

BrightHR user guide

General overview for Managers



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 0844 892 3927 or e-mail support@brighthr.com

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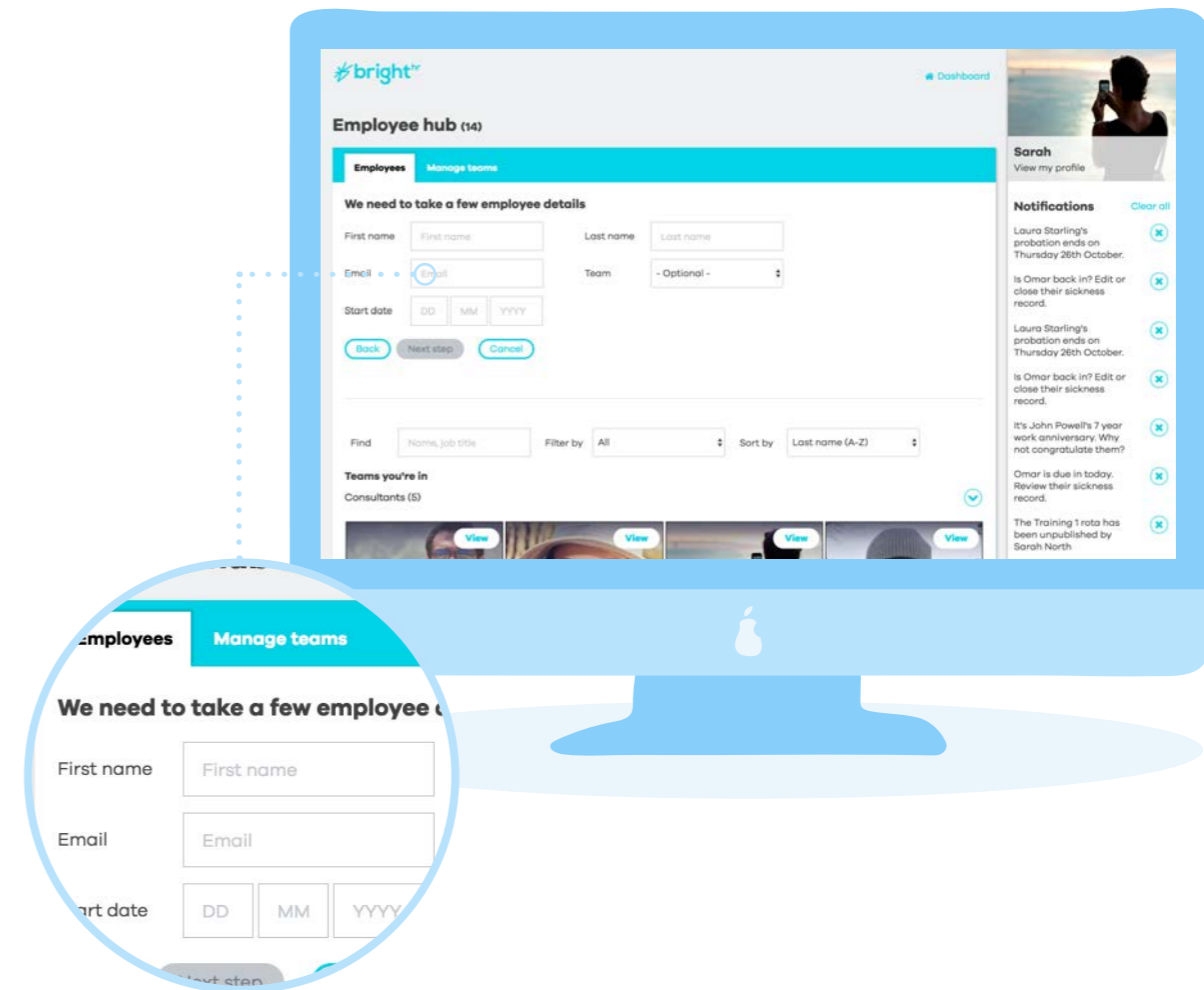
1. Dashboard



The Dashboard is the landing page you arrive at when logging into **BrightHR**. From here you can view your own details and those of the staff you manage.

The Dashboard will show you how many people are out of the business today and allow you to add absentees or late arrivals.

2. Adding Employees



From the Dashboard, click **Employee Hub**. Click **Add a new employee**.

Enter the details then click **Add Employee**. Unless deselected, this will send the employee their registration email.



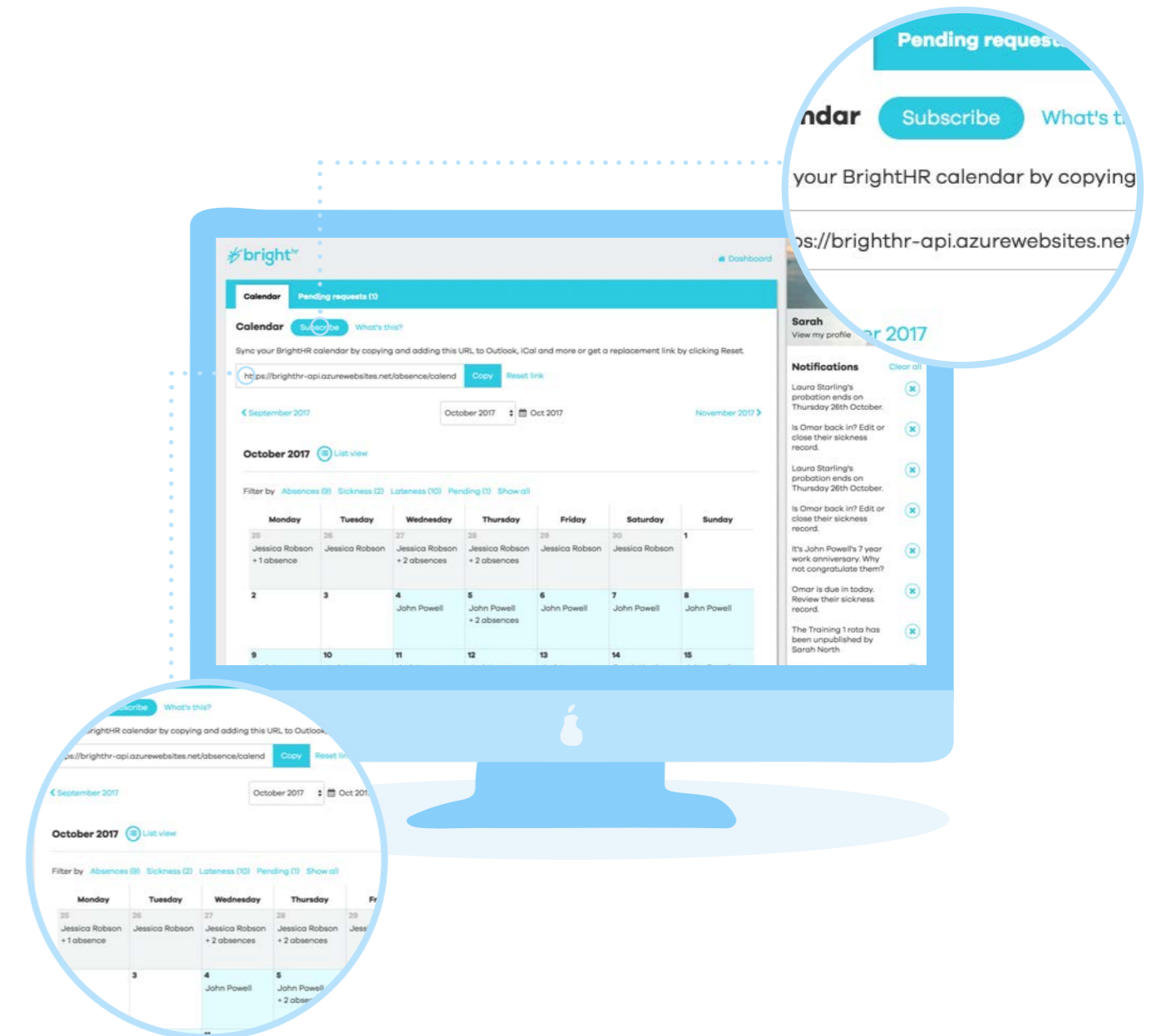
3. Managing Teams



From the Employee Hub select **Manage Teams**. Click on **Manage Team** on the relevant team.

You can select which employees are members of that team. Employees can belong to more than one team. Click **Update team** to Save.

4. Calendar



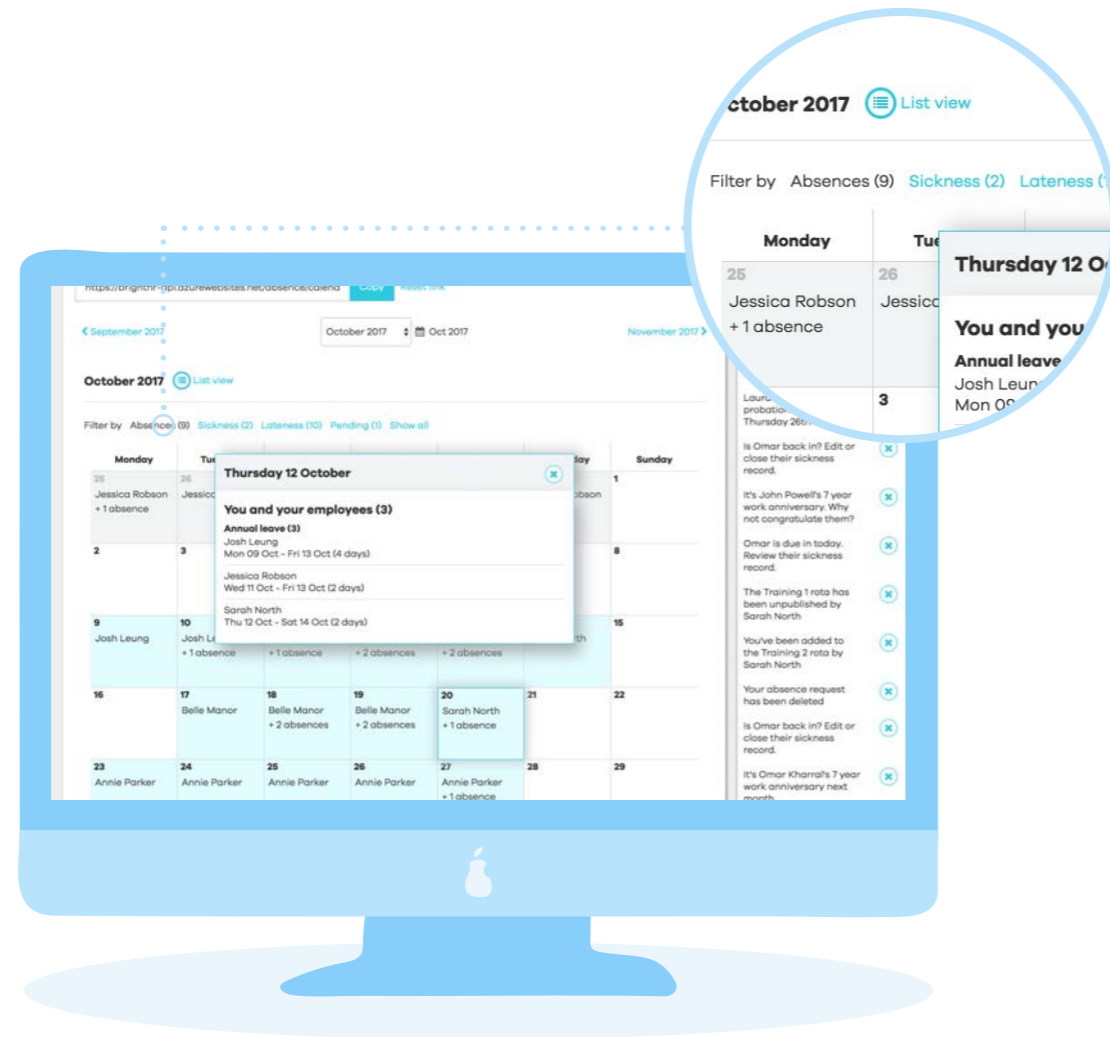
i) From the Dashboard select **Calendar**. Managers can synchronise the calendar to their email calendar.

Click **Subscribe** then copy the link. Go to Outlook (email Account) select **Calendar**, **Open Calendar** and **From Internet** and paste the link.

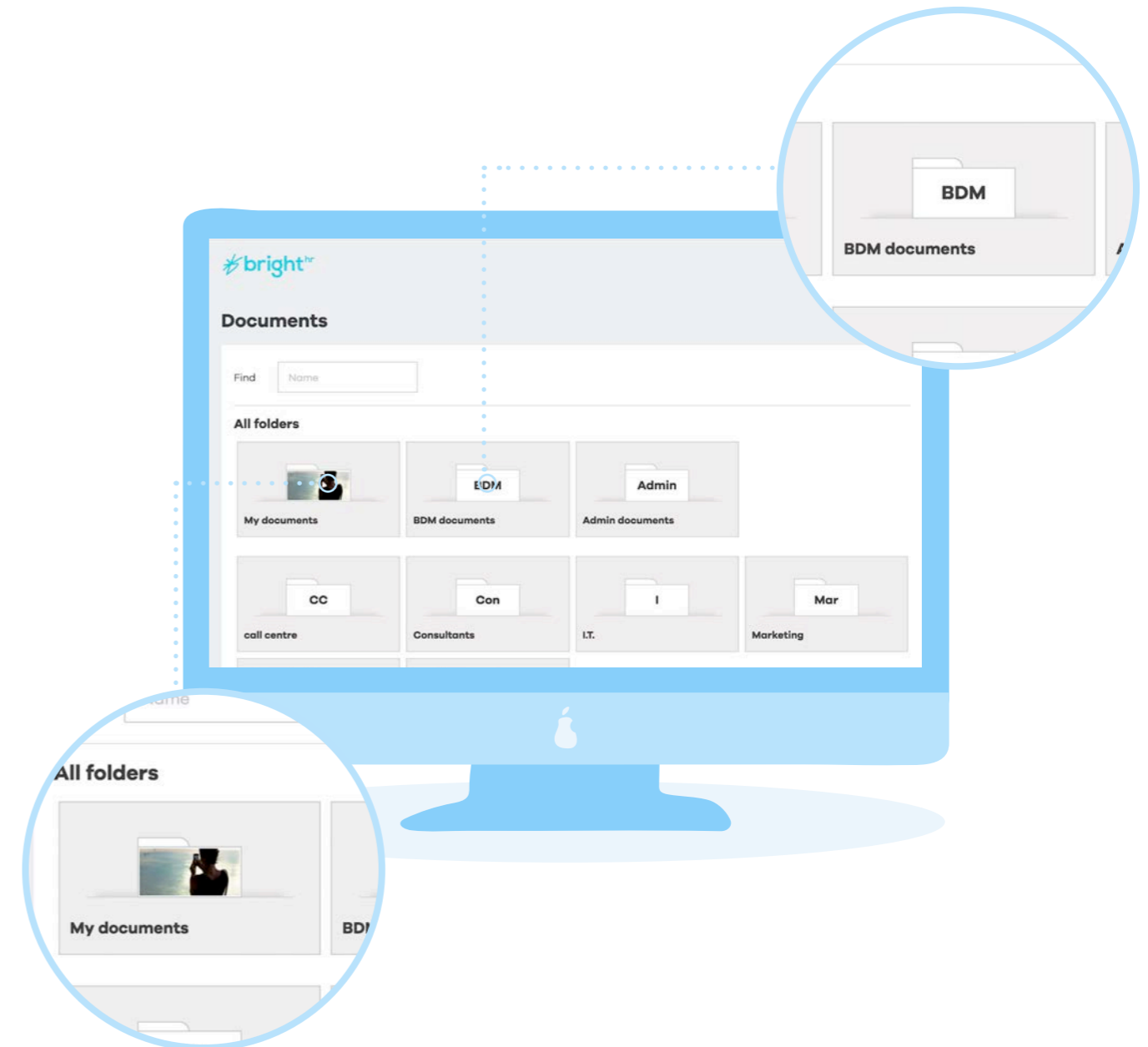
ii) To view absences shown on the Calendar on **BrightHR** click on a specific day and the people absent for that day will be listed.



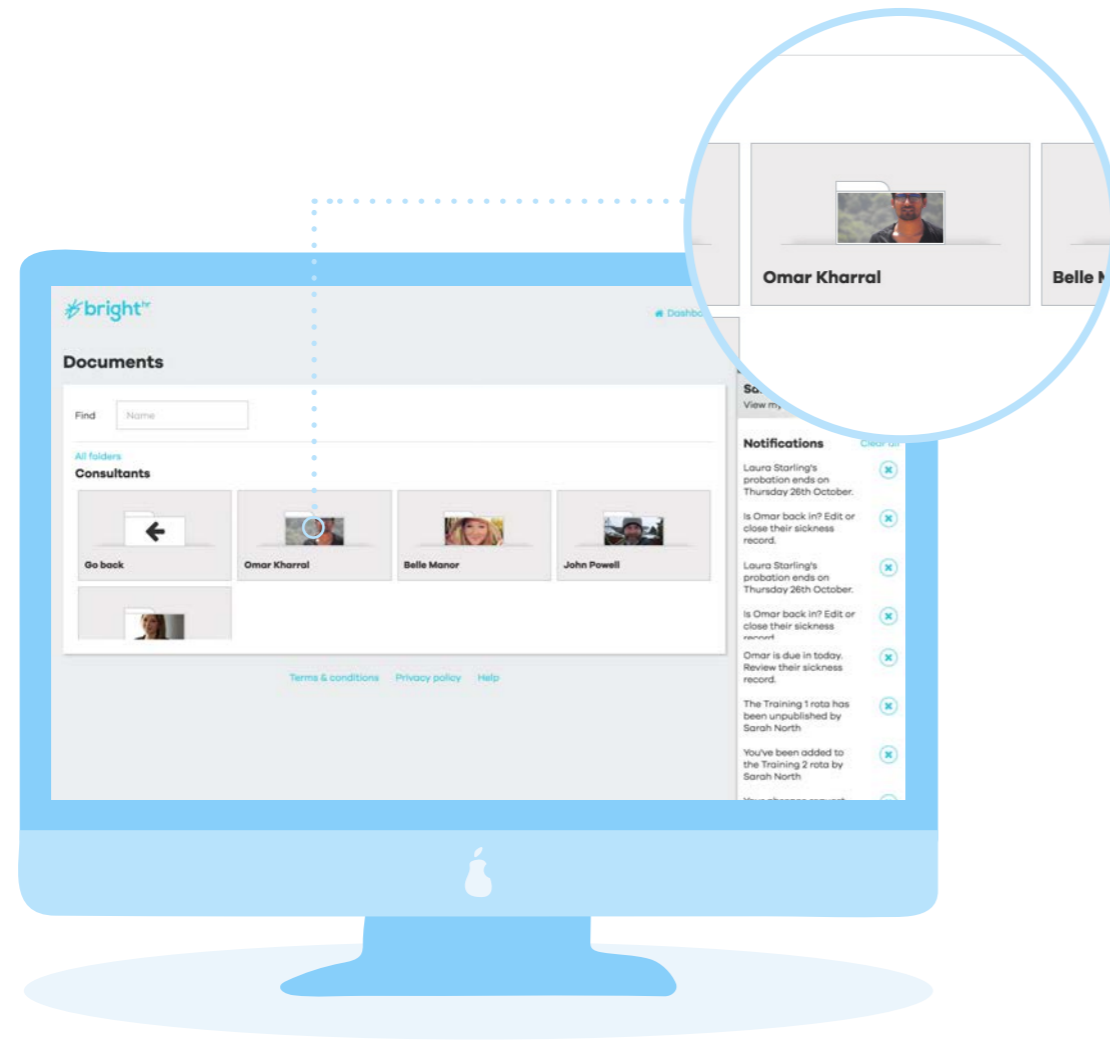
5. Documents



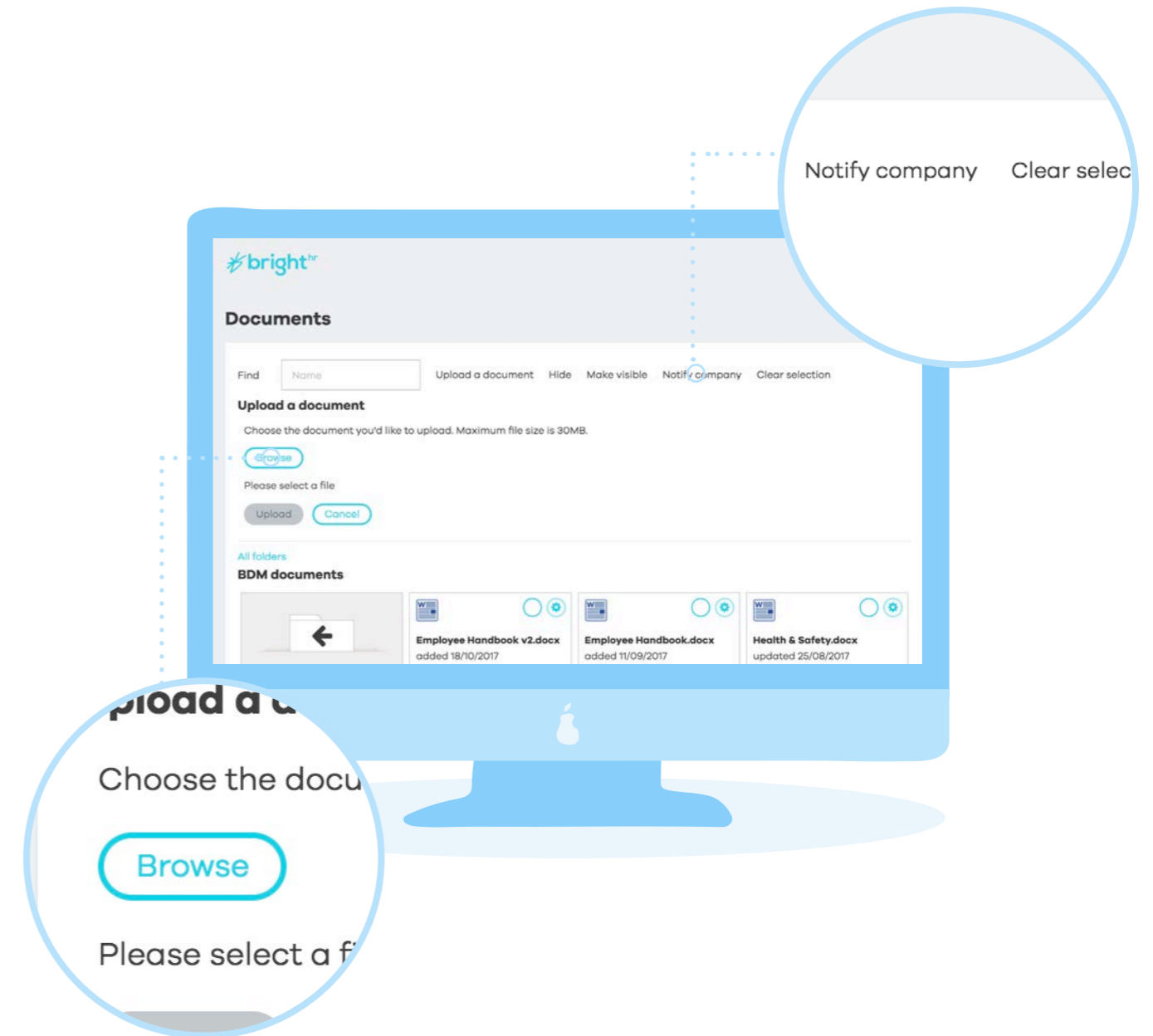
There is a series of filters to enable you to sort by absence types.



i) From the Dashboard click **Documents**. This is where you can upload documents to **BrightHR**. When you first log in there will be two boxes available, **My Documents** and the second will show your name.



Once you add teams, a documents folder for each team will be created and all the members of that team will have a folder contained therein.



ii) To upload documents, click into an employee's folder and select **Upload a document**

Click **Browse**, and select the file to be uploaded. You can choose whether or not you make that document visible to the employee.



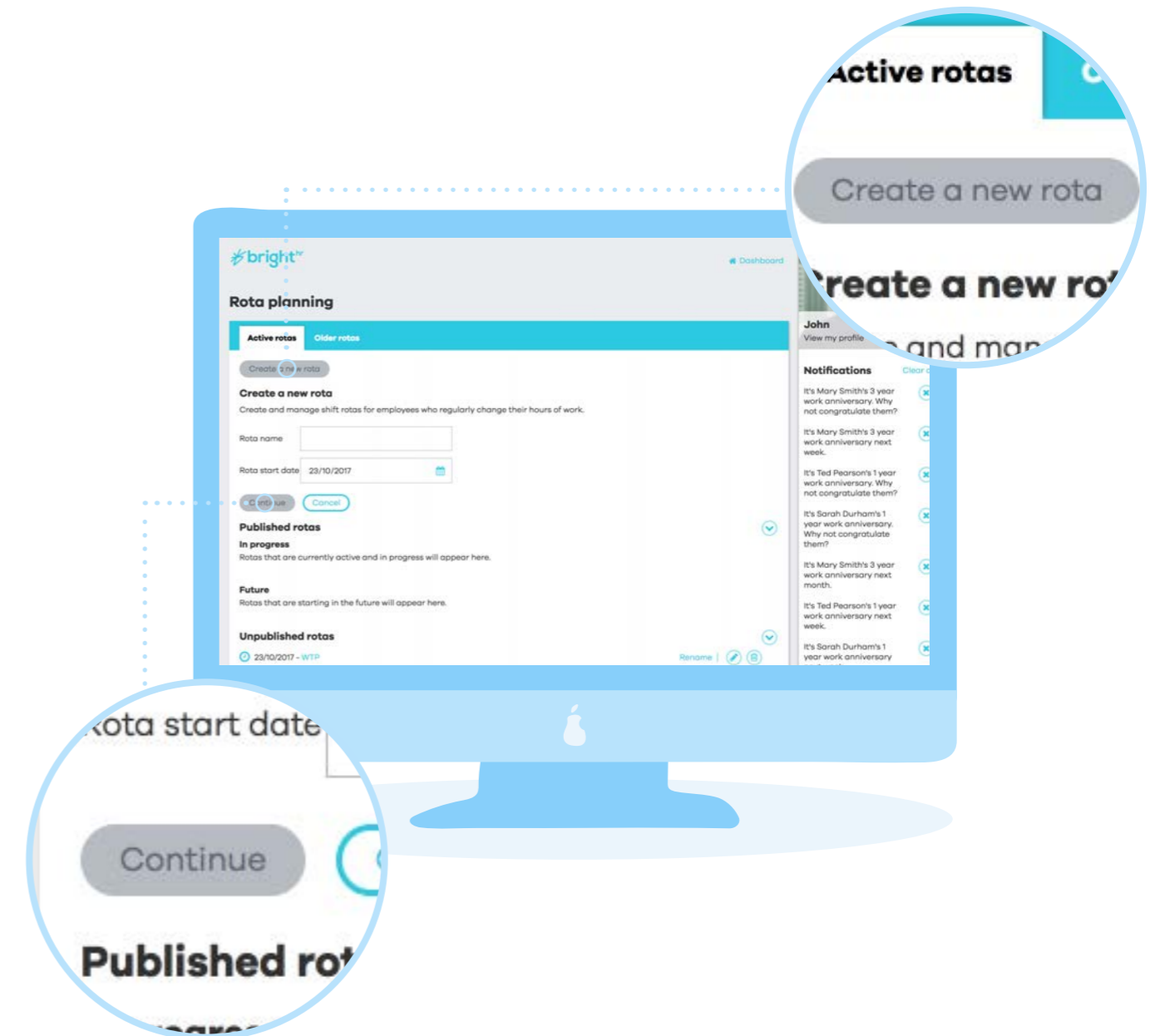
6. Reports



From the Dashboard click **Reports**.

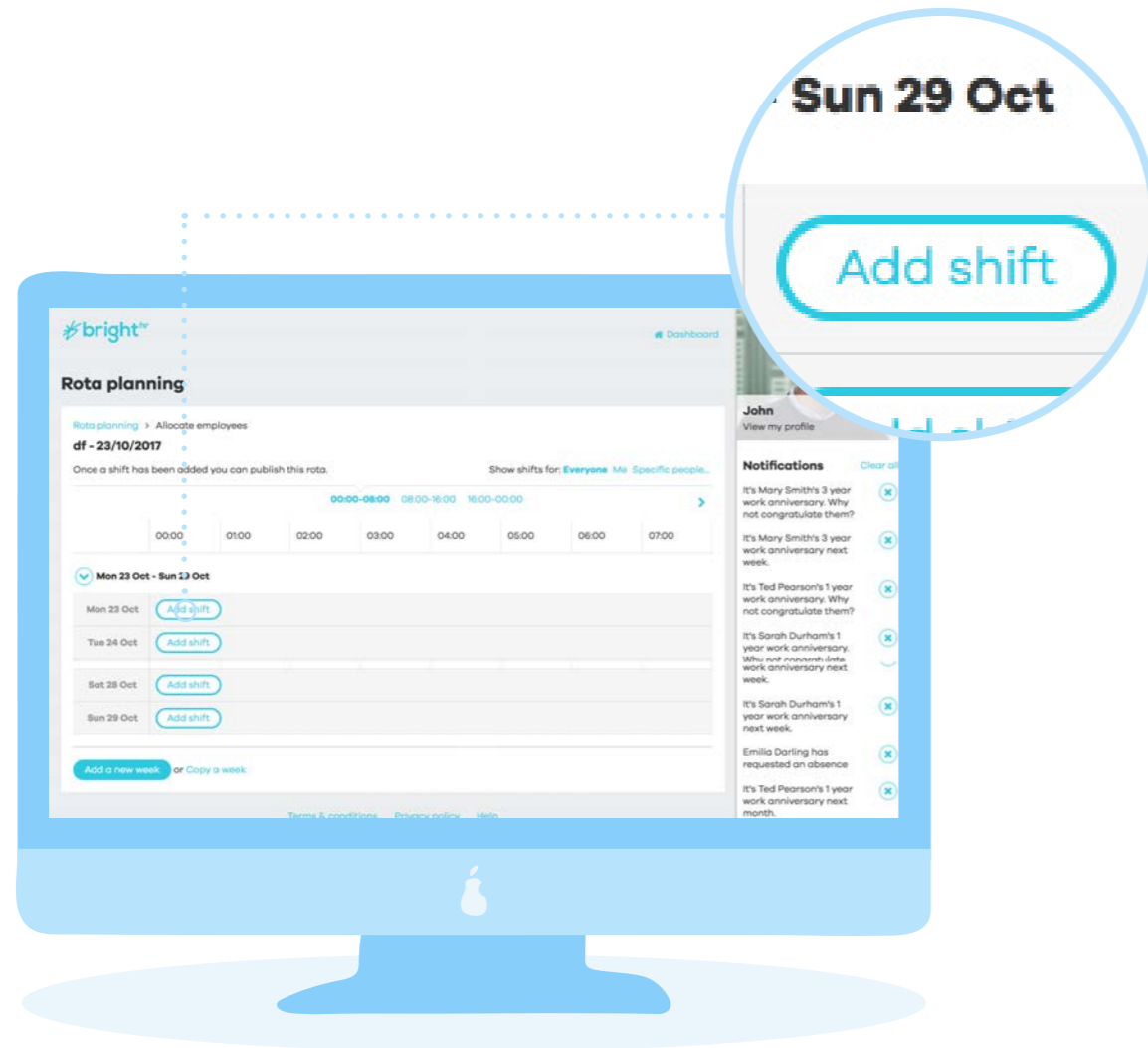
Select the report type, select the format of the report, enter a date range if required and click **Generate**.

7. Rota Planning



From the Dashboard select **Rota Planning** then **Create a new rota**.

Give the rota a Name and a Start Date the select **Continue**.



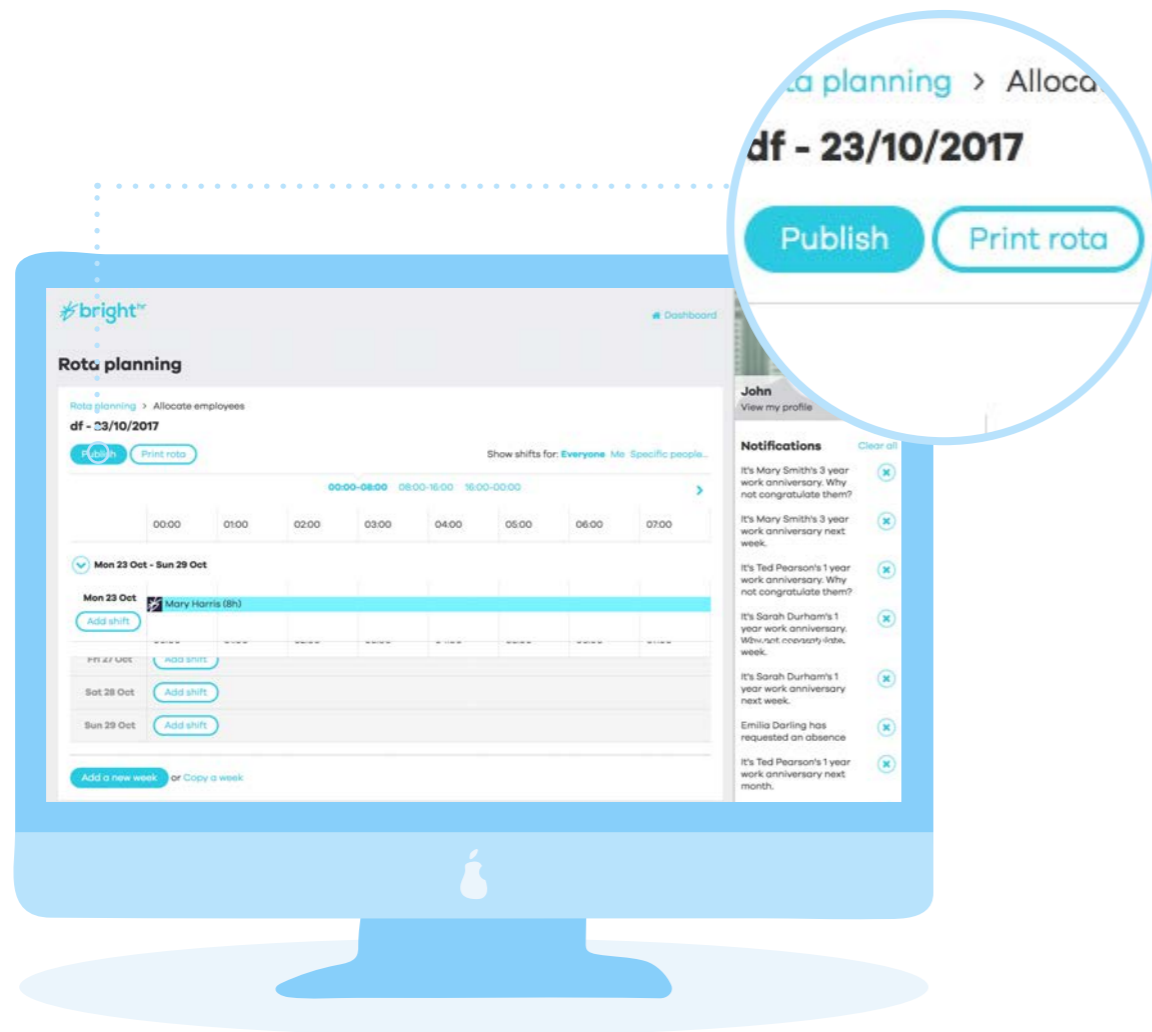
Click **Add Shift** for the relevant date.



Enter the Shift Duration, Note (if applicable) and select which employees to assign to the shift. Click **Add to rota**.



8. Notifications



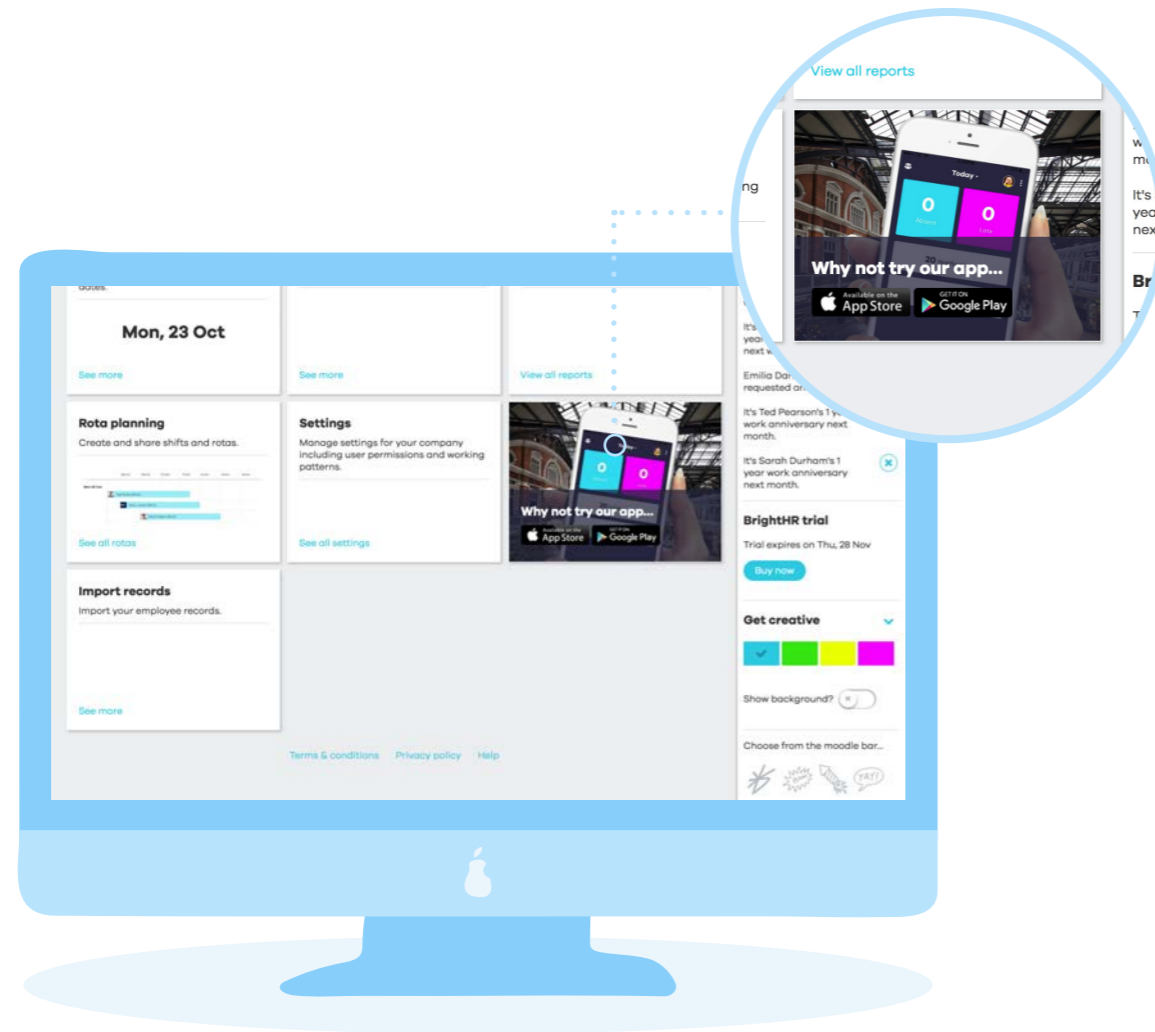
To publish this rota select **Publish** and the employees included in the rota will be notified.

You can set Notifications to advise you of Absences, Key Dates and/or Special Occasions. From the Dashboard click **Settings, Notifications**

Make your preferences then click **Update** at the bottom.



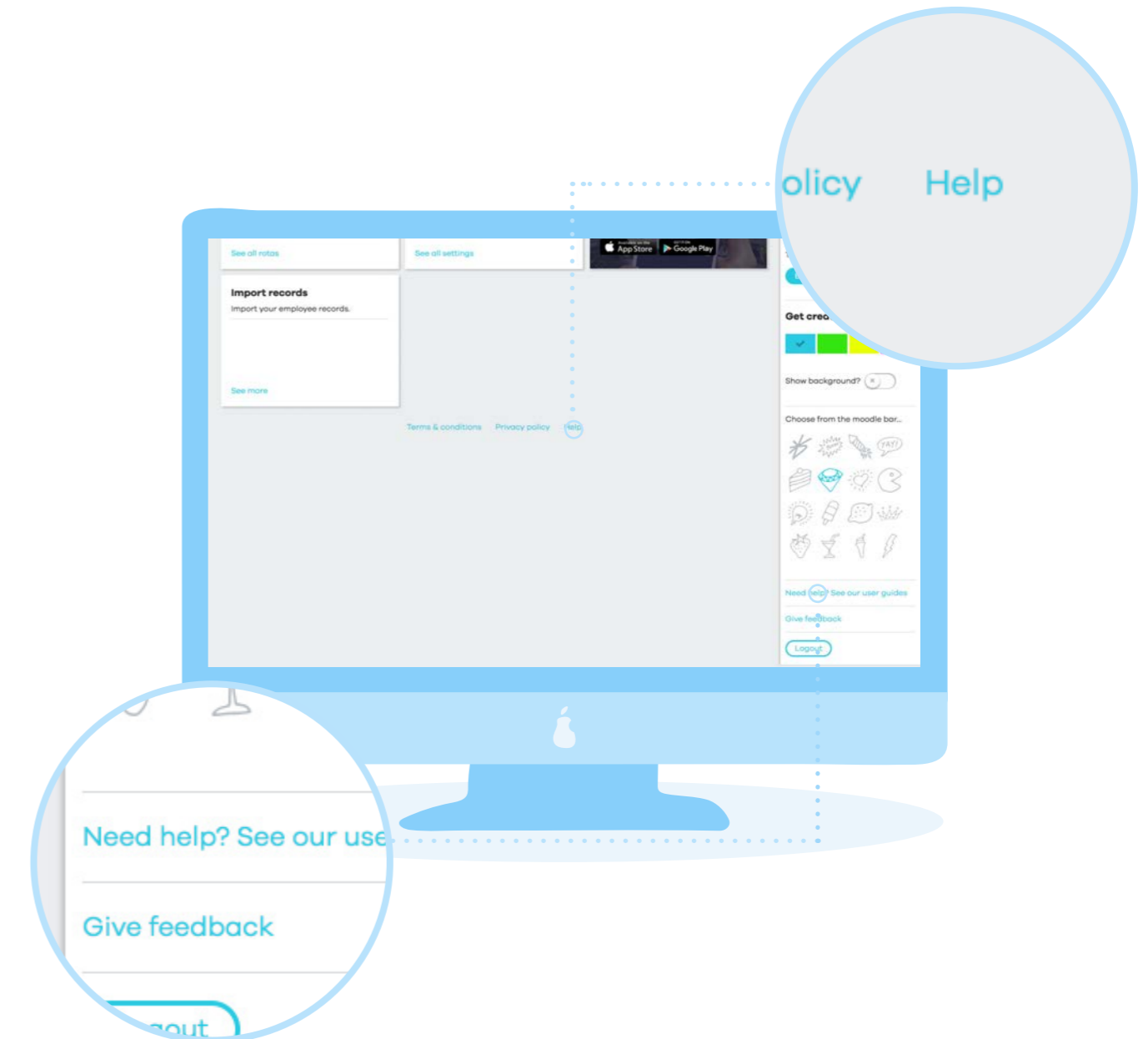
9. App



There is a free **App** available for all users to download from the App Store for iPhones and Google Play for Android phones.

Download the **App** and log in using the same details you use for the main system.

10. Contact Us/Help/Feedback



To contact the **BrightHR** support desk call 0844 892 3927 or email support@brighthr.com. At the bottom of the page throughout **BrightHR** is a Help link, click this to log a support request.

To access User Guides, click Need Help? To leave feedback click Give Feedback.

