

WEG 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 same as the first part of your email address before the @ sign. For example, if your email address was jsmith@walkerind.com, your username would be [jsmith](#). Your initial password is [changeme](#). 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 WEG 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**.

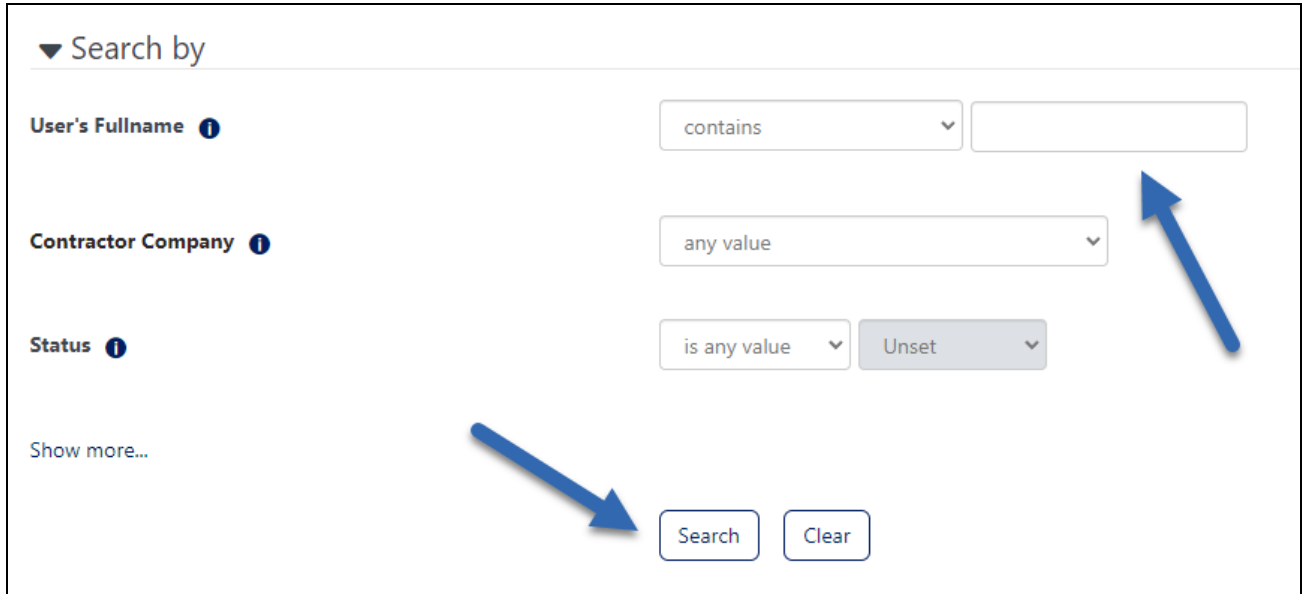
WEG Contractor Training Status

WEG CONTRACTOR CERTIFICATION 🔍 📄

User's Fullname	Contractor Company	Contractor Company Not Listed	Status	Completion date ▾	Expiration date
quentin hock	Walker		Certified	6 Jul 2022	6 Jul 2023
Christopher Fletcher	*NOT LISTED*		Certified	6 Jul 2022	6 Jul 2023
Vanessa Gunn	Walker		Certified	6 Jul 2022	6 Jul 2023
Lori Roy	Walker		Certified	6 Jul 2022	6 Jul 2023
Mark Rowe	Walker		Certified	6 Jul 2022	6 Jul 2023
Luke McCarter	Walker		Certified	5 Jul 2022	5 Jul 2023
WEG Contractor	*NOT LISTED*	Test	Certified	1 Jul 2022	1 Jul 2023
WEG Demo Contractor	*NOT LISTED*	testing	Certified	1 Jul 2022	1 Jul 2023
Demo WEG	*NOT LISTED*		Expired		
WEG Report Demo	*NOT LISTED*	Demo	Not certified		
Nash Mohammed Nazar Shamila	Walker		In progress		
Patti TESTING WEG	*NOT LISTED*	PCS Custom Training	Not certified		
Laura Pychel	Walker		Not certified		
patti testforChristy	*NOT LISTED*	PCS Custom Training	Not certified		
Brooke-Lynn Hoffele	Walker		In progress		
Jim Postnikoff	Walker		Not certified		
Jen McCulloch	Walker		In progress		
Caleb Lee	Walker		In progress		

[View full report](#)

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**.



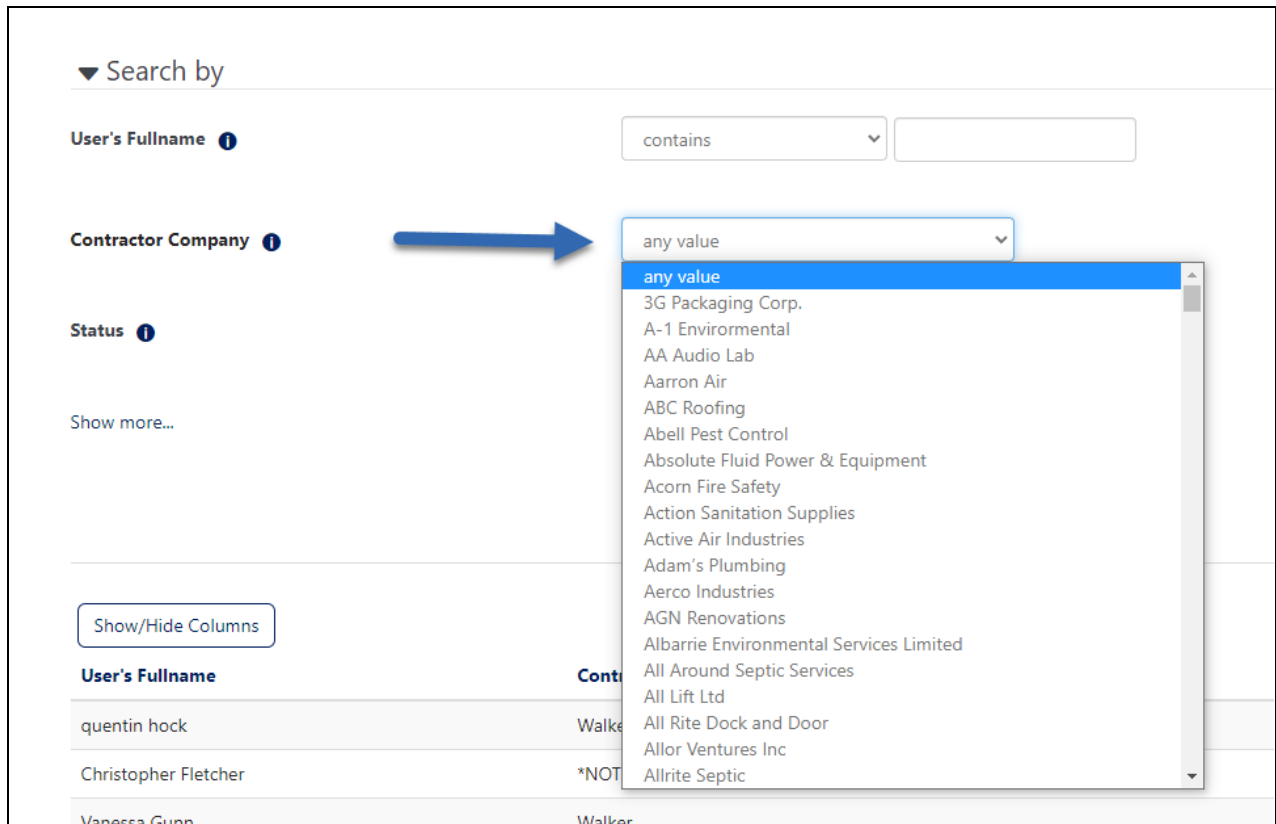
The screenshot shows a search interface with the following elements:

- A dropdown menu labeled "Search by" with a downward arrow.
- A search field labeled "User's Fullname" with a dropdown menu set to "contains" and an empty text input box. A blue arrow points to this input box.
- A search field labeled "Contractor Company" with a dropdown menu set to "any value".
- A search field labeled "Status" with a dropdown menu set to "is any value" and a secondary dropdown menu set to "Unset".
- A "Show more..." link.
- Two buttons: "Search" and "Clear". A blue arrow points to the "Search" button.

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.



The screenshot shows a search interface with the following elements:

- Search by** (dropdown arrow)
- User's Fullname** (with an information icon) and a search box containing the text "contains".
- Contractor Company** (with an information icon) and a dropdown menu. A blue arrow points to this dropdown menu.
- Status** (with an information icon) and a search box.
- Show more...** (text link)
- Show/Hide Columns** (button)
- Table:**

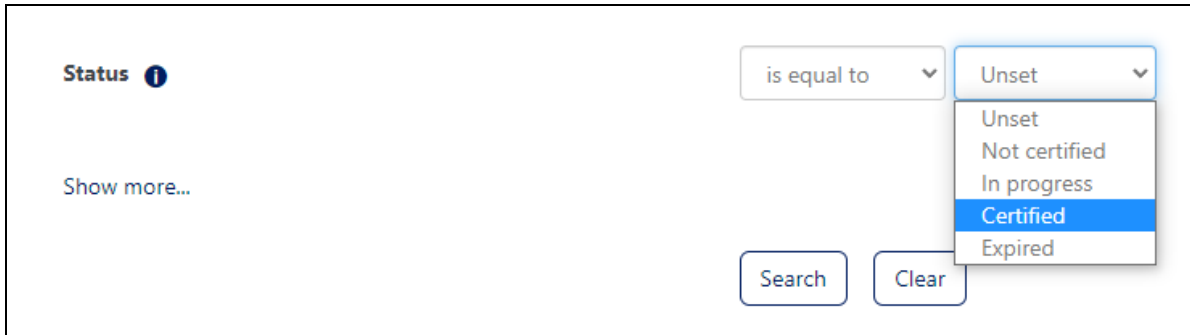
User's Fullname	Contractor Company
quentin hock	Walker
Christopher Fletcher	*NOT
Vanessa Gunn	Walker

The dropdown menu for Contractor Company is open, showing a list of company names. The first option is "any value", which is highlighted in blue. Other options include: 3G Packaging Corp., A-1 Environmental, AA Audio Lab, Aarron Air, ABC Roofing, Abell Pest Control, Absolute Fluid Power & Equipment, Acorn Fire Safety, Action Sanitation Supplies, Active Air Industries, Adam's Plumbing, Aerco Industries, AGN Renovations, Albarrie Environmental Services Limited, All Around Septic Services, All Lift Ltd, All Rite Dock and Door, Allor Ventures Inc, and Allrite Septic.

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.

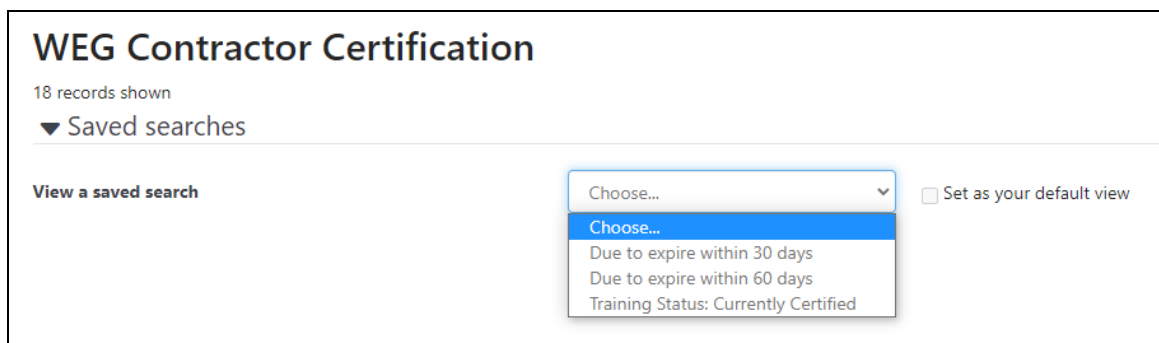
6. The **Status** filter is based on the certification status. When contractors take the training, they are certified for 1 year. After 1 year, the certification expires, and they must retake the training. Select **is equal to**, then filter for any of these statuses.

- **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.



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



Advanced Filters

Click **Show More...** This will give you two extra fields: **Due Date** and **Contractor Company Not Listed**. You can use these fields 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., Walker Environmental Group versus WEG).

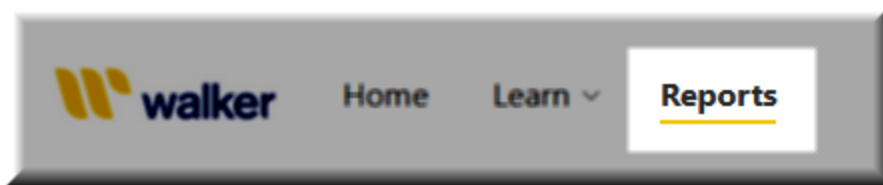
When you are done setting the filters, click **Search** to display your results. Click **Clear** between searches to reset your filters.

The screenshot displays the 'Advanced Filters' section. It features two main filter categories: 'Due Date' and 'Contractor Company Not Listed'. The 'Due Date' filter is expanded, showing four options: 'is after', 'is before', 'is between start of today and', and 'is between start of today and'. Each option has a corresponding input field for month, day, and year, along with a calendar icon. The 'Contractor Company Not Listed' filter is currently set to 'contains' and has an empty text input field. Below the filters, there is a 'Show less...' link. At the bottom of the filter section, there are two buttons: 'Search' and 'Clear'. A blue arrow points to the 'Search' button.

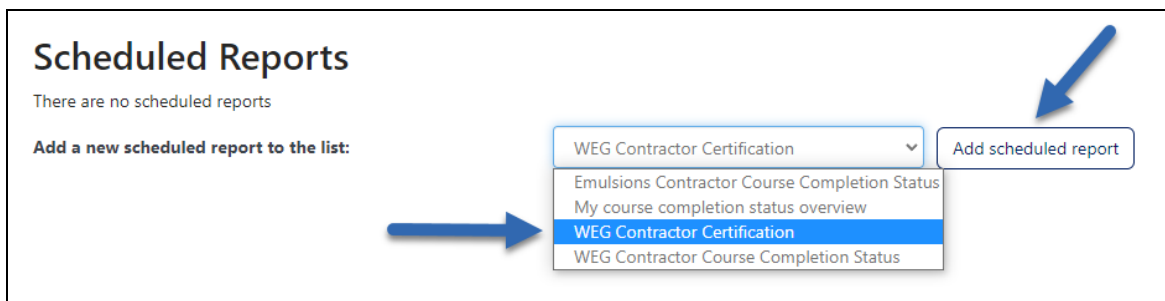
Scheduled Reports

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

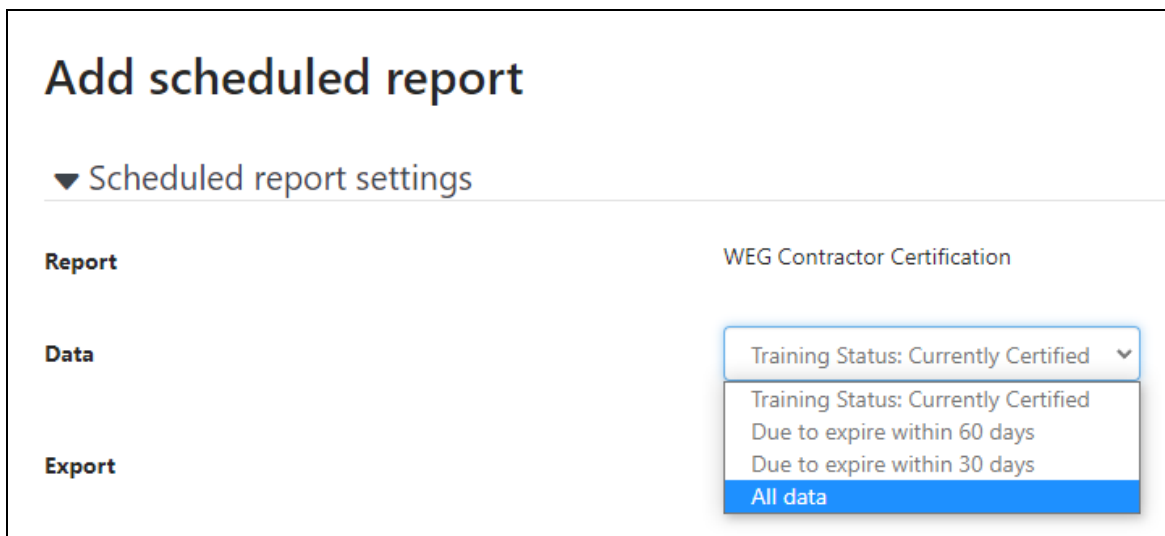
8. Click **Reports** in the top menu.



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

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).

The screenshot shows a configuration panel with the following elements:

- Export:** A dropdown menu set to 'CSV'.
- Schedule:** A dropdown menu with 'Weekly' selected. A blue arrow points to this dropdown. Other options are 'Daily', 'Weekly', and 'Monthly'.
- Time:** A dropdown menu set to '00:00'.
- Day:** A dropdown menu set to 'Sunday'.
- Frequency:** A dropdown menu set to '1'.
- Email Settings:** A section header with a downward arrow.
- Footer:** A note stating: "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**.

The screenshot shows the 'Email Settings' section with the following elements:

- Send to self:** A checkbox that is checked.
- External users email:** A text input field with an information icon (i) to its right.
- Add email:** A button next to the text input field.
- Save changes:** A dark blue button at the bottom.
- Cancel:** A light blue button at the bottom.
- Footer:** A note stating: "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."

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.

The screenshot shows a table titled 'Scheduled Reports' with the following data:

Report Name	Saved Search	Format	Schedule	Options
Emulsions Contractor Course Completion Status	All data	CSV	Weekly on Monday Monday, May 9, 2022, 4:44 PM	 

A blue arrow points to the gear icon in the 'Options' column of the first row.

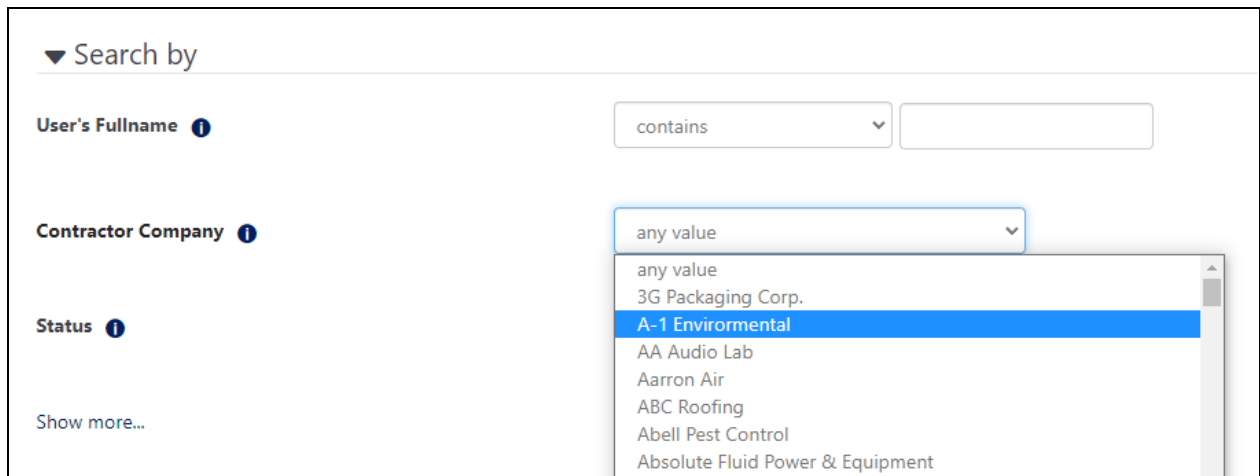
Scheduled Reports by Contractor Company

If you want to schedule a report for contractors from a specific company (for example, to send 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 A-1 Environmental 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 a 'Search by' section. It includes three search criteria: 'User's Fullname' with a 'contains' operator and an empty text input; 'Contractor Company' with a dropdown menu showing a list of companies, where 'A-1 Environmental' is highlighted in blue; and 'Status' with an empty dropdown menu. A 'Show more...' link is visible at the bottom left of the search criteria section.

2. Select **Save this search**.



The screenshot shows the search interface with the 'Status' dropdown menu set to 'is any value' and an 'Unset' dropdown menu. Below the search criteria, there are 'Search' and 'Clear' buttons. A blue arrow points to the 'Save this search' button, which is highlighted in blue.

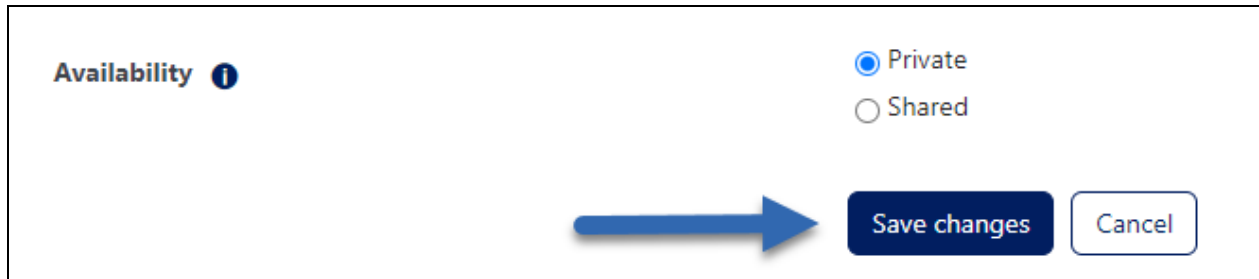
3. Type a name for your search. This name is how it will appear in the dropdown menu.



▼ Create a saved search

Search Name*

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**.



Availability ⓘ

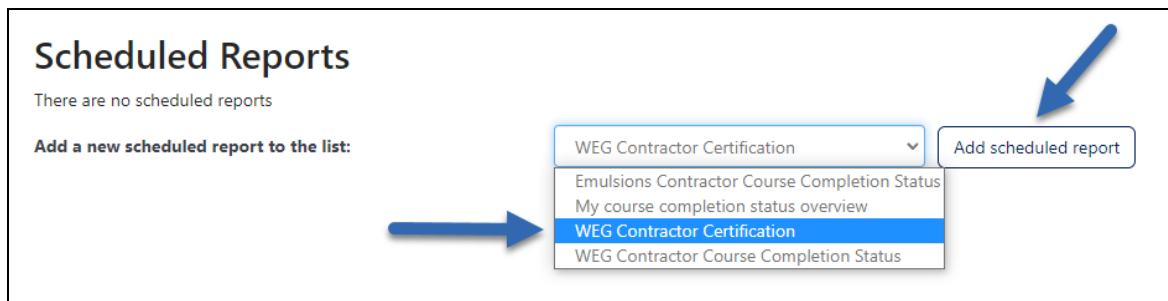
Private
 Shared

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



Scheduled Reports

There are no scheduled reports

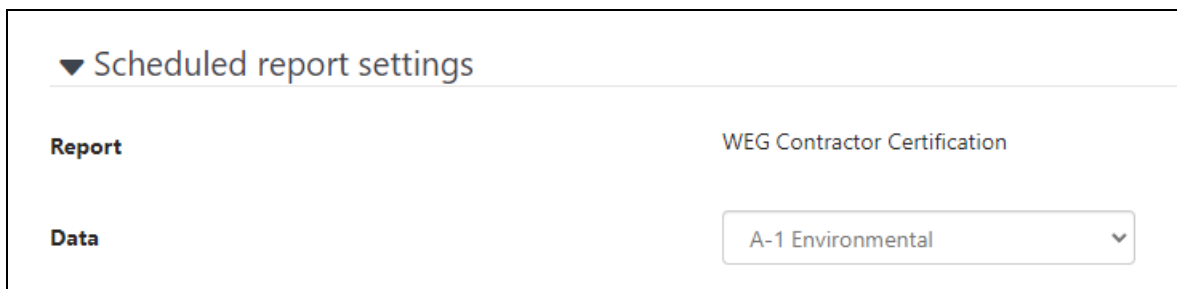
Add a new scheduled report to the list:

→ WEG Contractor Certification

WEG Contractor Certification
Emulsions Contractor Course Completion Status
My course completion status overview
WEG Contractor Certification
WEG Contractor Course Completion Status

↘ Add scheduled report

3. For **Data**, select your new saved search for the company (in this case, A-1 Environmental).



▼ Scheduled report settings

Report WEG Contractor Certification

Data A-1 Environmental

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

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 users email**
8. Click **Add email**.
9. Then, click **Save changes**.

The screenshot shows the 'Email Settings' section of a web interface. At the top, there is a dropdown arrow and the text 'Email Settings'. Below this is a note: '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.' There are two main sections: 'Send to self' with an unchecked checkbox, and 'External users email' with a text input field containing 'manager@a1env.com' and an 'Add email' button. At the bottom, there are 'Save changes' and 'Cancel' buttons. Blue callout boxes with numbers 6, 7, 8, and 9 point to the checkbox, the text input, the 'Add email' button, and the 'Save changes' button respectively.

If you are having difficulties that you cannot resolve on your own or by following these step-by-step instructions, please contact Michael Price (mprice@walkerind.com)