

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.

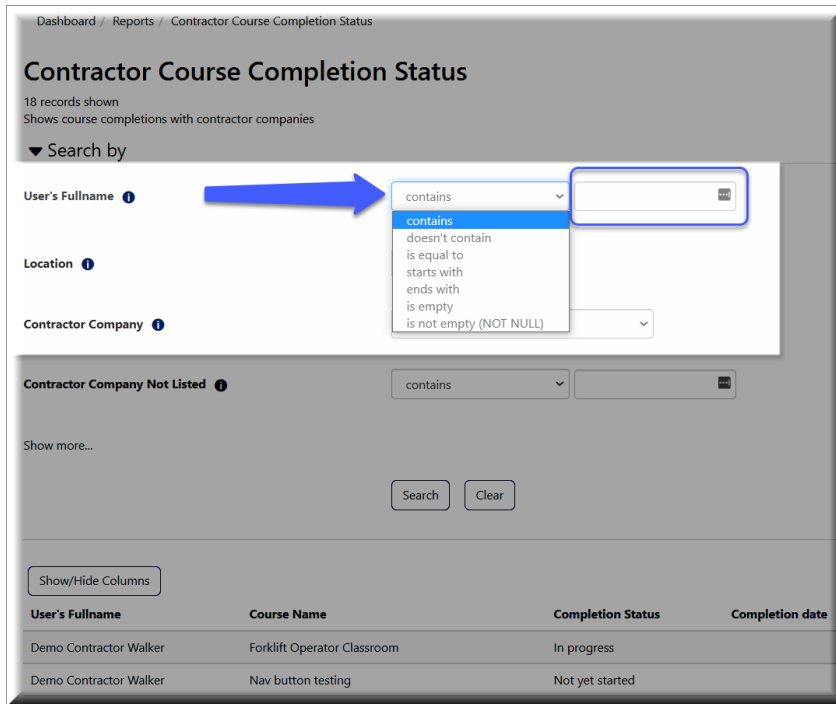
View and Filter Reports

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**.

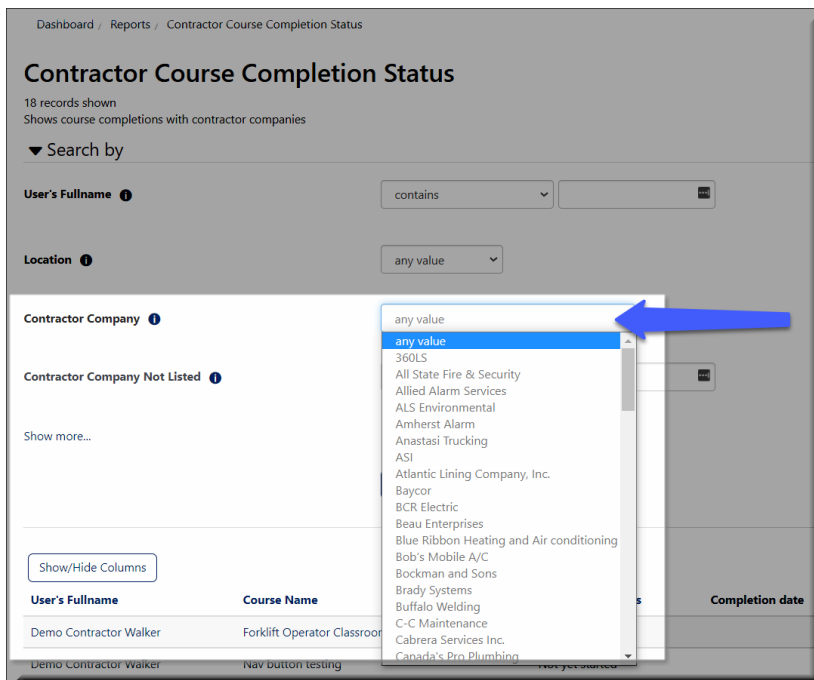
User's Fullname	Course Name ▼	Completion Status	Completion date	Location	Contractor Company	Contractor Company Not Listed
Demo Contractor Walker	Walker Emulsions Contractor Safety	Not yet started			*NOT LISTED*	Demo
Demo Walker	Walker Emulsions Contractor Safety	In progress			*NOT LISTED*	Demo
Walker 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 Debesse	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

- 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.



- 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.
- 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.

Dashboard / Reports / Contractor Course Completion Status

Contractor Course Completion Status

18 records shown
Shows course completions with contractor companies

▼ Search by

User's Fullname ⓘ contains [input field]

Location ⓘ any value [dropdown]

Contractor Company ⓘ any value [dropdown]

Contractor Company Not Listed ⓘ [dropdown menu open]

contains
contains
doesn't contain
is equal to
starts with
ends with
is empty
is not empty (NOT NULL)

Show more...

Show/Hide Columns

User's Fullname	Course Name	Completion Status	Completion date
Demo Contractor Walker	Forklift Operator Classroom	In progress	
Demo Contractor Walker	Nav button testing	Not yet started	

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.

▼ Search by

User's Fullname ⓘ contains [input]

Course Name * ⓘ contains [input]

Date Completed * ⓘ

is after February 20 2022 [calendar icon]

is before February 20 2022 [calendar icon]

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

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

Completion Status * ⓘ

Any value

Not yet started In progress Complete Complete via rpl

Location ⓘ any value

Contractor Company ⓘ any value

Contractor Company Not Listed ⓘ contains [input]

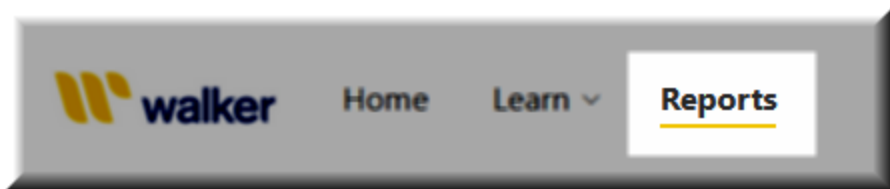
Show less...

Search Clear

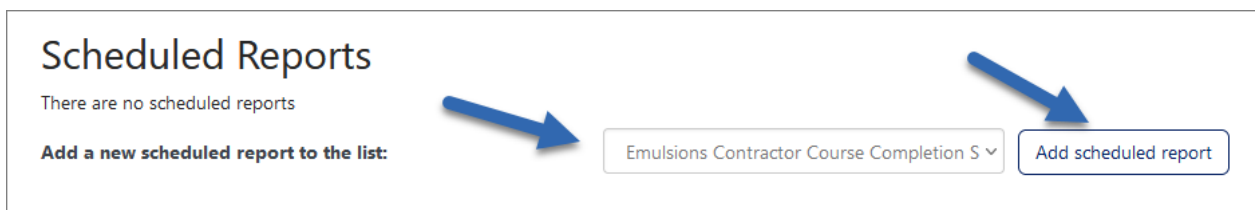
Schedule Reports

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

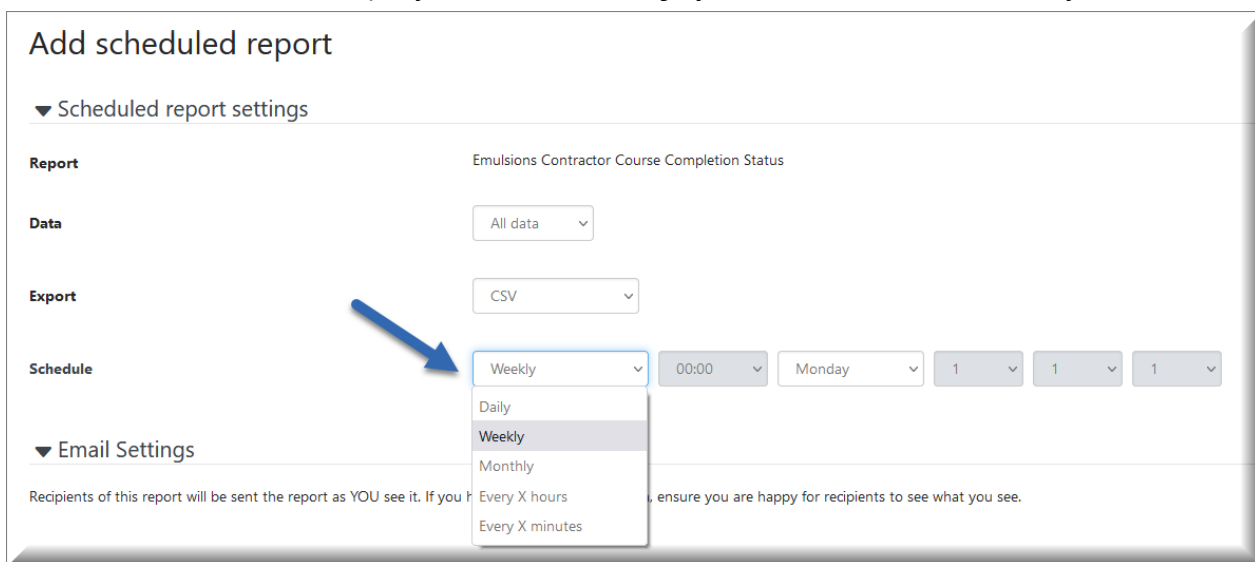
1. Click **Reports** in the top menu.



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**.

▼ 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

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.

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	

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](#)