



# BrightHR user guide

General overview of the dash for employees

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# **My Dashboard**

# My dashboard



The dashboard will show you some top level info about certain areas of your account but also provides access to other areas.

# 1. See who's out today

Starting from top left, you will have a quick view of how many people are absent and late on that day.

Clicking **'See the calendar'** opens our calendar, and shows you a day by day view of who is off in the business, we also show you when public holidays are coming up.

# 2. Your absences

This section has a dashboard to show you how many days holiday you have remaining, when your next scheduled absence is and any lateness or sickness days you have had. Clicking **'View all absences'** will take you through to your profile.

You can also request an absence very easily by clicking the **"Request Time Off"** button, which asks you for a few details about your absence before sending it your manager for approval. Once approved, you will get a notification and the absence will show in the **"Your Absences"** section, and will also be plotted on the calendar.

# 3. Employee hub

The employee hub is the place to see all of your colleagues within your business, including some information about each colleague.

Open the employee hub by clicking **"See all employees"** in the employee hub card, once in the employee hub you have the ability to search for colleagues using the **"Find"**, **"Filter by"**, **"Sort by"** features.

Clicking on the small arrow displays the additional information about that colleague, such as who they report to within the business.

# 4. Documents

Open the documents area to view documents that have been shared by the company, which contain important information about your employment and the company.

You will be able to see documents that your Manager or company have uploaded, you will also be able to upload documents to share with your manager, such as a sick note or a copy of your passport for example.

To upload a document hit the **"Upload a document"** link, next to the **"Find"** search bar, then click **"Browse"** to find the file on your computer, then upload it by clicking the **"Upload"** button. The file will show in **"My documents"** and will be visible to you and your manager.

## 5. Shedule Planning

The BrightHR schedule shows you when you're working. You get notifications every time a shift is added or updated for you. Your manager can also add notes to your shifts to share important information with you before your shift starts, such as where you're working.

To view your schedules, click the **"See all schedules"** under the **"Schedule planning"** card at the bottom of the homepage.

Once in the schedule area, you can see which schedules you are currently assigned to, including future shifts that you have been assigned to. You can also view your previous schedules and shifts by clicking the **"Older schedules"** tab.

View further details about your shift by clicking the title or **"View schedule"** next to the schedule you want to see; this will give you a timeline view of the shift, as well as the option to view notes by clicking the icon next to your name.

We have also added the ability to print your schedule, just in case you don't have access to BrightHR all the time.

## 6. Calendar

See your teams absences in one place in our calendar. This can help you when planning your leave, as well as knowing when the next public holiday is coming up.

Click the **"See the calendar"** button, in the card at the top left of the homepage, to open your calendar and see which of your colleagues are out today.

You can browse different months to see past and future absences, helping you to plan your own holidays by showing you if there would be any clashes with your colleagues absences.

You also have the option to toggle to **"List view"** which will show you a list of all absences planned for that particular month, including any that are pending approval - a simpler view of the calendar.

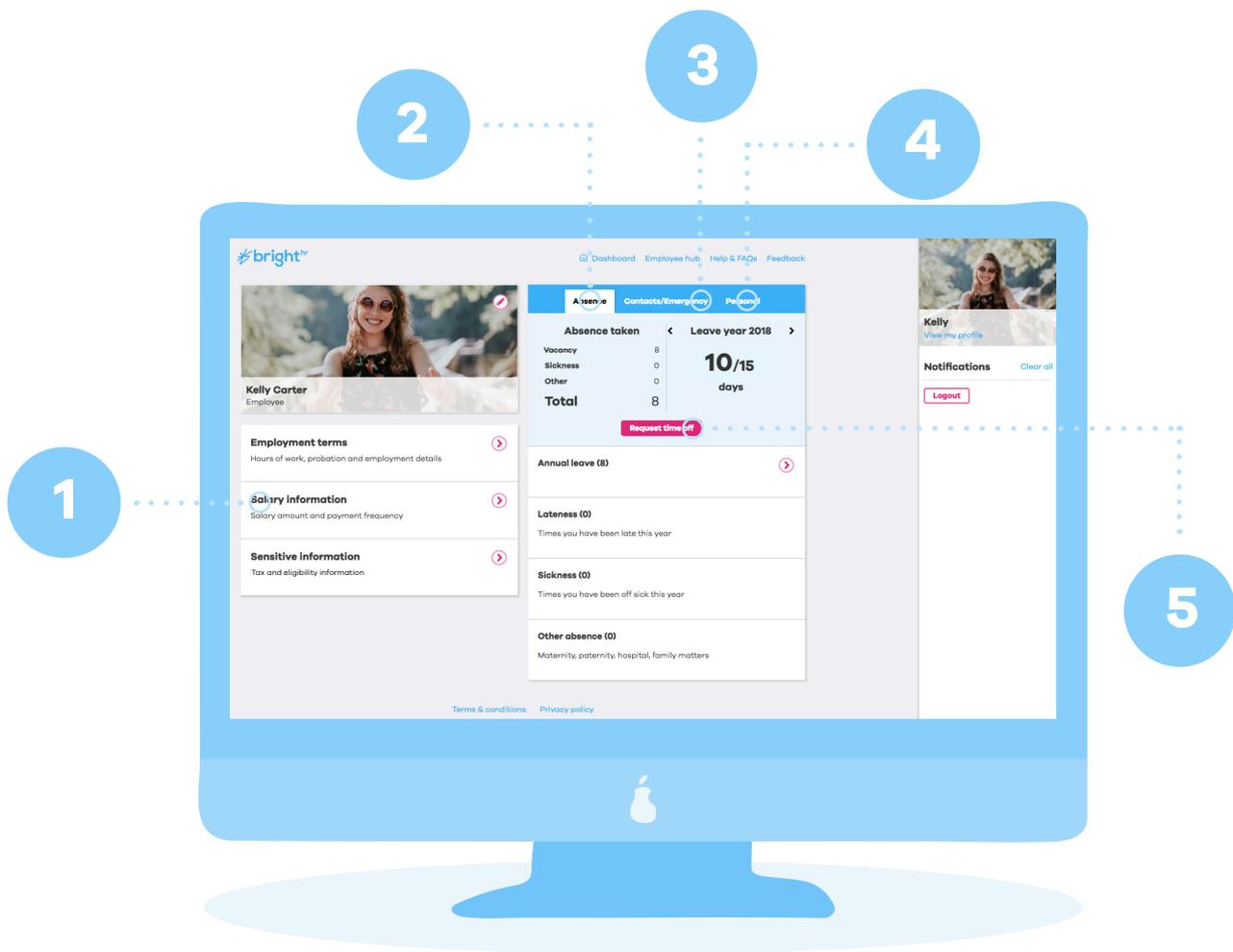
## 7. Side Bar

The side bar is used to display your notifications, as well as housing your profile card. The notifications mentioned earlier will appear here, which can then be cleared by clicking the **"x"** in the corner.

You can also go to your profile from the side bar, by clicking the **"View my profile"** link underneath your profile picture. The next section gives your further information about what you can see and do from your profile...

# My Profile

# My profile



This is your profile; it is split into a few sections, and contains all of your personal information including employment terms, salary, vacation details, as well as lots of other important information.

You can use the links in the right hand corner to navigate to other key areas of BrightHR - back to the dashboard, to the employee hub, or to get help with the product and view our FAQs.

We would also love to hear your feedback on our product, therefore if you'd like to share anything you can hit the **"Feedback"** link and help us improve BrightHR.

The following information will explain the profile sections in more detail;

## 1. Left hand column

The left hand side of the profile screen shows you all of the important information about your employment, such as salary, hours, and vacation entitlement.

By clicking the arrow in the top right hand corner, you can expand each section and view all of the information stored about you and your employment. Should any of this information require updating, your manager can do this for you.

## 2. Absence

The left hand side of the absence section displays a summary of your absences, including your vacation, Sick days, and any other absences you have taken in this Holiday year.

On the right hand side of this section, we show you how much of your vacation entitlement is remaining, as well as the leave year you are currently in.

You can also toggle between the current and future year's entitlement, by clicking the arrow next to the leave year - just in case you have booked anything in the next leave year.

## 3. Contacts/Emergency

We store important emergency contact information that can be accessed by your manager if required. This includes your personal contact details, as well as the ability to add multiple emergency contacts.

All of this information is easily updatable, in case your details change - just click the pencil icon next to the section you'd like to update.

## 4. Personal

The final section of the profile is the "Personal" tab, where you can add/edit all of your personal information such as your name, address, and gender. To update, just hit the pencil icon, and remember to save when complete.

## 5. Request time off

The Request time off button will take you back to your absence calendar where you can select the absence type from a drop down menu. You can then book in the request on the calendar by selecting the relevant dates in half days or full days.

Public holidays will also be accounted for when you place your request, whether you work these or not.



**MORE HELP?**

Although we've tried to keep our product as simple as possible, we understand every now and then things can get a bit confusing when you start using a new product! So we've made this little guide to help you getting to grips with using BrightHR... If you're still stuck or can't find what you're looking for we also have an amazing Customer Service team that are ready to help with all your questions and needs.

**Call us on 1-833-247-3658 or e-mail [brighthrsupport@peninsula-ca.com](mailto:brighthrsupport@peninsula-ca.com)**