

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).

Search Criteria

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

Search Staff

← RETURN

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

Search Criteria

First Name: Last Name:

Status:

Staff Location:

Birth Month:

Instructor:

Staff Type: Position:

Staff Availability Note/Label:

Review Date From: Through Date:

Start Date From: Through Date:

Staff Skills:

Staff Certifications:

Leaving a criteria blank will include all.

Staff: Jenny Williams

← RETURN

Clock-In | Clock-Out | Class Schedule (PDF) | Add Time Entry | Class Calendar | Weekly Schedule | Email

Summary	Classes	Attendance	Compensation	Feedback	Skills	Certifications
Certification Level1	CPR Certified	Date1	8/1/2018			
Certification Level2	Defibrillator Trained	Date2	1/1/2019			
Certification Level3	Safety	Date3	10/30/2018			
Certification Level4		Date4	mm/dd/yyyy			
Certification Level5		Date5	mm/dd/yyyy			



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

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:

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
Search	Search			Search	Search	Search	Search	Search	Search	Search
Dianne	Harris	Classes	Weekly Schedule Calendar	dliin@h@gmail.com	7516 Holly Road	Huntersville, NC	28078	7/11/1971	Master 5/1/2018	<input type="checkbox"/>

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

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

- 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.

Check All Uncheck All

<input type="checkbox"/> Loc	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Address1
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> City, ST
<input type="checkbox"/> Status	<input checked="" type="checkbox"/> Zip
<input type="checkbox"/> Positions	<input checked="" type="checkbox"/> Birth Date
<input checked="" type="checkbox"/> Classes	<input checked="" type="checkbox"/> Email All
<input type="checkbox"/> Home Phone	
<input type="checkbox"/> Work Phone	
<input type="checkbox"/> Cell Phone	
<input type="checkbox"/> Instructor	
<input type="checkbox"/> Type	

Apply Apply & Save Cancel

- 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.
