

# Making Breathe your own

HR User guide



# Welcome to Breathe

A very warm welcome and thank you for choosing Breathe.

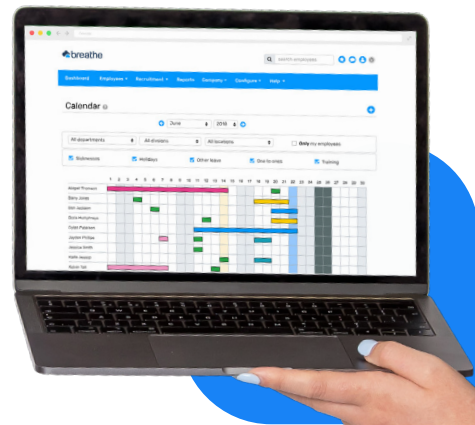
By switching to time-saving, people-focused HR software, you're taking a big step to building positive, nurturing culture that puts people first and drives business-success.

## How this guide will help you

This guide will equip you with everything you need to feel confident using Breathe and help you get the most out of the system.

We'll walk you through different areas of Breathe, from uploading your people's data through to dealing with holiday requests, sickness logging, creating working patterns and more.

As the HR user, this is your go-to Breathe manual. This guide is designed to answer any system queries you might have and get you back on track.





# Our team is here to support you

Whether you're fully set up on Breathe or are just getting started, so far you'll have been looked after by our onboarding team.

Our dedicated team is on hand to provide you with as much help as you need. They'll be there to help you get your account fully set up and answer any questions you may have along the way.

Once you're ready, you'll be introduced to our support team, who'll be there to help you with any queries going forward.

## The knowledge base

If you do have a burning question, we recommend that you take a look at our *knowledge base* first. Our huge collection of articles has been put together to provide you with helpful answers to your questions, so you're likely to find just what you're looking for.

This can be accessed by any HR user by going to **help > knowledge base** from within your Breathe account. Simply type in a keyword related to your query and choose a guide from the search results.

## Get in touch with us

But, if you can't find what you're looking for, our support team will be more than happy to help. Simply start a conversation with them from within your account via the chat function, or give them a call on 01403 288700.

## Not sure what's included in your plan?

[Click here to find out](#)





# What's inside

In this guide, we'll walk you through each of Breathe's features. Here's what's in store:

<b>1</b>	Work patterns	<b>5</b>
<b>2</b>	Holiday/leave allowance	<b>6</b>
<b>3</b>	Importing your people	<b>7</b>
<b>4</b>	Permissions	<b>8</b>
<b>5</b>	Assign line managers and your people status	<b>9</b>
<b>6</b>	Bulk assign	<b>10</b>
<b>7</b>	Sickness	<b>11</b>
<b>8</b>	Knowing your Breathe calendar	<b>12</b>
<b>9</b>	Setting up your calendar sync	<b>13</b>
<b>10</b>	Company documents	<b>14</b>
<b>11</b>	Modules	<b>15</b>
<b>12</b>	Other useful tools	<b>16</b>



## STAGE 1

# Work patterns

## What is a work pattern in Breathe?

Work patterns are the pre-determined days that a person is expected to work across a 1-week period. Don't confuse this with a rota, though – a work pattern is simply used for reference so that absences are logged correctly.

If they work irregular weeks, don't worry – we have a solution for this too. The guides below will explain how to manage this.

Managing irregular working patterns

Working patterns

## Why are work patterns needed?

A work pattern is needed to identify the deductions that need to be made when someone books leave or takes a period of sickness. These can be set in 15 minute increments.

In Breathe you can create as many work patterns as you'd like. For example, you'll need separate work patterns for full and part time staff.

### Our top tips

- Make sure you've created a work pattern that reflects the days that a person works. If they book a holiday or sickness against a day that is not in their working pattern, a deduction of 0 will be made.
- You can assign working patterns in bulk from the people list. Simply select the people you'd like to assign a pattern to by ticking the box, scrolling to the bottom, choosing 'assign working pattern' from the dropdown list before clicking the green 'Bulk update' button.
- If you have multiple employees who work the same pattern, you don't need to create a separate one for each. You can assign multiple employees to one pattern.



STAGE 2

# Holiday/leave allowance

## What is a leave allowance on Breathe?

A leave allowance is pre-selected amount of leave that is assigned to your people. Any amount of annual leave they take is deducted from this. It can be set to increase with length of service and allow carryover.

## Why is a leave allowance needed?

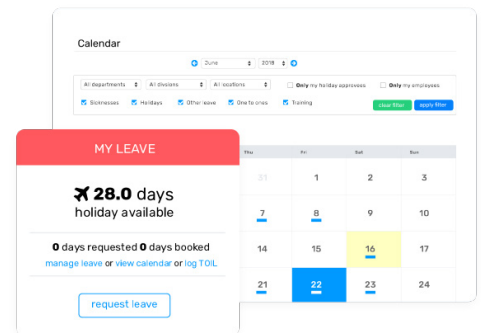
An employee will need a leave allowance to be able to show how much leave they are entitled to throughout the year.

You can calculate leave allowances using our (<https://www.breathehr.com/holiday-calculator>) handy holiday calculator.

Once the leave allowance has been assigned, your people will be able to see exactly how much they have booked and taken. And - most importantly for them - they'll be able to see how much holiday they have left for the year.

[Create a holiday allowance guide](#)

[Handy holiday calculator](#)



### Our top tips

- You can assign leave allowances in bulk from the people list. Select the people you wish to assign a pattern to by ticking the tick box, scrolling to the bottom, choosing 'assign working pattern' from the dropdown list before clicking the green 'Bulk update' button.
- If you have multiple employees with the same allowance, you don't need to create separate leave allowances - you can assign multiple employees to same allowance.
- Breathe does not automatically Pro rata leave based on the working pattern so you will need to create a separate allowance for any part time workers that you have and assign this to them.





## STAGE 3

# Importing your people

## What is the 'People import'?

This is a way of bulk importing information for your people into Breathe and saving valuable time.

We have provided you with a handy spreadsheet that you can fill out with as little or as much information as you like, along with the mandatory fields.

[Bulk assign guide](#)

## Why is it needed?

If you're adding more than one person, the import is a great tool to use. It allows you to get large amounts of information into Breathe quickly.

Along with this, you have 5 other ways of bulk-updating your existing people. These are:

- Update existing people
- Jobs
- Salary
- Benefits
- Additional payments

[Importing your people guide](#)

[Adding a new person to Breathe guide](#)

## Our top tips

- If you're adding in a line manager or holiday approver, this'll need to be their ref. number that's listed (e.g 001), rather than their name
- You can't change any of the columns - the titles and positions must remain the same







## STAGE 4

# Permissions

## What are permissions on Breathe?

Permissions allow you to give (or limit) access to specific areas of the system.

There are various permissions available to you and your people within Breathe. These are:

- **Admin:** The highest permission with overall control of the account
- **HR:** Can see all information, with the exception of remuneration  
You can purchase 3 extra HR permissions if needed.  
[Purchasing extra HR permissions guide](#)
- **Finance:** Can see information related to remuneration, including salary and pay. Can't see employee personal information.
- **Line Manager:** Line managers will only be able to view information relating to their direct team. This information depends on the settings applied. **Configure > settings > permissions and approvals > change what line managers can see and do**

There is also the functionality to assign holiday approvers to your people within Breathe. This person will receive leave requests. Use the Bulk assign feature to save time.

[Bulk assign guide](#)

## Why are they needed?

Permissions are needed to create a hierarchy of control within your account, and limit who is able to see sensitive data and make changes.

### Our top tips

- Before an admin user leaves, make sure they transfer their admin permissions across to another HR user.
- You're only able to have one admin user per account, but you can have a 'super user'. This is simply HR and finance permissions in one.
- Struggling to change someone's status to 'pending leaver'? They might be your account admin. To check this, scan your people list for an 'A' in the status and permissions column. Admin users will need to transfer their permissions to another HR user before you can make them a pending leaver.
- Can't assign a line manager? You will need to be either an admin or a super user.

Check out the below guide for instructions on how to become a super user:

[Permissions guide](#)







## STAGE 5

# Assign line managers and your people status

You may want to assign line managers to your people so they have someone to report to.

Only admin or super users (HR & Finance permissions together) can do this. This is because the line manager permissions allow for a certain amount of financial access, which HR users don't have.

Line managers can be assigned singularly or in bulk.

To do this via a person's profile, navigate to **more > permissions**. Click the pencil icon, and you'll see the line manager section on the right-hand side.

Please note: if the person you'd like to make a line manager isn't showing, it means that they haven't been given line manager permissions.

## What does 'people status' mean?

Do you have a mix of employees, contractors and volunteers? This little tool means you can differentiate your people and categorise the different types of workers.

Once you've selected a people status for each of your team, this will be reflected in their Breathe profiles and any reports you create.

### Our top tips

- You can bulk assign people status by going to 'our people' in the navigation bar. This is the most efficient way of updating lots of profiles in one go.
- You can also do this individually. All you need to do is search for the individual that you'd like to change, either using the search function on the top right of your account or by selecting them from 'our people'.





## STAGE 6

# Bulk assign

### What is bulk assign?

This means you can assign certain tasks or features to a group of people at once, rather than doing it one by one.

### How to bulk assign

Head over to **People > Our people**. Select the relevant employees using the tick-boxes. When you're done, scroll to the bottom of the page. A bar will show saying "x people selected" with a drop-down box next to it.

Choose from the following:

choose
Assign expense approver
Assign line manager
Assign holiday approver
Assign statutory holiday
Assign working pattern
Assign holiday allowance
Send email
Send welcome email
Assign training records
Assign benefit / pension records
Assign people to a department
Assign people to a location
Assign person type

choose ▾

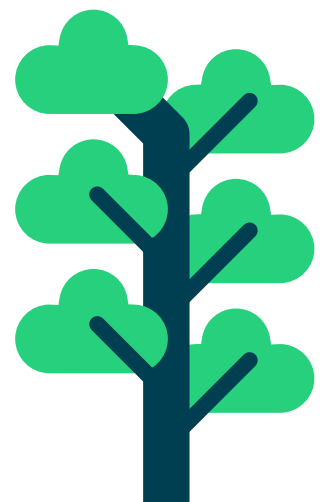
You'll notice that you can send an email in bulk, as well as sending a welcome email to your new starters.

You can also assign training/benefit/pension records, a department and a person status.

[Bulk assign guide](#)

### Our top tips

- You can't bulk-book leave for your employees - all leave entries need to be entered and approved individually.





STAGE 7

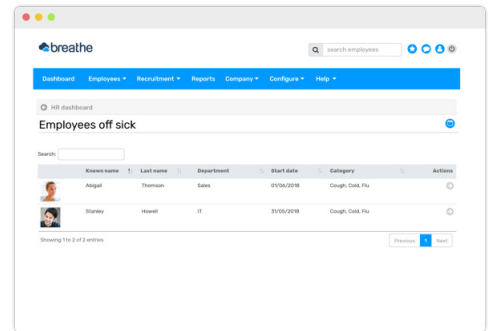
# Sickness

Your team can request leave directly from their profile. Once submitted, requests go straight through to their leave-approver. Once approved, a deduction will be made from their allowance.

## How is sickness managed on Breathe?

There is a dedicated area to log and track your people's sickness on Breathe.

Employees can log their own sickness if they have been given permission to, or it can be logged by their line manager or an HR user. To give your people the control to log their own sickness head to **Configure > settings > permissions and approvals > change what people can see and do > directly enter their own sickness.**



## Why is it needed?

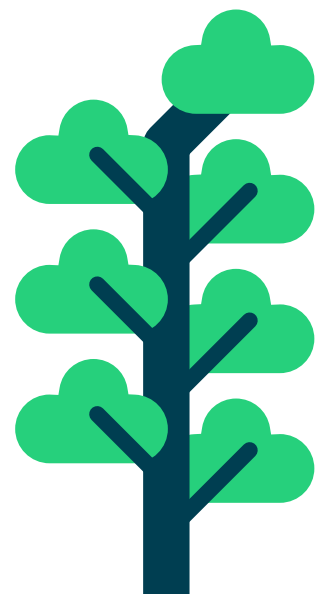
We recognise that the approach to sickness may vary from company to company.

With that in mind, we've designed a sickness module that allows you to track sickness trends, view Bradford factor scores, upload documents relating to leaves of absence and more.

[Sickness guide](#)

### Our top tips

- The sickness record will remain open and at a total of 0 until it has been closed. When the person has been marked as returned to work, the sickness will remain open to allow back to work interviews to be conducted and for you to assess whether they're fit to return to work. Once you are satisfied, you can mark the sickness as closed. Breathe will make the calculations for you.
- You can upload associated documents to a sickness record, such as doctor's notes. These can be uploaded by the HR users or the person who the sickness record relates to. You can do this in the 'attached documents' section at the bottom of a sickness record.





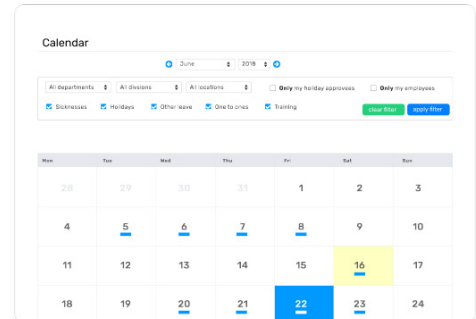
STAGE 8

# Knowing your Breathe calendar

## What is the calendar?

One of Breathe's key features is the holiday calendar. The calendar allows you to view any absence over a 1-month period, all in one place.

The names of users with an absence in that month will be listed on the left, with their absence displayed going across. There are different colours to indicate what type of absence it is, using the key as reference.



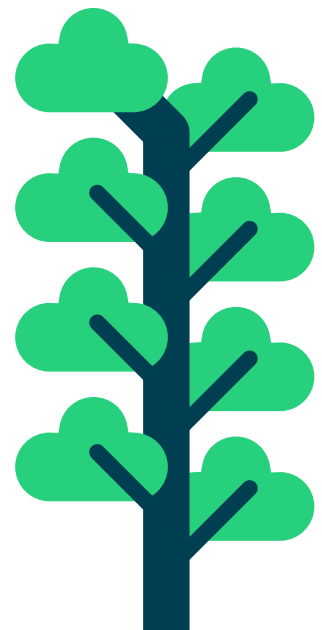
## Why is it needed?

Whether you're a manager or member of the HR team, there are times when you'll need to know when people across the business are away.

The calendar gives you a handy, digestible summary of who's out and when, giving you the freedom to plan ahead.

### Our top tips

- If a user isn't showing, it'll be because they don't have anything booked, ie. holiday or training. Users will only show on the calendar if there is data to display.
- Statutory holidays, company holidays and blackouts will only show if a user has booked something in during this time. Otherwise, it will remain in the system but won't show on the calendar.
- You're unable to change the colours in the calendar.





## STAGE 9

# Setting up your calendar sync

## What is the Calendar Sync?

Calendar sync is a way to pull across holiday and other leave in Breathe to an external calendar.

## How it helps

Setting up your calendar to sync with Outlook, iCal, Google calendar, etc. is a great way to view your team's availability right from your own calendar, saving you valuable time.

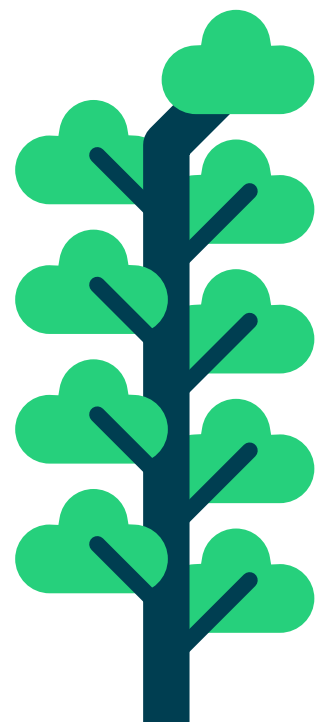
You can manage these calendars centrally, or alternatively you can allow your people to choose which calendars they'd like to sync themselves.

We've created some useful guides on how to sync with different calendars:

[Outlook guide](#)[Google calendar guide](#)[iCal guide](#)

## Our top tips

- It can take up to 48 hours for new entries to show on your own calendar. This is due to restrictions on Microsoft/Google with pulling the information across.



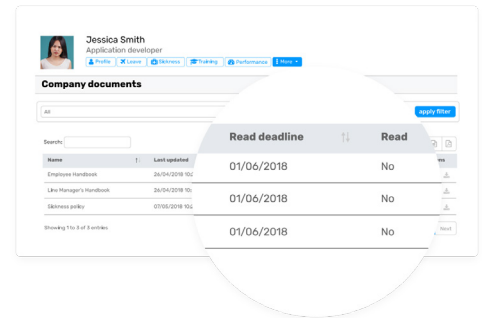


STAGE 10

# Company documents

## What are company documents?

These are business-related documents that you need your people to read, including policies and procedures. They may be relevant to all your people or just a select few. You can upload these to your company documents module within Breathe and store them centrally for easy access.



## Why is it needed?

Just like Dropbox and Sharepoint, the company documents area gives you the ability to store and share files within your account.

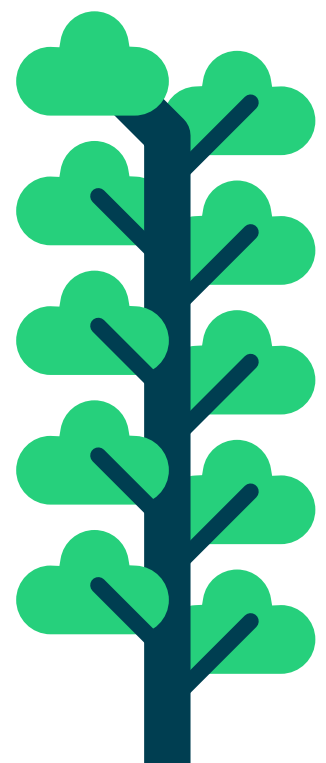
You can assign specific audiences by department or division, or you can list individuals that you would like to read the document.

You can also make the document read-required. This will send an email notification to the listed people and you can set the deadline also.

### Company documents guide

#### Our top tips

- Breathe doesn't use a folder system, as our mission is to help you move away from filing cabinets, physical or virtual. Instead, you can create tags, e.g. "company handbook", for your documents. You can then search your documents to find what you're looking for.
- Your team will be able to access and view company documents assigned to them to read from the tile icon on their dashboard.
- If someone doesn't get round to reading the document by the required date, you can give them a gentle reminder by clicking on the paper plane icon.





## STAGE 11

# Modules

Within your account you have a modules section. Here, you'll be able to control what's displayed on your account and what your people can access.

## Free modules

All modules displayed on the left of the modules page are free of charge and can be switched on and off when you like.

To access this, head over to **configure > settings > account > modules**. Here you can decide which modules you think will work best for your organisation and tailor Breathe to your needs.

[Modules & picklists guide](#)

## Chargeable modules

### The recruitment module

The recruitment module is a useful tool which allows you to manage vacancies and applicants in one place. Your admin user can turn this on if you'd like to make use of it.

There are 2 plan sizes, depending on how much recruiting you are doing.

[Watch video on the recruitment tool](#)

Please note that the recruitment module is part of the initial set up. You'll be asked if you'd like this to be included, but it's easy to switch it off if you don't need it. Remember you can turn it on again at a later date if you'd like to make use of it.

### The expenses module

This valuable tool allows you to manage all expenses in one secure place.

Your team can submit expenses with their receipts and you can approve them in a single click.

They'll then be sent to your finance user(s) for payment.

[Expenses add-on guide](#)

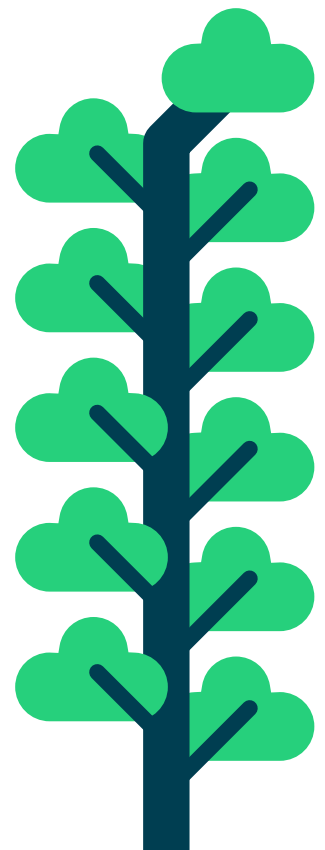
Free modules | Chargeable modules

Expenses

Off  
 On (£5.00/mo)  
 On (£5.00/mo)  
Enable your people to submit expense claims

Recruitment

Off  
 Standard (£5.00/mo - Max. 2 open vacancies)  
 Plus (£20.00/mo - Unlimited open vacancies)







STAGE 12

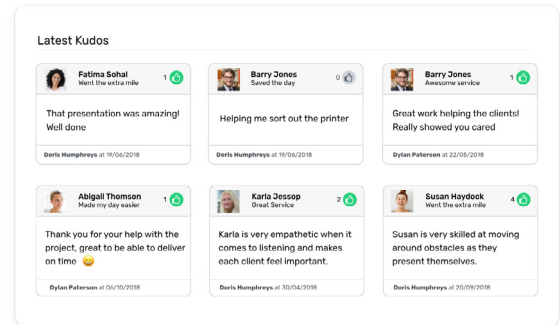
# Other helpful tools

## Kudos

At Breathe we are exceedingly proud of the product we've built and continue to develop. We hope you enjoy using our software as much as we do developing it.

If you want to spread some good vibes around your team, why not use the Kudos feature and let someone know that they've done something great. It's a great way to "thanks" and put a smile on their face.

[Kudos guide](#)



## HR partner directory

We aren't HR professionals at Breathe. Instead, we provide time-saving HR software to help streamline processes with UK small businesses.

However, should you need HR advice we have a fantastic HR partner directory. We've teamed up with some wonderful HR consultants who will be glad to help if you need any professional advice.

[The HR Partner Directory](#)

## Refer a friend

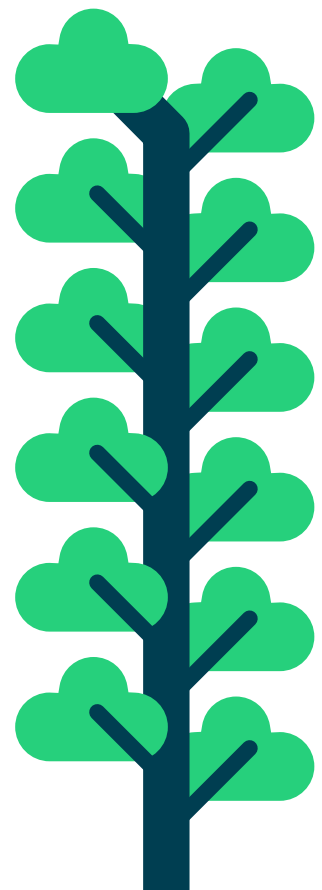
Did you know that if you refer Breathe to a friend, you could win some amazing prizes?

If you love Breathe already and know someone who would benefit from our easy-to-use system, simply send them your unique referral code from within your account.

If they become a customer, they'll get a 15% off lifetime discount, and you'll earn points towards some great prizes.

Pretty great, right?

[Refer a friend](#)



# Congratulations

It's great to have you on board.

All that is left to say is a big thank you for switching to Breathe and joining our paperless HR revolution.

We hope you enjoy using Breathe. Please don't be afraid to explore what is available to you by heading over to **configure > settings > modules**.

And, of course, if you need a hand with anything, please don't hesitate to get in touch with our friendly team.

WAHOO!

