

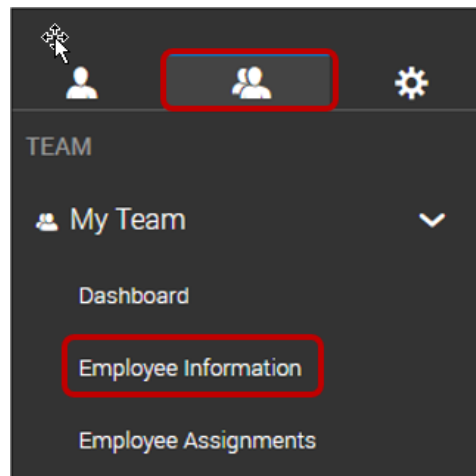
Adding the “Reports To” Column to the Employee Information View

When accessing the Employee Information view, you might see employees who are not direct reports to you. By adding the “Reports To” column to this view, you can then filter on your name, save the report, and access it for future use.

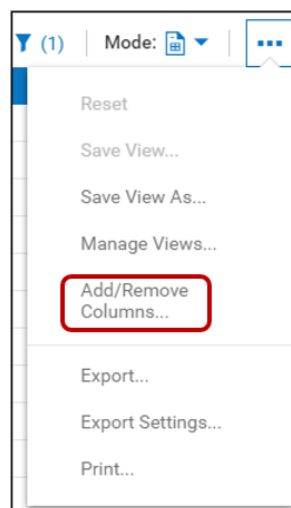
1. Click the **Main Menu** icon located in the upper left corner



2. Click the **Team** tab and expand the **My Team** section
3. Click the **Employee Information** link

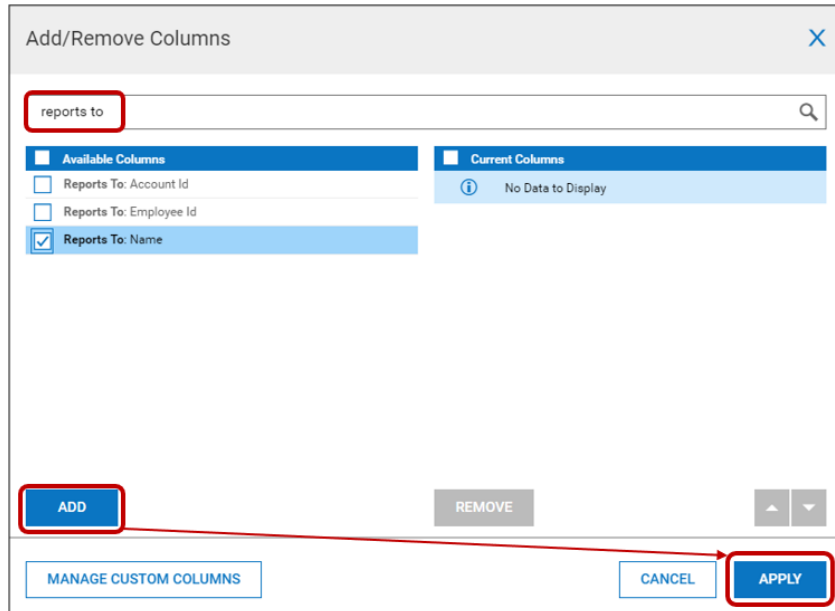


4. Click the **Actions** icon, and then click **Add/Remove Columns . . .**

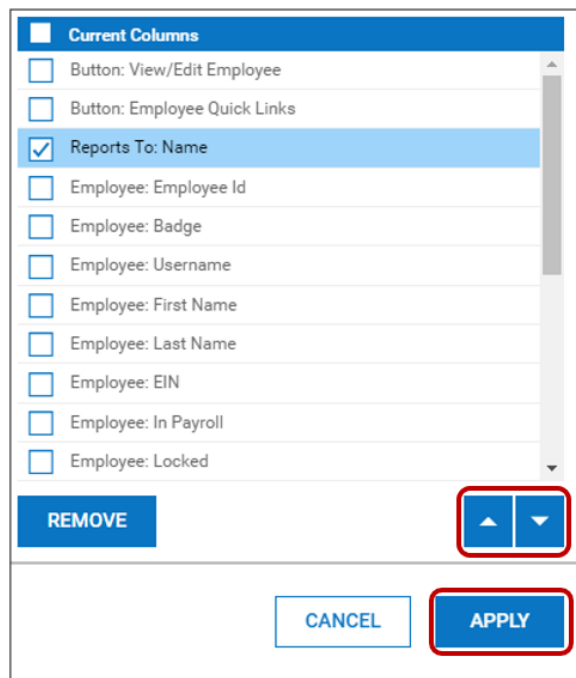




5. In the Search field, type “**reports to**”
 - a. All available columns that start with “reports to” display
6. Click the checkbox next to the Reports To: Name field, and then click **ADD**
7. Click **APPLY**



8. Use the up or down arrows to reposition the column within the report, and then click **APPLY**



- a. The Reports To Name column displays in the position you chose, and shows the names of all managers to whom employees report

← Employee Information

Employee Information Saved: [System] ▾

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| <input type="checkbox"/> | | Reports To Name | Employee Id |
|--------------------------|--|---|-------------|
| <input type="checkbox"/> | | Jonathon A. Ross (Centria Healthcare LLC) | 1014144 |
| <input type="checkbox"/> | | Benjamin E. Jennings (Centria Healthcare LLC) | 1014145 |
| <input type="checkbox"/> | | Gina M. Davis (Centria Healthcare LLC) | 1014146 |
| <input type="checkbox"/> | | Benjamin E. Jennings (Centria Healthcare LLC) | 1014147 |
| <input type="checkbox"/> | | Benjamin E. Jennings (Centria Healthcare LLC) | 1014148 |
| <input type="checkbox"/> | | Karolina A. Kasubowski (Centria Healthcare LLC) | 1014149 |
| <input type="checkbox"/> | | Benjamin E. Jennings (Centria Healthcare LLC) | 1014150 |
| <input type="checkbox"/> | | Benjamin E. Jennings (Centria Healthcare LLC) | 1014151 |
| <input type="checkbox"/> | | Benjamin E. Jennings (Centria Healthcare LLC) | 1014152 |
| <input type="checkbox"/> | | Benjamin E. Jennings (Centria Healthcare LLC) | 1014153 |

- 9. Click the **funnel tool** to filter the column to display your name



- 10. Click the **Column** tab
- 11. In the Reports To Name field, select **starts with** from the drop-down list, and type the first few letters of your first name in the text field
- 12. Click **APPLY**

Filters

Global **Column**

Clear Filters

Reports To Name

starts with | ben

Employee Id

=

Badge

=

Username

=

First Name

starts with

Last Name

starts with

Employee EIN

starts with

In Payroll

CANCEL APPLY

a. The report now shows only the employees who report directly to you

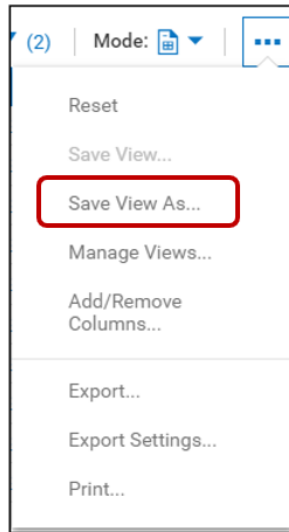
← Employee Information

Employee Information Saved: [System]

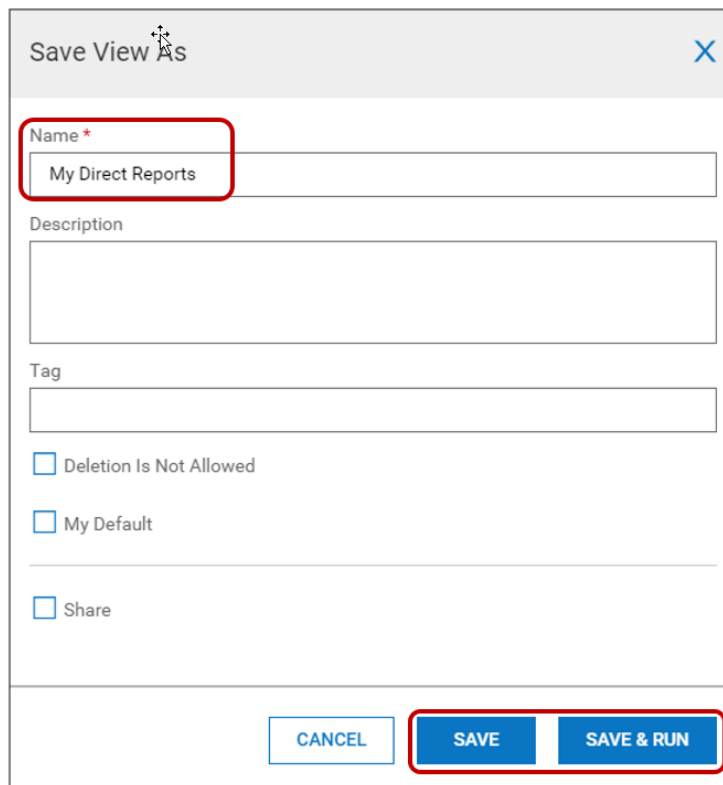
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| | Reports To Name | Employee Id |
|--------------------------|---|-------------|
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 99 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 98 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 1014471 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 1014506 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 1014520 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 1014521 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 1014522 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 1014523 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 1014524 |
| <input type="checkbox"/> | Benjamin E. Jennings (Centria Healthcare LLC) | 1014525 |

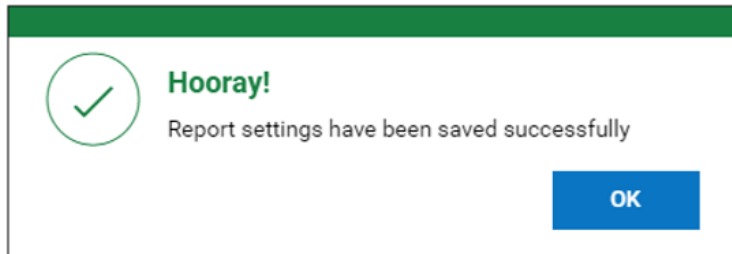
13. Click the **Actions** icon, and then click **Save View As . . .**



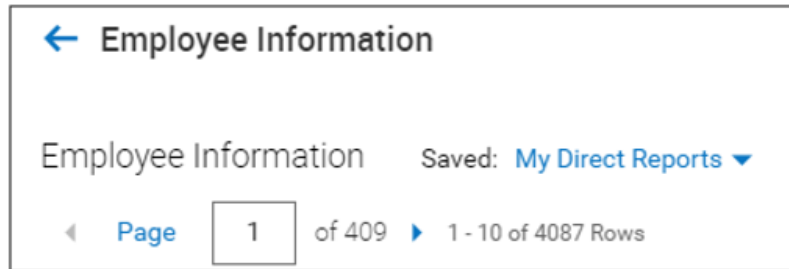
14. Enter a report name, and then click **SAVE** or **SAVE & RUN**

A screenshot of a 'Save View As' dialog box. The title bar says 'Save View As' with a close button (X) on the right. The 'Name *' field is highlighted with a red box and contains the text 'My Direct Reports'. Below it is a 'Description' field, which is empty. Then there is a 'Tag' field, also empty. There are three checkboxes: 'Deletion Is Not Allowed', 'My Default', and 'Share', all of which are unchecked. At the bottom, there are three buttons: 'CANCEL', 'SAVE' (highlighted with a red box), and 'SAVE & RUN' (also highlighted with a red box).

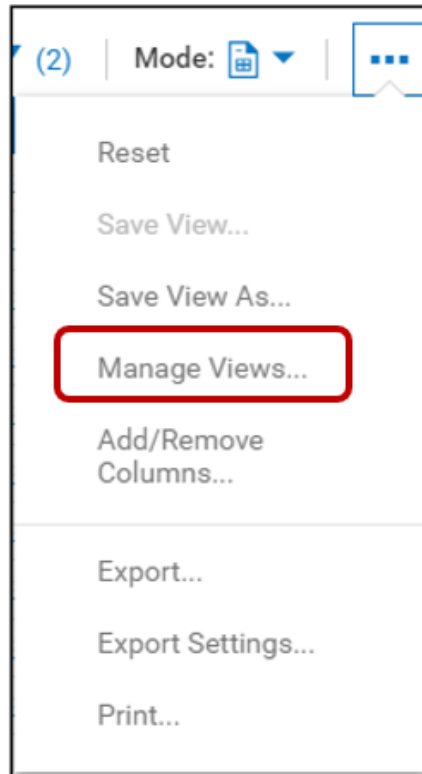
15. Click **OK** when the confirmation window displays



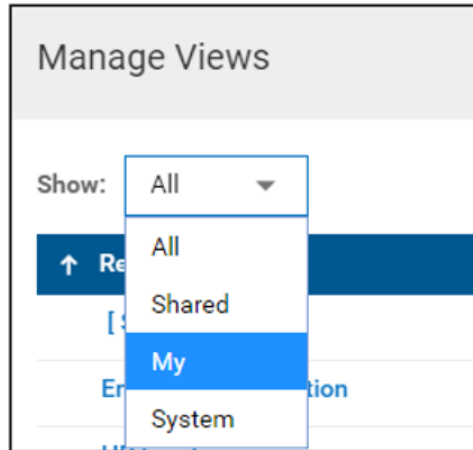
a. The report name displays, along with the number of employees that report directly to you



16. Click the **Actions** icon, and then click **Manage Views . . .**



17. Click the drop-down arrow in the Show: field and select **My**



a. The reports that you saved display

The image shows the 'Manage Views' dialog box with the 'Show:' dropdown set to 'My'. Below the dropdown is a table with the following data:

| Report View | Description | Owner | Date Created | Default | Actions |
|---------------------|-------------|-------|-------------------|-----------------------|---------|
| ↑ HR Test Employees | | My | November 16, 2018 | <input type="radio"/> | ... |
| My Direct Reports | | My | December 12, 2018 | <input type="radio"/> | ... |

18. Click the **Actions** icon to run, edit, or delete a report you created

