

# Getting Started with breatheHR Line Managers

## Understanding Line Manager Access in breathe

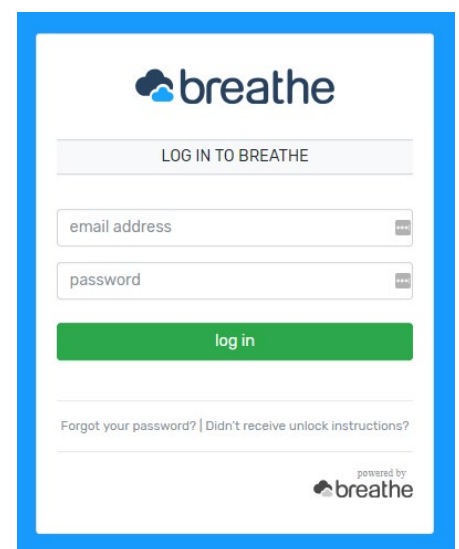
### 1. Logging In

Use the web address from the welcome email.

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

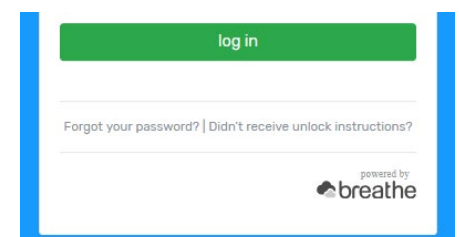
You could think about bookmarking the login page so it's easy to find next time.

**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 a line manager 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 'Manager Dashboard' (which we'll look at later) is where you see all your tasks that you need to either approve or monitor, e.g. approving leave/expenses or monitoring your employee's sickness.



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 the 'breathe' HR portal dashboard. At the top, there is a navigation bar with 'Dashboard', 'My profile', 'Company', 'Reports', 'Calendar', and 'Employees'. A notification banner states: 'Your email address penelope.foundary@brth.eml is not verified' with a 'verify email' button. Below this is a section titled 'The Grapevine' with an 'Update' banner: 'Posted by Georgina Sillett on 24/07/2018'. The main dashboard is divided into several tabs: 'My dashboard', 'Manager dashboard', and 'Community'. The 'Community' tab is active, displaying a grid of 12 widgets:

- MY LEAVE:** 24.0 days holiday available. 1 days requested, 0 days booked. Includes links for 'manage leave', 'view calendar', and 'log TOIL'. Button: 'request leave'.
- MY SICKNESS:** 0.0 days in the last 12 months. over 0 absences. Button: 'report new sickness'.
- MY ONE TO ONES:** 0 one to ones upcoming. You are able to request a one to one. Button: 'request a one to one'.
- MY OBJECTIVES & DELIVERABLES:** 1 objective and 0 deliverables. Button: 'add a new deliverable'.
- COMPANY DOCUMENTS:** 3 documents to read. 2 documents already read. Button: 'view company docs'.
- MY EXPENSE CLAIMS:** £0.00 in unclaimed expenses. 0 claims submitted, 0 claims rejected. Button: 'add an expense'.
- MY TIME LOGS:** 0 time logs logged in last seven days. Button: 'add a new time log'.
- LOCATION UPDATES:** Location: Work from home. Last location: Work from home. Button: 'update location'.
- TRAINING:** 0 requests awaiting approval. 0 courses completed this year. Button: 'request training'.

#### 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

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

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[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

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

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[report new sickness](#)

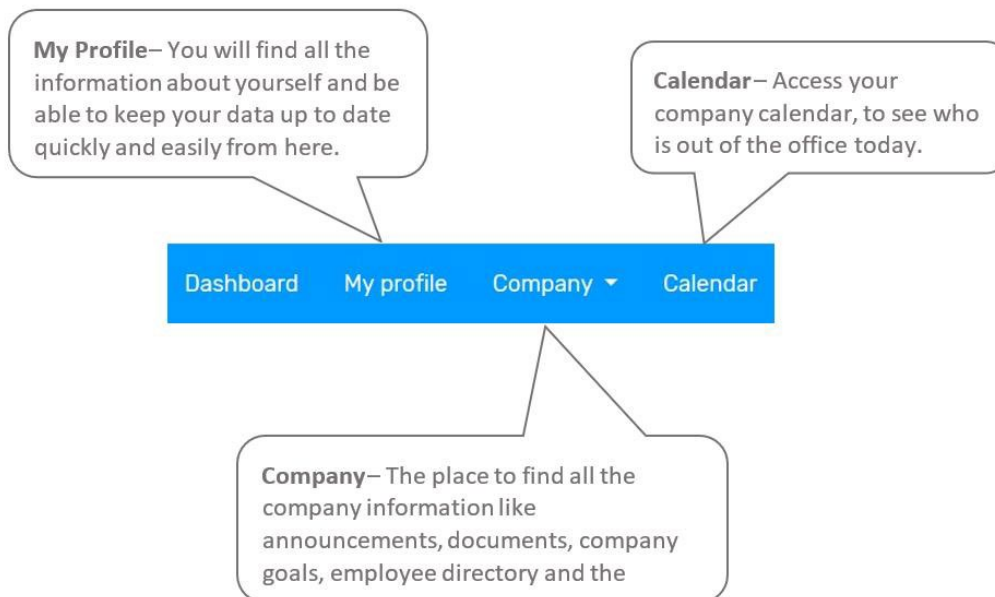
##### My Dashboard

From My Dashboard you can also view any objectives that have been set for you, see all your companies' policies and procedures from the company documents, and if your company has enabled expenses and time logs you can manage them from here.

<p>MY LEAVE</p> <p><b>✂ 24.0 days</b> holiday available</p> <p>10 days requested 0 days booked <a href="#">manage leave</a> or <a href="#">view calendar</a> or <a href="#">log TOIL</a></p> <p><a href="#">request leave</a></p>	<p>MY SICKNESS</p> <p><b>🏠 2.0 days</b> in the last 12 months</p> <p>over 2 absences <a href="#">view my sick leave</a></p> <p><a href="#">report new sickness</a></p>	<p>MY ONE TO ONES</p> <p><b>🗨 No one to ones</b> upcoming</p> <p>You are able to request a one to one <a href="#">view my one to ones</a></p> <p><a href="#">request a one to one</a></p>
<p>MY OBJECTIVES &amp; DELIVERABLES</p> <p><b>🗨 2 objectives</b> and 1 deliverable <a href="#">view objectives</a> or <a href="#">deliverables</a></p> <p><a href="#">add a new deliverable</a></p>	<p>COMPANY DOCUMENTS</p> <p><b>📄 1 document</b> to read</p> <p>2 documents already read</p> <p><a href="#">view company docs</a></p>	<p>MY EXPENSE CLAIMS</p> <p><b>💷 £90.00</b> in unclaimed expenses</p> <p>0 claims submitted 1 claim rejected <a href="#">view expenses</a></p> <p><a href="#">add an expense</a></p>

### The Toolbar

Use the toolbar to find your data



## 5. How to Use the System to Manage Your Employees

From the Manager dashboard you will be able to see any tasks that you need to either review or approve.

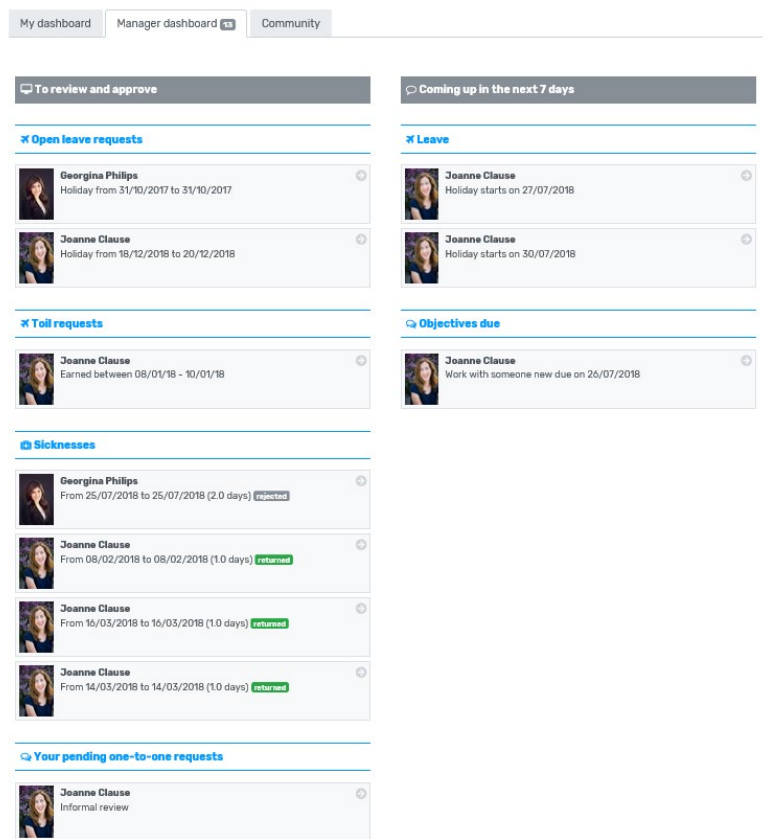
It is very simple, all you need to do is click the arrow icon to the right hand side of the record.

You will then be redirected to the appropriate page, so that you can approve the request to update the record.

On the left you can see anything that's coming up for the employees you're responsible for.

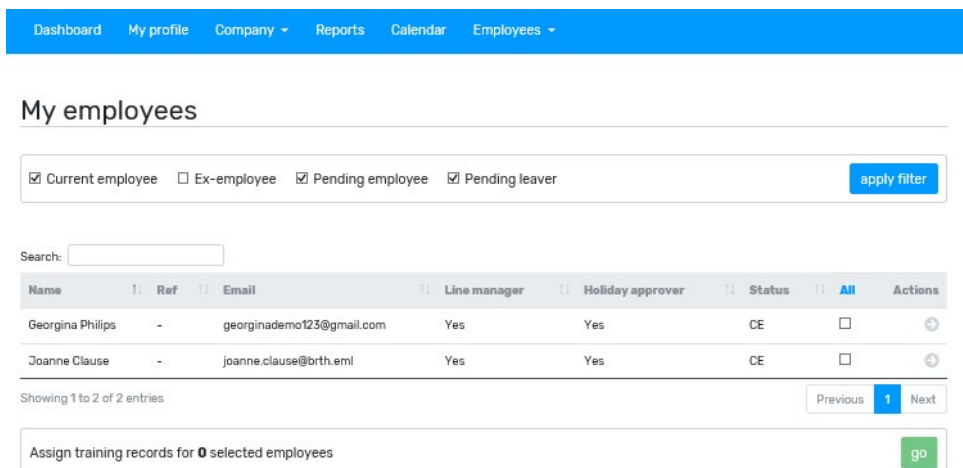
You will also be able to see all the employees you manage from the 'Employees' tab. From here you can access employees profiles and help manage their employee data

Providing that you've been set up with relevant permission, you will be able to run reports from the 'Reports' tab on areas that you help to manage.



The screenshot shows the 'Manager dashboard' with several sections:

- To review and approve:**
  - Open leave requests:** Georgina Philips (Holiday from 31/10/2017 to 31/10/2017), Joanne Clause (Holiday from 18/12/2018 to 20/12/2018).
  - Toll requests:** Joanne Clause (Earned between 08/01/18 - 10/01/18).
  - Sickneses:** Georgina Philips (From 25/07/2018 to 25/07/2018 (2.0 days) expected), 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:** Joanne Clause (Informal review).
- Coming up in the next 7 days:**
  - Leave:** Joanne Clause (Holiday starts on 27/07/2018), Joanne Clause (Holiday starts on 30/07/2018).
  - Objectives due:** Joanne Clause (Work with someone new due on 26/07/2018).



The 'My employees' page includes a navigation bar with 'Dashboard', 'My profile', 'Company', 'Reports', 'Calendar', and 'Employees'. Below the navigation bar, there are filter options:  Current employee,  Ex-employee,  Pending employee,  Pending leaver, and an 'apply filter' button. A search bar is also present.

Name	Ref	Email	Line manager	Holiday approver	Status	All	Actions
Georgina Philips	-	georginademo123@gmail.com	Yes	Yes	CE	<input type="checkbox"/>	
Joanne Clause	-	joanne.clause@brth.eml	Yes	Yes	CE	<input type="checkbox"/>	

Showing 1 to 2 of 2 entries. Previous 1 Next. Assign training records for 0 selected employees. go