

Walker Emulsions 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.

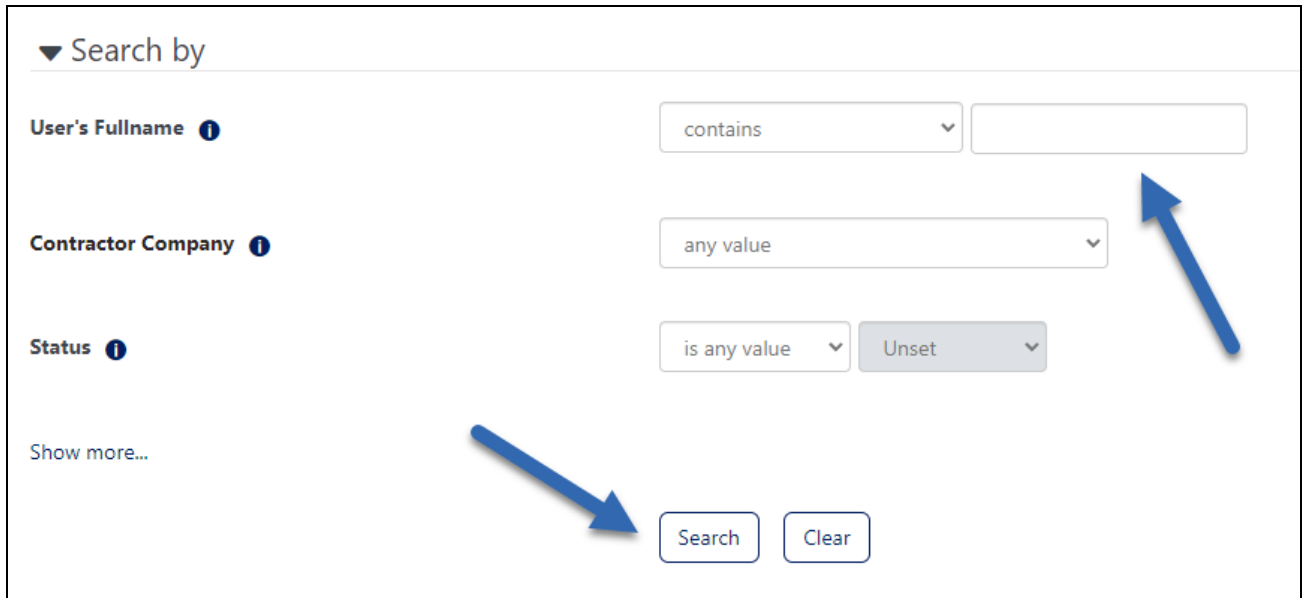
View and Filter Reports

1. [Log into Totara](#). You should have received an email with your login information. You can log in 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 Walker Emulsions 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**.

User's Fullname	Location	Contractor Company	Contractor Company Not Listed	Status	Completion date	Expiration date
Michael Hoff	Portland	Apollo Mechanical Contractors		Certified	8 Feb 2023	8 Feb 2024
Henry Oberbarnscheidt	Portland	Apollo Mechanical Contractors		Certified	7 Feb 2023	7 Feb 2024
Andy Dueltette	Portland	Test	Mott Lab	Certified	7 Feb 2023	7 Feb 2024
Dorian Bertrand	Burlington	Test	Action group	Certified	7 Feb 2023	7 Feb 2024
Nathan Gostin	Burlington	Niaskoka		Certified	7 Feb 2023	2 Mar 2024
Jim Eysel	Burlington	Niaskoka		Certified	6 Feb 2023	2 Mar 2024
Mike Buchaly	Burlington	Triple Crown Enterprise		Certified	31 Jan 2023	31 Jan 2024
Adam Evangelisto	Burlington	Triple Crown Enterprise		Certified	30 Jan 2023	30 Jan 2024
Mike Marchetti	Burlington	Triple Crown Enterprise		Certified	23 Jan 2023	23 Jan 2024
Dan Morin	Burlington	Triple Crown Enterprise		Certified	20 Jan 2023	20 Jan 2024
Steven Burk	Burlington	Jasen Enterprises		Certified	19 Jan 2023	19 Jan 2024
bobby higham	Burlington	Mainway Industrial		Certified	18 Jan 2023	18 Jan 2024
Rob Andrews	Burlington	Triple Crown Enterprise		Certified	18 Jan 2023	18 Jan 2024
Braydon Rigggett	Burlington	*NOT LISTED*	Mainway industrial	Certified	5 Jan 2023	5 Jan 2024
Wilburn Jamieson	Burlington	Mainway Industrial		Certified	2 Jan 2023	2 Jan 2024
wes gilbert	Burlington	Mainway Industrial		Certified	23 Dec 2022	23 Dec 2023
Brogan Park	Burlington	Mainway Industrial		Certified	23 Dec 2022	23 Dec 2023
Chris Harvey	Burlington	RDC Crane/Trademark Millwrights		Certified	21 Dec 2022	21 Dec 2023
Dylan Hamilton	Burlington	RDC Crane/Trademark Millwrights		Certified	21 Dec 2022	21 Dec 2023
Victor King	Burlington	RDC Crane/Trademark Millwrights		Certified	21 Dec 2022	21 Dec 2023
Miguel Calderon	Burlington	Clean Harbours		Certified	20 Dec 2022	20 Dec 2023
Norm Quihot	Orangeburg	*NOT LISTED*	Johnson Controls	Certified	19 Dec 2022	19 Dec 2023
David Haselden	Orangeburg	*NOT LISTED*	Johnson Controls	Certified	19 Dec 2022	19 Dec 2023
Daniel Connell	Burlington	Clean Harbours		Certified	13 Dec 2022	13 Dec 2023
donald cousineau	Burlington	Clean Harbours		Certified	12 Dec 2022	12 Dec 2023
Jordon boeder	Burlington	Clean Harbours		Certified	12 Dec 2022	12 Dec 2023
Frank Madden	Burlington	Clean Harbours		Certified	8 Dec 2022	8 Dec 2023
Alberto Giammarino	Orangeburg	Mainway Industrial	Mainway industrial	Certified	7 Dec 2022	7 Dec 2023
Jeff Hurlburt	Burlington	Mainway Industrial	mainway industrial	Certified	7 Dec 2022	7 Dec 2023
Jason Hall	Burlington	Clean Harbours		Certified	29 Nov 2022	29 Nov 2023
mikayla ball	Burlington	Clean Harbours		Certified	29 Nov 2022	29 Nov 2023
terry shevalier	Burlington	Apex Insulation	apex insulation	Certified	27 Nov 2022	27 Nov 2023
Jake Boyle	Burlington	Clean Harbours		Certified	24 Nov 2022	24 Nov 2023
Adam woods	Portland	Beltmeier Mechanical		Certified	8 Nov 2022	8 Nov 2023
teddy webb	Orangeburg	Atlantic Fall Protection	Atlantic fall protection	Certified	7 Nov 2022	7 Nov 2023
peter from	Orangeburg	Atlantic Fall Protection	atlantic fall protection	Certified	7 Nov 2022	7 Nov 2023
paulo goncalves	Burlington	Triple Crown Enterprise	triple crown enterprises ltd	Certified	4 Nov 2022	4 Nov 2023
Daryl Goodfellow	Burlington	Triple Crown Enterprise	Triple Crown Enterprise	Certified	4 Nov 2022	4 Nov 2023
Bill Gibson	Burlington	Jasen Enterprises	Jasen Enterprises	Certified	4 Nov 2022	4 Nov 2023
Ted Piet	Orangeburg	CC Boiler		Certified	21 Oct 2022	21 Oct 2023

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**.

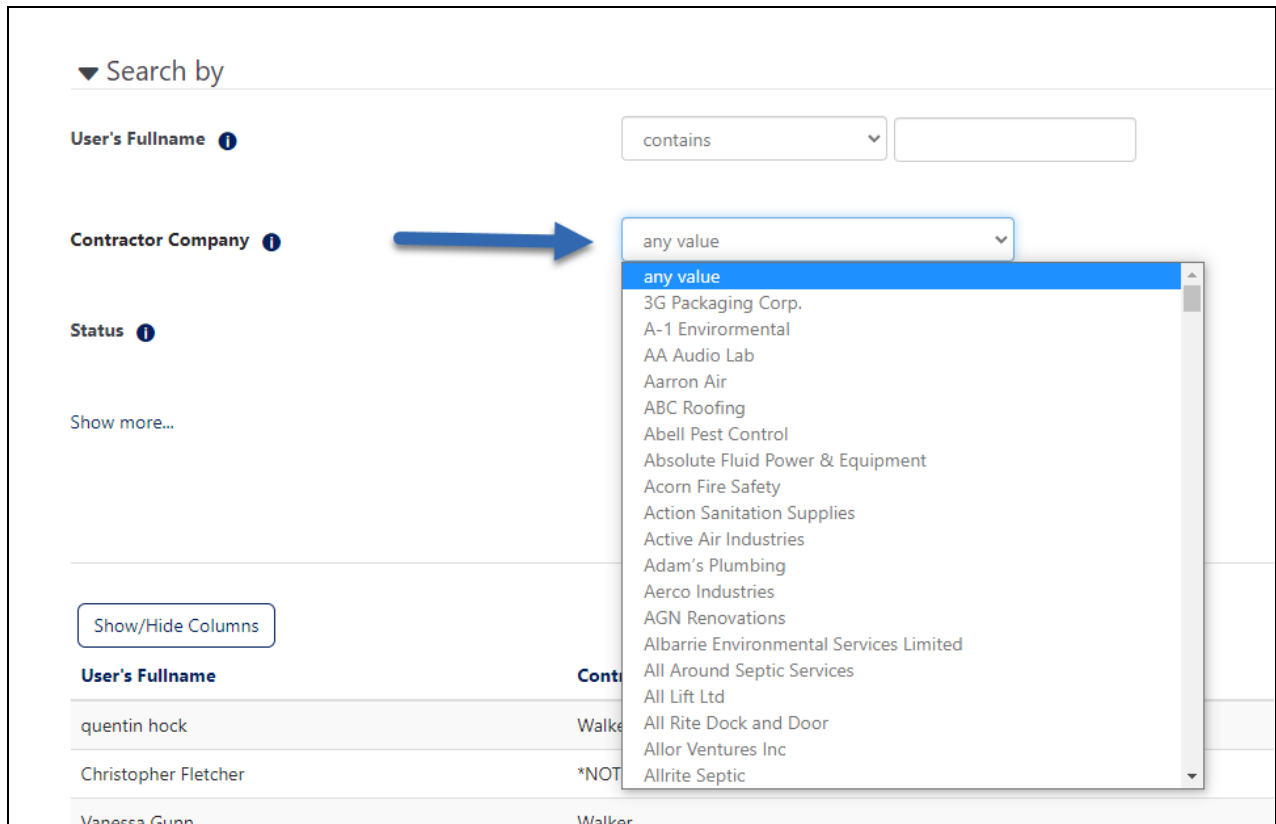


The screenshot shows a search interface with a dropdown menu labeled "Search by" at the top. Below it are three search criteria: "User's Fullname" with a dropdown set to "contains" and an empty text input field; "Contractor Company" with a dropdown set to "any value"; and "Status" with a dropdown set to "is any value" and a secondary dropdown set to "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 "Search" button and the empty text input field.

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:

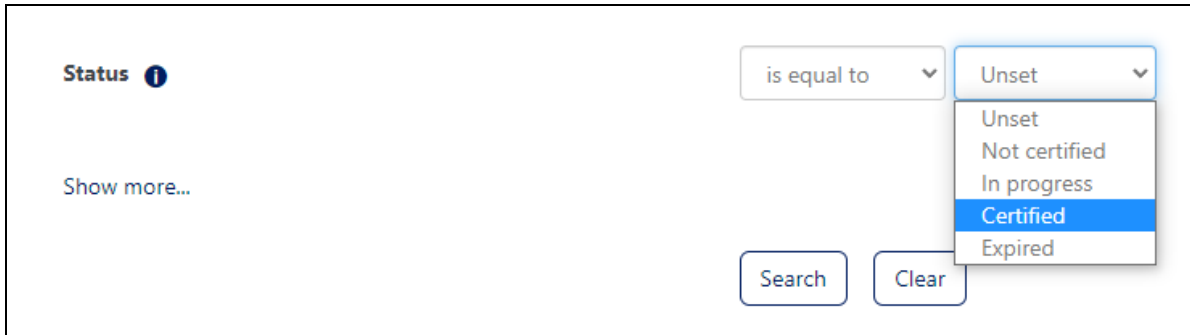
- Search by** (dropdown arrow)
- User's Fullname** (with an information icon) and a search box containing the text "contains".
- Contractor Company** (with an information icon) and a dropdown menu. A blue arrow points to this dropdown. The dropdown is open, showing a list of contractor companies. The first item, "any value", is highlighted in blue.
- Status** (with an information icon)
- Show more...** (text)
- Show/Hide Columns** (button)
- A table with columns **User's Fullname** and **Contractor Company**. The table contains the following rows:

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.

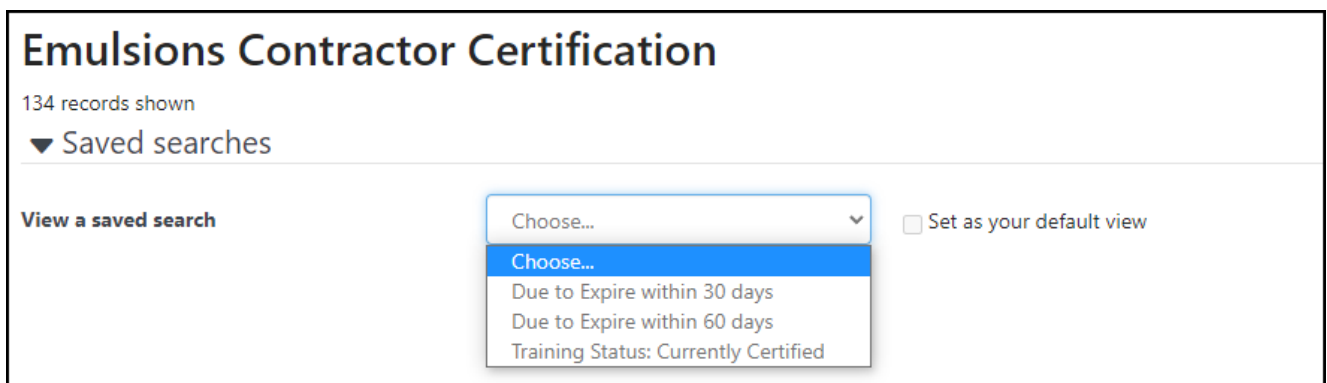
6. The **Status** filter is based on the certification status. When contractors take the training, they are certified for 1 year. After 1 year, the certification expires, and they must retake the training. Select **is equal to**, then filter for any of these statuses.

- **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).

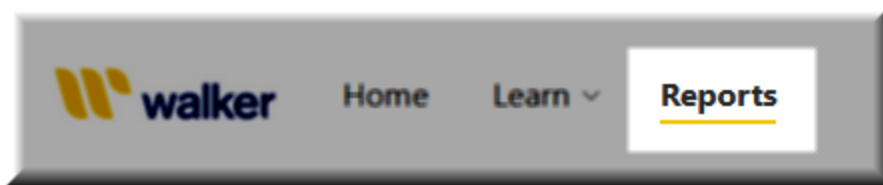
When you are done setting the filters, click **Search** to display your results. Click **Clear** between searches to reset your filters.

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.

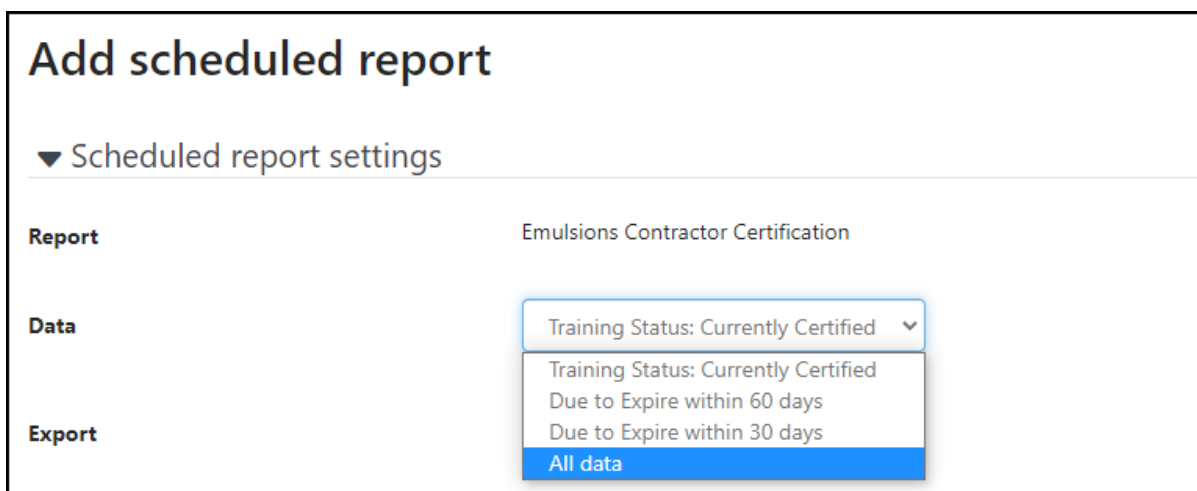
8. Click **Reports** in the top menu.



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

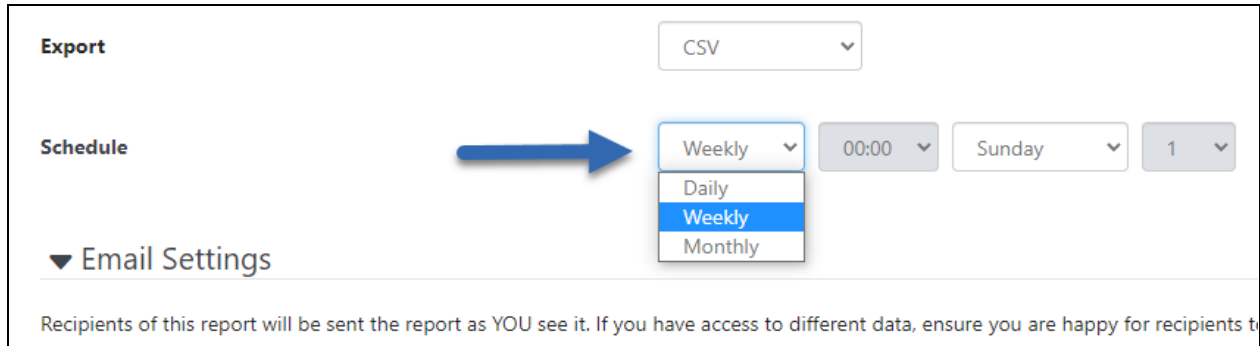


11. Select the data to include from the list of saved searches. If you want everything, select **All Data**.



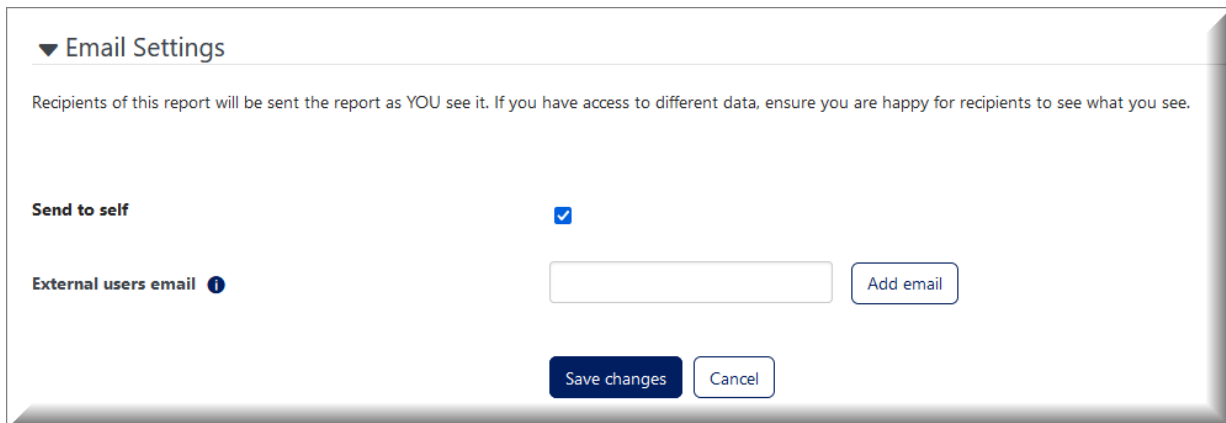
12. Select the format to **Export**. Usually, you will pick CSV or Excel so you can work with the data easily.

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).



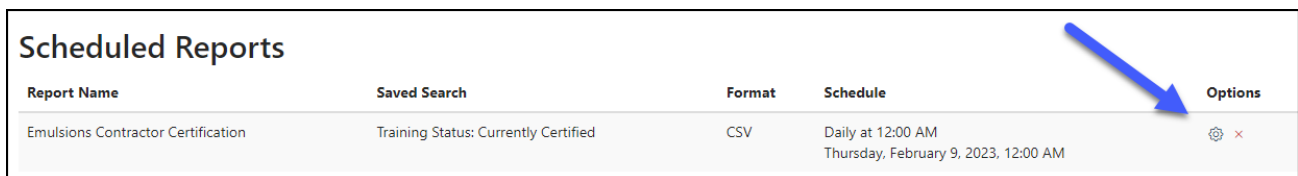
The screenshot shows the 'Export' and 'Schedule' sections of a settings form. The 'Export' dropdown is set to 'CSV'. The 'Schedule' dropdown is open, with 'Weekly' selected. To the right of the 'Schedule' dropdown are three other dropdowns: '00:00', 'Sunday', and '1'. Below the 'Schedule' dropdown is a section for 'Email Settings' with a downward arrow. At the bottom of the form, there 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.'



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. It includes 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.' Below this is the 'Send to self' checkbox, which is checked. There is an 'External users email' field with an information icon and an 'Add email' button. At the bottom are 'Save changes' and 'Cancel' buttons.

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.



Report Name	Saved Search	Format	Schedule	Options
Emulsions Contractor Certification	Training Status: Currently Certified	CSV	Daily at 12:00 AM Thursday, February 9, 2023, 12:00 AM	 

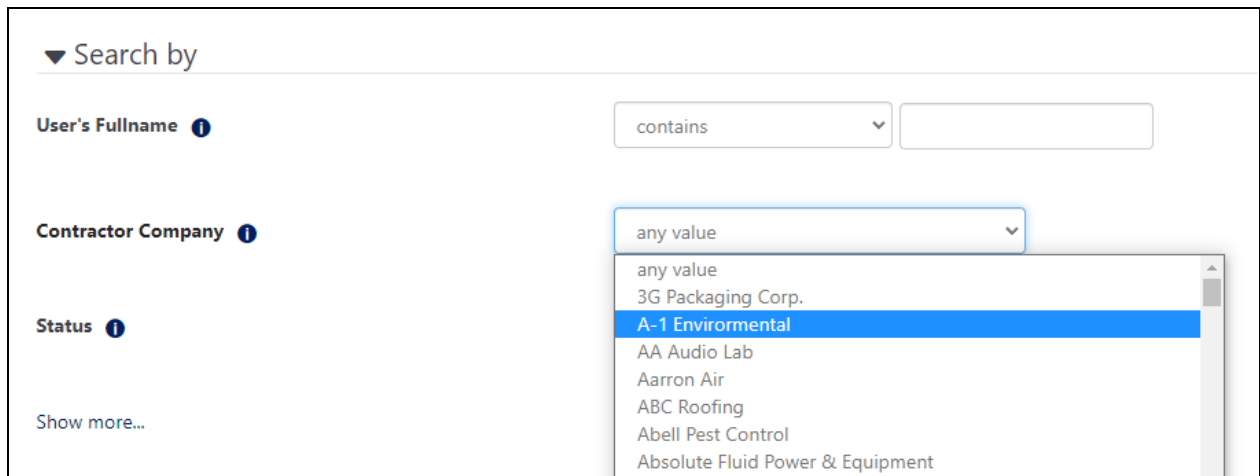
Scheduled Reports by Contractor Company

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**.



▼ Search by

User's Fullname ⓘ contains

Contractor Company ⓘ any value

- any value
- 3G Packaging Corp.
- A-1 Environmental**
- AA Audio Lab
- Aarron Air
- ABC Roofing
- Abell Pest Control
- Absolute Fluid Power & Equipment

Status ⓘ

Show more...

2. Select **Save this search**.



Status ⓘ is any value Unset

Show more...

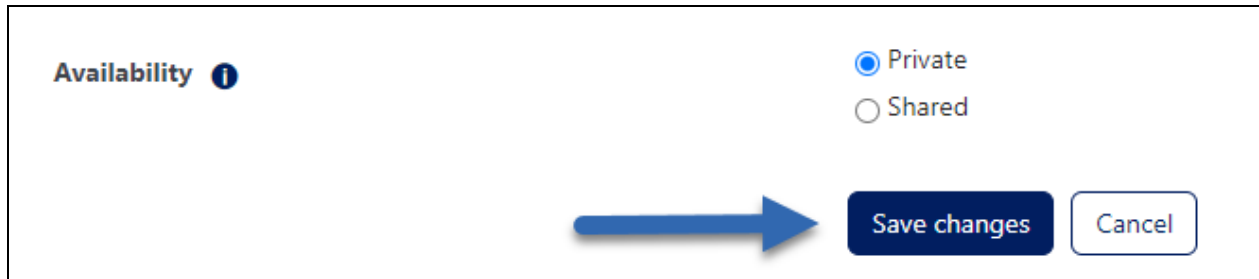
Search Clear

Save this search

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



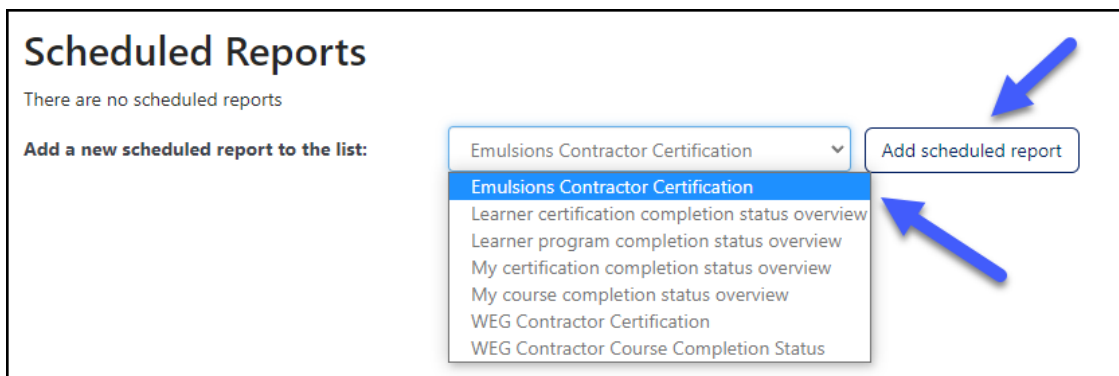
4. Leave the availability as **Private**. Otherwise, everyone who can view this report will see the shared search and have it in their list of options. Select **Save changes**.



Part 2: Schedule the Report

Follow the same directions as before to schedule the report.

1. Click **Reports** in the top menu.
2. Select **Emulsions 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	Emulsions 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 software 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.' The main settings area contains two sections: 'Send to self' with an unchecked checkbox, and 'External users email' with a blue information icon. A text input field contains the email address 'manager@a1env.com'. To the right of the input field is an 'Add email' button. Below these are two buttons: 'Save changes' and 'Cancel'. Blue callout boxes with numbers 6, 7, 8, and 9 point to the checkbox, the input field, 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)