

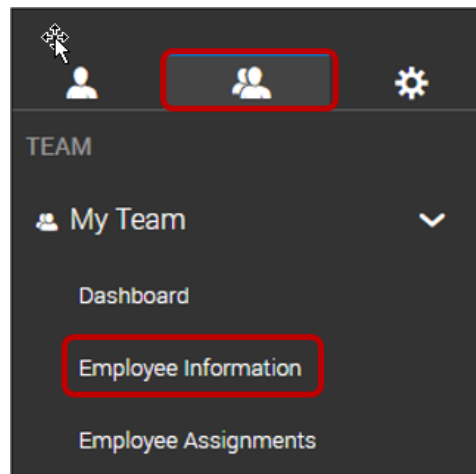
## Adding the “Reports To” Column to the Employee Information View

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.

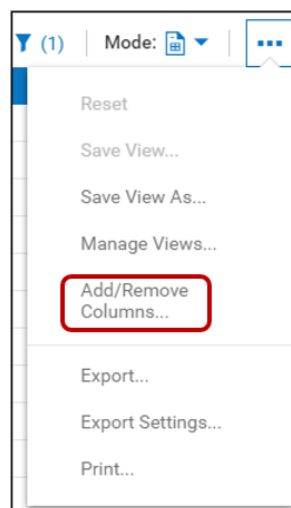
1. Click the **Main Menu** icon located in the upper left corner



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

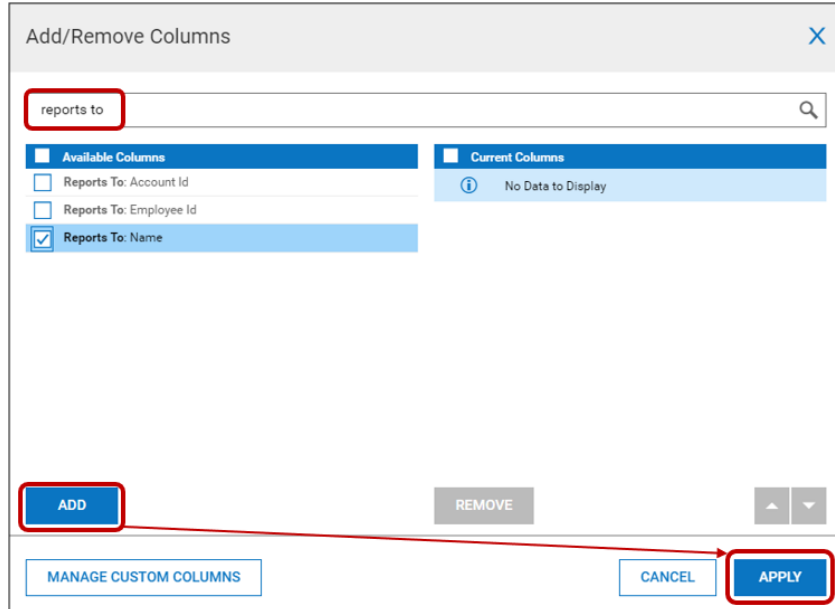


4. Click the **Actions** icon, and then click **Add/Remove Columns . . .**

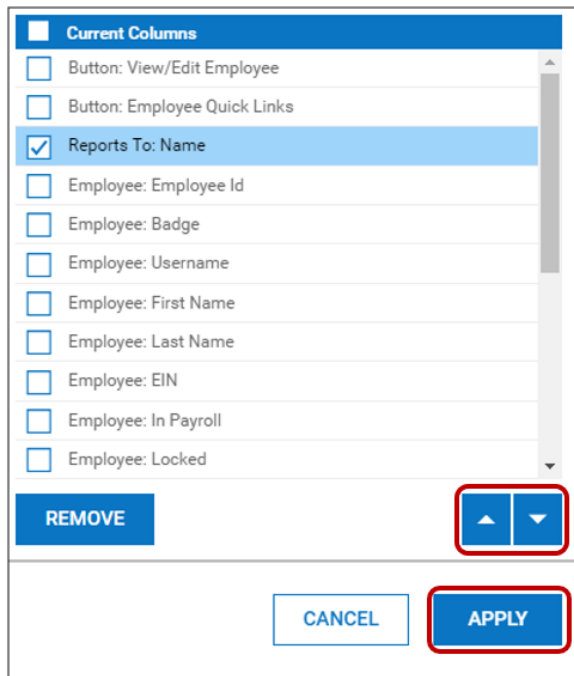




5. In the Search field, type “**reports to**”
  - a. All available columns that start with “reports to” display
6. Click the checkbox next to the Reports To: Name field, and then click **ADD**
7. Click **APPLY**



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] ▾

Page 1 of 483 1 - 10 of 4828 Rows

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

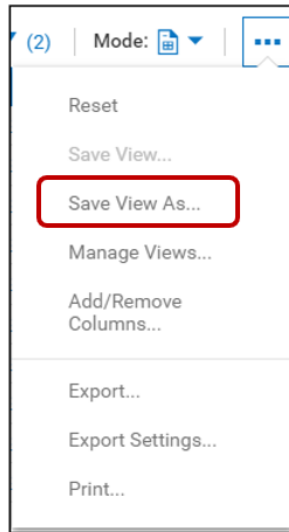
← Employee Information

Employee Information Saved: [System]

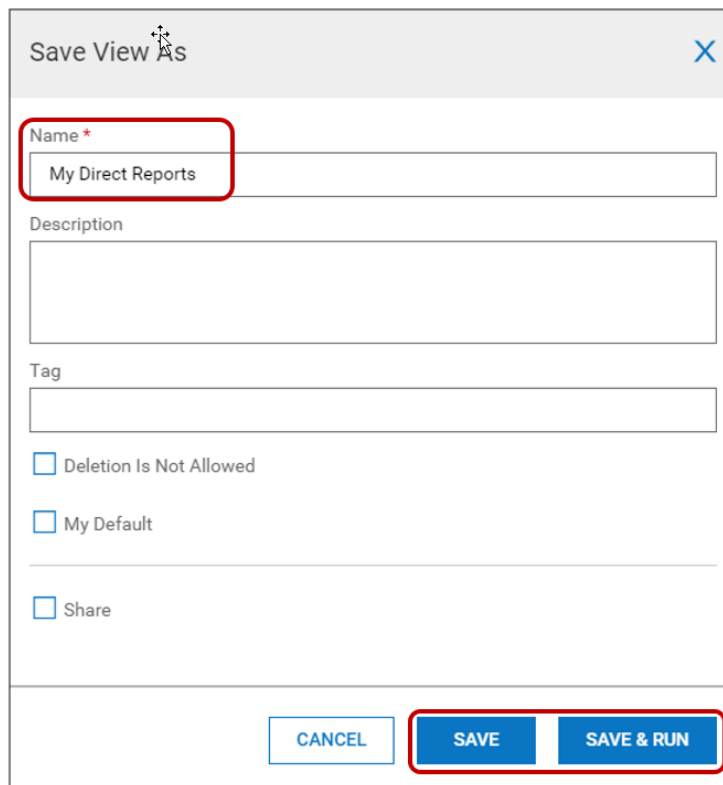
Page 1 of 409 1 - 10 of 4087 Rows

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

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



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

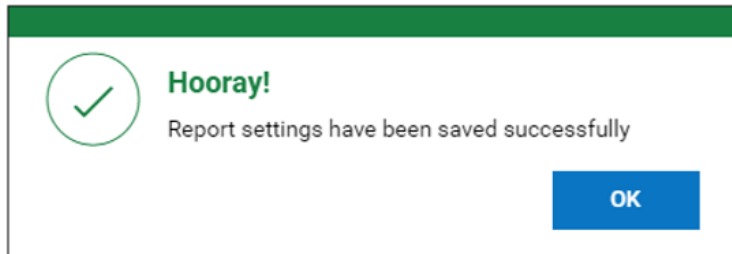


A screenshot of a 'Save View As' dialog box. The title bar says 'Save View As' with a close button (X). The form contains the following fields and options:

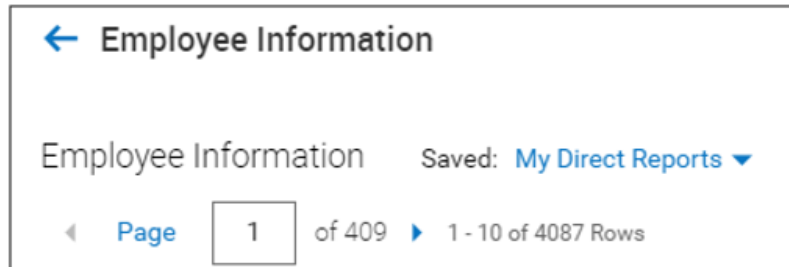
- Name \***: A text input field containing 'My Direct Reports' (highlighted with a red box).
- Description**: An empty text area.
- Tag**: An empty text input field.
- Deletion Is Not Allowed
- My Default
- Share

At the bottom, there are three buttons: 'CANCEL', 'SAVE' (highlighted with a red box), and 'SAVE & RUN' (highlighted with a red box).

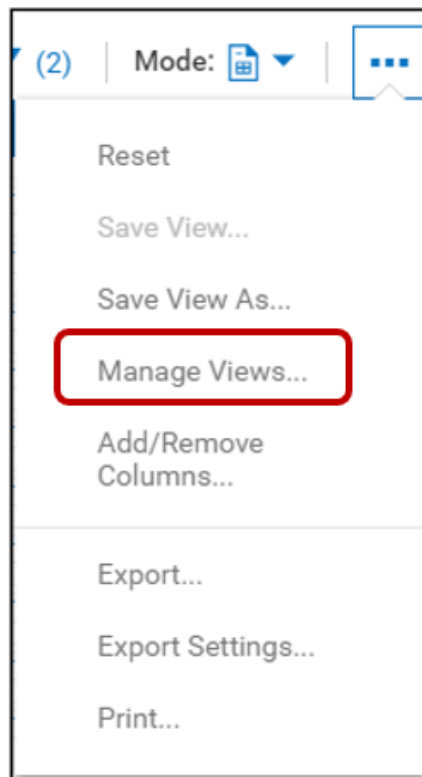
15. Click **OK** when the confirmation window displays



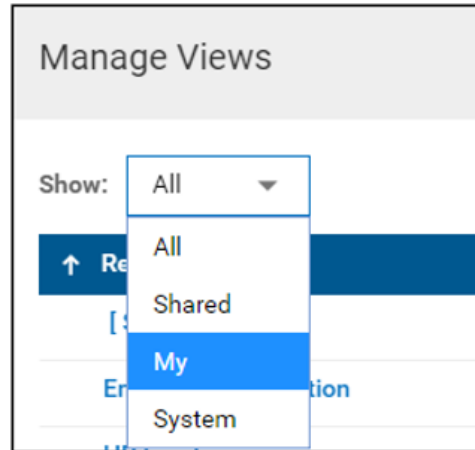
a. The report name displays, along with the number of employees that report directly to you



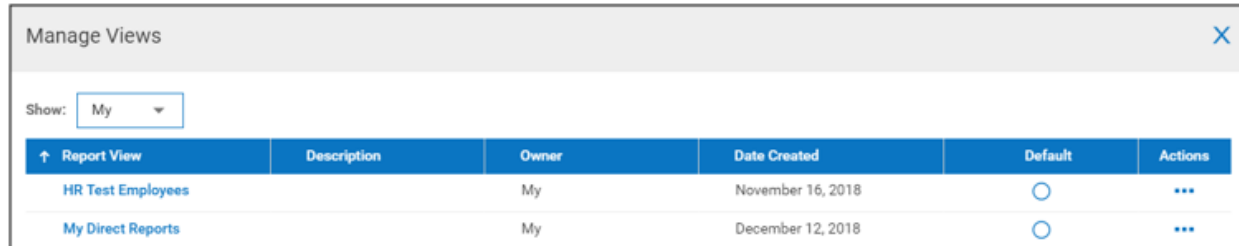
16. Click the **Actions** icon, and then click **Manage Views . . .**



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

