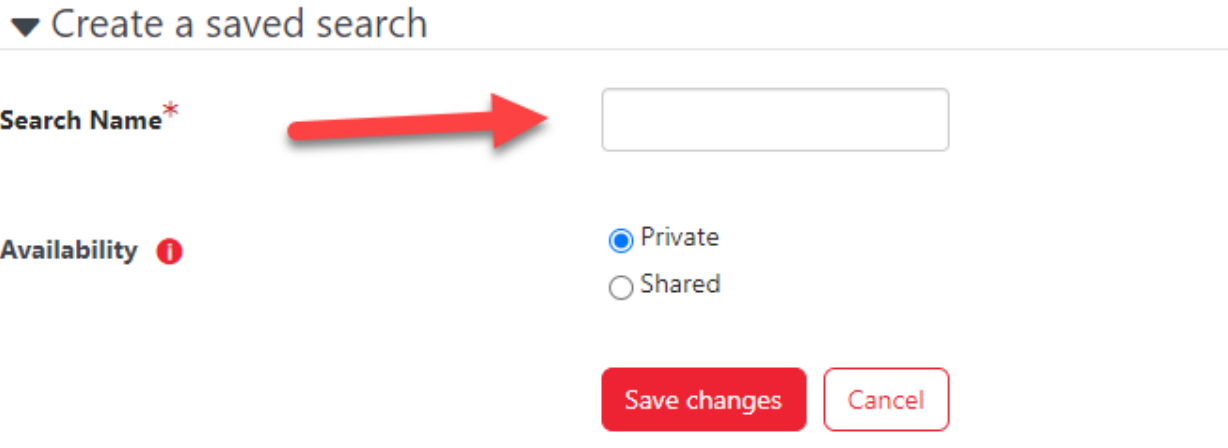
There are required fields in this form marked \*.

▼ Create a saved search

Search Name\* 

Availability ⓘ  Private  Shared

Save changes Cancel



4. Leave the availability as **Private**. Otherwise, everyone who can view this report will see the shared search and have it in their list of options. Select **Save changes**.

There are required fields in this form marked \*.

### ▼ Create a saved search

Search Name\*

Availability ⓘ

Private

Shared



Save changes

Cancel

## Part 2: Schedule the Report

Follow the same directions as before to schedule the report.

1. Click **Reports** in the top menu.
2. Select **NP Bloomfield Contractor Certification** in the drop-down menu, and then click **Add scheduled report**.

### Scheduled Reports

Report Name	Saved Search	Format	Schedule	Options
NP Mechanicsburg Contractor Certification	Training Status: Currently Certified	Excel	Weekly on Sunday Sunday, April 23, 2023, 12:00 AM	⚙️ ×
NP Mechanicsburg Contractor Certification	Firs		Monthly on the 1 Monday, May 1, 2023, 12:00 AM	⚙️ ×
NP Mechanicsburg Contractor Certification	All		Daily at 12:00 AM Wednesday, April 19, 2023, 12:00 AM	⚙️ ×

Add a new scheduled report to the list:

Learner certification completion status overview  
 Learner program completion status overview  
 My certification completion status overview  
 My course completion status overview  
 NP Allentown Contractor Certification  
**NP Bloomfield Contractor Certification**  
 NP Hartwell Contractor Certification  
 NP Mechanicsburg Contractor Certification  
 Learner certification completion status ov


3. For **Data**, select your new saved search for the company (in this case, Nestle Purina Contractors).

### ▼ Scheduled report settings

<b>Report</b>	NP Bloomfield Contractor Certification
<b>Data</b>	Nestle Purina Contractors ▼
<b>Export</b>	CSV ▼

4. Select the format to **Export**.

### ▼ Scheduled report settings

<b>Report</b>	NP Bloomfield Contractor Certification
<b>Data</b>	Nestle Purina Contractors ▼
<b>Export</b>	CSV ▼ 
<b>Schedule</b>	Daily ▼ 00:00 ▼ Sunday ▼ 1 ▼

5. Set the **Schedule**. You can send the report daily, weekly, or monthly.
6. If you only want to email the report to someone else, not to yourself, uncheck the **Send to self** option. Otherwise, leave it checked.
7. Enter the recipient's email address as the **External user's email**
8. Click **Add email**.

9. Then, click **Save changes**.

▼ Email Settings

Recipients of this report will be sent the report as YOU see it. If you have access to different data, ensure you are happy for recipients to see what you see.

Send to self

6

External users email ⓘ

7  8 Add email

9 Save changes Cancel

If you are having difficulties that you cannot resolve on your own or by following these step-by-step instructions, then click this link to request technical support.  
[Nestle Purina Support Request](#)