

Searching

Last Modified on 12/07/2018 10:08 am CST

[Enhanced Searching from TempWorks Software on Vimeo .](#)

[How to Better Utilize Messages, Reports, and Searches as Tools from TempWorks Training on Vimeo .](#)

For best viewing quality, expand the *HD* option, and select 1080p:

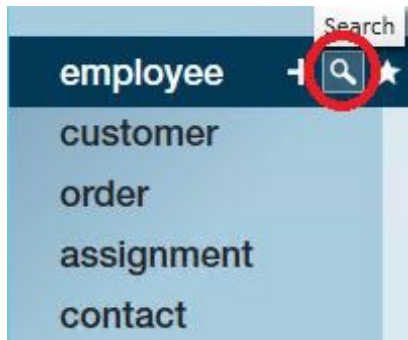


An Enterprise search can be very simple - like searching by an employee name, or complex - like searching for all unassigned employees that live within 10 miles of a job and are certified forklift operators. In addition to locating records, searching can also be used for:

- Email lists
- Reporting
- Auditing
- Creating call sheets

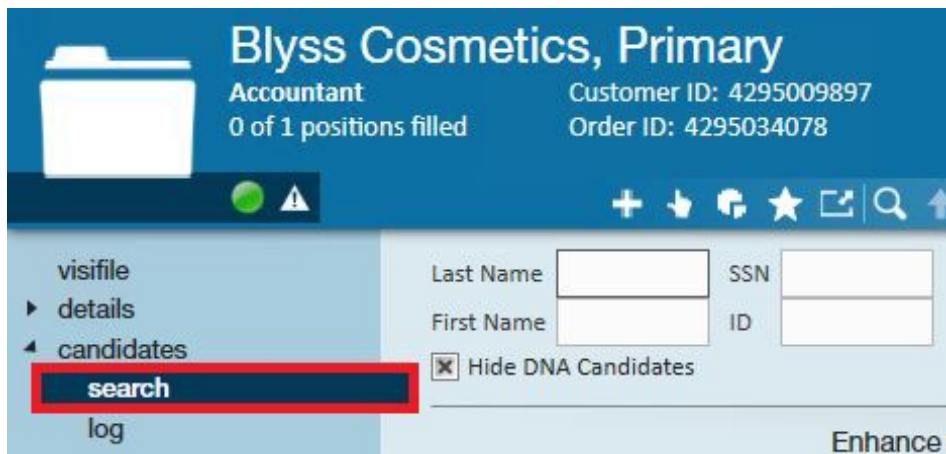
Part 1: What can be searched?

Any of the core records in Enterprise (employees, customers, orders, assignments, and contacts) can be searched in depth. Selecting the corresponding magnifying glass will take you to the search dashboard for that record type.



Searches may also be conducted for finding candidates for an order:

Note Users may also search for candidates when working within an order record. The added benefit to searching from the order is that users can attach employees to the order as candidates or assign them from the search results page.



There are other sub-areas of Enterprise where searching can be conducted such as within the check register and invoice register:

Check register:

payroll and invoicing
time entry

- check register
 - check summary
 - staged check summary
 - incomplete transactions
- invoice register
- other

employee

customer

order

assignment

contact

pay / bill

calendar

reports

all options ▶

Checks Detailed View

Drag a column header here to group by that column.

ID	Num	Check...	Status	Employee	Gross	Adj	Tax	Net
		Steskjal, Alisa			Gross: \$0.00	Adj: (\$46.52)	Tax: \$0.00	Net: (\$46.52)
	9016	Steskjal, Alisa	Dated 12/7/2015	AP Bank Account (E-Pay)	Gross: \$0.00	Adj: (\$46.52)	Tax: \$0.00	Net: \$46.52
	-11679	Aschbacher, Dayle	Dated 12/3/2015	AP Bank Account	Gross: \$0.00	Adj: \$332.32	Tax: \$0.00	Net: (\$332.32)
		Aschbacher, Dayle	Dated 12/3/2015	AP Bank Account	Gross: \$0.00	Adj: (\$327.32)	Tax: \$0.00	Net: \$327.32
	-9014	Berston, Norman	Dated 11/18/2015	AP Bank Account	Gross: \$0.00	Adj: \$301.12	Tax: \$0.00	Net: (\$301.12)
		Berston, Norman	Dated 11/18/2015	AP Bank Account	Gross: \$0.00	Adj: (\$301.12)	Tax: \$0.00	Net: \$301.12
	-9013	Auclair, Neva	Dated 10/30/2015	AP Bank Account	Gross: (\$429.00)	Adj: (\$342.40)	Tax: (\$586.60)	Net: \$0.00

search for checks

Posted Staged

Accounts AP Bank Account

Check Dates

From 8/29/2015

To 12/8/2015

Employee ID

Employee

Check Date

Payroll Run ID

Check #

Check ID

Gross

Net

Employer

Show all checks

Search

Invoice register:

payroll and invoicing
time entry

- check register
- incomplete transactions
- invoice register**
 - invoice detail
- other

employee

customer

order

assignment

contact

pay / bill

Invoices Detailed View

Drag a column header here to group by that column.

Ov...	Posted	Inv Num	Date	Customer	Departm...	Branch	Amo...	P...
		123	Entity Invoice Date 9/9/2015 Amount \$250.00	Farnsworth's Delivery Service, Primary				
			Last Paid Paid \$0.00					
			Invoice Due 9/29/2015 Balance \$250.00					
		44326-1-1	Entity Invoice Date 11/19/2015 Amount (\$49,470.00)	Blyss Cosmetics, Primary				
			Last Paid Paid (\$49,470.00)					
			Invoice Due 11/19/2015 Balance \$381,780.00					
		44326-1-1-1	Entity Invoice Date 11/19/2015 Amount \$381,780.00	Blyss Cosmetics, Primary				
			Last Paid Paid \$381,780.00					
			Invoice Due 11/19/2015 Balance \$0.00					
		44800-1	Entity Invoice Date 12/7/2015 Amount (\$59.40)	Blyss Cosmetics, Primary				
			Last Paid Paid (\$59.40)					
			Invoice Due 12/7/2015 Balance \$0.00					
		45855-1	Entity Invoice Date 9/8/2015 Amount (\$130.00)	Crom Equipment, Primary				
			Last Paid Paid (\$130.00)					
			Invoice Due 9/8/2015 Balance \$0.00					

search

Invoice Dates

From 9/8/2015

To 12/8/2015

Customer

Due Date

Inv Number

Inv ID

Inv Amount

Balance

Show pending invoices

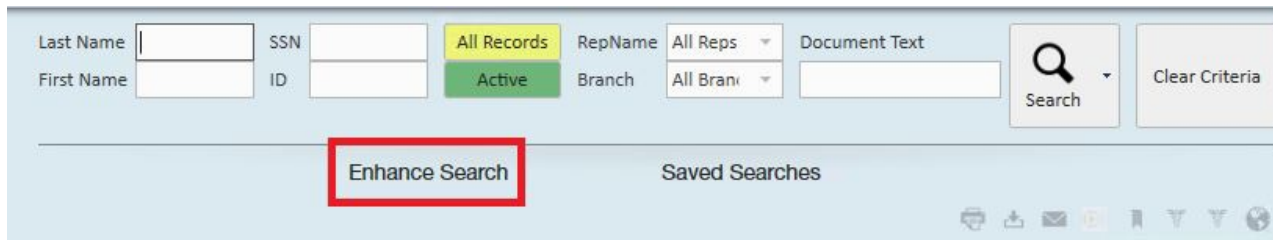
Show only Overdue invoices

Exclude \$0 Balance invoices

Search

Part 2: Setting up Enhanced Searches:

To begin a search click on enhance search in any of the main areas:



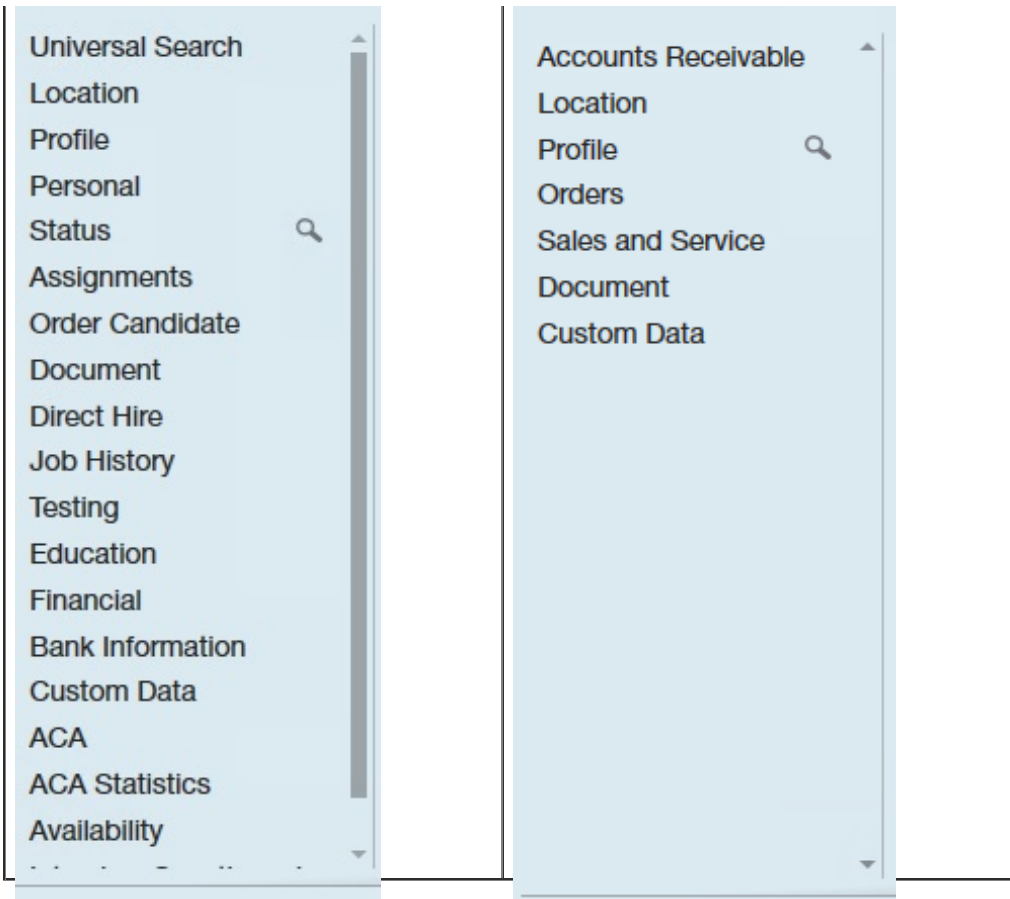
This will open the search area and list the categories by which you can search:



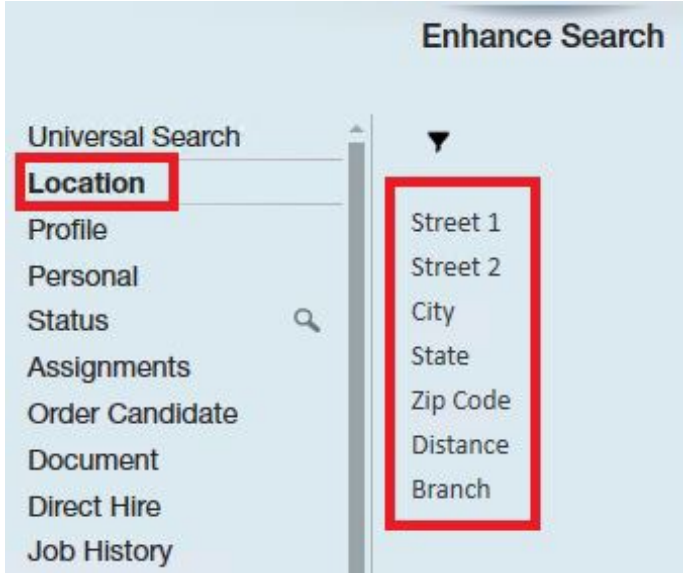
Note Before running a search always click Clear Criteria. Otherwise, Enterprise remembers the last criteria by which you've searched and will assume you still want that criteria.

Note The categories will change to correspond with the area of Enterprise where you are working. For example, the below compares employee categories against customer categories:

Employee Search Categories:	Customer Search Categories:




By clicking on any category, the individual fields within that category will be displayed to the right:



Click on any individual field name to run a search on the data within that field:



Add:

More than one criteria within any field can be searched at the same time by clicking the add button: 

For instance, if you wanted to find everyone who lives in zip code 55121 and 14850.

Match all/Match any:

When searching multiple criteria in the same field, for instance, everyone who has the interest codes of 2nd shift & forklift, you can select to match all or match any:



Match all will find all records that contain all criteria being searched (and). Match any will return records where any of the criteria has been matched (or).

Note As much criteria can be added to the different categories as needed to find the appropriate records.

In our example, the search is looking for:

- All employees
- Who are not on assignment (1.)
- Who are active (2.)
- Have a branch of Memphis SE (3.)
- Can drive a forklift and can work the 2nd shift (4.)

Last Name SSN **1.** Unassigned RepName All Reps Document Text
 First Name ID **2.** Active Branch Memphis SE **3.**

Enhance Search Saved Searches

Universal Search
 Location
 Profile
 Personal
 Status
 Assignments
 Order Candidate

Interest Code Show in Results
 Like Forklift
 Like 2nd Shift
 4. Match All Match Any

Once you are done establishing criteria, select the search button or simply hit enter on the keyboard, this will bring you to the results page.

Results page example:

Note The results page is covered in more depth later in this document.

Enhance Search Saved Searches

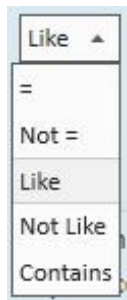
Your search returned 261 results.

Drag a column header here to group by that column.

ID	Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...
5412	Abbott	sam	Memphis CA	(651) 845-4845	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	55121	<input checked="" type="checkbox"/>
429497...	Abinteh	Mary	Memphis SE	(321) 456-8080	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	55121	<input checked="" type="checkbox"/>
5022	Abron	Jill	Memphis NE	(651) 232-82...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input checked="" type="checkbox"/>
429497...	Accrue	Jackie	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTc	55121	<input type="checkbox"/>
429497...	Accrue	James	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	DNA	55121	<input type="checkbox"/>
5583	Acme	Sam	Memphis NE	(651) 469-4469	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	55121	<input type="checkbox"/>
5023	Acosta	Davis	Memphis SE	(651) 233-82...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input checked="" type="checkbox"/>
429501...	Adam	Froehlich	Memphis SW	(651) 555-4782	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email	55121	<input checked="" type="checkbox"/>
429501...	Alda	Alan	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input type="checkbox"/>

Searching by Date Range:

With a little bit of practice, you'll be an expert at running searches with date ranges in no time. Before running a date range search, an important concept to introduce is comparatives. Comparatives: At the beginning of some criteria input fields there are comparative boxes which can be used to match to the data housed within the record's field:



Comparative	Definition
=	Is an exact match
Not =	Does NOT match
Like	Starts with
Not Like	Does NOT start with
Contains	Somewhere within the field the characters exist



Comparative	Definition
<	Less than
<=	Less than or equal to
=	Equal to
>	Greater than
>=	Greater than or equal to
Not =	Does NOT match

For example:

Searching every employee record that was activated on a certain date:

Activation Date Show in Results

= 11/16/2015

Searching every employee record that was added on or after a certain date:

Activation Date Show in Results

>= 11/16/2015

What if you want to find everyone who registered in the month of November? You'll want to search based on a date range: November 1 through November 30.

There is a little nuance to doing this:

Activation Date Show in Results

>= 11/1/2015

<= 11/30/2015

+ Add Match All Match Any

In this example, we are searching for everyone who registered on or after 11/1/2015, everyone who registered on or before 11/30/2015. By selecting match all, Enterprise will take into consideration both sets of criteria and "lock down" the date range

Note If left as match any, the result would return ALL employees who were entered on or after 11/1/2015 and ALL who were entered on or before 11/30/2015, meaning *all employees*.

Toggle Buttons:

Some comparatives are three way toggle buttons allowing the search to be based on an answer of Yes, No, or Both:

I9 On File I9 On File I9 On File

An example of using the 3 way toggle buttons would be if you want to find all employees who are assigned (1.) but do not have an I9 on file(2.):

Last Name SSN **1.** **Assigned** RepName All Reprs Document Text
 First Name ID **Active** Branch All Branches

Enhance Search Saved Searches

Universal Search

Location

Profile 🔍

Personal

Status 🔍

Assignments

Order Candidate

Document

Direct Hire

Job History

Testing

Education

Financial

▼

Job Title

Entered By

Message Date

Numeric Rating

Message Action

Message Text

Interviewed By

Activation Date

Anniversary Date

2. **I9 On File** Show in Results

No

✕

Hopefully, in this example we will have no results!

Part 3: Managing Search Results

Once a search has been run the results will be displayed in a grid:

Your search returned 300 results.

Drag a column header here to group by that column.

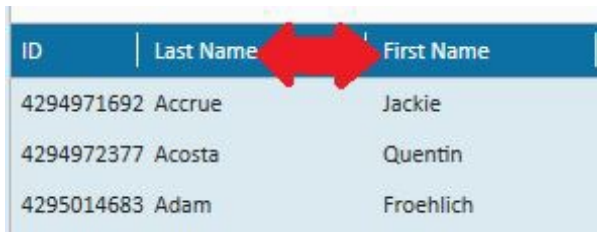
ID	Last Name	First Name	Branch	Phone	Is Active	Is Assigned	Last Message	Zip Code	HasResume	Cell Phone
16408	1099 Test 12	Jeff1	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate		<input type="checkbox"/>	
4294971692	Accrue	Jackie	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTc	55121	<input type="checkbox"/>	
4294972377	Acosta	Quentin	Memphis SE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	55082	<input type="checkbox"/>	
4295014683	Adam	Froehlich	Memphis SW	(651) 555-4782	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email	55121	<input checked="" type="checkbox"/>	
4295015097	Adams	Dianna	Memphis CA	(763) 222-4339	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email	55107	<input checked="" type="checkbox"/>	(485) 488-5555
4295016336	Almonds	Franceen	Memphis SE	(651) 845-9991	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	55109	<input checked="" type="checkbox"/>	
4294971762	Altstatt	Megan	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	55306	<input type="checkbox"/>	
4295014363	Amons	Tori	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	35465	<input type="checkbox"/>	
4295014388	Anderson	Billy	Memphis SE	(856) 936-8532	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	56001	<input checked="" type="checkbox"/>	
4294973055	Anderson	Erik	Memphis SE	(123) 456-1234	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	55121	<input type="checkbox"/>	
4294973157	Anderson	Erik	Memphis SE	(123) 456-7890	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	55121	<input type="checkbox"/>	(123) 456-7890
4295015674	Anderson	Kesha	Memphis SE	(342) 342-3423	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ex.Perf Letter	55419	<input type="checkbox"/>	
4295003595	Anderson	Sam	Memphis SE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LMTc	56003	<input type="checkbox"/>	
4295003765	Andrews	David	Memphis SE	(651) 912-3115	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	55128	<input type="checkbox"/>	
4295015313	Andrews	Natalie	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	85017	<input type="checkbox"/>	
4295015393	Anniebee	Randv	Memphis SE	(651) 698-2088	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	55105	<input checked="" type="checkbox"/>	

This grid can be rearranged to suit: Sort by a column by clicking on the column header.

- Click once to sort ascending.
- Click again to sort descending.
- Click a third time to sort in the original order.

Note The grid will always display the line that is currently highlighted after selecting sorting options so scrolling to the top of the list may be necessary.

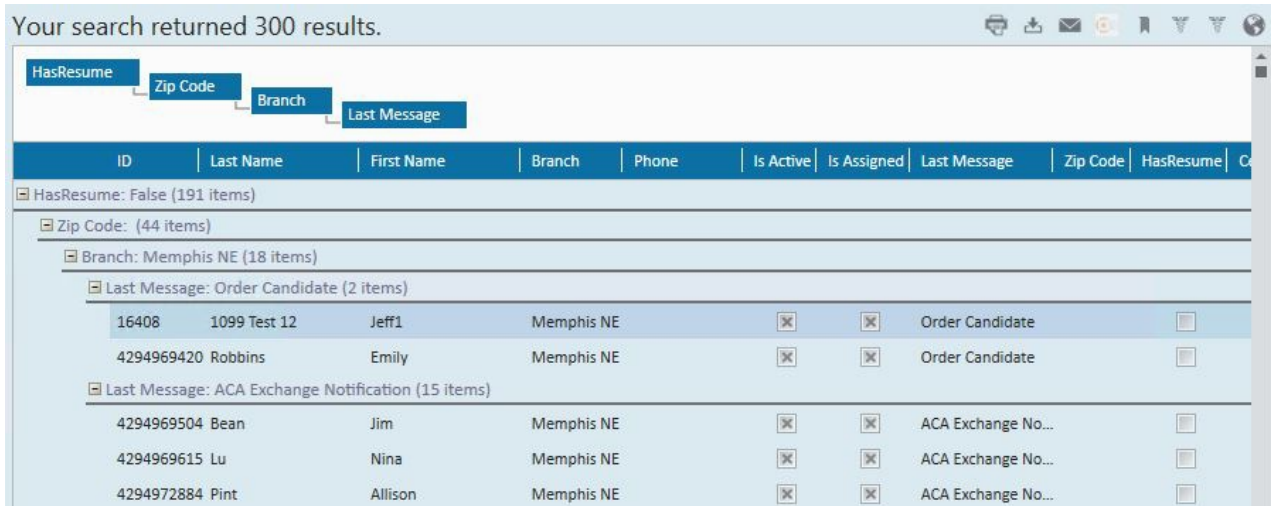
Rearrange Columns:



ID	Last Name	First Name
4294971692	Accrue	Jackie
4294972377	Acosta	Quentin
4295014683	Adam	Froehlich

- Drag and drop a column header name to where in the grid it should be displayed.

Group by Columns:



Your search returned 300 results.

HasResume Zip Code Branch Last Message

ID	Last Name	First Name	Branch	Phone	Is Active	Is Assigned	Last Message	Zip Code	HasResume
HasResume: False (191 items)									
Zip Code: (44 items)									
Branch: Memphis NE (18 items)									
Last Message: Order Candidate (2 items)									
16408	1099 Test 12	Jeff1	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate		<input type="checkbox"/>
4294969420	Robbins	Emily	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate		<input type="checkbox"/>
Last Message: ACA Exchange Notification (15 items)									
4294969504	Bean	Jim	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACA Exchange No...		<input type="checkbox"/>
4294969615	Lu	Nina	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACA Exchange No...		<input type="checkbox"/>
4294972884	Pint	Allison	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACA Exchange No...		<input type="checkbox"/>

- Drag and drop a column header to the blank area above the column header bar. The grid can be grouped by multiple columns.

Note This is a good way to view subtotals of sets of records.

- To un-group, drag and drop the column headers back into the column header bar.

Printing and Exporting Search Results:



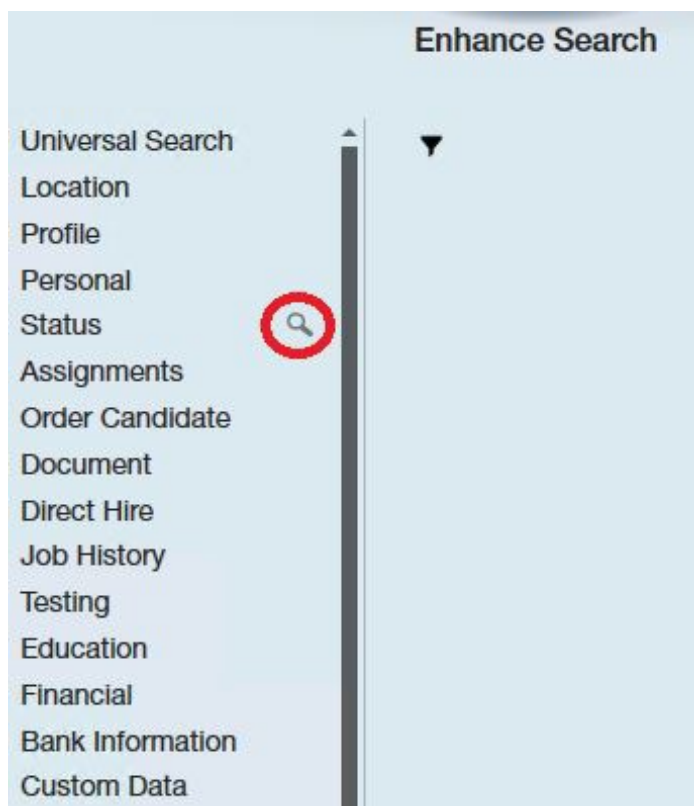
Print search results by clicking on the print icon (1.) in the upper right corner. This will open the print dialog box where a specific printer can be selected. When printing the orientation can be selected.

If there are a large number of columns, the landscape option may be best for printing. Export search results by clicking on the export icon (2.) in the upper right corner.

Part 4: Revising Searches

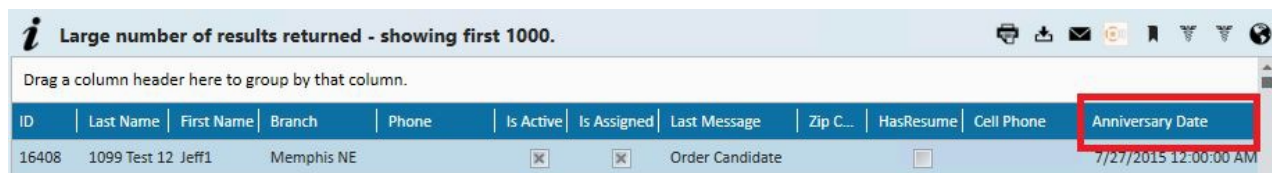
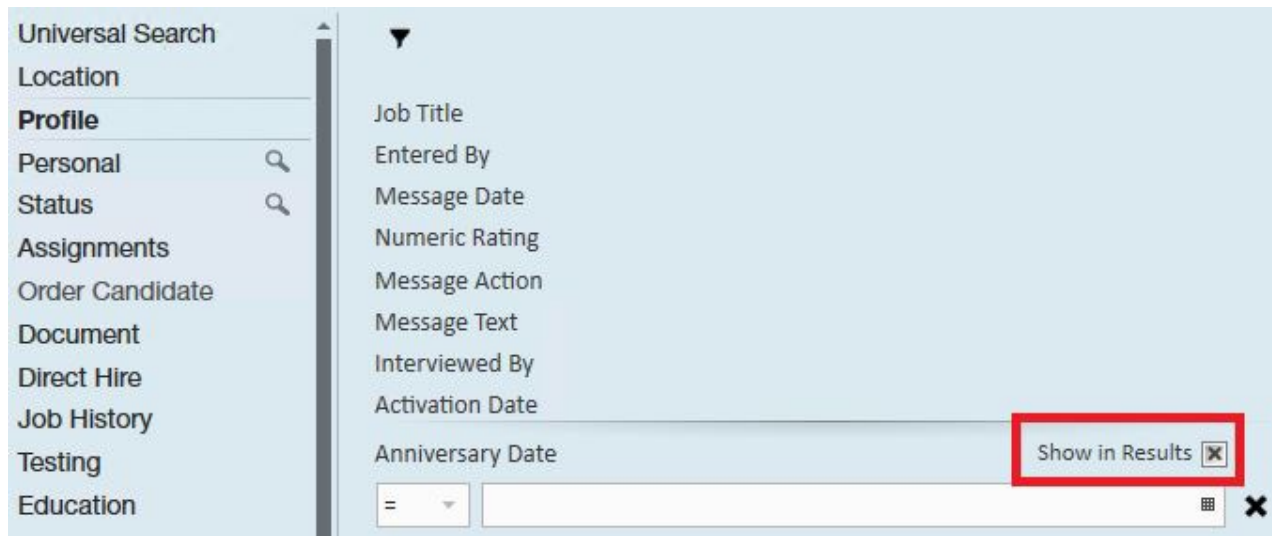
Displaying Additional Data:

Before adding additional search criteria, note that there will be a magnifying glass next to the categories and fields where criteria has already been added:



To display additional data in the search results locate the category and field that should be displayed and click to place an "x" in the show in results box.

The additional fields that are displayed can, but do not have to, be criteria that has been searched for. In the image below, we are selecting to show the anniversary date in the results page, but are not actually entering criteria to search by.



Note Multiple fields can be selected to be displayed in the search results.

Part 5: Saved Searches

If a search will be run over and over again, instead of building the criteria over and over, a search can be saved. Saving searches can save a ton of time with not having to rebuild previously built searches.

Build a search:

In this example, the user would like to send welcome letters to everyone who registered in the month of November 2015.

Therefore, the search is looking for:

- All employees
- All statuses
- All branches for which the user has access:

Last Name	<input type="text"/>	SSN	<input type="text"/>	All Records	RepName	All Reps
First Name	<input type="text"/>	ID	<input type="text"/>	All Statuses	Branch	All Branches

- Who were entered into the database during the month of 11/2015 and the user wants to know what the activation date is:

Activation Date Show in Results

>= 11/1/2015

<= 11/30/2015

Match All Match Any

Note When searching for records within a date range, always use "match all".

Note Show in results has been selected because in this instance the activation is desired. Once the search has been built, click the save button:



A save search box will prompt for:

? X

save search

Name

Description

Share search?

Select any columns you wish to prompt for each time this search is run.

Activation Date (Prompt)

Activation Date (Prompt)

0
 Save

- Search name
- Search description
- Share the search with others, if desired
- Click to select the criteria which should be entered every time the search is run

A save search box will prompt for:

- Search Name
- Search Description
- Share the search with others, if desired.
- Click to select the criteria which should be entered every time the search is run.

Note In this example, next year we will want to register in 2016.

Running a Saved Search:

Once a search has been saved, to run a saved search go to the search area and click:

All saved searches will be displayed. Click to highlight the desired saved search (1.) to run. If any fields have been set to be prompted for, they will be displayed.

Key in the criteria needed (2.) then click run (3.):

The screenshot shows a search interface with two main sections: "Enhance Search" on the left and "Saved Searches" on the right. In the "Enhance Search" section, there is a text input field labeled "Enter search name..." with a red "1." next to it. Below this, a search entry titled "New Employees" is highlighted with a red box; its description reads "Finds all employees who registered within a specific date range. Used for welcome letters." Other search entries listed include "Phone Number Lookup", "Resume Sales Management Search", "Sales Assistants", and "Sams Search". In the "Saved Searches" section, two date filters are shown: "Activation Date" with a dropdown set to "<=" and a date field containing "12/31/2015", and another "Activation Date" filter with a dropdown set to ">=" and a date field containing "12/1/2015". A red "2." is placed above these filters. At the bottom of the "Saved Searches" section, a "Run" button with a magnifying glass icon is highlighted with a red box and a red "3." next to it. Other buttons visible are "Save As", "Delete", "Unshare", and "Revise".

Related Articles
