

Getting Started with breatheHR HR Users

Understanding HR User Access in breathe

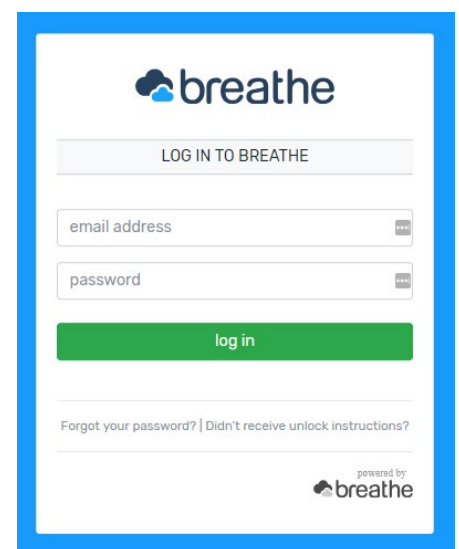
1. Logging In

Use the web address from the welcome email.

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

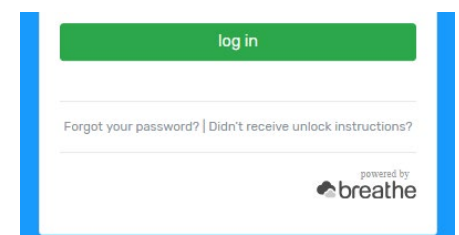
You could think about bookmarking the login page so it's easy to find next time.

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

A screenshot of the breatheHR login page. At the top is the 'breathe' logo. Below it is a grey button labeled 'LOG IN TO BREATHE'. There are two input fields: 'email address' and 'password', both with eye icons on the right. A green 'log in' button is positioned below the fields. At the bottom, there is a link for 'Forgot your password? | Didn't receive unlock instructions?' and a 'powered by breathe' logo.

2. Forgotten Your Password?

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

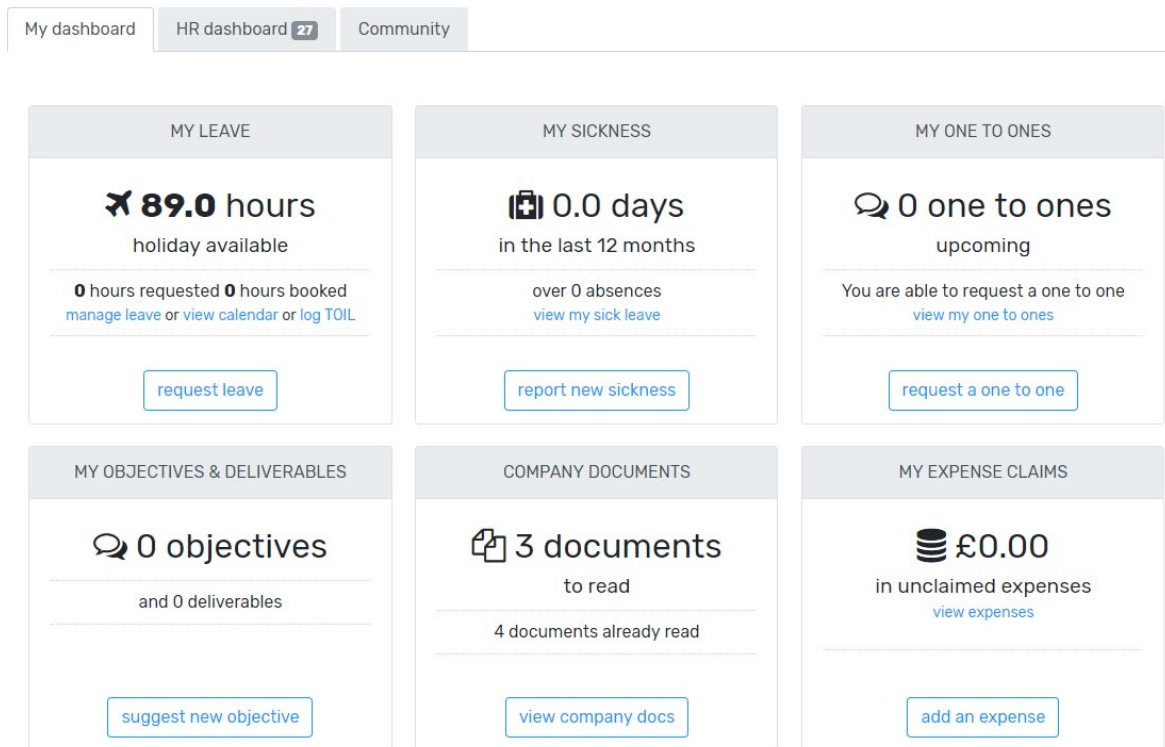
A screenshot showing a close-up of the 'log in' button and the 'Forgot your password? | Didn't receive unlock instructions?' link from the login page. The 'log in' button is green, and the link is in a smaller font below it. The 'powered by breathe' logo is visible at the bottom right.

3. Dashboard

The dashboard is where it all starts. As an HR User this is split into three sections. The first section 'My Dashboard' 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.

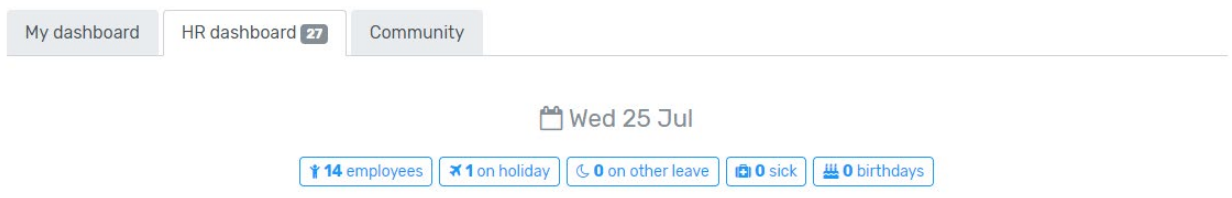


The screenshot shows a navigation bar with three tabs: 'My dashboard', 'HR dashboard 27', and 'Community'. Below the navigation bar are six dashboard cards arranged in a 2x3 grid:

- MY LEAVE**: 89.0 hours holiday available. 0 hours requested, 0 hours booked. Buttons: [manage leave](#), [view calendar](#), [log TOIL](#), [request leave](#).
- MY SICKNESS**: 0.0 days in the last 12 months. over 0 absences. Button: [view my sick leave](#), [report new sickness](#).
- MY ONE TO ONES**: 0 one to ones upcoming. You are able to request a one to one. Button: [view my one to ones](#), [request a one to one](#).
- MY OBJECTIVES & DELIVERABLES**: 0 objectives and 0 deliverables. Button: [suggest new objective](#).
- COMPANY DOCUMENTS**: 3 documents to read. 4 documents already read. Button: [view company docs](#).
- MY EXPENSE CLAIMS**: £0.00 in unclaimed expenses. Button: [view expenses](#), [add an expense](#).

3. HR Dashboard

The second tab on this Dashboard is the HR Dashboard.



The screenshot shows the HR dashboard with a navigation bar containing 'My dashboard', 'HR dashboard 27', and 'Community'. Below the navigation bar, the date 'Wed 25 Jul' is displayed. A summary row contains five statistics:

- 14 employees
- 1 on holiday
- 0 on other leave
- 0 sick
- 0 birthdays

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.

My dashboard
HR dashboard 30
Community

📅 Wed 25 Jul

↑ 14 employees
✕ 1 on holiday
👤 0 on other leave
🏠 0 sick
🎂 0 birthdays

Employee data to-dos

- 1 pending change for 1 employee ➔
- 2 unresolved grievance incidents ➔
- 14 employees with missing data ➔
- 2 employees awaiting their welcome email ➔

To review and approve

✕ Open leave requests

- Barbara Keys**
Holiday from 06/08/2018 to 07/08/2018 ➔

🏠 Sickinesses

- Edd Bloggs**
Off work since 06/04/2018 open ➔
- Phil Coy**
Off work since 14/03/2018 open ➔
- Barbara Keys**
From 07/02/2018 to 07/02/2018 (1.0 days) returned ➔
- Barbara Keys**
From 01/02/2018 to 01/02/2018 (1.0 days) rejected ➔
- Joanne Clause**
From 08/02/2018 to 08/02/2018 (1.0 days) returned ➔
- Joanne Clause**
From 16/03/2018 to 16/03/2018 (1.0 days) returned ➔
- Joanne Clause**
From 14/03/2018 to 14/03/2018 (1.0 days) returned ➔

🗨 Your pending one-to-one requests

- Barbara Keys**
Monthly review ➔

🎓 Training requests

- Barbara Keys**
First aid (Training) ➔

💰 Expenses to pay

- 1 expense to pay 🔍 ➔

📅 Coming up in the next 7 days

✕ Leave

- Susie Flow**
Holiday starts on 26/07/2018 ➔
- Joanne Clause**
Holiday starts on 27/07/2018 ➔
- Joanne Clause**
Holiday starts on 30/07/2018 ➔
- Susie Flow**
Holiday starts on 01/08/2018 ➔

🗨 Objectives due

- Joanne Clause**
Work with someone new due on 26/07/2018 ➔

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 LEAVE

✈ 24.0 days
holiday available

1 days requested 0 days booked
[manage leave](#) or [view calendar](#) or [log TOIL](#)

[request leave](#)

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 SICKNESS

🏥 0.0 days
in the last 12 months

over 0 absences
[view my sick leave](#)

[report new sickness](#)

My Dashboard

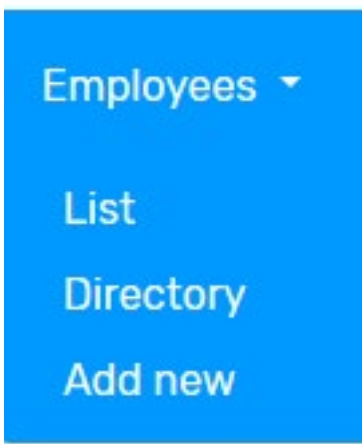
From My Dashboard you can also view and suggest an objective, have access to your company documents and, providing the functionalities have been enabled for use, update your location, request training, add an expense and make a time log.

My dashboard | HR dashboard **30** | Community

<p>MY LEAVE</p> <p>✈ 89.0 hours holiday available</p> <p>0 hours requested 0 hours booked manage leave or view calendar or log TOIL</p> <p>request leave</p>	<p>MY SICKNESS</p> <p>🏠 0.0 days in the last 12 months</p> <p>over 0 absences view my sick leave</p> <p>report new sickness</p>	<p>MY ONE TO ONES</p> <p>💬 0 one to ones upcoming</p> <p>You are able to request a one to one view my one to ones</p> <p>request a one to one</p>
<p>MY OBJECTIVES & DELIVERABLES</p> <p>🗨 0 objectives and 0 deliverables</p> <p>suggest new objective</p>	<p>COMPANY DOCUMENTS</p> <p>📄 3 documents to read</p> <p>4 documents already read</p> <p>view company docs</p>	<p>MY EXPENSE CLAIMS</p> <p>💰 £0.00 in unclaimed expenses view expenses</p> <p>add an expense</p>
<p>MY TIME LOGS</p> <p>🕒 0 time logs logged in last seven days view all the time logs</p> <p>add a new time log</p>	<p>LOCATION UPDATES</p> <p>📍 Location</p> <p>Last location: No location available Choose a new location</p> <p>update location</p>	<p>TRAINING</p> <p>🎓 0 requests awaiting approval</p> <p>0 courses completed this year</p> <p>request training</p>

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.

Employees +

Pending employees
 Pending leavers
 Current employees
 Ex employees
 Only my employees
apply filter

Search:

Known name	Last name	Ref	Department	Line manager	Status & permissions	All	Actions
	Barbara	Kate	Finance	Cathy Troy	CE	<input type="checkbox"/>	

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

	Phil	<input type="checkbox"/>	<ul style="list-style-type: none"> choose Assign expense approver Assign line manager Assign holiday approver Assign statutory holiday Assign working pattern Assign holiday allowance Send email Assign training records Assign benefit / pension records Assign employees to a department 	Gareth Cruise	CE	<input type="checkbox"/>	
	Rodger	<input type="checkbox"/>		Dave Derby	CE LM	<input checked="" type="checkbox"/>	
	Susie	<input type="checkbox"/>		Resources Cathy Troy	CE HR	<input checked="" type="checkbox"/>	

Showing 1 to 14 of 14 entries

For 2 selected employees bulk update


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

All **Actions**

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.

BOB SQUARE



Barbara Keys 🔒

Finance Advisor

Profile
Leave
Sickness
Training
Performance
More

Profile

Available holiday ↕

42.0 days

Objectives ↕

0

Summary
Job
Personal
Custom

BASIC INFO

Name	Barbara Keys
Employee ref	-
Status	Current employee
Last login	25 Jul 18 at 13:12

APPROVERS AND MANAGERS

Line manager	Cathy Troy
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DDI	-
Work extension	-
Work mobile	-
Skype	-

- Company docs
- DBS
- Disciplinarys
- Documents
- Emergency contacts
- Equipment
- Expenses
- Grievances
- History
- ID docs
- Jobs
- Kudos
- Medical facts
- Notes & Reminders
- Pay
- Payslips
- Permissions
- Time logs
- Work pattern & leave allowances

📄 📁 🗑️

barbara.keys@brth.eml

not yet verified
verify

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.

Dashboard Employees Recruitment Reports Company Configure Help

Reports

Reports Overview Demographics

<div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">✕ Absence reports</div> <ul style="list-style-type: none"> Outstanding leave requests Outstanding TOIL requests Calendar Holiday allowances Leave overview Adjustments Cancelled leave Rejected leave requests <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">📄 Sickness reports</div> <ul style="list-style-type: none"> Open sicknesses Sickness overview Annual sickness report Sickness trends <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">£ Remuneration reports</div> <ul style="list-style-type: none"> Salaries Additional payments Benefits Auto enrolment <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">📑 Expense reports</div> <ul style="list-style-type: none"> Expense claims Expenses <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">🕒 Time log reports</div> <ul style="list-style-type: none"> Time logs 	<div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">📄 HR reports</div> <ul style="list-style-type: none"> Pending employees Joiners & leavers Employee details changes Employee last logon Employee data export Unverified emails <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">📄 Employee records</div> <ul style="list-style-type: none"> Birthdays & age details DBS checks Emergency contacts Equipment Grievances Disciplinarys ID Jobs Length of service Medical facts Notes & reminders Personal history <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">📄 Performance reports</div> <ul style="list-style-type: none"> One to ones Objectives Deliverables Training Kudos <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">📄 Recruitment</div> <ul style="list-style-type: none"> Analytics
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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.

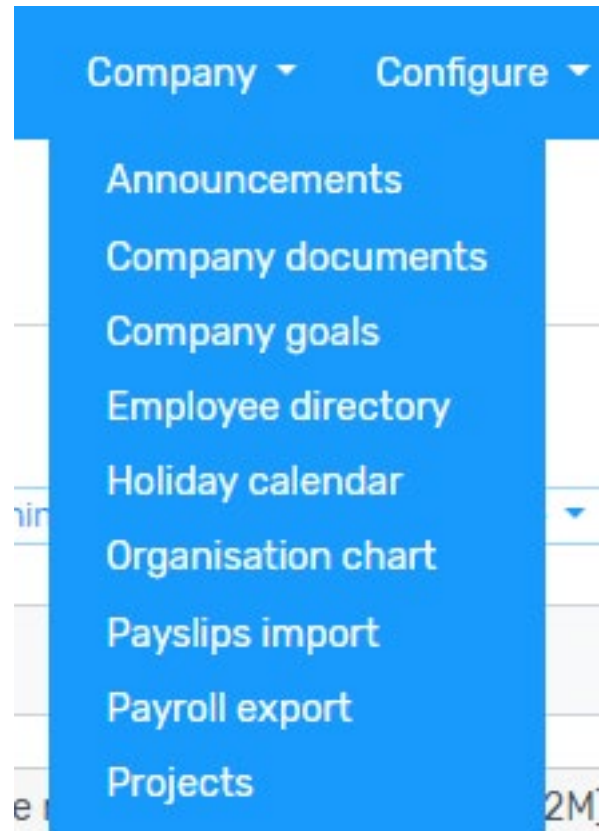
Holiday calendar - you can easily see who is off and when.

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

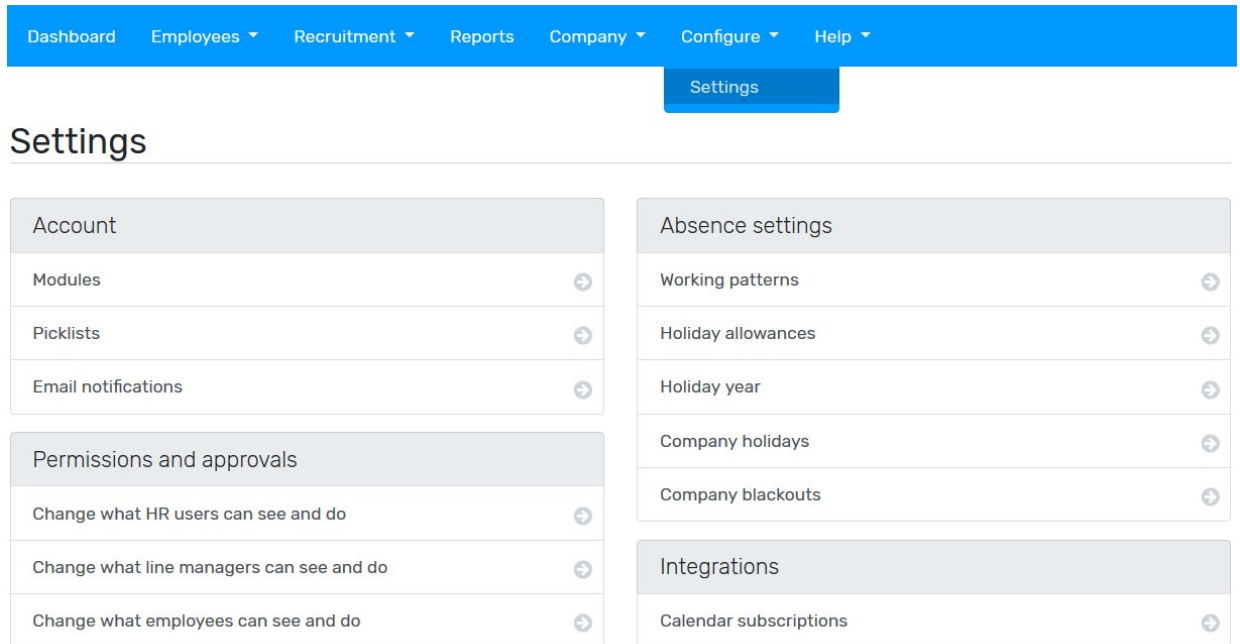
Payslips import - if you work with Payrite you can upload your payslips in here.

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



Account	Absence settings
Modules	Working patterns
Picklists	Holiday allowances
Email notifications	Holiday year
	Company holidays
	Company blackouts
Permissions and approvals	Integrations
Change what HR users can see and do	Calendar subscriptions
Change what line managers can see and do	
Change what employees can see and do	

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.

Settings

Calendar subscriptions

Subscriptions enable you to create leave calendars that can be viewed in external applications such as Google Calendar, Apple Calendar, Outlook.com and other software that supports the webcal protocol.

Calendar subscription settings

Manage calendar subscriptions centrally

This enables HR users to create calendars that you (or your IT support department) can add as shared calendars for your organisation. This is best option if you use a central Exchange Server, Outlook.com or Google Apps for business.

Allow employees to manage their own calendar subscriptions

This is the best option if your employees manage their own calendars using programs such as Apple Calendar or Google Calendar.

update calendar subscription settings