

Creating Reporting Groups

Overview

Reporting Groups are created to assign users to certain groups to categorize employees. The categories are based on your organizational structure and may include groups such as Operations, Senior Management, Field Workers, etc.

Step 1

Log in to https://inunison.io and click on "your profile" in the top right corner of the screen, then select "Organization Settings".



Step 2

Slide the "Reporting Groups" button to the right, to activate.

↓ ≣∎	Notifications Organization Settings Reporting Groups	General Informat Organization Name InUnison Corporatio	tion Or on 11	rganization Size -50		Edit	Add image
	Reporting Information	Manage Regions Add or remove indu: REGION Alberta	stries and position INDUSTRIES 3	ns for each region. POSITIONS 29	Edit	Remove	Organization Logo jpg.jpeg.png. 10mb max, min 150X150
		Configure organi Enable or disable pla FEATURE Worksites	zation features atform features.	3	ACT		
		Reporting Groups			Manage	9	

Step 3

Select "Reporting Groups" on the left settings menu and click the blue "+ Add Group" button.

	Your Settings Notifications	Manage rep Add or remove repor	orting groups ting groups.	+ Add Group
≞⊳	Organization Settings	GROUP NAME	DESCRIPTION	PEOPLE
	Reporting Groups Reporting Information			



Step 4

Create "Group Name" and "Description" of the group, then select the blue "Add Group" button.

Group Name	
Client Success	
Description	
Support and help besk	

The information will be populated, and you will see this...



Step 5

Select anything on the main header to return back to the system.



You have now successfully completed creating a Reporting Group.

If you have any questions, comments, concerns or suggestions, please contact us. We want you to succeed and are here to help!