

The Search Staff Report

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The **Search** function, in the *Staff* menu, is a customizable report of your staff members. It allows you to search through all of your staff to find only those that meet the criteria you select.

- ★ Create a list of employees who have been with you for 5+ years for service awards (\$start Date criteria).
- ★ Ensure your staff's certifications are up to date (optional to use *Staff Certifications* criteria, *Show Staff Certifications* setting).
- ★ Generate a list of your staff with birthdays in the coming month and email them a birthday greeting (*Birth Month* criteria, *Email* button in report results).

Search Criteria

All of the search criteria in Search Staff pull information from fields in the **Staff record**.

The screenshot shows the 'Search Staff' interface. At the top left, there are two buttons: a grey '← RETURN' button and a green '✓ SUBMIT' button. A yellow callout bubble points to the 'SUBMIT' button with the text: 'Save your criteria and selections as a Favorite for consistent reporting.' Below the buttons is a navigation bar with tabs for 'Search Criteria', 'Favorites', 'Save Favorites', 'Refresh', and a help icon. The main search area contains several fields: 'First Name' and 'Last Name' (text boxes), 'Status' (dropdown menu set to 'Active'), 'Birth Month' (dropdown menu), 'Department Default' (dropdown menu with options 'D-TEACH', 'ADMIN', 'G-TEACH'), 'Instructor' (dropdown menu), 'Staff Type' and 'Position' (dropdown menus), 'Staff Availability Note/Label' (text area), 'Review Date From' and 'Through' (date pickers), 'Start Date From' and 'Through' (date pickers, with '4/1/2014' entered in the first), 'Staff Skills' (dropdown menu with options 'Cheerleading', 'Dance', 'Gymnastics', 'Swim', 'Tumbling'), and 'Staff Certifications' (dropdown menu with options 'CPR', 'CPR - Adult', 'CPR - Infant/Child', 'Criminal Records Check', 'First Aid', 'L1'). A yellow callout bubble points to the 'Department Default' dropdown menu with the text: 'Leaving a selection field blank will include all.'



The more criteria you select, the fewer staff will be included in the report because a staff member must meet all the criteria.

Instructors Assigned to Classes

The selections made in this section apply only to staff members who are instructors that are assigned to classes. These selections will pull from fields located in the **Class record**.

Instructors Assigned to Classes
Class Location: CCD (Select one or more by holding the CTRL key)
 DVD
 EDU
Assigned to Class Session: Room:
Assigned to Class Category 1: Category 2: Category 3:
Class Meets: Mon Tue Wed Thu Fri Sat Sun

Display Settings

Use these settings to optionally add a column(s) to the report results to display Staff Skill and/or Staff Certifications.

Display Settings
Show Staff Skill:
Show Staff Certifications:

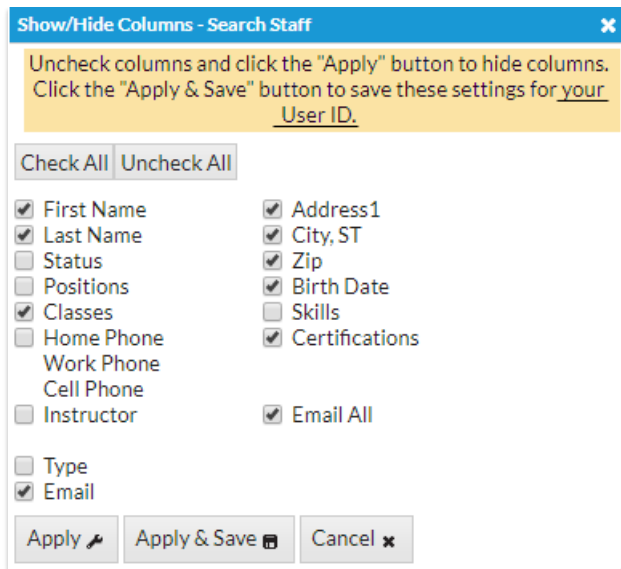
Report Results

Search Staff

View 1 - 1 of 1 |

First Name	Last Name	Status	Positions	Classes	Home Phone	Work Phone	Cell Phone	Instruct	Type	Email	Address1	City, ST	Zip	Birth Date	Email All
Dianne	Harris	Active	Instructor	Classes	Weekly Schedule Calendar	h: (704) 374-2415	c: (704) 374-2415	Yes	Full-Time	dlinth@gmail.com	7516 Holly Road	Huntersville, NC	28078	7/11/1971	<input type="checkbox"/>

- The **Show/Hide Columns** button allows you to customize your report by selecting which information to display.



- Select **Apply** to have these selections applied to only the report you are currently viewing.
 - Select **Apply & Save** to have these selections applied and saved for your User ID. When logged in as your User ID, you will see only the columns of information you chose previously. Other Users will see the columns they selected and saved, which may differ from yours.
 - Use **Restore Columns** to view all available columns.
 - **Email** directly from the report results. Use the *Email All* column to send to only selected staff or send to all.
 - The **Weekly Schedule** link will open the **Weekly Calendar** filtered for that instructor.
 - Use the **Calendar** link to go to open the **Monthly Calendar** filtered for that instructor.
- Note:** If the staff member is not an instructor and you have set their *Instructor* setting (on the *Summary* tab of the *Staff* record) to **No**, they will not appear on the calendars.
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