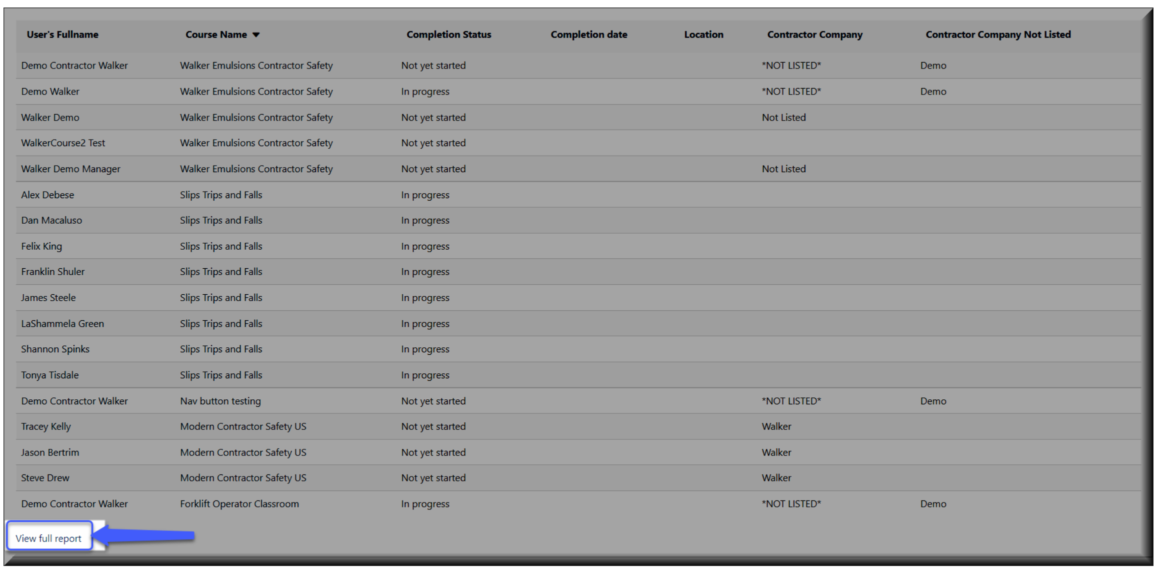
# Walker Contractor Completion/Status Reports

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

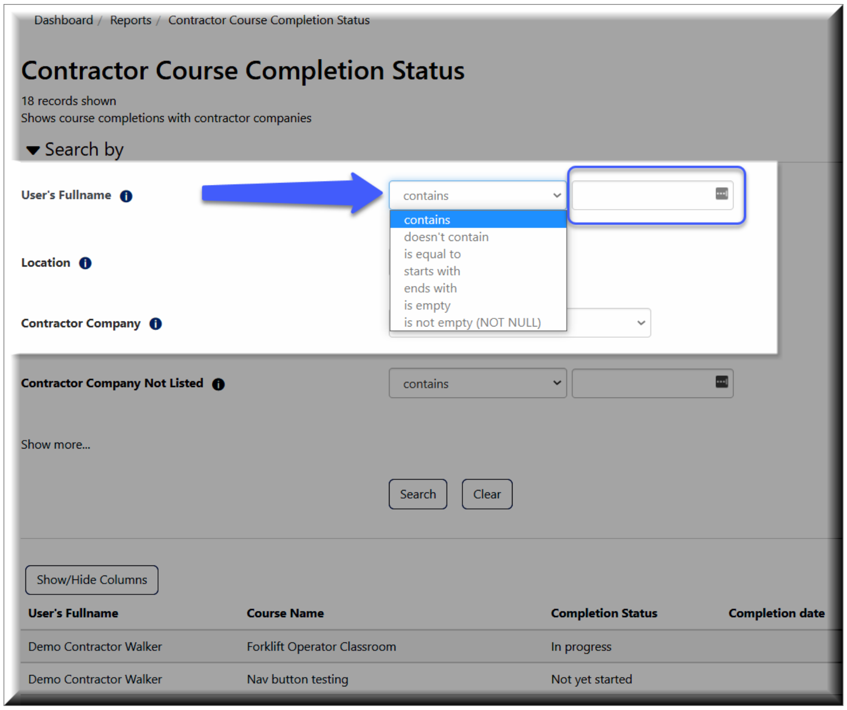
1. Log into Totara. You should have received an email with your login information. If you didn't, please submit a support request.
2. You will see the Emulsions Contractor Course Completion Status report at the top of your dashboard. To view more records and use filters, at the bottom of this report, click **View full report**.



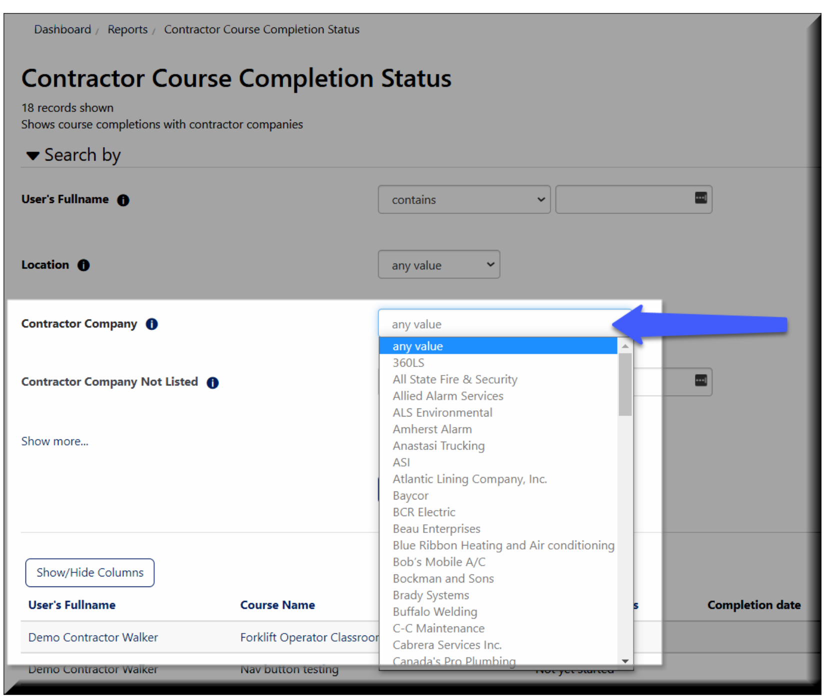
| User's Fullname | Course Name | Completion Status | Completion date | Location | Contractor Company | Contractor Company Not Listed |
|---|---|---|---|---|---|---|
| Demo Contractor Walker | Walker Emulsions Contractor Safety | Not yet started | | | *NOT LISTED* | Demo |
| Demo Walker | Walker Emulsions Contractor Safety | In progress | | | *NOT LISTED* | Demo |
| Walker Demo | Walker Emulsions Contractor Safety | Not yet started | | | Not Listed | |
| WalkerCourse2 Test | Walker Emulsions Contractor Safety | Not yet started | | | | |
| Walker Demo Manager | Walker Emulsions Contractor Safety | Not yet started | | | Not Listed | |
| Alex Debese | Slips Trips and Falls | In progress | | | | |
| Dan Macaluso | Slips Trips and Falls | In progress | | | | |
| Felix King | Slips Trips and Falls | In progress | | | | |
| Franklin Shuler | Slips Trips and Falls | In progress | | | | |
| James Steele | Slips Trips and Falls | In progress | | | | |
| LaShammela Green | Slips Trips and Falls | In progress | | | | |
| Shannon Spinks | Slips Trips and Falls | In progress | | | | |
| Tonya Tisdale | Slips Trips and Falls | In progress | | | | |
| Demo Contractor Walker | Nav button testing | Not yet started | | | *NOT LISTED* | Demo |
| Tracey Kelly | Modern Contractor Safety US | Not yet started | | | Walker | |
| Jason Bertrim | Modern Contractor Safety US | Not yet started | | | Walker | |
| Steve Drew | Modern Contractor Safety US | Not yet started | | | Walker | |
| Demo Contractor Walker | Forklift Operator Classroom | In progress | | | *NOT LISTED* | Demo |

View full report

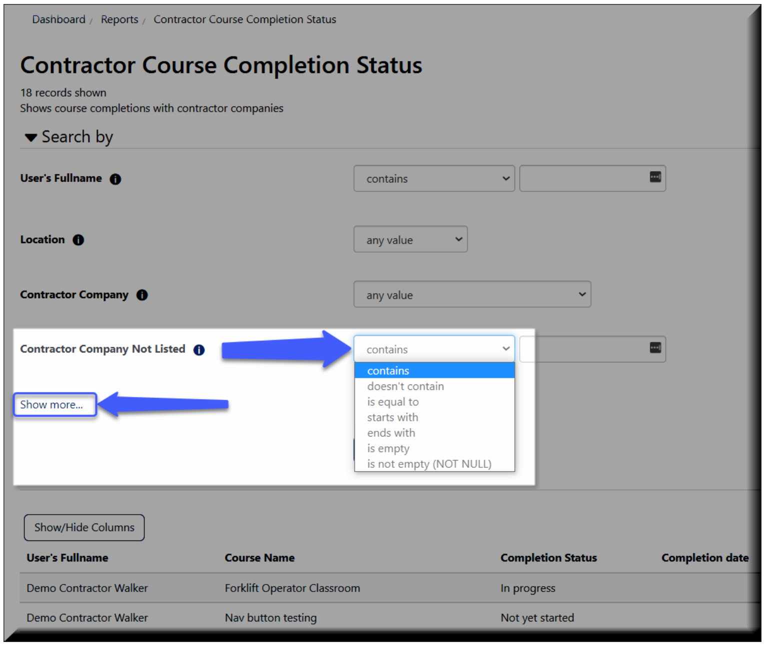
3. Each field has a drop-down field. There is also a field to the right of the drop-down box. You can enter any part of a contractor's name in the **User's Fullname** field. This is the most common way to search for a contractor employee.




4. To filter by location, choose an option from the location drop-down field. If you'd like a report on ALL of the contractors from your location, select your location but leave all other filters blank.
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.



6. You can choose from some of the options in the Contractor Company Not Listed (not required). You can then enter some information in the field to the right. Use this search to look for companies that have not been added to the list yet.



# Advanced Filters

Click **Show More…**This will give you three extra fields: Course Name, Date Completed, and Completion Status. You can use these fields and drop-down boxes to narrow your results.

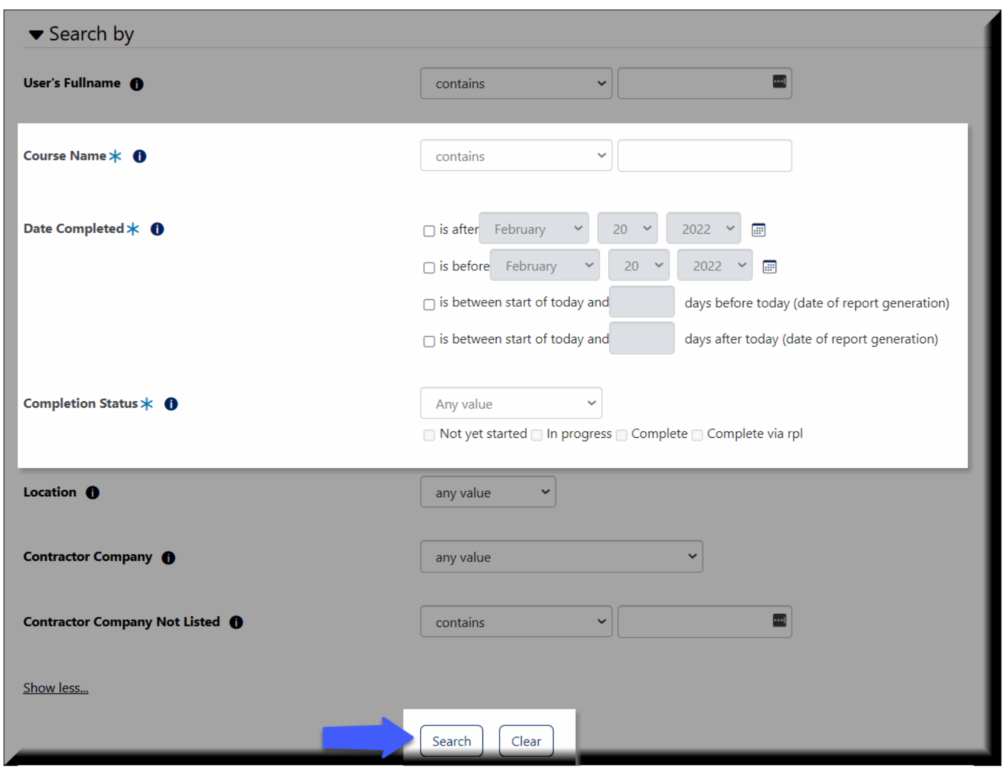
These advanced filters might be best used when

- an employee reports saying he completed the course but he's not listed with the company he says he works for
- you want to try searching under the name, rather than the contractor company

Here is what each field means:

- The Course Name field can be used to enter the name of a specific course you would like to see results for.
- The Date Completed fields can be used to see which users completed a course within a certain time frame.
- The Completion Status field will allow you to view results by a user's completion status for the course (i.e if they have not started, completed the course, etc.)

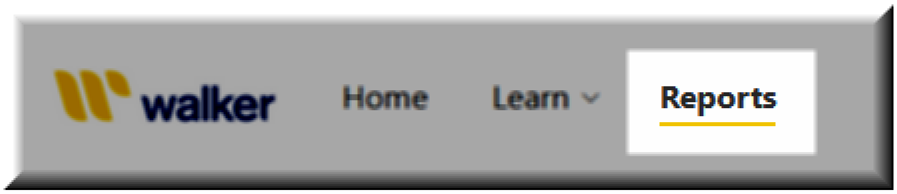
When you are done, click **Search** to display your results.



# Schedule Reports

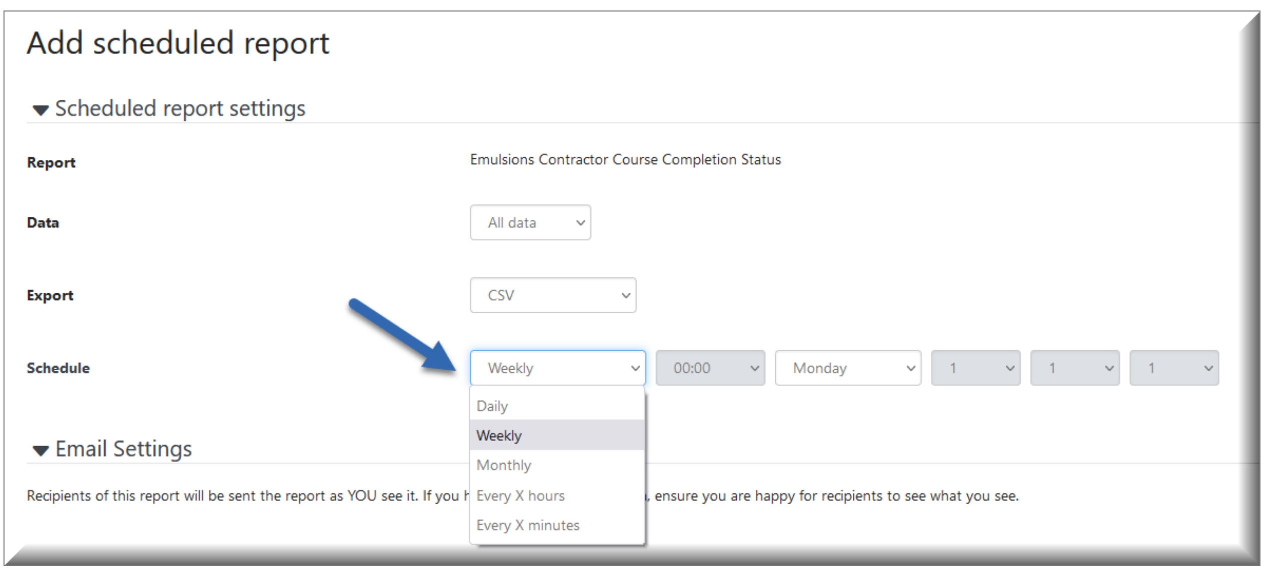
If you would prefer to have reports automatically emailed to you, rather than logging into the system, you can schedule them.

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

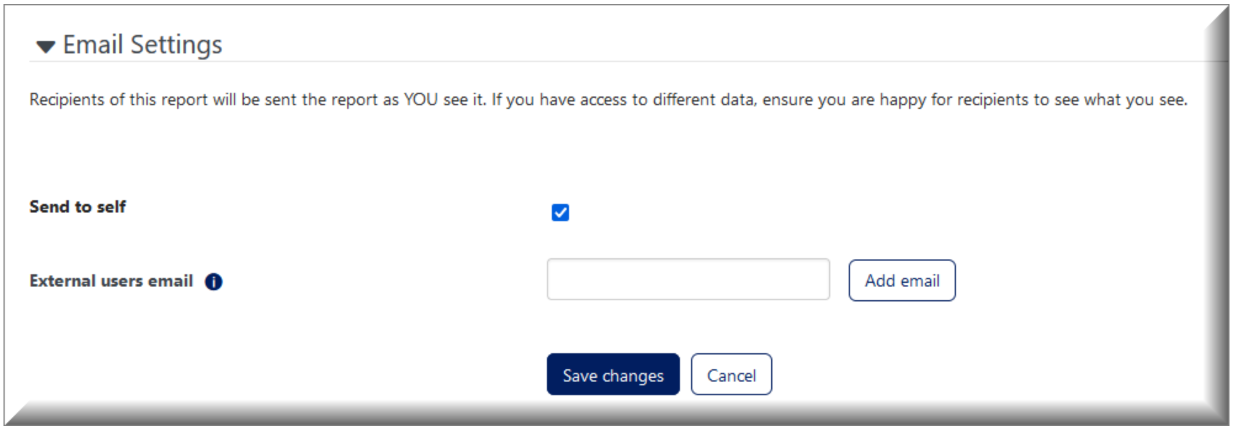



2. Initially, you will see this message: “There are no scheduled reports.” Make sure that the correct report is selected in the drop-down menu, and then click **Add scheduled report**.

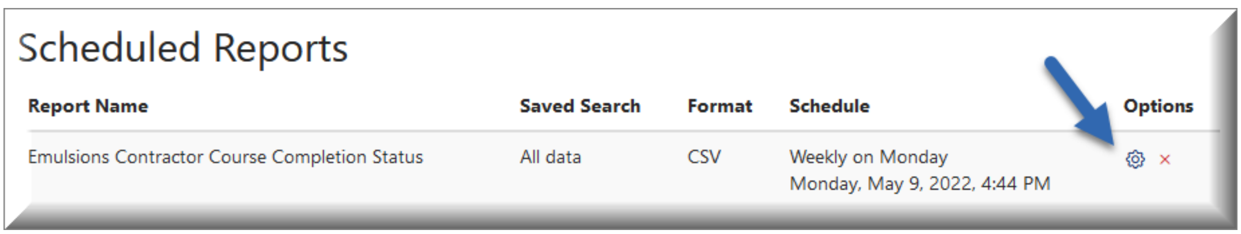

3. Select the format to **Export**. Usually, you will pick CSV or Excel.
4. Set the **Schedule**. You can choose to receive the report daily, weekly, or monthly. (We recommend avoiding the “Every X hours” and “Every X minutes” settings so you don’t get overwhelmed with emails.) If you select **Weekly**, you can also select the day of the week.



5. If you want to email the report to yourself, double check that the **Send to self** option is clicked. Then, click **Save changes**.
6. If you want to email the report to someone else, enter their email address and click **Add email**. Then, click **Save changes**.




7. 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.




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.
Walker Support Request