

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 \$tart Date criteria).
- Ensure your staff's certifications are up to date (optional to useStaff 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 S	taff ✓submit			Save your criteria and selections as a Favorite for consistent reporting!				
		C Favorites	ave Favorit	es ×Refre		e reporting.	/		
				First Name:		L	ast Name:		
			_	Status: Birth Month:	T	C			
			Depart	ment Default:	D-TEACH ADMIN G-TEACH V		aving a criteria k will include all.		
				Instructor:	Yes 🔻				
				Staff Type:	e: Vosition: V				
		S	taff Availabilit	y Note/Label:		11			
			Revie	w Date From:	mm/dd/yyyy	💼 Through Date:	mm/dd/yyyy 🧰		
			Sta	rt Date From:	4/1/2014	💼 Through Date:	4/30/2014 🗰		
				Staff Skills:	Cheerleading Dance Gymnastics Swim Tumbling	* *			
			Staff C	Certifications:		*			
Staff: Diann	ne H Harris			L1 L2 Master					
	VE CHANGES				Master				
Summary Classe Ce Cer	Add Time Entry Instructor Call es Compensation Time ertification Level L1 rtification Level2 L2 rtification Level3 Master	endar Weekly Schedule Email a Card Portal Settings Feedb • Date 5/1/2018 • Date2 7/30/2018 • Date3 9/19/2018	ack Skills	Certifications					



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:	n: EDU (Select one or more by holding the CTRL key)					
Assigned to Class Session:	Spring 2019 V Room: V					
Assigned to Class Category 1:	▲ Category 2: ▲ Category 3: ▲					
	Adult Fitness Advanced Billable Camp Beginner Non-Billable					
	Camp Beginner Non-Billable Costumes Intermediate					
	Dance					
	Drop-ins 💌					
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: No 🔻	
	Show Staff Certifications: Yes 🔻	

The Report Results

Search Staff Customize your report by showing only the information that is important to you.										
View 1 - 1 of 1 🔹 Print & Export 🖗 Refresh Scolumns 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	<u>Classes</u>	Weekly Schedule Calendar	dilinth@gmail.com	7516 Holly Road	Huntersville, NC	28078	7/11/1971	Master 5/1/2018	
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

Show/Hide Columns - Sear	ch Sta	ff	
Uncheck columns and cl Click the "Apply & Save	' butt		
Check All Uncheck All			
 First Name Last Name Status Positions Classes Home Phone Work Phone Cell Phone Instructor 		Address1 City, ST Zip Birth Date Skills Certification Email All	5
☐ Type✓ Email			
Apply 🖌 Apply & Save	2 🗖	Cancel x	

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.