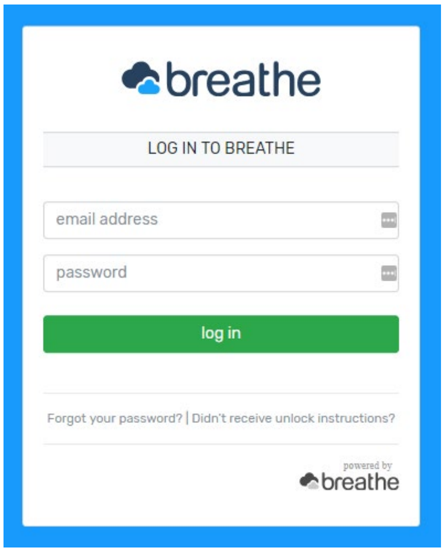
Getting Started with breatheHR HR Users

Understanding HR User Access in breathe

1. Logging In



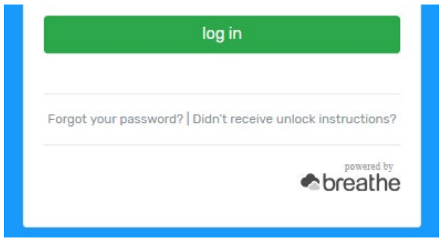
Use the web address from the welcome email.

Enter your email address and password then click the sign in button.

You could think about bookmarking the login page so it's easy to find next time.

Note: breatheHR works with all the main browsers, so feel free to use your favourite.

2. Forgotten Your Password?



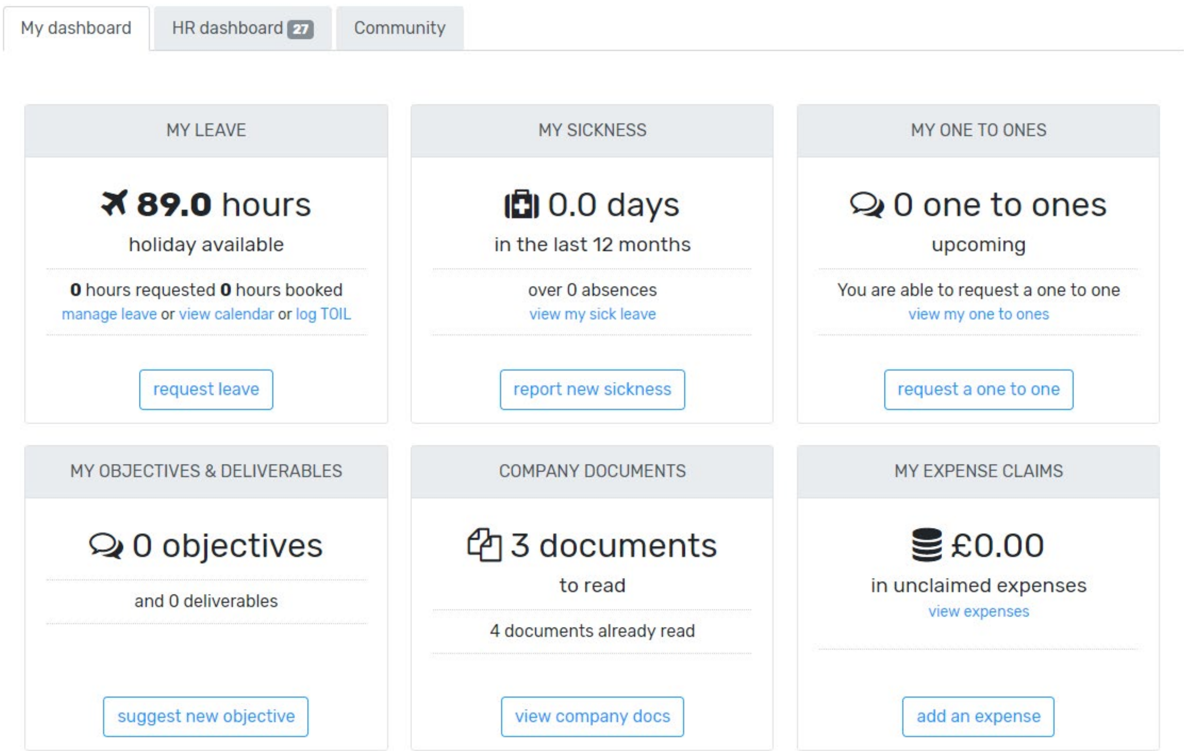
Don't worry! Follow the 'Forgot your password?' link and we'll email you instructions to reset your password.

3. Dashboard

The dashboard is where it all starts. As an HR User this is split into three sections. The first section 'My Dashbord' is all about you. You can see company announcements, book a holiday, manage your sickness, get your company documents, praise your colleagues for doing a great job and much more!

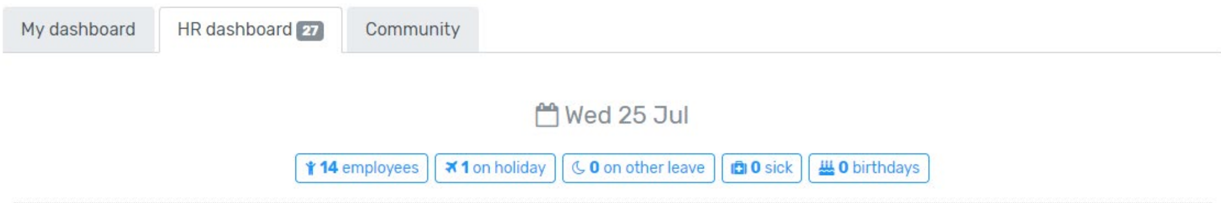
The second section is where you see all your tasks that you need to either approve or monitor, e.g. approving leave/ managing expenses, monitoring your employee's sickness etc. The next page will look at this further.

The third section is the 'Community Tab', this is where you can view company Kudos and view and add any company suggestions.



3. HR Dashboard

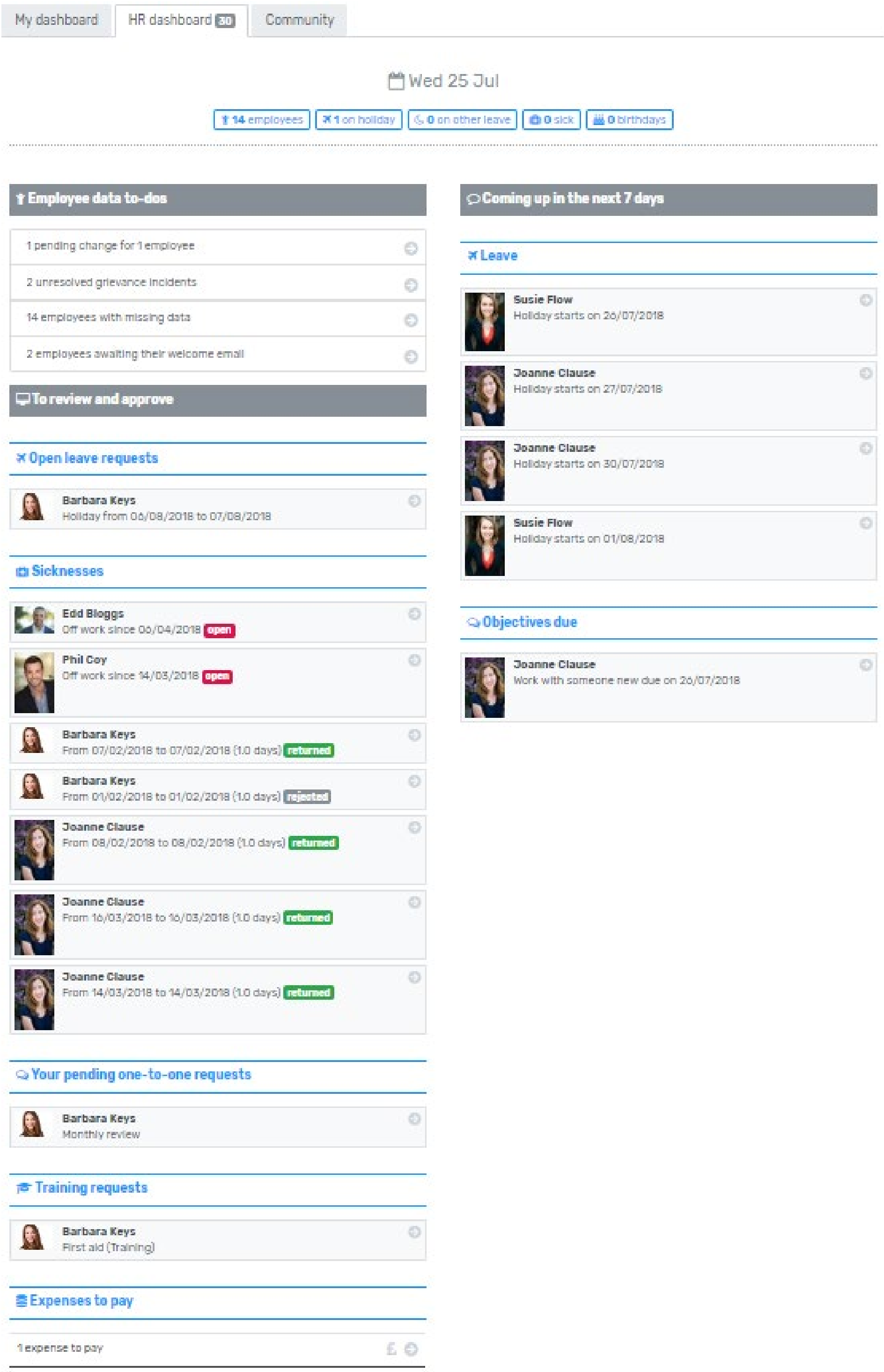
The second tab on this Dashboard is the HR Dashboard.



At the top you have a summary. This will tell you the number of employees who are in the system, who is on leave, who is sick and whose birthdays are coming up.

On the left side of the screen you have your tasks that you need to manage. You will see an arrow next to each individual request. By clicking this arrow it will take you to a new screen where you can see more details about the task and action it.

On the right hand side, the system is telling you what is happening in the next seven days - who is on leave, sick, has one-to-ones, training, birthdays and work anniversaries.



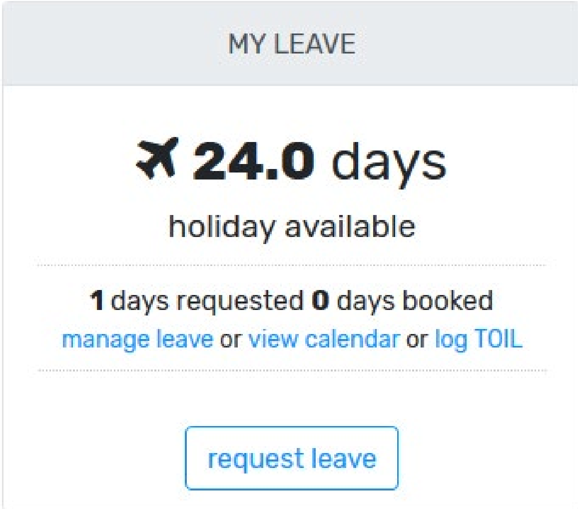
4. How to Use the System for Self Service

My Leave

Take the guesswork out of holiday booking.

From the dashboard take a look at the 'My Leave' section where you'll see how much holiday you have and can make a new leave request.

Clicking 'request leave' is the quickest way or you could view leave calendar to see who else is on holiday. When you request a holiday your line manager or holiday approver will get an email asking them to sign into breatheHR. When your holiday has been approved (or not) you'll get an email.

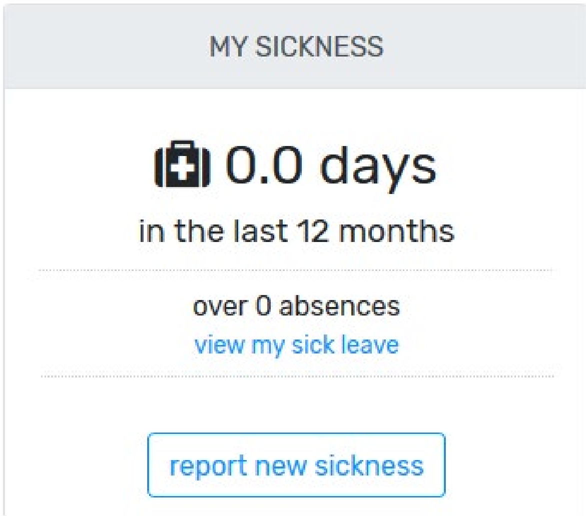


My Sickness

Your sickness record in one place.

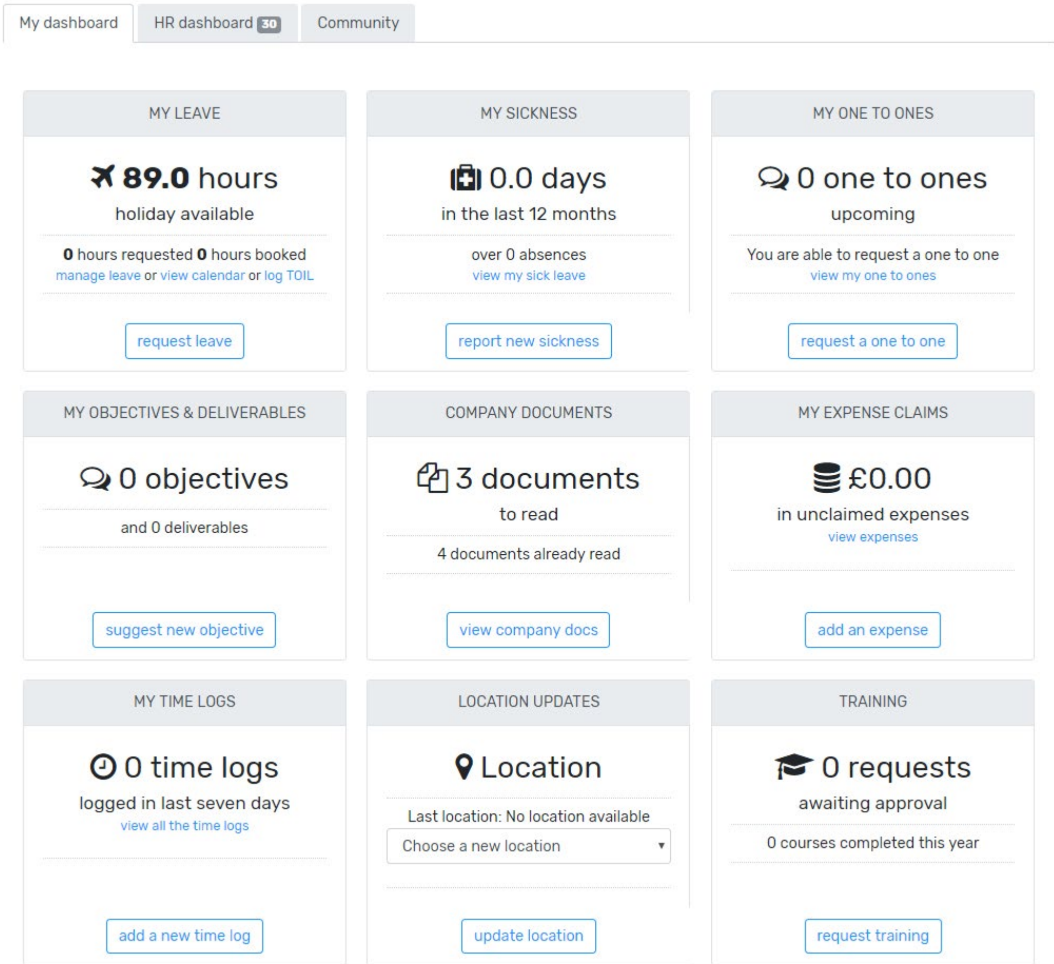
Report a new sickness or upload a fit note straight from the dashboard.

Note: If the 'report new sickness' button isn't showing it;s because the functionality has been switched off by your HR user, so you'll need to phone in sick.

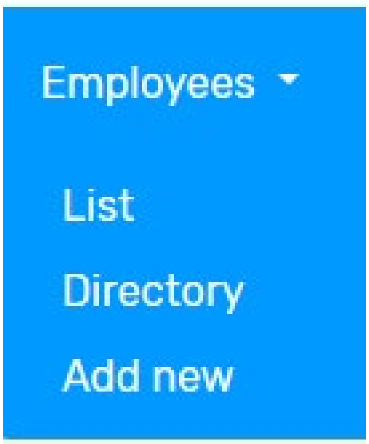


My Dashboard

From My Dashboard you can also view and suggest an objective, have access to your company documents and, providing the functionalities have been enabled for use, update your location, request training, add an expense and make a time log.



5. Employees Tab

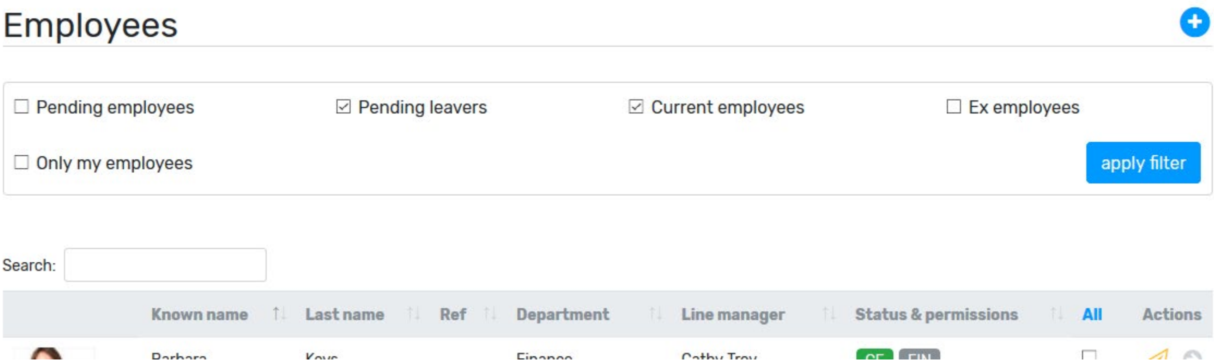


From the 'Employees' tab you can:

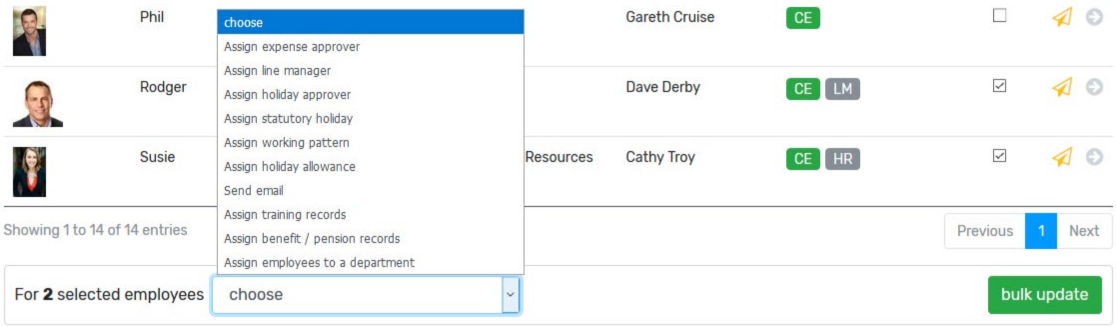
- View a list of your employees;
- View the employee category;
- View the latest Kudos given within the company;
- Add new employees.

5. Employee List

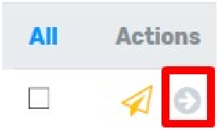
From your employee list you can filter by employee status, as well as name.



By clicking the tick boxes next to employee names, you are able to change details in bulk.

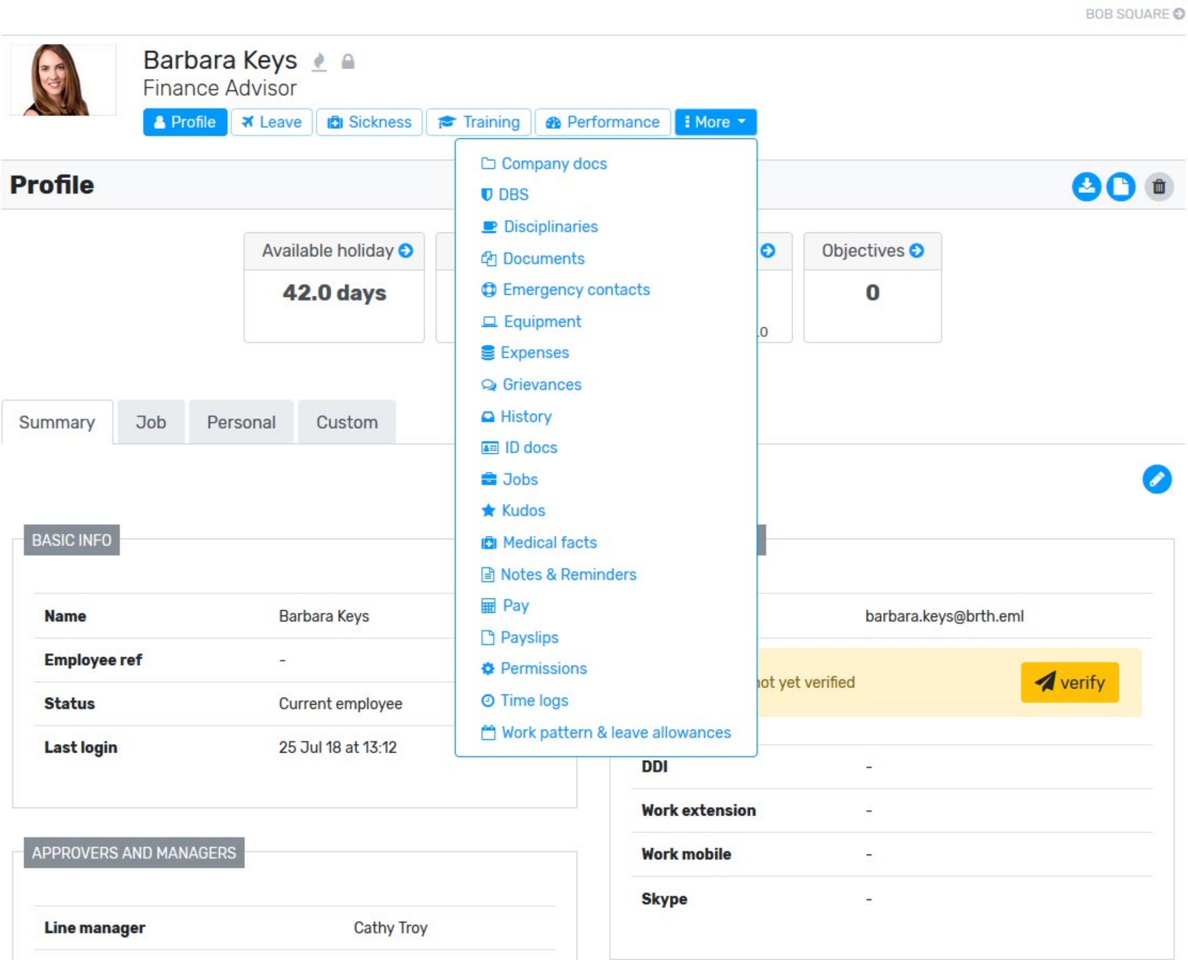


From the employees list, you can access their profile and manage their data by simply clicking on the arrow as shown below.



6. Employee Profile

Once you have clicked into your employee, there are tabs at the top to manage their data. By clicking the ‘More’ tab, you are able to gain access to other areas to store data.

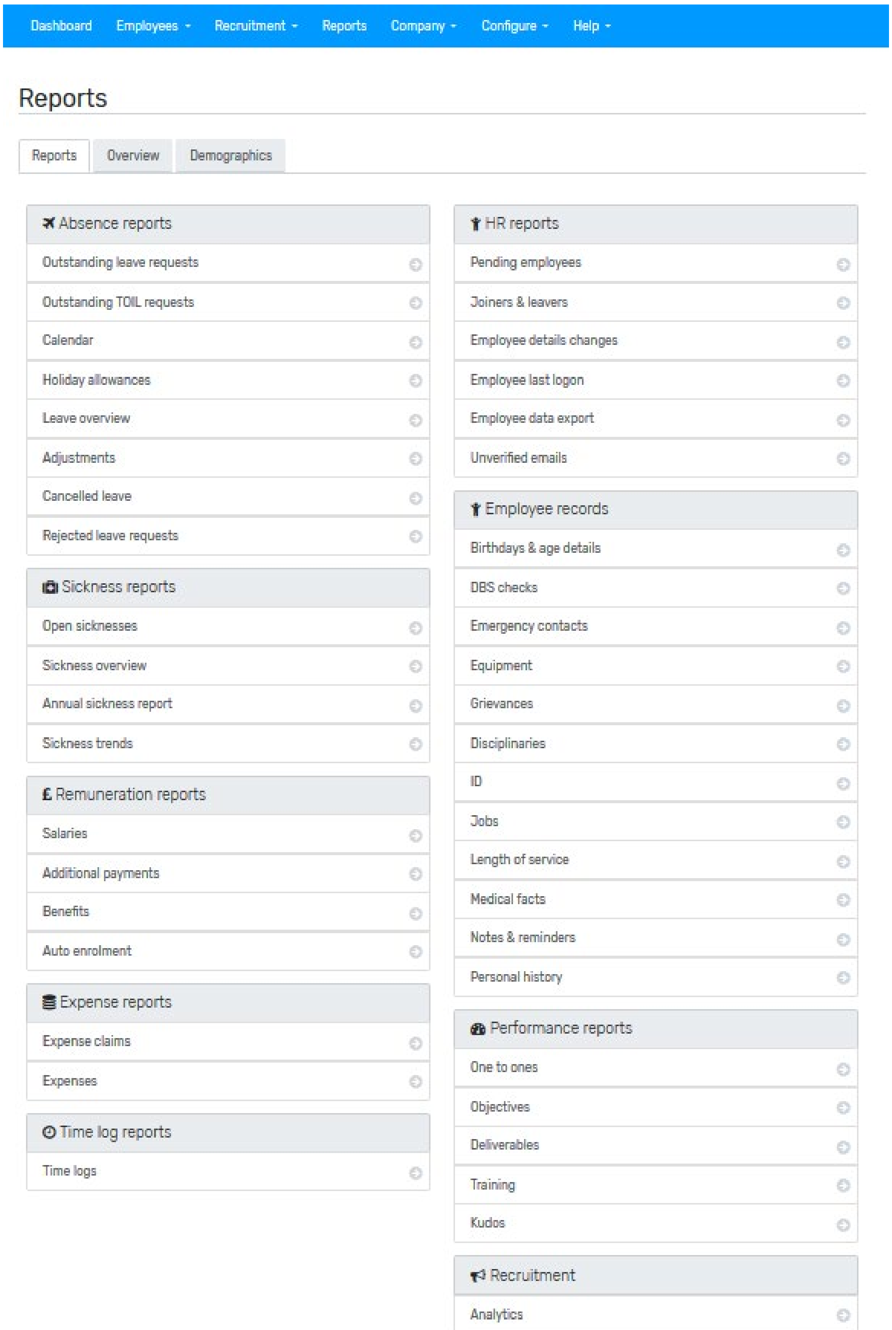


You are able to add and manage employee data within any one of these tabs.

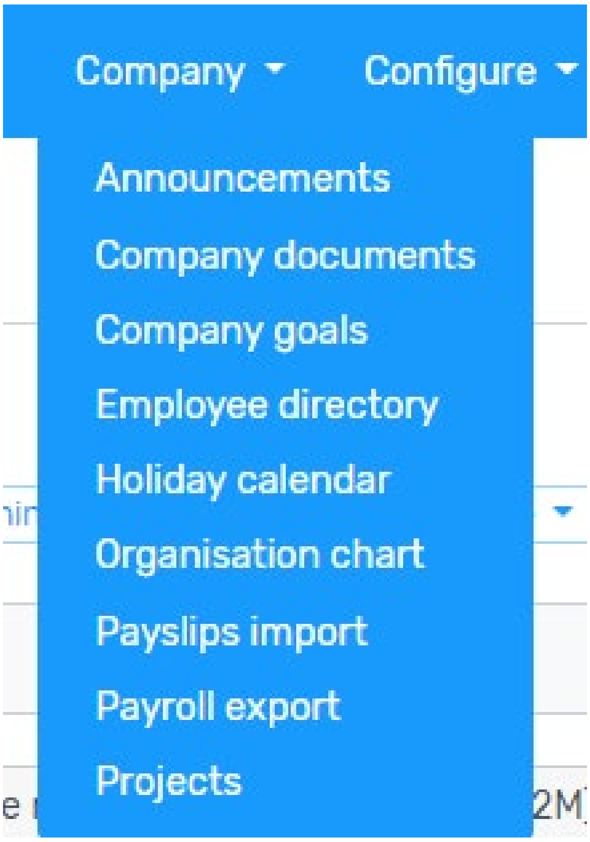
7. Reports

You are able to choose from over 20 ready-made reports from the 'Reports' tab. Most of which have relevant filters for you to hone in on certain data.

90% of these reports can be exported to Excel where you can manipulate as you see fit.



8. Company



Announcements - a great way to communicate quickly with the company. You can choose what you post and how long it is published for. This will show in all of your employees' accounts.

Company documents - useful to send any policies, procedures, contracts etc. to your employees. You can set 'read by' dates so that you have a clear audit trail or who has/hasn't read the document.

Company goals - if you have any company goals, you can post them in here and this will be available to view by all employees. When you set objectives you can also relate them to a company goal.

Employee directory - quick, easy access to employee contact details.

Holiday calendar - you can easily see who is off and when.

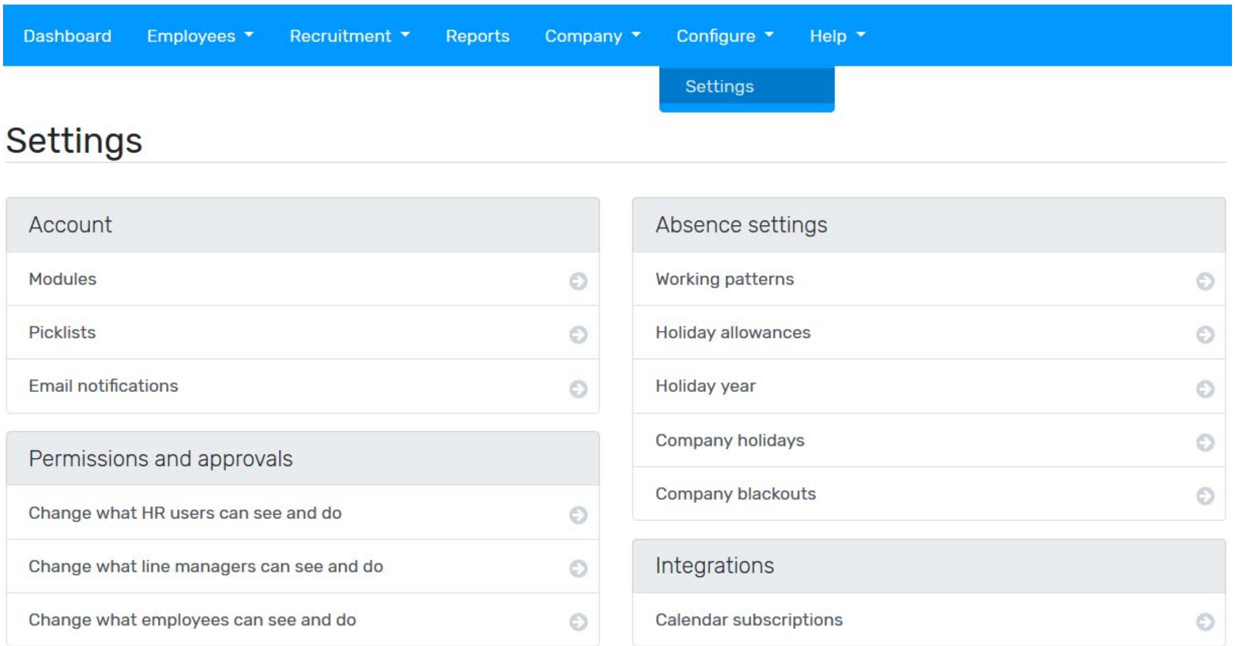
Organisation chart - automatically populated when you add Line Managers in.

Payslips import - if you work with Payrite you can upload your payslips in here.

Payroll export - a great place to see what changes have been happening in the system. We recommend turning this on even if you don't want to use the payroll export itself. A very useful functionality to run prior to payroll.

Projects - a place for you to manage any company projects.

9. Settings



Modules

This is where you can turn different modules in the system on/off. If you turn any modules off these will disappear for all users in the system.

Picklists

This is where you can customise certain picklists and tailor the system to your company, e.g. departments, locations, expense types, plus many more!

Email Notifications

This is where you can choose email notifications to go on/off. We would recommend you have them on as this helps with things like reminders and holiday requests.

Permissions and Approvals

This is where you control what users can see and do in the system. With GDPR in mind this is a really important functionality as you can clearly see who has access to work- this is especially important for Line Managers.

Absence Settings

Working patterns and Holiday allowances are vital when setting up an account, you can also set the Holiday year, add Company holidays and Company blackouts – where employees can't request holiday over a certain time.

Integrations

The Calendar subscription means that you can sync the breathe calendar with your office calendar.