

The Search Staff Report

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Watch a (2:17) video tutorial on Searching Staff

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).
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Search Criteria

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

Search Staff

← RETURN

✓ SUBMIT

Save your criteria and selections as a **Favorite** for consistent reporting!

Search Criteria

🔍 Favorites

💾 Save Favorites

✕ Refresh ?

First Name: Last Name:

Status: Active ▼

Birth Month: ▼

Department Default:
 D-TEACH
 ADMIN
 G-TEACH ▼

Leaving a criteria blank will include all.

Instructor: Yes ▼

Staff Type: ▼ Position: ▼

Staff Availability Note/Label:

Review Date From: mm/dd/yyyy 📅 Through Date: mm/dd/yyyy 📅

Start Date From: 4/1/2014 📅 Through Date: 4/30/2014 📅

Staff Skills:
 Cheerleading
 Dance
 Gymnastics
 Swim
 Tumbling ▼

Staff Certifications:
 L1
 L2
 Master ▼

Staff: Dianne H Harris

← RETURN

💾 SAVE CHANGES

🗑 DELETE

Instructor Schedule (PDF)	Add Time Entry	Instructor Calendar	Weekly Schedule	Email
Summary	Classes	Compensation	Time Card	Portal Settings
Feedback	Skills	Certifications		
Certification Level	L1	Date	5/1/2018 📅	
Certification Level2	L2	Date2	7/30/2018 📅	
Certification Level3	Master	Date3	9/19/2018 📅	



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: EDU (Select one or more by holding the CTRL key)

SUP ▼

Assigned to Class Session: Spring 2019 ▼ Room: ▼

Assigned to Class Category 1:

Adult Fitness
 Camp
 Costumes
 Dance
 Drop-ins ▼

Category 2:

Advanced
 Beginner
 Intermediate ▼

Category 3:

Billable
 Non-Billable ▼

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:

The Report Results

Search Staff

[← RETURN](#) [✉ EMAIL](#)

View 1 - 1 of 1 [Print](#) [Export](#) [Refresh](#) **5 columns hidden** [Show/Hide Columns](#) [Restore Columns](#)

First Name	Last Name	Classes		Email	Address1	City, ST	Zip	Birth Date	Certifications	Email All
<input type="text" value="Search"/>	<input type="text" value="Search"/>			<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
Dianne	Harris	Classes	Weekly Schedule Calendar	dilinth@gmail.com	7516 Holly Road	Huntersville, NC	28078	7/11/1971	Master 5/1/2018	<input type="checkbox"/>

Customize your report by showing only the information that is important to you.

Use this link to create a calendar of the instructor's classes

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

Show/Hide Columns - Search Staff

Uncheck columns and click the "Apply" button to hide columns. Click the "Apply & Save" button to save these settings for your User ID.

☒ First Name
☒ Last Name
☐ Status
☐ Positions
☒ Classes
☐ Home Phone
Work Phone
Cell Phone
☐ Instructor

☐ Type
☒ Email

☒ Address1
☒ City, ST
☒ Zip
☒ Birth Date
☐ Skills
☒ Certifications

☒ Email All

- 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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