

Enterprise - Employee Searching

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What is an Employee Record?

The Employee section of Enterprise includes all applicants, current & past employees. These records contain information such as current employment status, compliance documents, past jobs, interview questions, skills, and more.

The screenshot displays the Enterprise software interface for an employee record. The top navigation bar shows the user's name, 'James "Jay" West', and various system notifications. The left sidebar contains a navigation tree with options like 'details', 'documents', 'integrations', 'evaluations', 'messages', 'pay history', 'pay setup', 'tasks', and 'search'. The main content area is divided into several sections: 'employee snapshot' with fields for Name, Email Address, Desired Location, Hire Status, and Rate Desired; 'messages' with a table of communication history; 'assignments' with a table of job assignments; and 'interest codes' with a list of codes. The right sidebar includes 'phone/email' and 'interest codes' sections.

Date	Action	Message	Rep	Contact	Due
7/18/2019	Message	allergic to materials	tamara.czapliewski		
4/2/2019	Interview in office	Scheduled 9 am interview Thursday, 4/4 - possible warehouse c...	hostewal1		
4/2/2019	1st Recruiting Call	called James west about a job in eagan	alix.borkowski		
3/28/2019	LMTC	Called James about a job	alix.borkowski		
12/6/2018	LMVM	Looking to have James come in to sign a new copy of employee...	amelia.stout		
12/5/2018	Ended	Customer: Buy N Large	amelia.stout		
11/9/2018	Available	Ready to work - willing to work weekends or short term jobs.	amelia.stout		
8/8/2018	Approved	Customer: Lightning's Computer	hostewal1		
6/15/2018	Check in	Called for a follow up after interview. Need availability	amelia.stout		
6/12/2018	Interview	Interview with James scheduled today at 12 in conference room	amelia.stout		

Title	Customer	Code	Start	End	Bill	Pay	Dept	Assignment ID
Distribution Spect...	Buy N Large	CO	11/9/2018	5/14/2019	\$28.80	\$18.00	Primary	4301403926
Warehouse Worker	Buy N Large	CO	11/14/2018	11/14/2018	\$24.00	\$15.00	Primary	4301404008
Data Entry	Lightning's Comp...	CO	6/18/2018	8/10/2018	\$25.00	\$20.00	Primary	4301402710

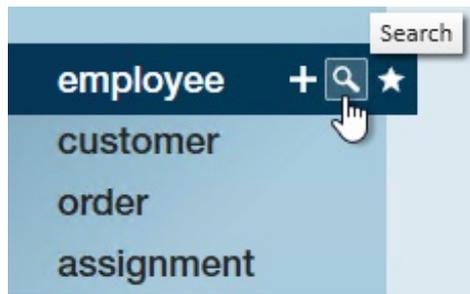
This Article Covers:

1. Basic Searching Options
2. Enhanced Searching Examples

Looking for a video? Check out [Employee Part 2: Searching](#)

Basic Employee Searching

Hover over the Employee Section in the Navigation Tree (lower left corner) & click the magnifying glass to open the employee search:



The basic search options will appear at the top:

Basic search options are best to use when you are looking for a specific employee or group of employees based on the following options:

- **First & Last Name:** Search for all or just part of the name in these fields. Use the % (wild card) before typing to have it search for any name that contains those letters (ex. %ith in the last name will have results for Smith, Griffith, Keith, and more)
- **SSN & ID:** If you have all or part of the SSN or ID you can type what you have in here and it will automatically search for employees who have those numbers in the SSN or the ID field respectively.
- **All Records:** Toggle option that allows you to choose whether you want to see All Records, Only Unassigned, or Only Assigned. Remember that assigned means they have an assignment that has already started and has not ended yet.
- **Active:** Toggle option that allows you to choose whether you want to see Active, Inactive, or All Employees when searching. Usually you want to focus on Active employees but if you are looking to add a note or reactivate an old employee's record or can't find someone try changing this toggle.
- **RepName:** This is the name of the service representative who is set as the Staffing Specialist on an employee's record. Select from the drop down or start typing to find the correct rep
- **Branch:** If you are at a hierarchy level where you can see multiple branches you can narrow your results down to employee records associated with a specific branch.
- **Document Text:** Allows you to search for key words in any electronic text document

that is saved on the employee's file.

- **Clear Criteria:** Your system will save the last criteria you used until you either log out or hit this clear criteria button. If you are running a new search, please remember to clear criteria first!

Enhanced Employee Searching

Looking for potential candidates? Auditing your records? Use the enhanced search options to pull up more specific groups of employee records. Almost every field on the employee record is searchable so if your recruiters are entering the information, then you can use the enhanced search options to pull out lists of the employees.

Click on the Enhance Search button underneath the basic search options to open more options:

The screenshot shows a search interface with the following elements:

- Basic search fields: Last Name (with a dropdown menu), First Name, SSN, ID, Unassigned (toggle), Active (toggle), RepName (dropdown), Branch (dropdown), and Document Text (text input).
- Buttons: Search (magnifying glass icon) and Clear Criteria.
- Enhanced Search section: A list of search categories on the left, including Universal Search, Location, Profile, Personal, Status, Assignments, Order Candidate, Document, Direct Hire, and Job History. A magnifying glass icon is next to Personal and Status.
- Saved Searches section: A header for saved search criteria.

Fields are set in different categories. The magnifying glasses are showing where you may already have set some different search criteria. Depending on your security role options and your system, you may have different options. This article will walk through a couple of examples:

Recruiting Search Examples

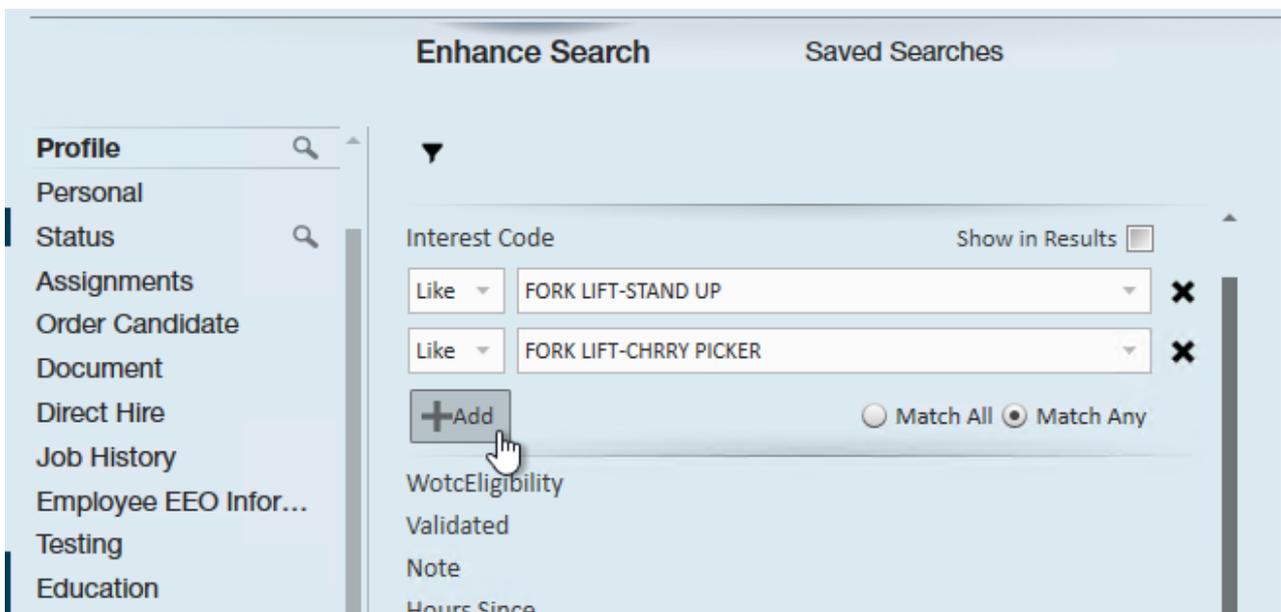
Start with the basic Unassigned and Active toggles if you are looking for potential candidates:



Search By Interest Code

If you are utilizing the [Interest Code](#) section on the employee record you can search for all employees that have a specific skill, certification, interest, etc.

1. Navigate to Profile and select interest code
2. Select from the drop down or start typing an interest code
3. Select the + Add option to add more interest codes & choose to search for employees who have all or any of the interest codes you are searching for



Search By Location

Employees who are closer to a worksite are probably more likely to say yes and make it there with fewer complaints about the commute. Use the location options to find employees in a certain area.

1. Select Location category on the left
2. Choose Zip Code & enter a zip code you are looking for

Zip Code Show in Results

Like ✕

+ Add

- You can also select the Show in Results checkbox to see a column that shows which zip code the employee is in

3. Select Distance in Miles and enter the number of miles that an employee can be (ex. 10 miles)

Distance in Miles

✕

4. Hit Search

Results will be posted with all the criteria you have entered:

ID	Last Name	First Name	Branch	Zip Code
429508...	A1 Temp Service	561	Minneapolis	55121
429508...	Aardson	Steve	Eagan	55121
5583	Acme	Sam	Memphis NE	55121
429501...	Adam	Froehlich	New Brighton	55121
429504...	Adams	Benny	Minneapolis	55121
429508...	Adams	Dianna	St.Paul	55107
429508...	Adams	Grace	New Brighton	55123

Don't forget to clear your criteria between searching!

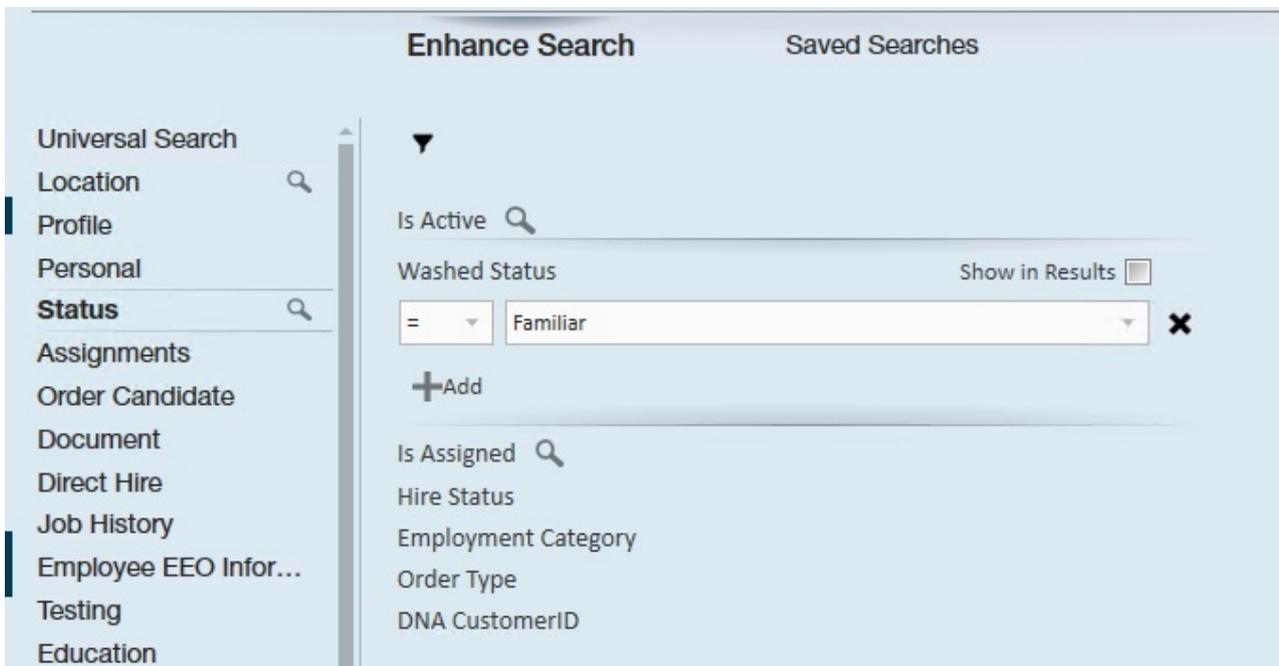
Search by Washed Status

Washed status indicates whether an employee has been through all their orientation information and are ready for work. To learn more about the washed status, check out [Enterprise - Utilizing the Washed Status](#).

Searching for all familiar employees can make it easier to find an employee who you can send out to work today:

1. Navigate to the status category

2. Select Washed status
3. Select the washed status you want to search by
4. Click search

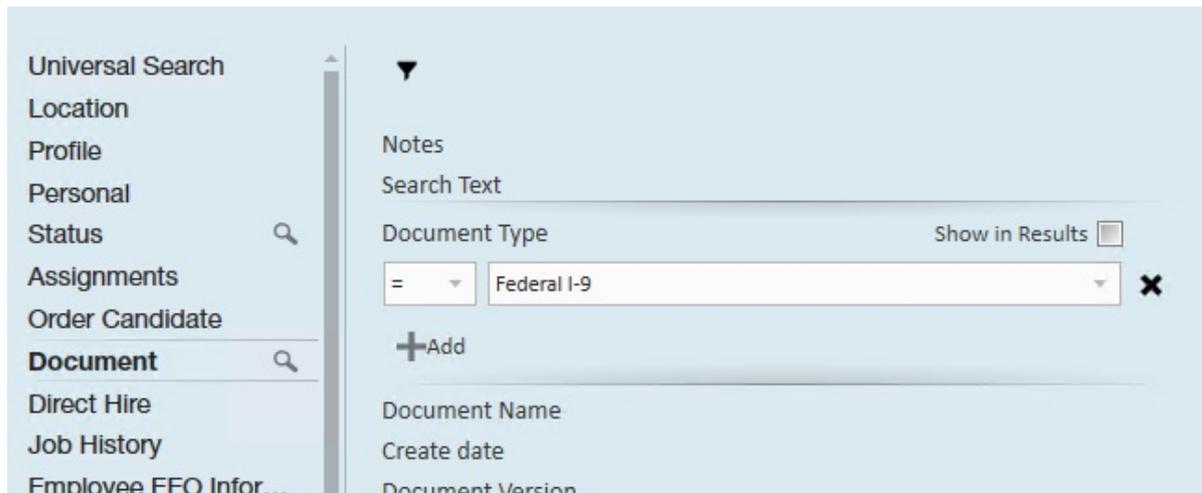


Auditing Search Examples

Search for Expiring Documents

To help keep you in compliance, you can search for documents that have expired or are expiring soon:

1. Navigate to Enhanced Search
2. Select the Document category on the left
3. Optionally, select the document type you are looking for (ex. I-9, W-4, etc.)

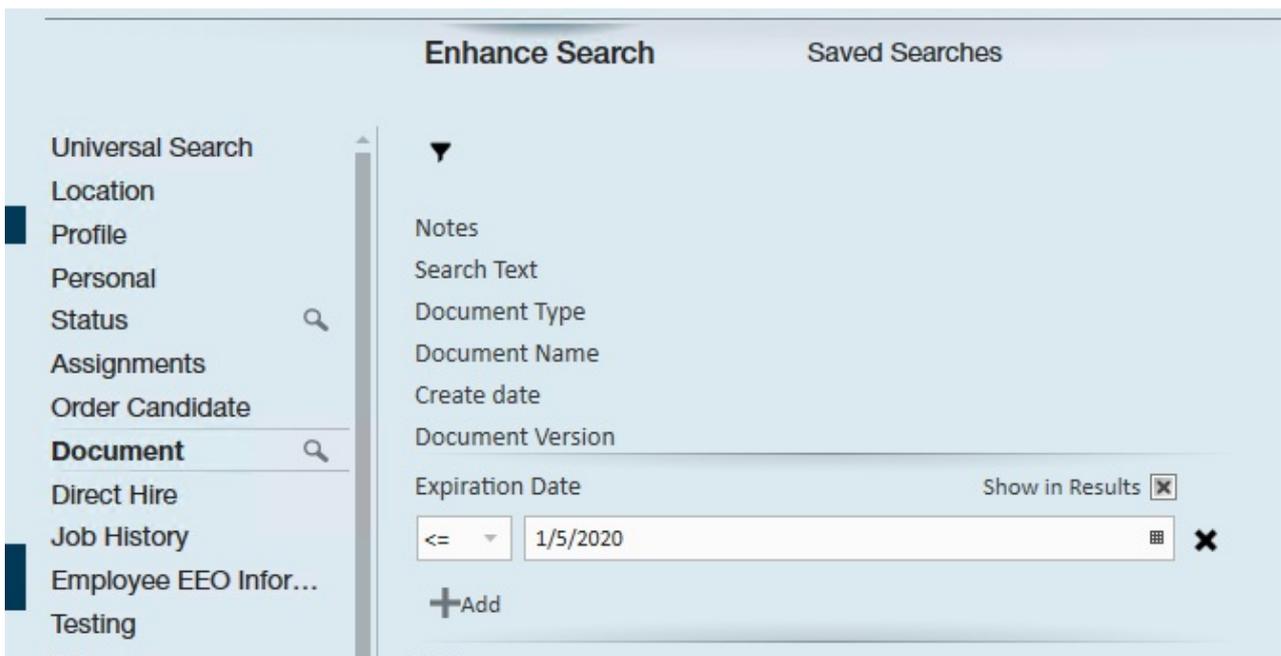


4. Select Expiration Date

Important to keep in mind:

Symbol	Meaning
>	Greater Than (after the date entered)
<	Less Than (before the date entered)
=	Equal To (the date entered - can be used with > or < to include a date)

If today is January 1st and I want to see all employees with a document that has already expired or expire by January 5th then I want to enter it like this:



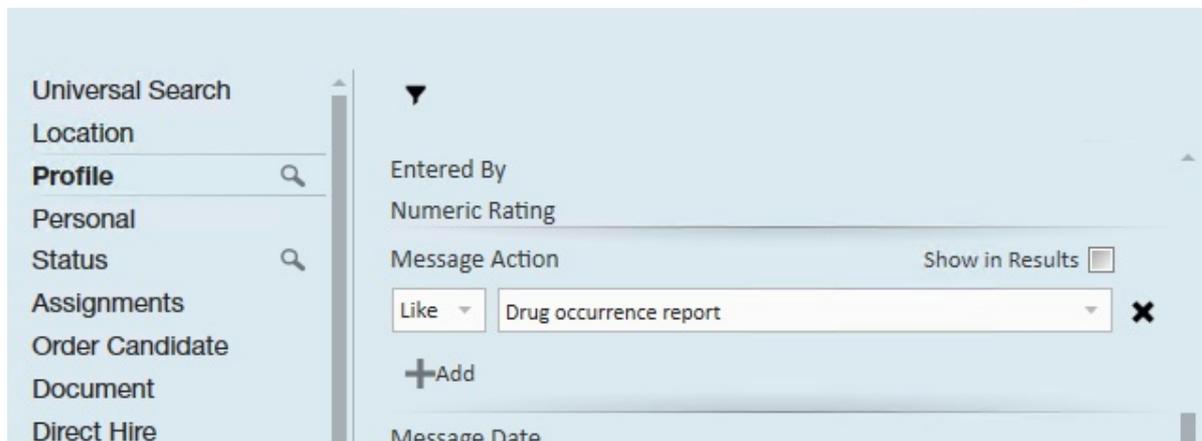
This will make sure any that may have slipped through the last search are caught now.

Check show in results to see the expiration date in the search results.

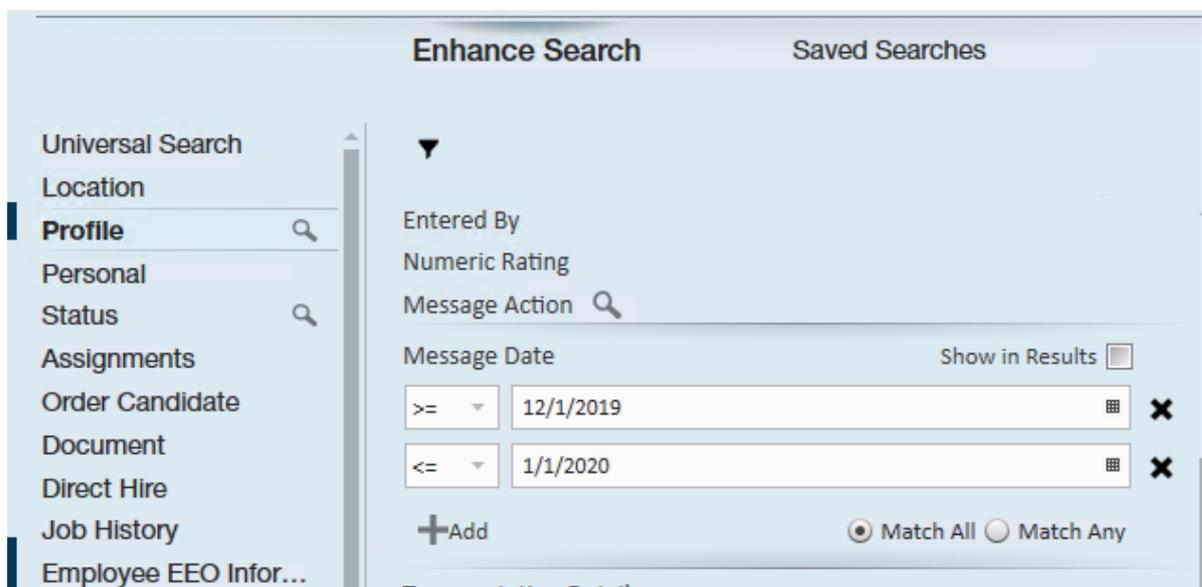
Searching by Messages Logged

This is a great search option to use if your team is using messages to track different kinds of interactions. For example, who has been late, filed a complaint, made an unemployment claim, etc. You can create your own message action codes to fit your business needs. See [Tips for Message Logging](#).

1. Navigate to Enhanced Search
2. Select Profile
3. Choose Message Action: what message action code was used to log the message type you are looking for (Ex. Late, Unemployment, etc.)



4. Choose the Message Date: What date or date range are you looking for (this case we are looking at a date range of the month of December)

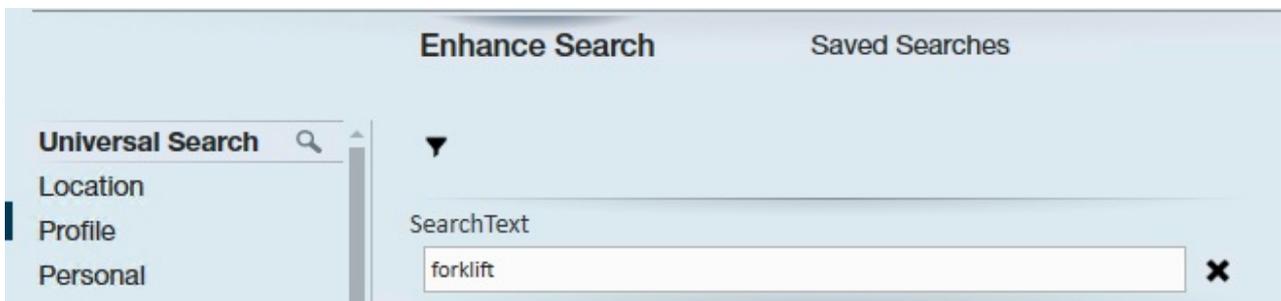


5. Click Search

Using Universal Search

The universal search allows you to enter a key word to find anywhere on an employee record. For example, you are looking for someone that has some sort of forklift interest/experience, etc. or you just can't find the field you are looking to search for you can use the universal search text.

This can be helpful if you aren't sure what you are looking for but keep in mind this is all encompassing so searching for 'Forklift' could include results of employees who have written on their record ' no forklift experience'



Looking for more searching tips and tricks? Check out [Searching](#).

Related Articles