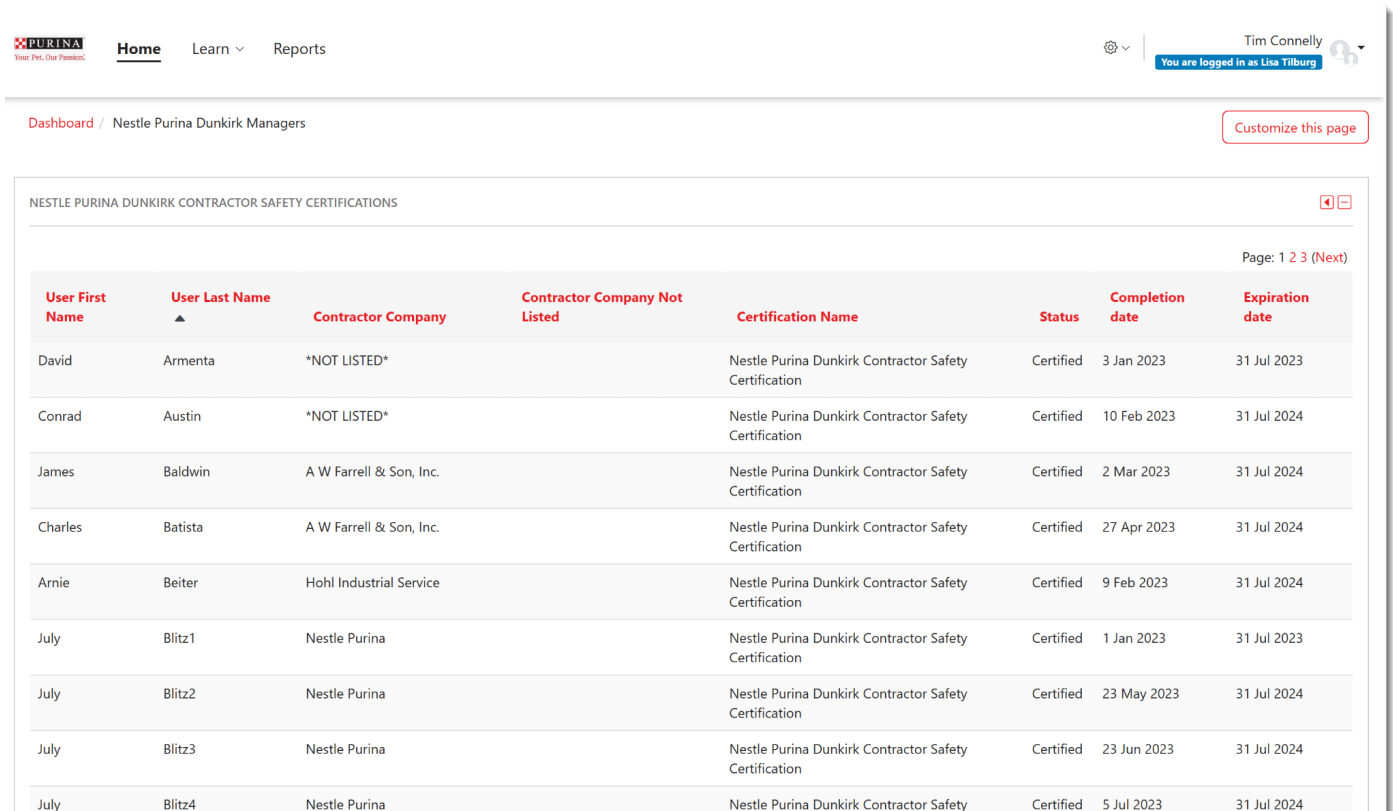


# Nestle Purina Dunkirk Contractor Certification Reports

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 Dunkirk 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**.



The screenshot shows the user interface of the Totara dashboard. At the top, there is a navigation bar with the Purina logo, "Home", "Learn", and "Reports" menus. The user is identified as "Tim Connelly" and is logged in as "Lisa Tilburg". The main content area displays a report titled "NESTLE PURINA DUNKIRK CONTRACTOR SAFETY CERTIFICATIONS". The report includes a table with the following columns: User First Name, User Last Name, Contractor Company, Contractor Company Not Listed, Certification Name, Status, Completion date, and Expiration date. The table lists several certified contractors, including David Armenta, Conrad Austin, James Baldwin, Charles Batista, Arnie Beiter, and four users named July Blitz (Blitz1 through Blitz4).

User First Name	User Last Name	Contractor Company	Contractor Company Not Listed	Certification Name	Status	Completion date	Expiration date
David	Armenta	*NOT LISTED*		Nestle Purina Dunkirk Contractor Safety Certification	Certified	3 Jan 2023	31 Jul 2023
Conrad	Austin	*NOT LISTED*		Nestle Purina Dunkirk Contractor Safety Certification	Certified	10 Feb 2023	31 Jul 2024
James	Baldwin	A W Farrell & Son, Inc.		Nestle Purina Dunkirk Contractor Safety Certification	Certified	2 Mar 2023	31 Jul 2024
Charles	Batista	A W Farrell & Son, Inc.		Nestle Purina Dunkirk Contractor Safety Certification	Certified	27 Apr 2023	31 Jul 2024
Arnie	Beiter	Hohl Industrial Service		Nestle Purina Dunkirk Contractor Safety Certification	Certified	9 Feb 2023	31 Jul 2024
July	Blitz1	Nestle Purina		Nestle Purina Dunkirk Contractor Safety Certification	Certified	1 Jan 2023	31 Jul 2023
July	Blitz2	Nestle Purina		Nestle Purina Dunkirk Contractor Safety Certification	Certified	23 May 2023	31 Jul 2024
July	Blitz3	Nestle Purina		Nestle Purina Dunkirk Contractor Safety Certification	Certified	23 Jun 2023	31 Jul 2024
July	Blitz4	Nestle Purina		Nestle Purina Dunkirk Contractor Safety Certification	Certified	5 Jul 2023	31 Jul 2024

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 Dunkirk Contractor Certification

81 records shown

▼ Saved searches

View a saved search

Choose...

Set as your default view

[Manage your saved searches](#)

▼ Search by

**User's Fullname** ⓘ

contains

**Contractor Company** ⓘ

any value

**Status** ⓘ

is any value

Unset

**Due Date** ⓘ

is after May 30 2023

is before May 30 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)

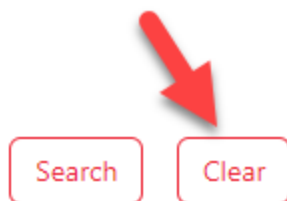
[Show more...](#)



Search

Clear

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



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** ▼

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.

▼ Search by

User's Fullname ⓘ contains

Contractor Company ⓘ any value

Status ⓘ is equal to

Contractor Company Not Listed ⓘ contains

Show more...

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 Dunkirk Contractor Certification

1 record shown

▼ Saved searches

View a saved search

Choose... ▼

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

Set as your default view

▼ 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

**Due Date** \* ⓘ

is after


is before

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

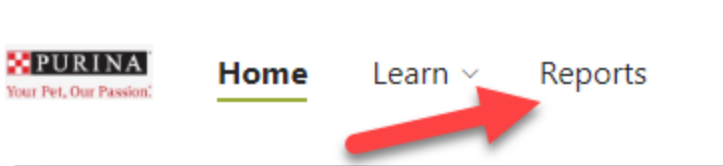
Show less...



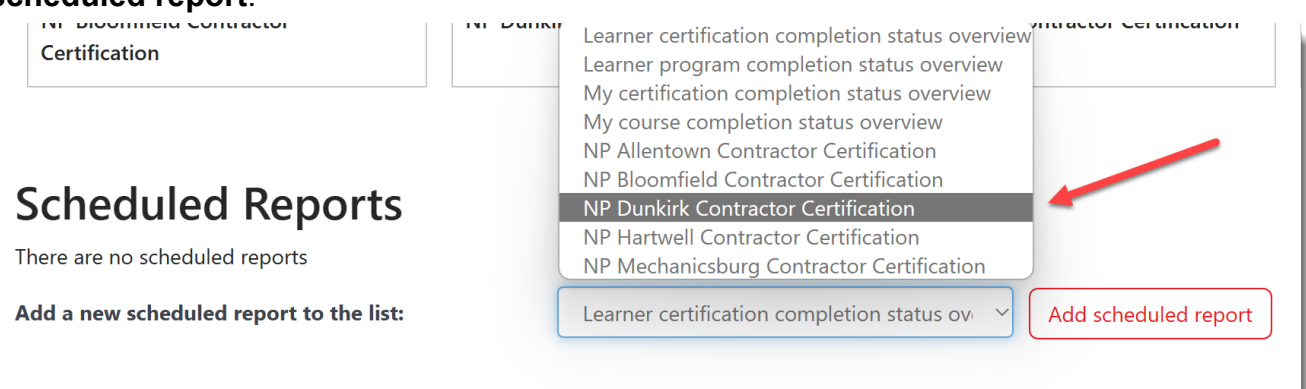
# Scheduled Reports

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

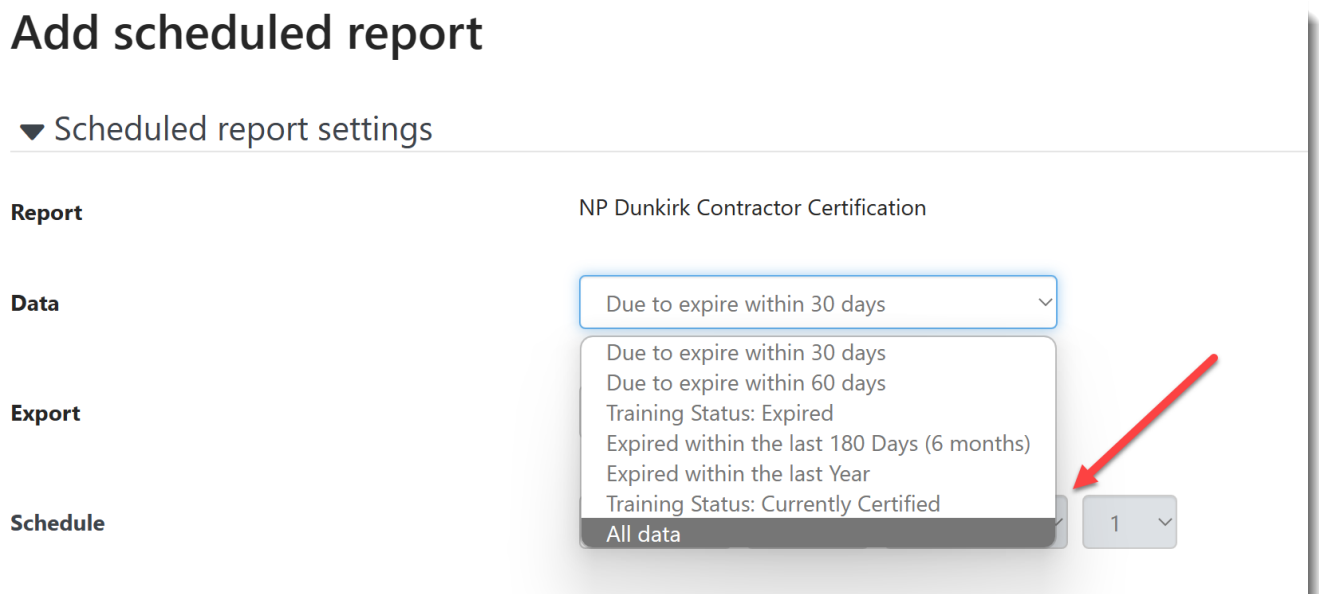
8. Click **Reports** in the top menu.



9. Initially, you will see this message: "There are no scheduled reports."
10. Select **NP Dunkirk Contractor Certification** in the drop-down menu, and then click **Add scheduled report**.



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



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

## Add scheduled report

### ▼ Scheduled report settings

<b>Report</b>	NP Dunkirk Contractor Certification		
<b>Data</b>	All data		
<b>Export</b>	CSV	←	
<b>Schedule</b>	Excel	0:00	Sunday
	PDF landscape		1
	PDF portrait		

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).

<b>Export</b>	CSV		
<b>Schedule</b>	Daily	00:00	Sunday
	Weekly		1
	Monthly		

▼ 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.

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 Dunkirk Contractor Certification	All data	CSV	Daily at 12:00 AM Wednesday, May 31, 2023, 12:00 AM	

Add a new scheduled report to the list:  [Add scheduled report](#)

# 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 with "Nestle Purina" selected. A list of other contractor companies is visible in the dropdown, including: 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, and Zefco Industrial Flooring, Inc.
- 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

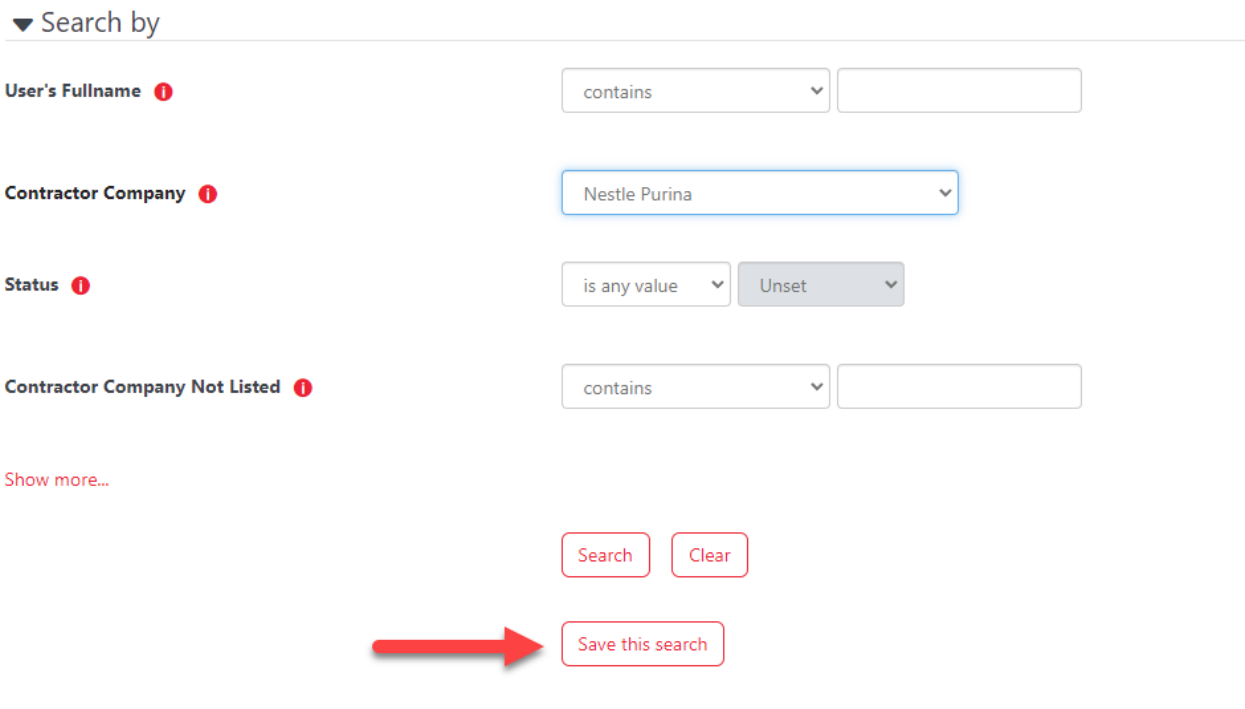
**Status** ⓘ is any value Unset

**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.

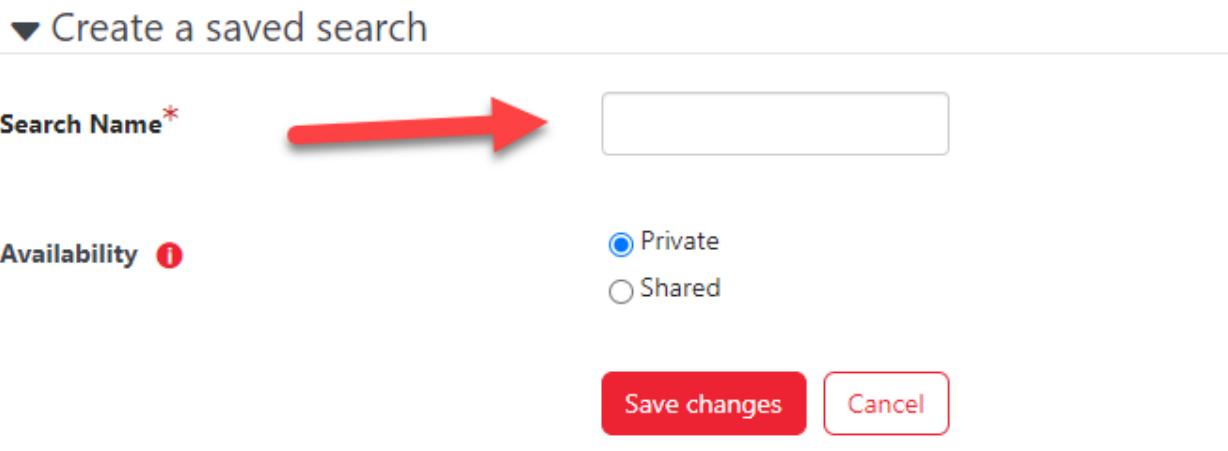
There are required fields in this form marked \*.

▼ 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 Dunkirk Contractor Certification** in the drop-down menu, and then click **Add scheduled report**.

The screenshot shows the 'Scheduled Reports' section of a software interface. The title 'Scheduled Reports' is displayed in a large, bold font. Below the title, it states 'There are no scheduled reports'. Underneath, there is a section labeled 'Add a new scheduled report to the list:'. This section contains a dropdown menu with a blue border and a red arrow pointing to the selected item, 'NP Dunkirk Contractor Certification'. The dropdown menu is open, showing a list of options including '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 Dunkirk Contractor Certification', 'NP Hartwell Contractor Certification', and 'NP Mechanicsburg Contractor Certification'. To the right of the dropdown menu is a red button labeled 'Add scheduled report'.

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


▼ Scheduled report settings

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

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

▼ Scheduled report settings

<b>Report</b>	NP Dunkirk 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

9

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](#)