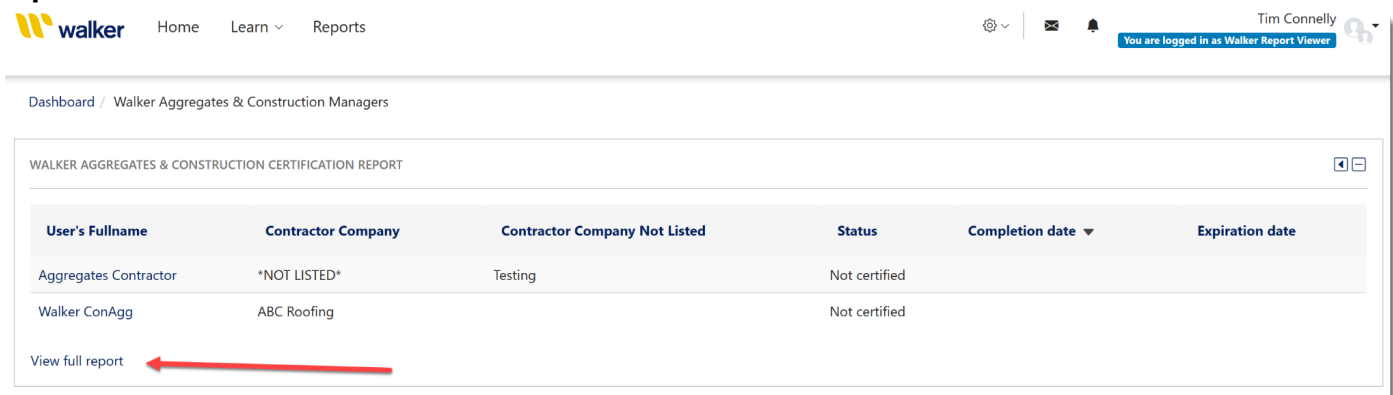


Walker Aggregates & Constructions Contractor Certification Reports

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 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 Walker Aggregates & Construction 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**.



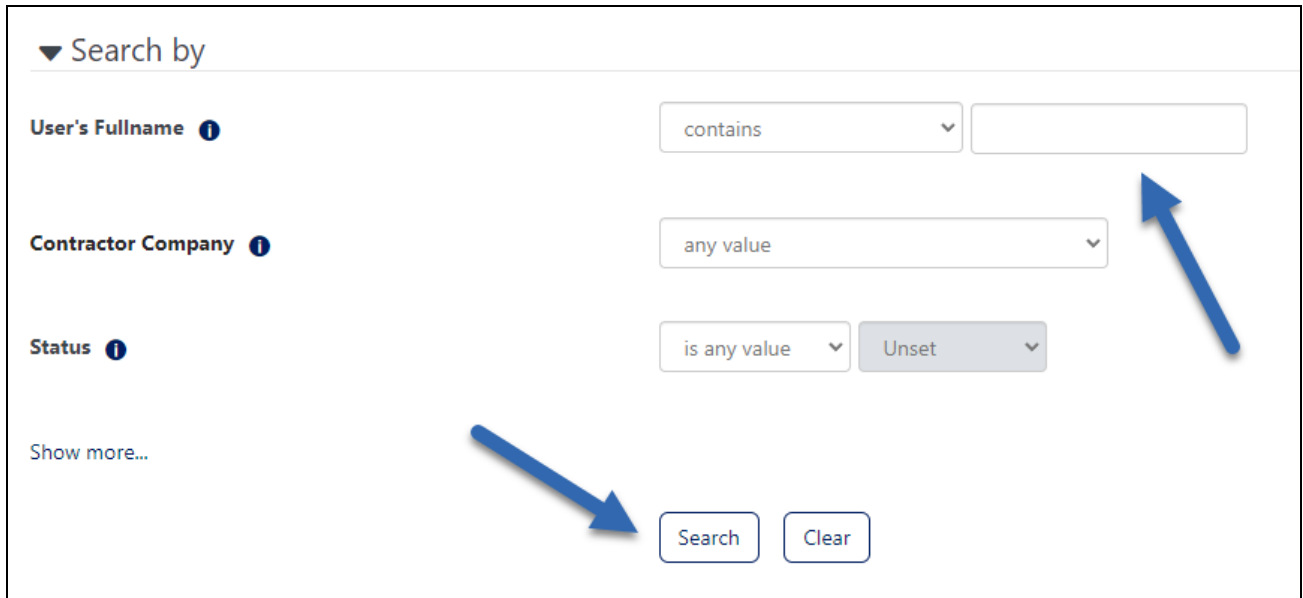
Dashboard / Walker Aggregates & Construction Managers

WALKER AGGREGATES & CONSTRUCTION CERTIFICATION REPORT

User's Fullname	Contractor Company	Contractor Company Not Listed	Status	Completion date	Expiration date
Aggregates Contractor	*NOT LISTED*	Testing	Not certified		
Walker ConAgg	ABC Roofing		Not certified		

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 a dropdown menu labeled "Search by" at the top. Below it are three search criteria: "User's Fullname" with a dropdown set to "contains" and an empty text input field; "Contractor Company" with a dropdown set to "any value"; and "Status" with a dropdown set to "is any value" and a button labeled "Unset". A "Show more..." link is located below the "Status" field. At the bottom are "Search" and "Clear" buttons. Two blue arrows point to the "User's Fullname" input field and 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:

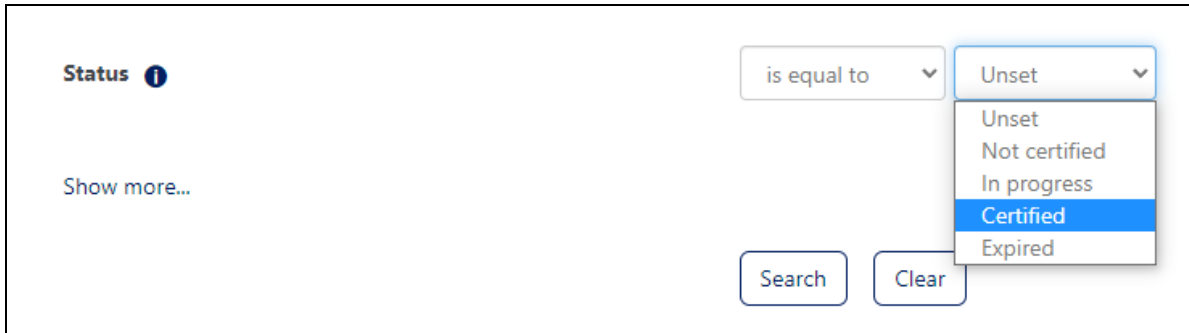
- Search by** (dropdown arrow)
- User's Fullname** (filter label with info icon) with a dropdown menu set to "contains" and an empty text input field.
- Contractor Company** (filter label with info icon) with a dropdown menu open, showing a list of company names. A blue arrow points to this dropdown.
- Status** (filter label with info icon)
- Show more...** (text link)
- Show/Hide Columns** (button)
- Table:**

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

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 2 year. After 2 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
- Training Status: Expired
- Training Status: In Progress
- Training Status: Not Certified

Walker Aggregates & Construction Contractor Certification

2 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
- Training Status: Currently Certified
- Training Status: Expired
- Training Status: In Progress
- Training Status: Not Certified

▼ Search by

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).

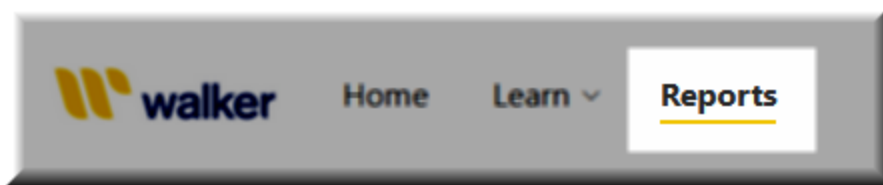
When you are done setting the filters, click **Search** to display your results. Click **Clear** between searches to reset your filters.

The screenshot displays the 'Advanced Filters' section. It features two filter categories: 'Due Date' and 'Contractor Company Not Listed'. The 'Due Date' filter has four options: 'is after' (July, 6, 2022), 'is before' (July, 6, 2022), 'is between start of today and [] days before today (date of report generation)', and 'is between start of today and [] days after today (date of report generation)'. The 'Contractor Company Not Listed' filter has a 'contains' dropdown and an empty text input field. Below the filters is a 'Show less...' link. At the bottom, there are 'Search' and 'Clear' buttons, with a blue arrow pointing to the 'Search' button.

Scheduled Reports

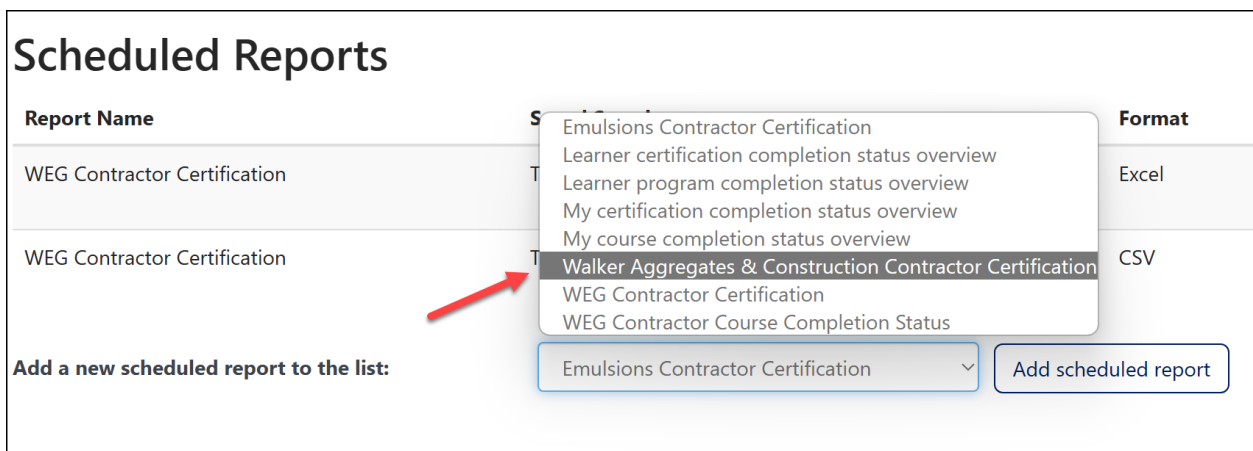
If you would prefer to have reports automatically emailed to you, rather than logging into the system, you can schedule them.

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



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

10. Select **Walker Aggregates & Construction Contractor Certification** in the drop-down menu, and then click **Add scheduled report**.

A screenshot of the 'Scheduled Reports' page. The page title is 'Scheduled Reports'. Below the title is a table with two columns: 'Report Name' and 'Format'. The table contains two rows, both with 'WEG Contractor Certification' in the 'Report Name' column and 'Excel' in the 'Format' column. Below the table is a section titled 'Add a new scheduled report to the list:'. This section contains a dropdown menu with the text 'Emulsions Contractor Certification' and a small downward arrow. A red arrow points to the dropdown menu. A list of report names is displayed over the dropdown menu, with 'Walker Aggregates & Construction Contractor Certification' highlighted. Below the dropdown menu is a button labeled 'Add scheduled report'.

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 Walker Aggregates & Construction Contractor Certification

Data Training Status: Currently Certified ▼

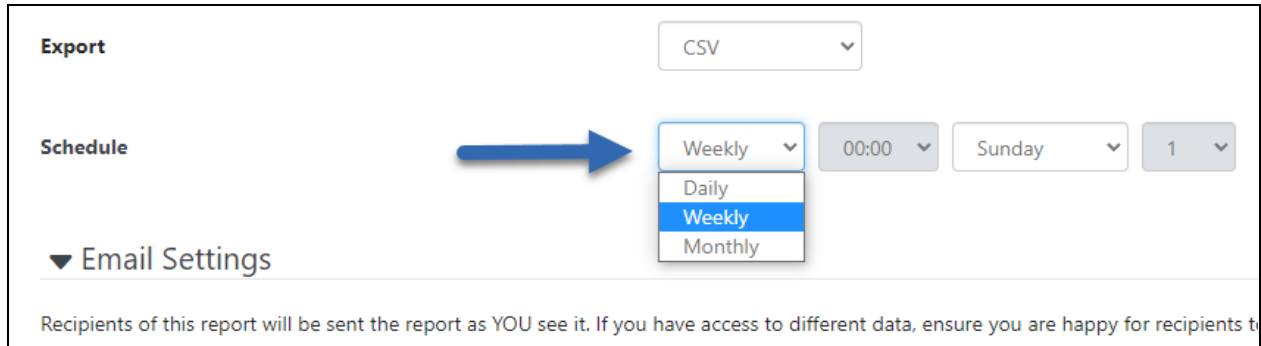
Export

Schedule

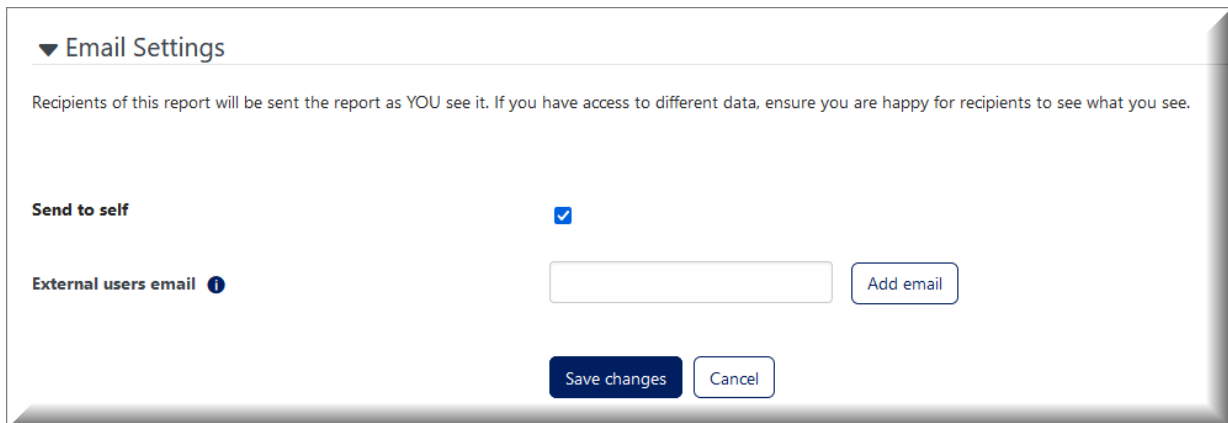
- Training Status: Currently Certified
- Training Status: In Progress
- Training Status: Not Certified
- Training Status: Expired
- Due to expire within 30 days
- Due to expire within 60 days
- All data

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).



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**.



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
Walker Aggregates & Construction Contractor Certification	Training Status: Currently Certified	CSV	Daily at 12:00 AM Thursday, August 17, 2023, 12:00 AM	 

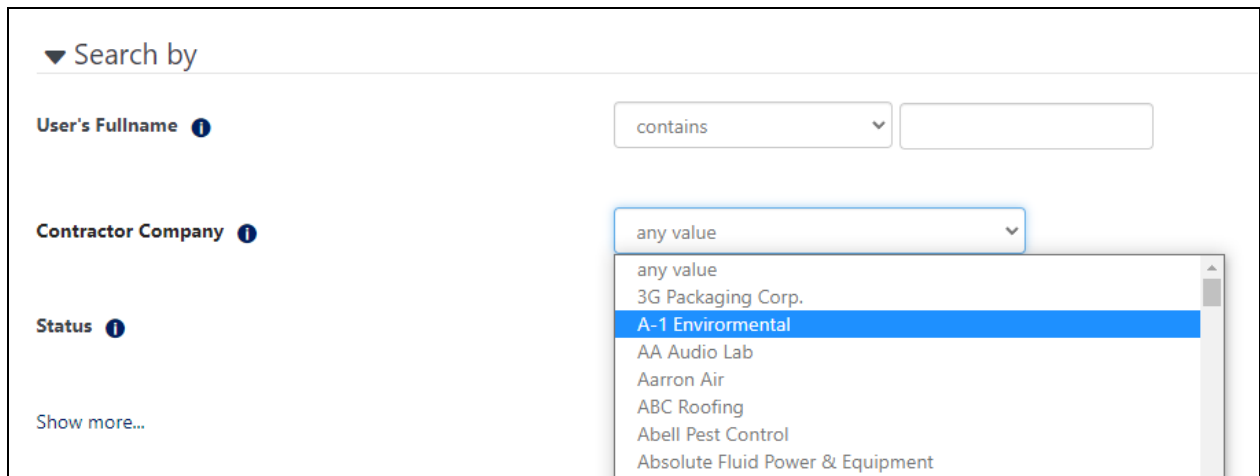
Scheduled Reports by Contractor Company

If you want to schedule a report for contractors from a specific company (for example, to send 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' dropdown menu. The 'Contractor Company' field is selected, and a dropdown menu is open showing a list of companies. 'A-1 Environmental' is highlighted in blue. Other companies listed include 'any value', '3G Packaging Corp.', 'AA Audio Lab', 'Aarron Air', 'ABC Roofing', 'Abell Pest Control', and 'Absolute Fluid Power & Equipment'. The 'User's Fullname' field has a 'contains' operator and an empty text box. The 'Status' field has an information icon and a 'Show more...' link.

2. Select **Save this search**.

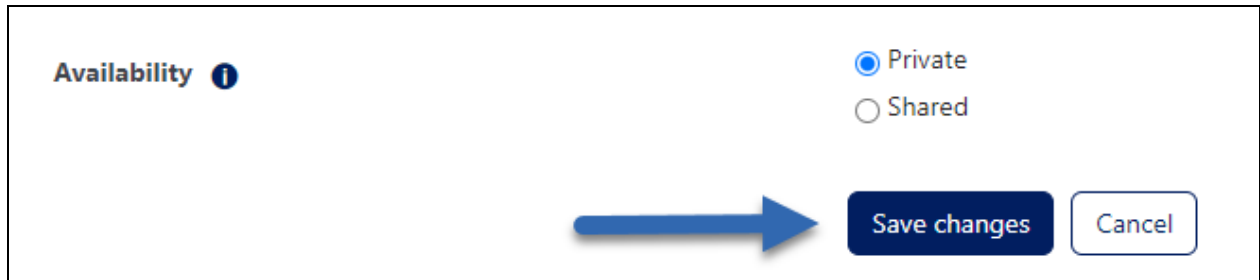


The screenshot shows a search interface with a 'Status' field, an 'is any value' dropdown, and an 'Unset' dropdown. The 'Search' and 'Clear' buttons are visible. A blue arrow points to the 'Save this search' button.

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



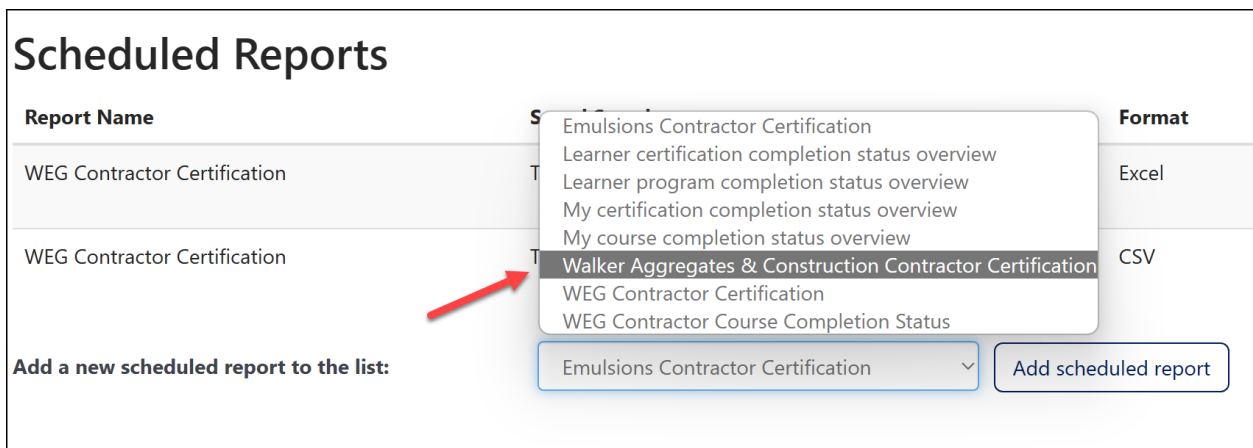
4. Leave the availability as **Private**. Otherwise, everyone who can view this report will see the shared search and have it in their list of options. Select **Save changes**.



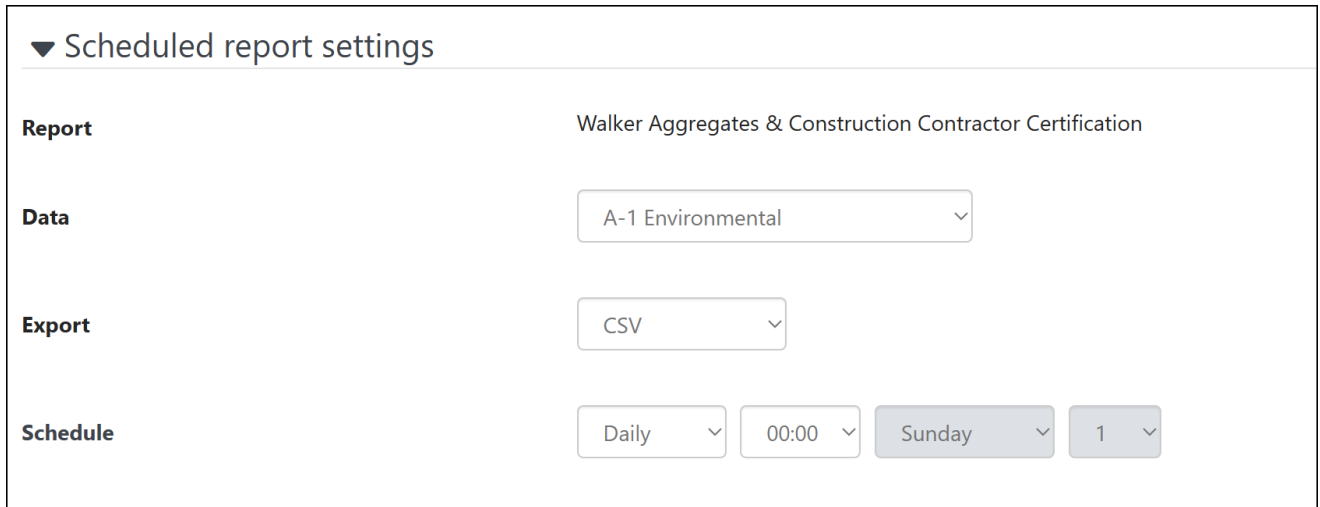
Part 2: Schedule the Report

Follow the same directions as before to schedule the report.

1. Click **Reports** in the top menu.
2. Select **Walker Aggregates & Construction Contractor Certification** in the drop-down menu, and then click **Add scheduled report**.



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



▼ Scheduled report settings

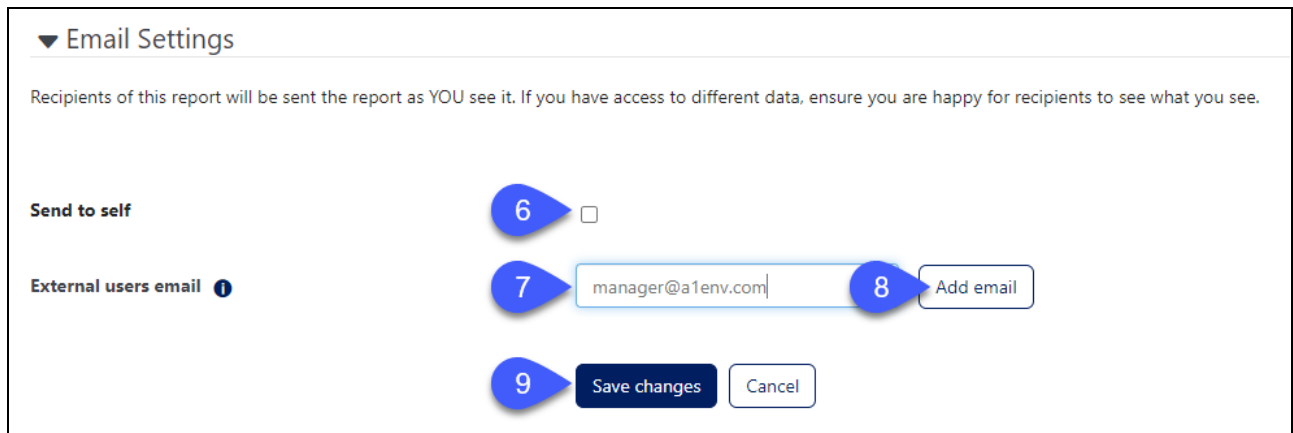
Report Walker Aggregates & Construction Contractor Certification

Data A-1 Environmental

Export CSV

Schedule Daily 00:00 Sunday 1

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**.



▼ 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, please contact Michael Price (mprice@walkerind.com)