naturalhr
TRANSFORMING BUSINESS

Manager's guide

A complete guide to Natural HR for managers.

May 2022

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Important note

Natural HR is a powerful and feature-rich human resources platform with different versions offering different features and functionality.

As such, this guide may refer to features or functions or show modules which are not in your version of the system.

This may be because the specific feature is not offered in the version of Natural HR which your company uses or it may be that your company has set alternate settings or chosen not to allow certain features to be used.

Additionally, depending on your operating system and browser, there may be slight differences in how pages are laid out and displayed – this is perfectly normal and is to be expected.

If you are unsure about what you can and cannot use, please contact your account administrator.

Logging in

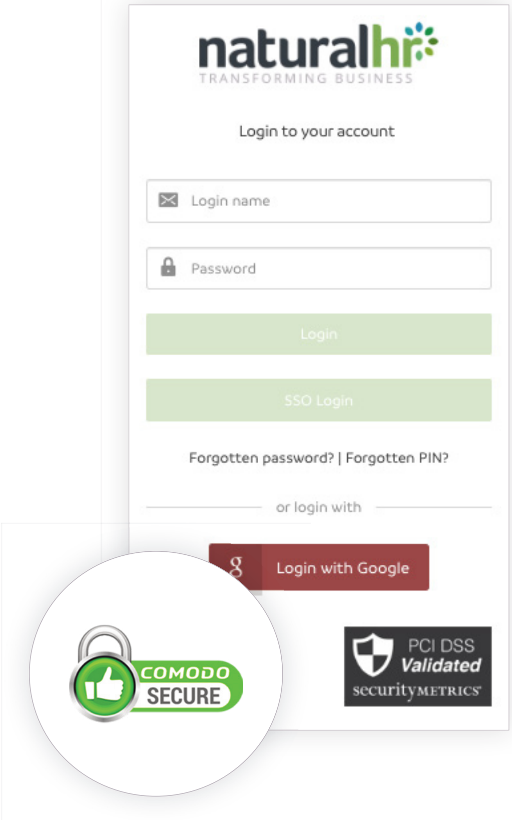
The URL to log into Natural HR is https://www.naturalhr.net/log in

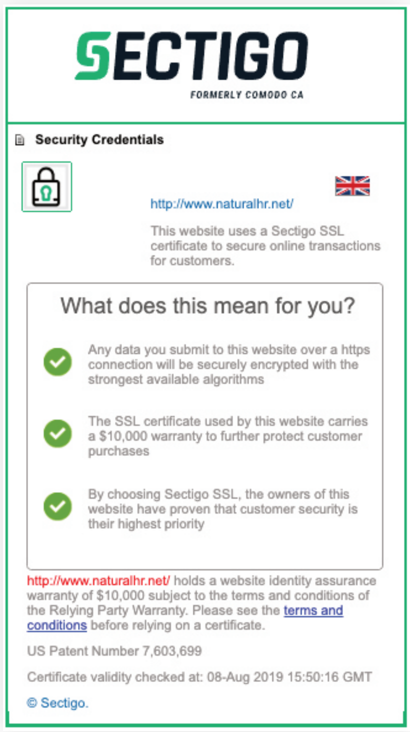
How do I know that I am on the correct site and my connection is secure?

1. Ensure the URL is https://www.naturalhr.net/log in

2. Ensure that there is a padlock next to the URL along with a green banner with Natural HR Limited (GB) like the below (the actual image will vary according to your browser).

3. You can click the Comodo Secure icon under the log in box to verify that the SSL (security) certificate is valid and that the site is indeed genuine. Upon doing so you'll see something similar to the below which confirms the identity of the site.





How do I log in?

There are three ways to log in to Natural HR:

1. Username and password

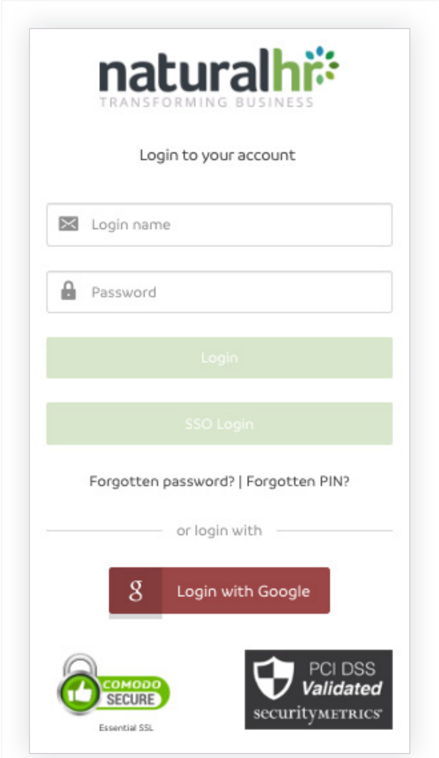
When your account was created, you'll have been given a unique username and password and you should use these to log in by entering the correct values in the relevant box.

2. Single Sign On (SSO)

If your company is using a single sign on platform, you'll simply be able to enter your email address and select the option for SSO Log in; you may then be prompted to authenticate the log in via the single sign on platform.

3. Log in with Google

Alternatively, your company may have opted to use Google to authenticate your credentials and log into your account.



Log in page

Username and password

If your company is using username and password to log in, then you may also be asked to enter three random digits from a six-digit PIN number as a second step of log in.

If this is the case, then you should pay particular attention to the digits you are being asked to enter.

For example, in this instance you are being asked to enter digits 3, 6 and 1 from your PIN so if your PIN was 147 853 then you would enter:

7 in the first box;
3 in the second box; and
1 in the third box.

Entering your Natural HR PIN

Error 17: Incorrect username or password
If, when logging in, you receive an error 17: Incorrect username or password, please check that you have entered the correct username and password.

Whilst it is frustrating, for security reasons, we are unable to tell you if it is your username or your password which is incorrect.

If you are getting error 17 then either the username or password you are entering is incorrect. Our support team will not be able to resolve this as the message will only occur through human error or by using saved passwords as described below.

Saved passwords
Generally speaking, we do not recommend that you save passwords to your browser as this has been known to be less secure and can cause log in issues.

We do recognise that some companies/employees do save their passwords to browsers. With this in mind, if your password is changed, please ensure that you update the password in your browser otherwise the browser will repeatedly attempt to complete the log in fields using the old password and the log in will fail.

Multiple failed log ins
If you continue to attempt to log in with an incorrect username and/or password, your account will get locked.

Additionally, if you continue trying when your account is locked you'll also have your IP address blocked. Should this happen then no one on the same IP address (i.e. potentially your whole company) will be allowed to log in for 15 minutes.

If your account or IP address does get blocked then you should wait for AT LEAST 15 minutes before trying to log in again – if you try sooner, each incorrect attempt will restart the 15-minute timer again.

Forgotten password
If you have forgotten your password you can reset it either by visiting **https://www.naturalhr.net/forgotten-password**, clicking the forgotten password link on the log in page or contacting your account administrator.

If you don't log in using your email address and normally log in to Natural HR using a username and NOT your email address (for example you log in using joe.bloggs rather than joe.bloggs@email.com) then you'll NOT be able to reset your password using this form. In this instance, you should speak to your account administrator who can reset it for you manually.

Our support team CANNOT reset passwords – if you need someone to reset your password for you then please contact your account administrator.

Google log in

If your company has chosen to then you may optionally log in using your Google account. Doing so means you do not need to use your username and password for Natural HR and you can simply click the **Log in with Google** button and then be authenticated by Google instead.

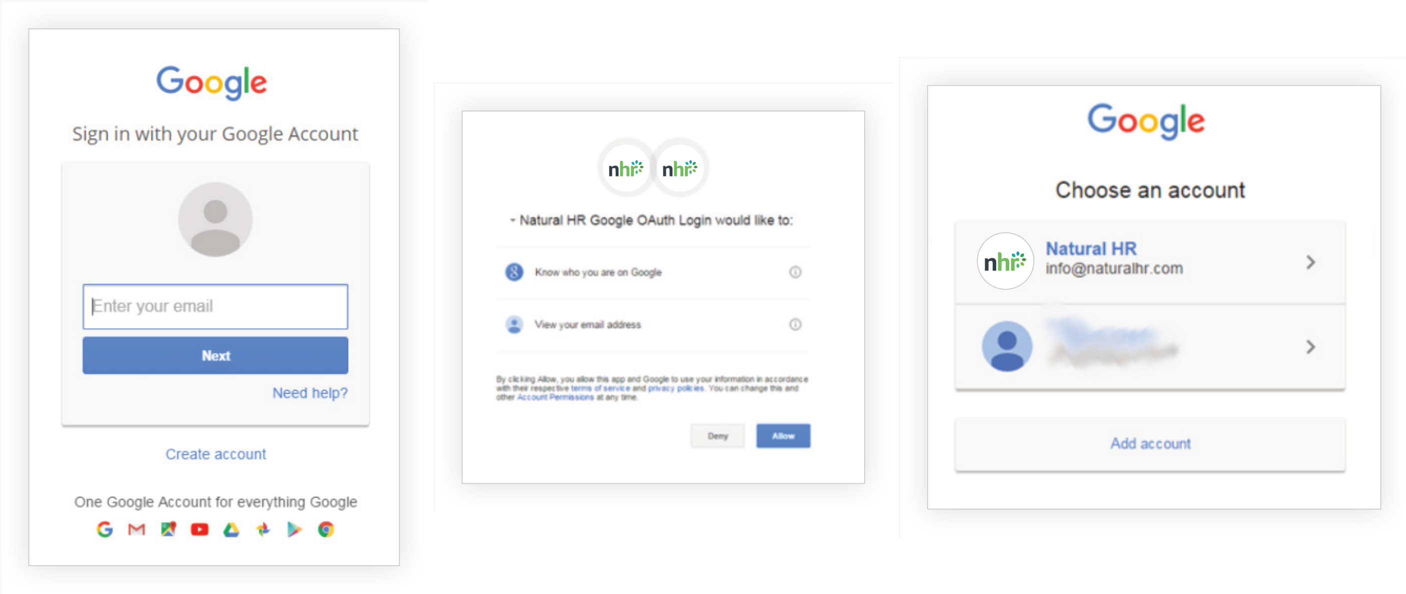
The actual process to log in will depend on whether you are logged in to Google at the time or not.

If you are not yet logged in to Google you'll get a "Sign in with your Google Account" box. In this case you should enter your Google email address and on the following screen, your password.

During the log in and authorisation, you'll be redirected to Google to log in and so on – your URL will change to a very long URL with a beginning similar to: **https://accounts.google.com/o/oauth2/auth?access_type=online** – this is expected behaviour.

Whilst your Google email address will be the same as your Natural HR log in address, your password (hopefully) won't be so ensure you enter your Google password on this screen.

Once you have entered valid credentials, Google will ask you to authorise Natural HR to know your identity and your email address from Google – you need to click "Allow" to proceed and you should then be logged in automatically.



Logging in with Google

If you are already logged in to Google, then you'll not be asked to log in again but you'll be asked to choose an account to use to log in similar to the third image above.

If it is your first time to using this account to log in, you'll also be asked to Allow access to authorise Natural HR to use your account details.

At any time, you can remove the authorisation for Natural HR from using your account – this is done within your browser.

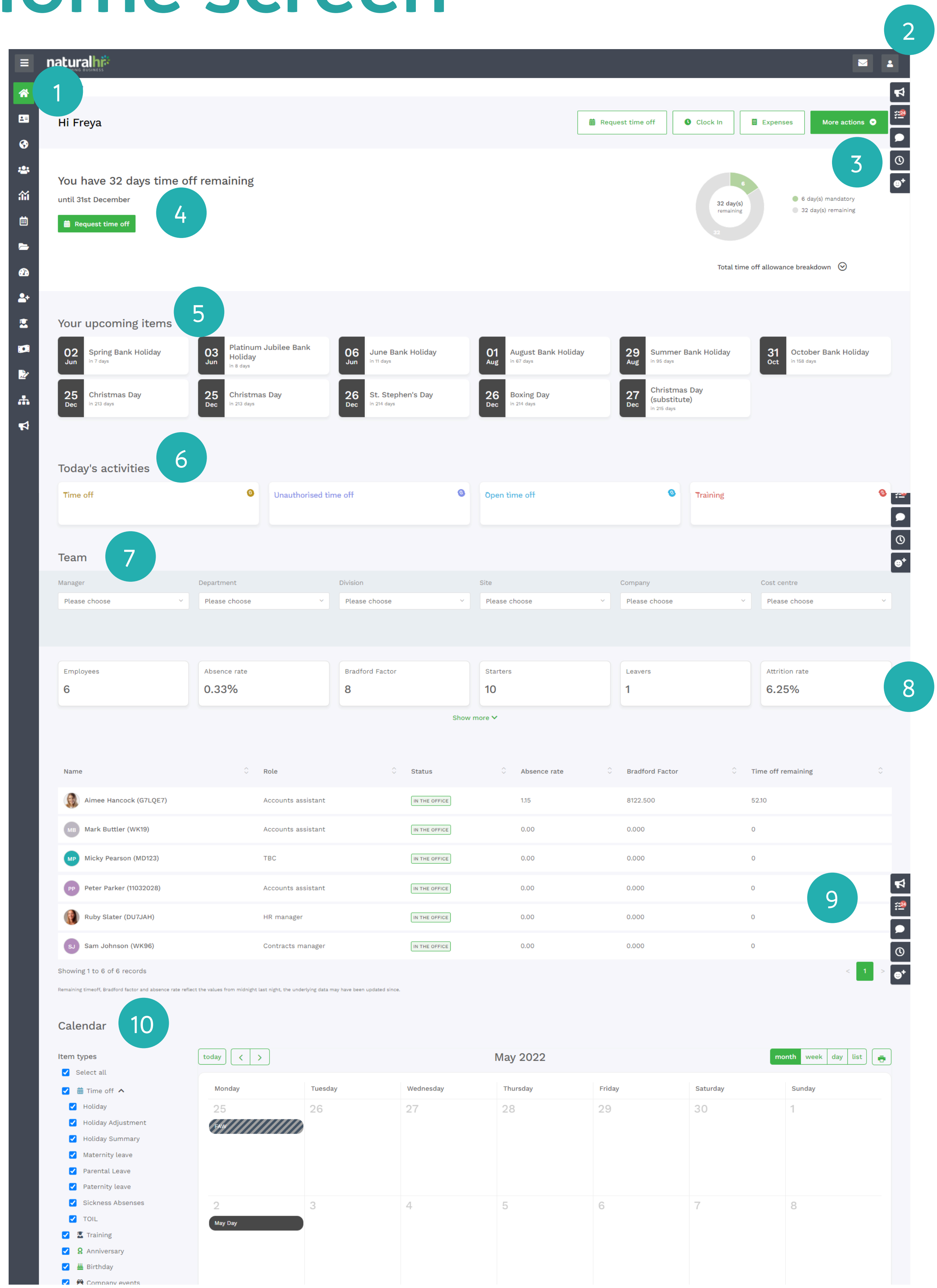
If you receive a notice that your Google account is not authorised to log in, then there are two possible causes:

1. The Google account you are using does not have a corresponding account within Natural HR – remember the log in names must be EXACTLY the same.

2. Your company does not allow Google log ins.

It is important to note that the Log in with Google button is displayed to everyone regardless of what their company has chosen.

Home screen



1. **Main menu:** from here you can access all the functionality and features of your version of Natural HR.

2. **Profile menu:** here you can set your personalisation options and change your password.

3. **Quick launch and To do menu:** quick access to the main functions of the system including announcments, workflows and time off

4. **Timeoff allowance:** your real-time time-off balance.

5. **Upcoming items:** list of the next 12 upcoming booked events

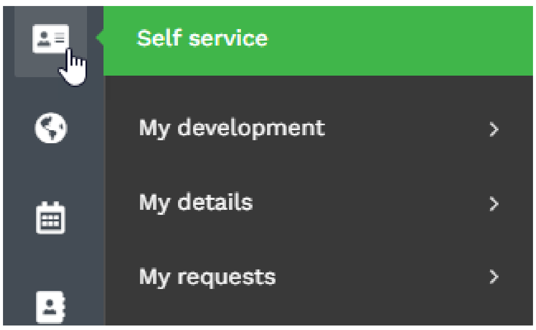
6. **Todays activity:** quick indication of any time off, unauthorised time off, open time off or training booked for the day

7. **Team filters:** filter options for options 8 and 9 below

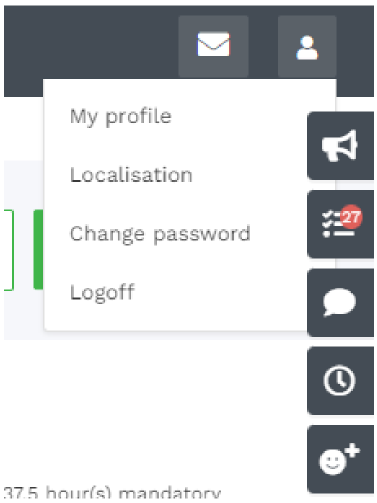
8. **Dashboard:** a dashboard showing real-time information for your team members.

9. **Employee quick view:** quick glance view of status, absence rate, bradford factor and time off remaining for your team.

10. **Calendar:** your personal calendar.



Self service menu



Profile menu and To do menu

Changing your password

To change your password, click the dropdown next to your name in the profile menu, followed by **Change password.**

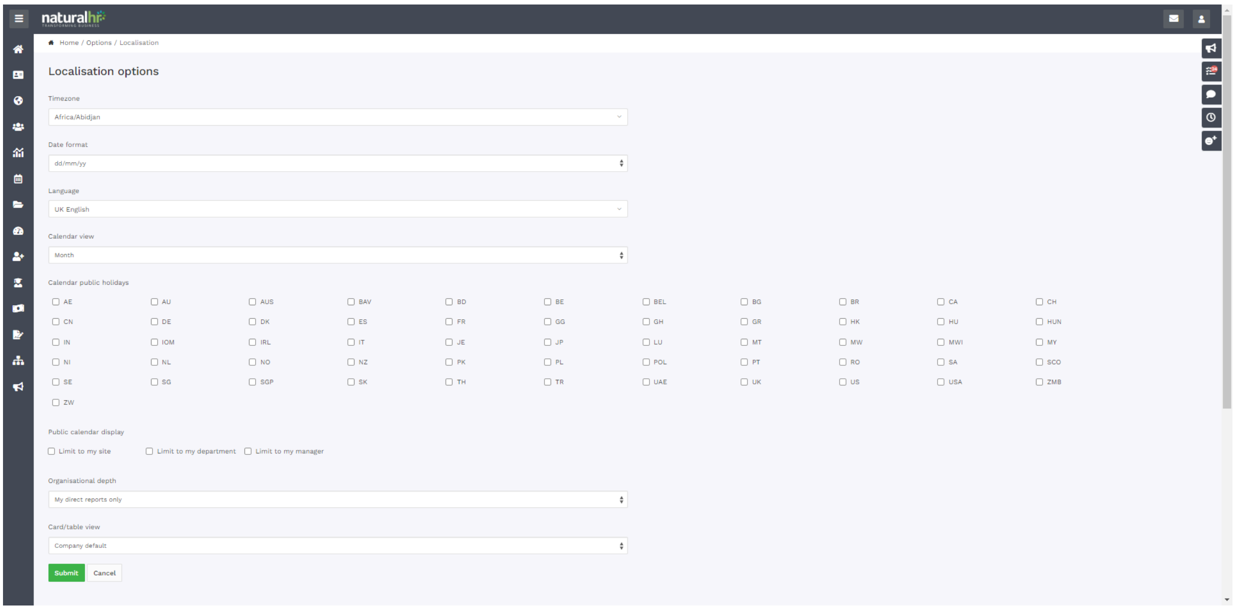
If you do not change your password for 90 days, you'll be required to do so on your next log in.

Passwords need to be at least 8 characters long (ideally longer) and should be something which you do not use on other sites. We recommend you choose a strong password and we prevent you from using any of 10,000 most commonly used passwords for security reasons.

Localisation

Natural HR offers a variety of helpful localisation options. These are accessed from within your profile menu and then clicking **Localisation**.

Within localisation you can set your time zone, date forma and additionally your language. In some cases, this may just be regional variations such as UK vs US or it may be a totally different language. Also, within localisation you can choose to display Public Holidays for your country.



Localisation options

Tables

Throughout Natural HR you'll encounter tables displaying data such as your time off, timesheets, expenses and so on.

All tables follow a common layout such as below:

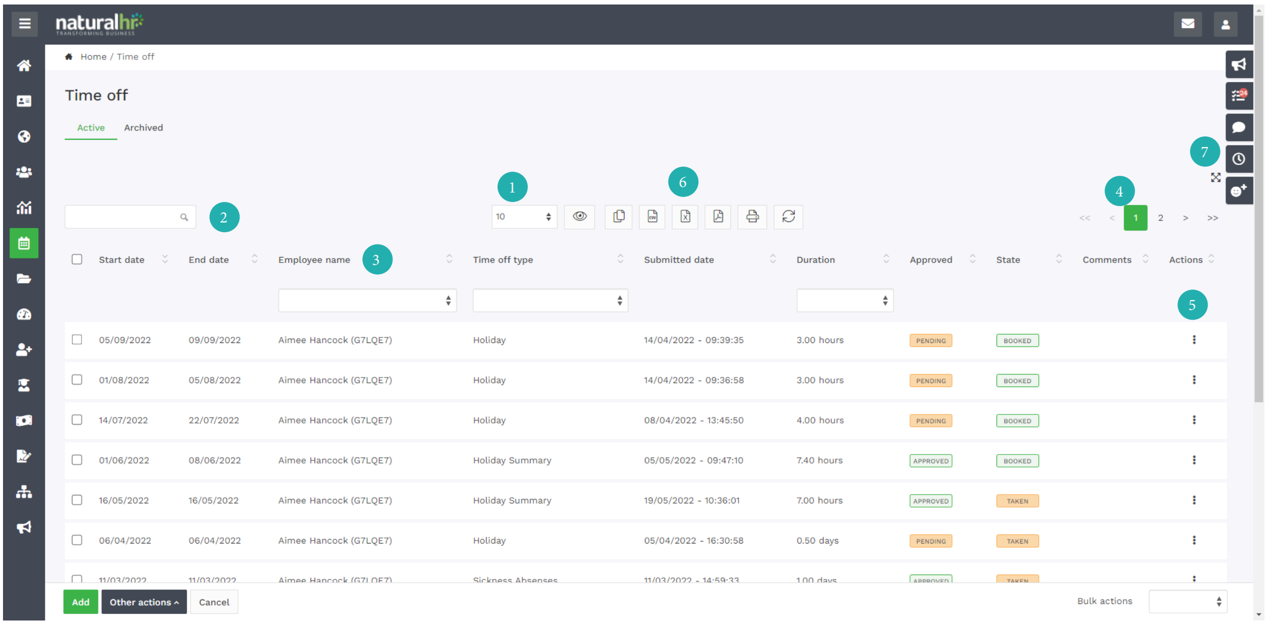


Table layout

1 At the top right, there is a dropdown which allows you to view 10, 25, 50 or 100 records at a time.

2 At the top left, there is a search box which will search visible data within the table and only return rows which contain the search entry.

3 Each of the columns can be sorted by clicking the column title – to reverse the sort order, click the column title again.

4 At the top right there is a pagination section which allows you to move to the first, previous, next or last pages or jump to a specific page by clicking the page number.

5. The actions column in the actual table shows what actions you can take against each row. The actual contents of the action column will vary according to the data type and the status of the record but typically you can edit, delete and view many items. If you are unsure what an item in the actions column does, then hover over it for a handy tooltip guide.

6. At the top right there are also various controls to interact with the information in the table. Column visibility will allow you to toggle being viewing columns, copy will copy all of the information to your clipboard, excel will export the information as a CSV. Format, PDF will export the information as a PDF. File and Rest will refresh the data in the table.

7. The icon above the reset control will expand the table to a full screen view.

Adding and listing data

When adding data in Natural HR, the majority of input is via forms – in some cases, such as expenses, time-off and timesheets, the forms are bespoke but in many places the forms used are very similar to the below.

Adding data in forms

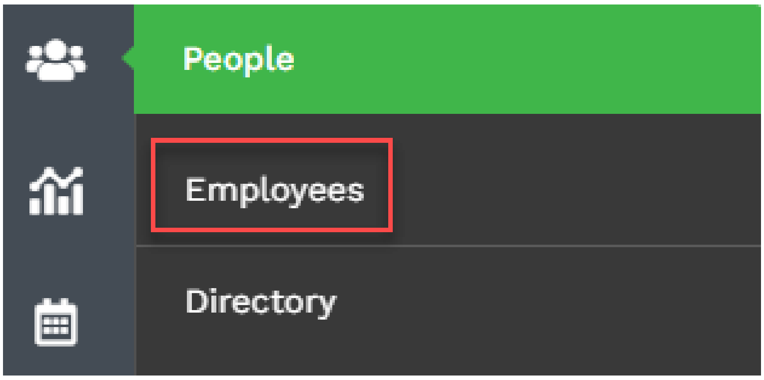
Once you have completed the contents of the form, you simply need to click Submit to confirm. Alternatively, you can click Cancel which will take you back to the parent module without saving.

Occasionally, forms will have required fields indicated by a red asterisk next to the field name which denotes they are mandatory. In this instance, if you try to submit a form without filling in the required field(s) you'll be unable to do so and the required field(s) will be highlighted in red for your convenience. This may also happen if you try to enter text into a number field, for example.

Accessing employee files

As managers, you have the ability to view the employee files of those employees who report in to you. The amount of data which you can view on your employee's files will depend on the permissions which have been granted by system administrators. For example, certain options such as employee salary information may not display if this has been hidden by administrators.

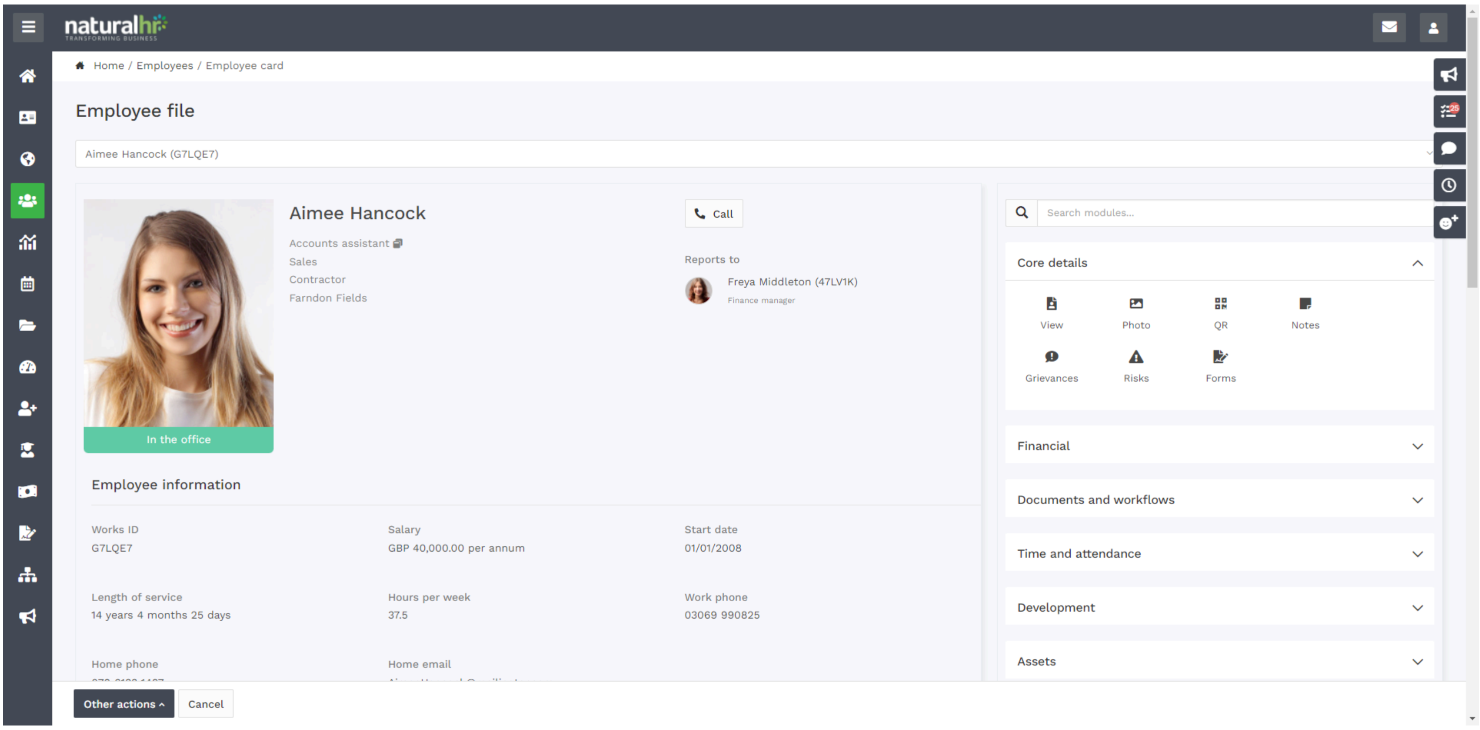
To access an employee file, simply go to 'People' > 'Employees'.



Accessing employee files

Upon doing so, you are then taken to the employee cards page where there is simply a drop-down menu populated with employee names. Click the name of the employee and their employee card is loaded.

Alternatively, you can use the search box and enter a few letters from the employee name and the list will be narrowed to only show those which contain the letters entered.



Employee card

The card view of the employee file will display various information about this employee at a glance. The icons in the drop down menus to the right the employee card each represent an action which can be performed against the employee's file, these icons are:

- **View**: show all the information relating to this employee on one screen.
- **Edit:** edit the employee file.
- **Medical:** view or add medical information for this employee.
- **Change:** change the employee manager, department, job title, job status etc.
- **Onboarding:** start or modify the current onboarding process for this employee.
- **Benefits:** update employee working days, hours per week, timeoff allowances, salary and benefits information.
- **Working Pattern:** add or review the variable working pattern for this employee.
- **Photo:** add a photo of the employee.
- **Documents:** upload documents which are attached to the employee file.
- **Workflows:** the ability to allocate custom-built task workflows to this employee.
- **Risks:** review any risks associated with this employee such as, missing mandatory documents or training qualifications.
- **Forms:** review any "other forms" which have been completed by this employee.
- **Map:** shows an annual view of the employee's absence.
- **Vehicles:** rrack any vehicles associated with the employee.
- **Grievances:** a record of any grievances which have been filed by this employee.

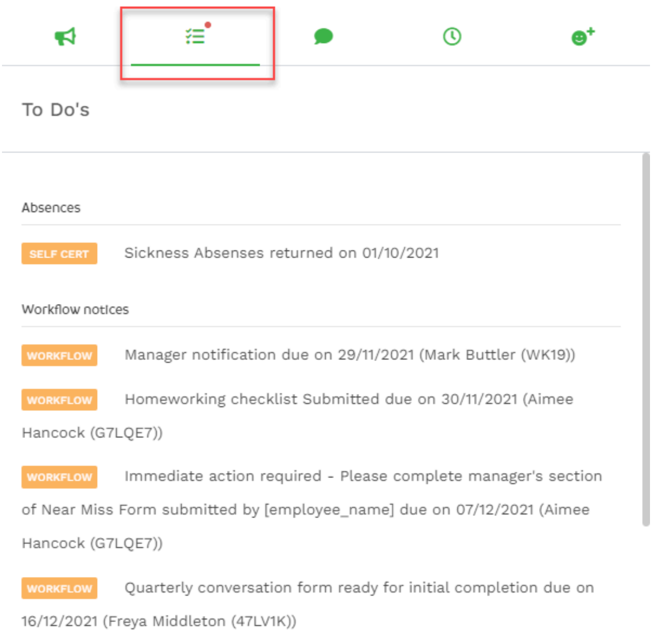
- **Development:** input the desired future job role of an employee once they have expressed an interest in promotion. This feature works alongside the competencies module.
- **Competencies**: input and map employee competencies alongside required competencies in their current role. Alongside the development module, you can also map competencies alongside desired job roles.
- **Payments:** track any extra payments outside of salary and expenses which have been made to this employee.
- **Notes:** notes relating to this employee.
- **Goals:** goals for this employee.
- **Time off:** view or add time off records for this employee.
- **Training:** training for this employee.
- **Timesheets:** view all timesheets which have been completed by this employee.
- **Reviews:** reviews for this employee.
- **Reminders:** reminders for this employee.
- **Leaver:** process the employee as a leaver and archive.

Some of these icons may not appear within your system, this will be either due the module being unavailable or permissions set by administrators.

Approving and declining requests

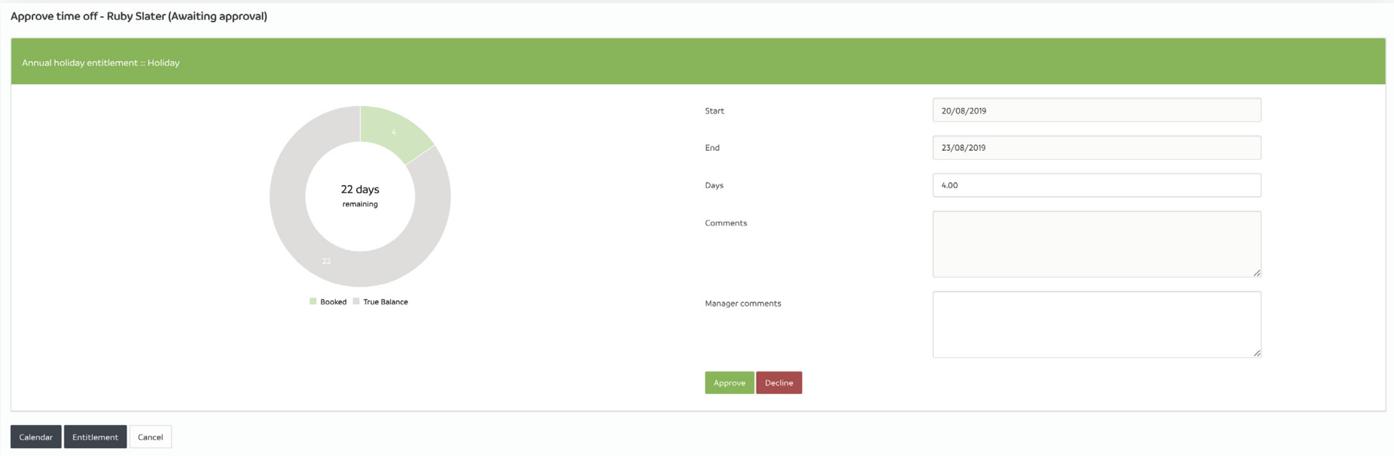
Once a member of your team has submitted a request, this will require approval from a manager. When a request is received, the employee's approver will receive an email making them aware that a new request requires their attention; the email notification will also contain a link which the approver can click through to action the request.

Alongside the email, an item will appear in the 'To Do's' option on the to do menu. The workflow will show a maximum of 15 items in reverse order (most recent items at the bottom using the logic that items which have been in the workflow the longest require manager's attention first).



Employee requests workflow

Once you click through either the 'Action Now' button on the email or the item in the workflow, you'll be presented with the following screen which will display the relevant information for the request as well as the ability to add manager's comments and approve or decline the request using the coloured options below the comments boxes.

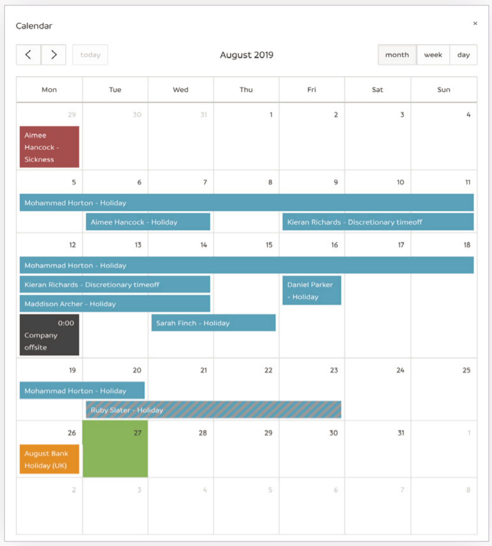


Approving time off

Using the two black buttons below the item entitled ‘Calendar’ and ‘Entitlement’, you’ll be able to view your calendar and the employee’s full entitlement before actioning this particular request.

On the calendar, any requests showing as a solid-coloured box have already been approved whereas a pending request will show as a hatched box.

Once the request has been actioned, the employee will be notified of the outcome via email and under the ‘Recent Actions’ section within their account. The item will be updated on the calendar and their allowance will be adjusted accordingly.



Calendar

Documents

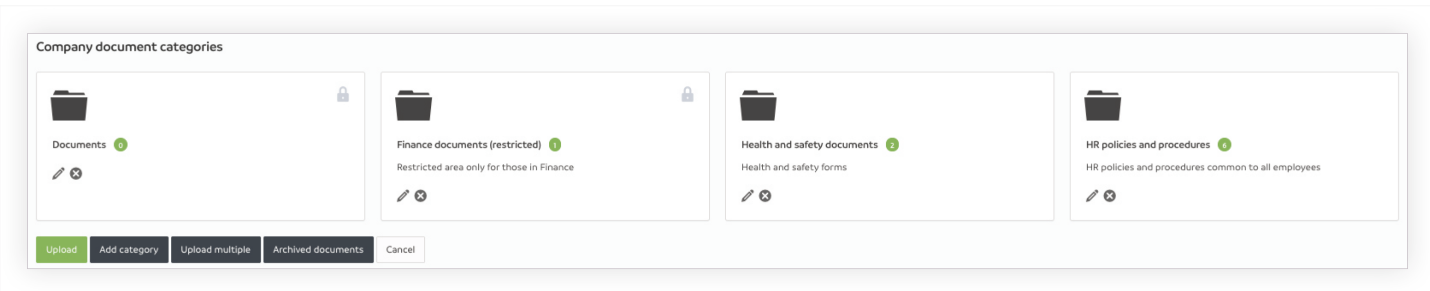
Within Natural HR there are two types of documents: company documents and employee documents.

Within the Documents module, you'll be able to see both with company documents at the top and your documents at the bottom. Documents may be stored in folders in which case you simply need to click the folder name or icon to enter the folder.

When you wish to open a document, you have two choices indicated by the two icons. You can either download the document (paperclip) or view the document (magnifying glass).

In some instances, you may choose to view a document and it may download. This is usually as your browser cannot open that particular file type such as with Word documents.

Additionally, you may upload employee documents using the Upload button. Please note, uploaded documents will not be visible until they have been approved by your manager.

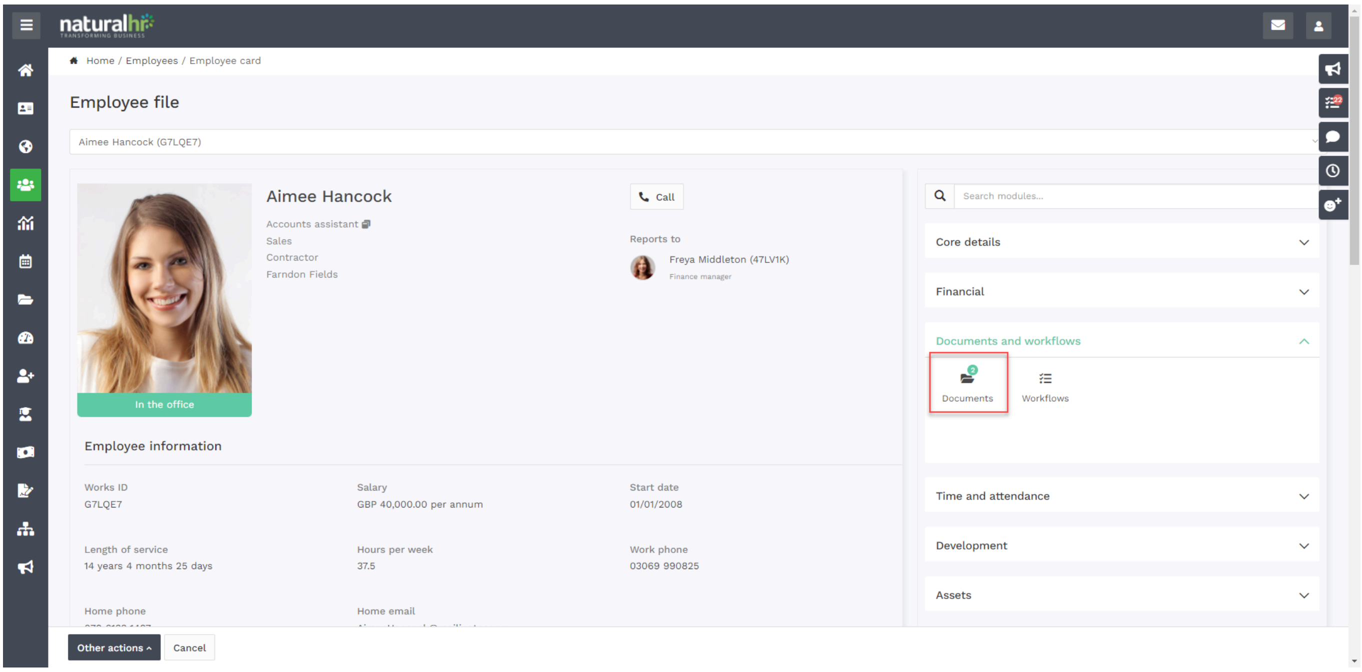


Documents

Uploading documents to an employee's file

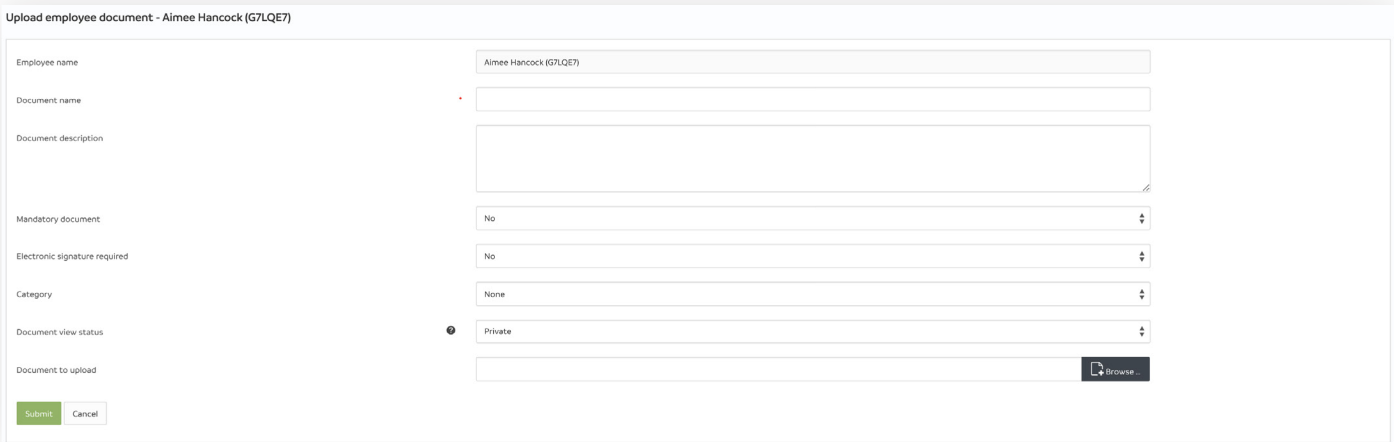
Documents can be uploaded and stored against your employee's files from within your account; permissions can be set against these uploaded documents as some can be viewable to the employee or just administrators, HR and the employee's line manager.

To upload a document to an employee file, you'll need to select the 'Documents' icon on their employee card.



Employee file

To upload a document, select the green 'Upload' button at the bottom of the next page.



Uploading documents

You'll then be required to complete the following fields:

- **Document name:** the name of this document
- **Document description:** a description to outline the contents of this document
- **Mandatory Document:** if this document is a mandatory document e.g a passport, right to work, CRB check etc. You'll be able to select the document type from this pre-populated list.

If you are uploading a mandatory document type which is not in the list, you'll need to contact your administrator who will be able to add this option in for you.

- **Electronic signature required:** selecting 'Yes' will notify and require the employee to log in to their account and electronically sign this document.
- **Category:** if this document is being assigned into a category (a folder), you'll be able to select the relevant category from the drop-down list.

If documents are not assigned to a category they will reside in a table on the employee documents page.

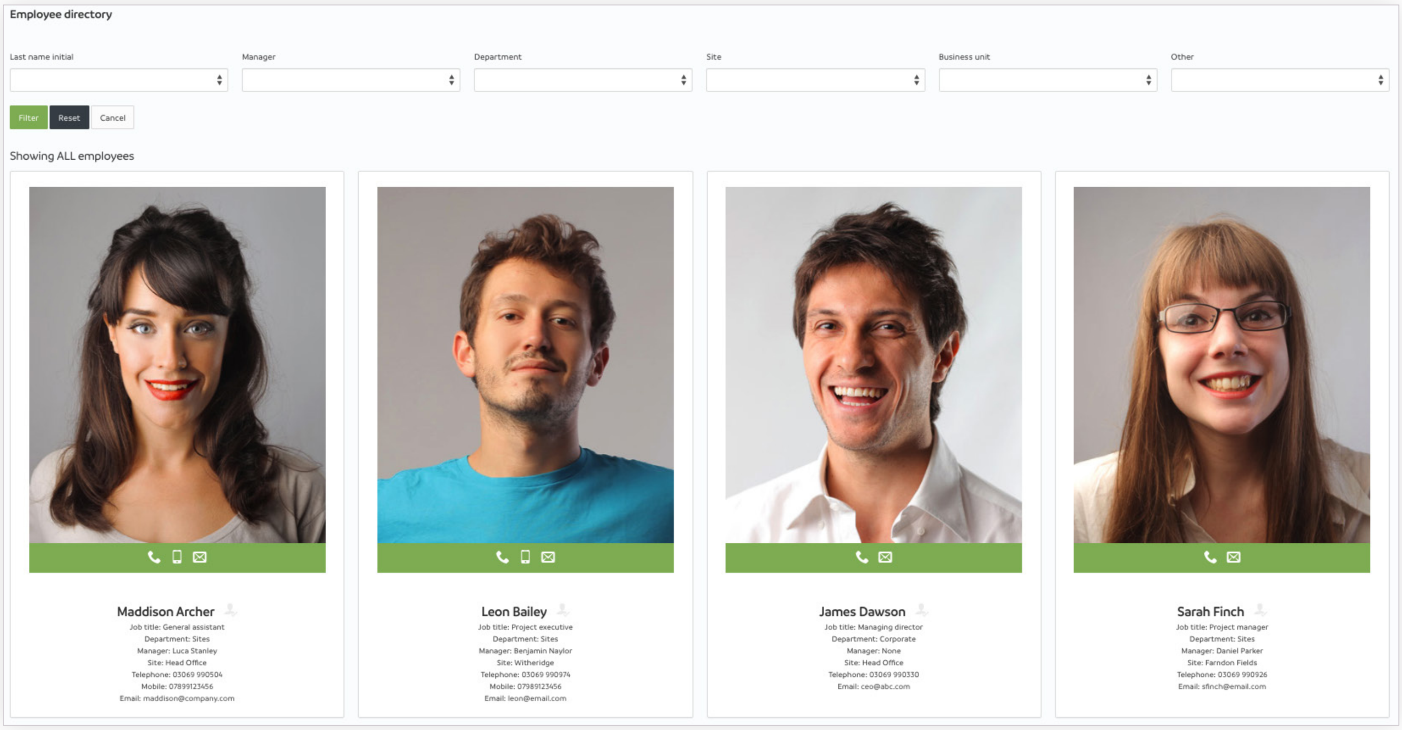
- **Document view status:** if the view status for this document is set to Private, the employee will not be able to view this document. This will only viewable by admin, HR and the employee's manager. If this is set to Employee, they will also be able to view this document within their self-service accounts.
- **Document to upload:** select the Browse button to upload a document from your computer.

Once the fields on this page have been completed, select Submit and a green banner up at the top of the screen will confirm that this document has been uploaded successfully.

Employee directory

Natural HR contains an employee directory which gives you easy access to work information about your colleagues.

If you wish to narrow down the number of results shown on the screen you can use the filters at the top of the page to view results by: last name initial, managers, departments and site locations.



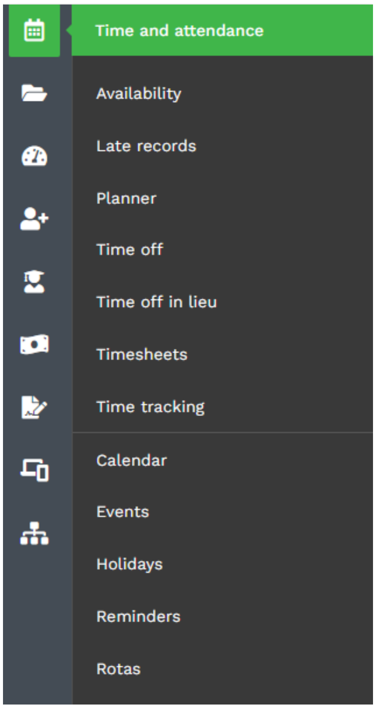
Emoloyee directory

Time off

Allocating time off to employees

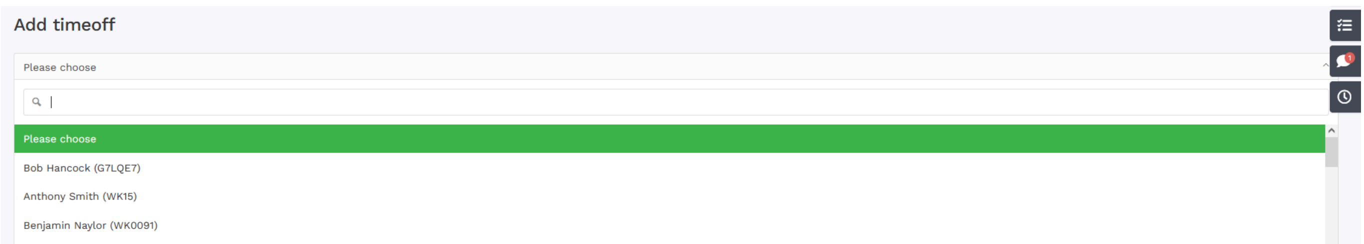
Within your company, you may need to allocate certain instances of time off to your employees for types of time off which an employee cannot book through self-service. For example, instances of sickness absence.

To allocate time off to your employees, you'll need to go to Time and attendance > Time off and select 'Add' below the table.



Time off

You'll then need to select your employee's name from the drop-down list.



Adding time off

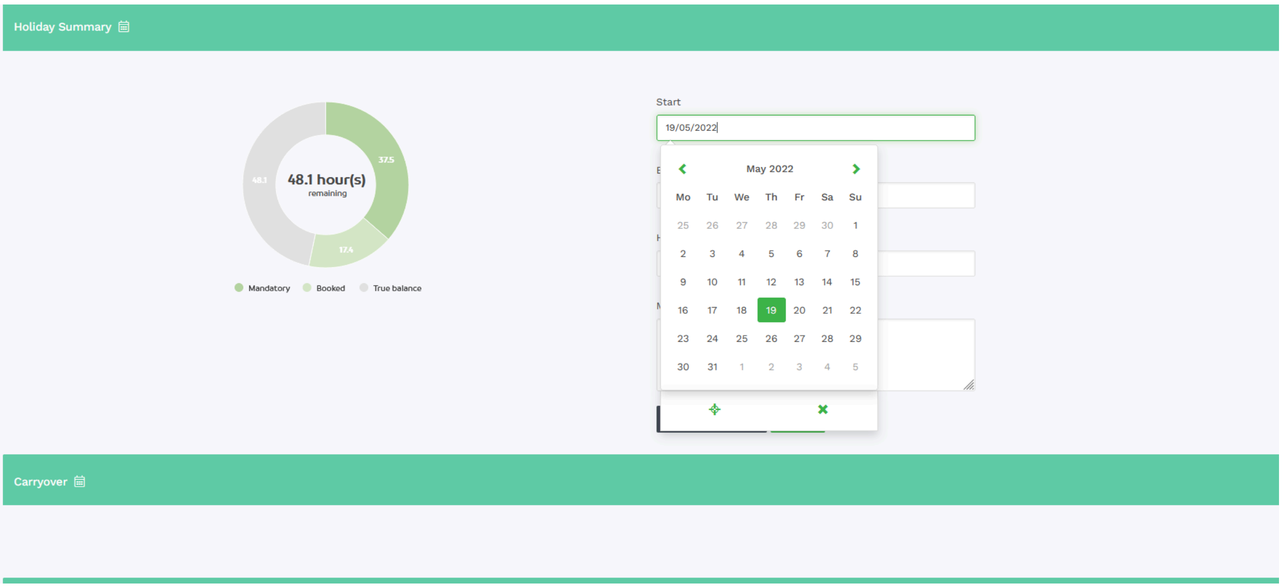
Adding time off

When you add time off, you'll be presented with a list of the various types from which you can add time off.

The actual time off types themselves are different for every company.

To add time off, the first step is to click the down arrow to the right of the appropriate time off heading. This will then open an additional box or boxes into which you can then add your request.

Depending on how your company has set up time off and also what types they have configured, there will be at least two core types: those with an allowance (such as Annual Leave) and those without (such as Sickness).



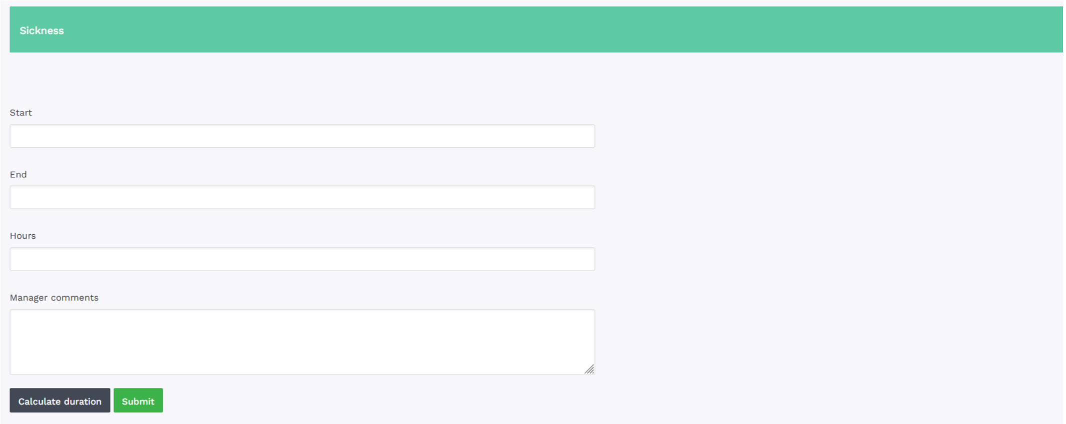
Adding time off

When a particular type has an allowance , you'll first be presented with a balance graphic showing you the particulars of this type. The terminology used is the same as outlined above. Once you have entered the start and end date, click **Calculate Duration** and this will tell you how many days or hours this request consists of and then click **Submit**.

If the start date and the end date are the same, an option may appear for you to select "All day, AM or PM". If this occurs, selecting "All day" will automatically calculate the duration of absence to be 1 full days' worth of leave whereas, selecting "AM" or "PM" will only deduct half a days' worth of leave.

Where a particular type has no allowance, you'll be presented with form fields in which you should enter a start and end date and then optionally some comments.

In both cases, depending on how your company has configured time off types, you may have an additional box to fill in when making a request as below where you need to upload a document. In this instance, you need to upload a document which is related to sickness leave, but this can be the case for any type of time off configured by administrators.



Uploading supporting documents to time off

Occasionally when making a request you may get an error or a notification – errors (in red) must be rectified before submitting the request whilst notifications (in yellow) are informational only.

Some examples of messages you may receive:

- Start and end date are required.
- Start date must be before the end date.
- You do not have enough days to complete this request - you currently have X remaining.
- The end date of this request is outside the allowed time period for carryover of X, please resubmit as two separate requests.
- You do not have enough X to book this request.
- There is already time off booked for one or more of these dates - this is for your information only.

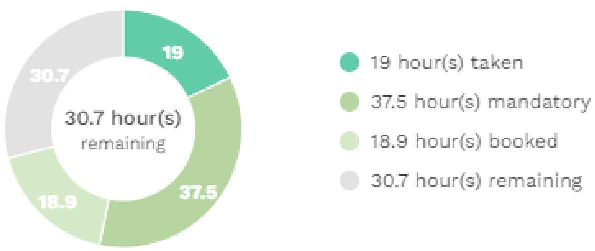
Time off balance

Within Natural HR, your time off balance will be displayed as a graphic. Within this graphic, there are either 3 or 4 numbers which are part of the time off balance calculations.

Depending on your contract and relevant entitlement, these numbers can either be in hours or days.

In some cases, (such as on the home screen) this will be displayed as a rollup of all your time off and in others, such as when requesting time off of a particular type, it will be shown only for one specific type.

1. Taken: the number of days in the past which you have already taken.
2. Mandatory: mandatory days which you must take such as public holidays which are automatically taken from your allowance.
3. Booked: days in the future which you have booked but not yet taken.
4. True Balance: your remaining time off allowance, assuming that you take all of your booked time off.



Time off balance

Recruitment

The recruitment module within Natural HR allows you to keep a record of all of your candidates' information and manage your full recruitment process all of the way through until they become an active employee.

The recruitment module can be accessed by clicking the **magnifying glass icon** in the main menu.

The number of options which you may see in the recruitment module may vary depending on the access permissions which you have been given. If you require further access than you currently have, please contact your administrator.

Each of the menu items are as follows:

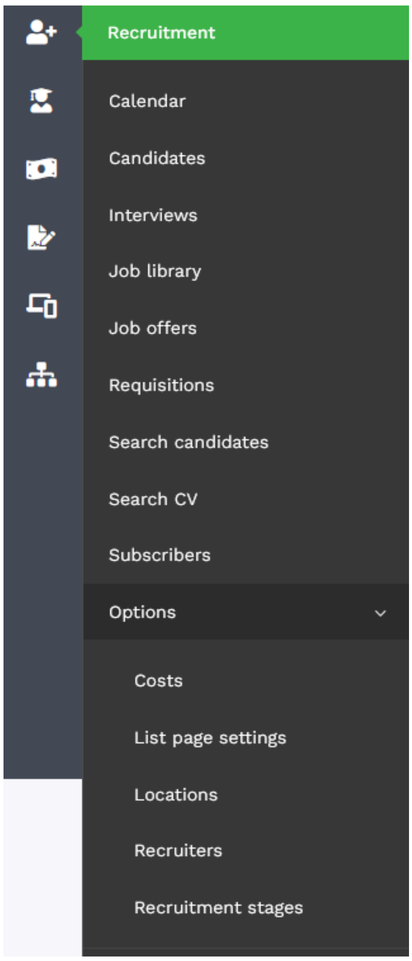
- **Calendar:** a dedicated calendar which will display all items in relation to the recruitment process.

- **Candidates:** a central database of any candidates which have been entered into the system. Icons below the candidate file present the options for managing each candidate.

- **Interviews:** a comprehensive list of any interviews which have been scheduled.

- **Job Library:** a comprehensive list of all of the job roles within your company, the job description for each role and whether or not this role is a manager level role.

- **Job Offers:** a comprehensive list of any job offers which have been made to candidates.



Recruitment module

- **Requisitions:** the ability to add or request for new job requisitions to be published.

- **Search Candidates:** the ability to search for either by tags which have been attached to their files or by availability dates.

- **Search CV:** if a CV has been uploaded for candidates, the CV search will allow you to search by key phrases and display any CVs which contain your search terms.

Options:

- **Costs:** the ability to add or view any financial costs which have been associated with the recruitment process.

- **List page settings:** configuration settings for customising the iFrame which publishes requisitions and the application form to the company website.

- **Locations:** the ability to add or view any advertising locations which can be used during the recruitment process.

- **Recruiters:** the ability to add or view any external recruiters into the system. Each recruiter will need to be allocated a unique code which they will need to add to the application form when entering candidate information online. Natural HR will then recognise any particular candidates which have been referred by a recruiter.

- **Recruitment Stages:** the ability to view, edit or add any recruitment stages to the process. This checklist defines the steps which must be followed when progressing a candidate from applying for the role to becoming an active employee.

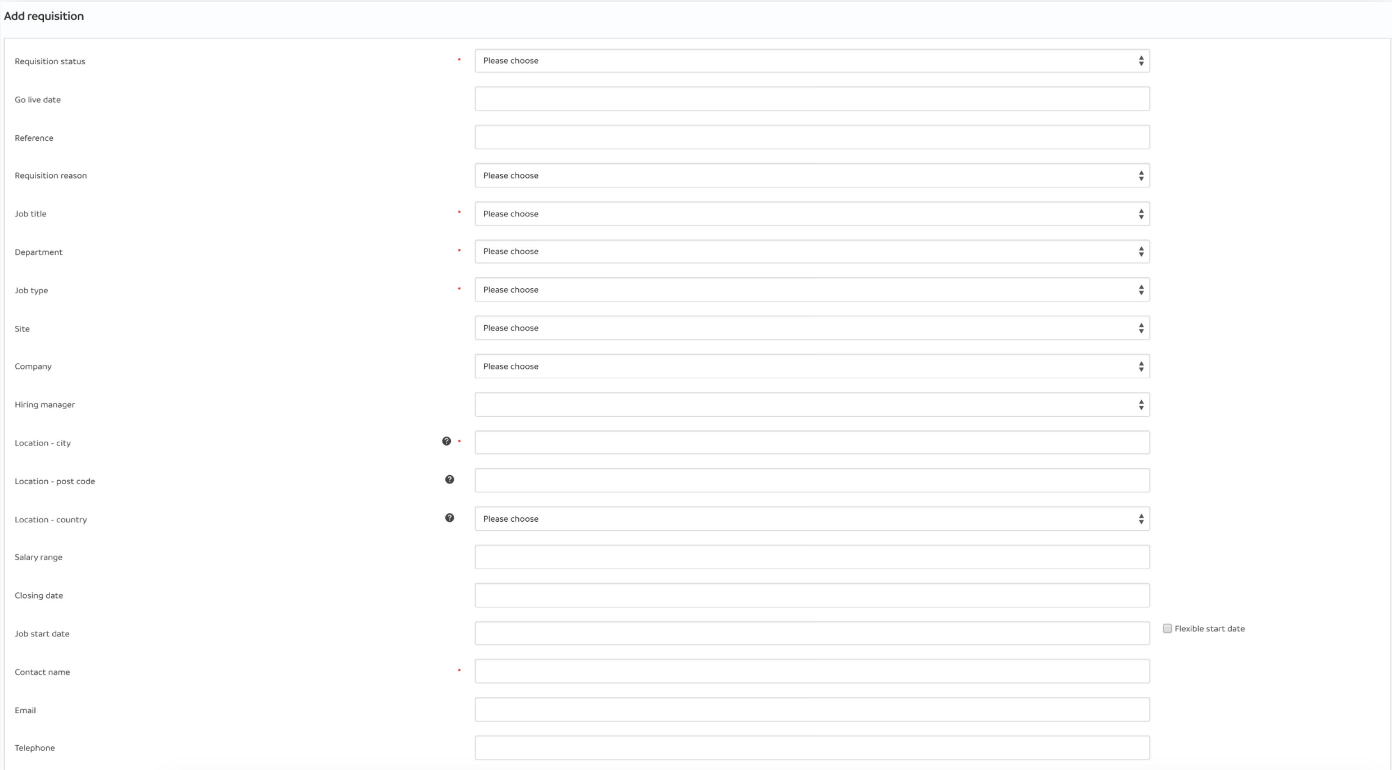
Recruitment - restricted view

Depending on the permissions which have been set by administrators, managers may only be able to view a very restricted version of the recruitment module.

In this case, managers will only be able to request requisitions and manage candidates which have been entered into the system for those requisitions.

Requesting a requisition

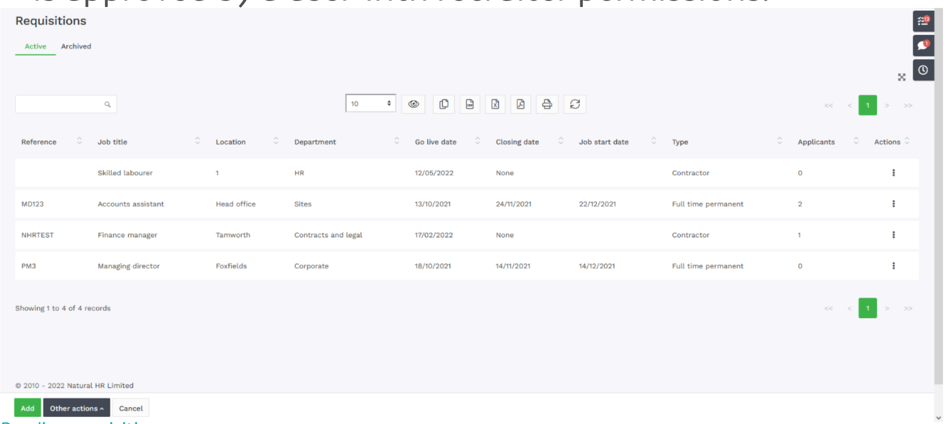
To request a requisition, you'll need to go to Recruitment > Requisitions and select the green 'add' button below the table.



Adding requisitions

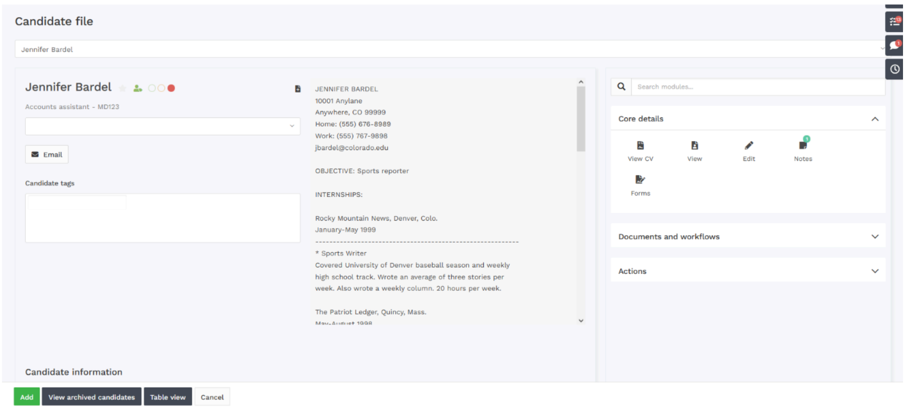
You'll then need to complete the fields necessary for this new requisition. Once complete, select 'Submit' at the bottom of the page.

This requisition will then be stored under the requisitions table as pending until it is approved by a user with recruiter permissions.



Pending requisitions

Candidate file



The candidate file shares characteristics with the employee file. The top section will show various sections of information from the candidate's stage in the recruitment process to their availability and a preview of their CV.

Interactions with the candidate file can be made using the various icons below the candidate view:

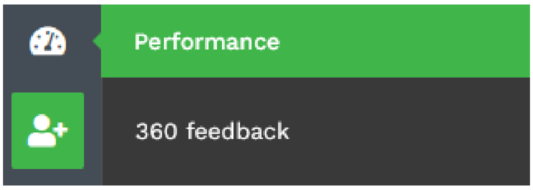
- **View CV:** a full screen view of the candidate's CV.
- **View:** a full view of all of the information about the candidate which has been captured.
- **Edit:** the ability to update personal information about the particular candidate.
- **Set Inactive:** this will move the candidate file into the 'Archived candidates' section storing the file to be restored at a later date
- **Delete:** the ability to delete the candidate from the system
- **Progress:** the ability to view and update the progress of this candidate through your recruitment stages.
- **Workflows:** the ability to begin or view the progress of a custom workflow for a candidate.
- **Reject:** the ability to reject the candidate, within this section you'll be asked to type a feedback message which will be sent to the candidate via email informing them that they have been unsuccessful.
- **Scoring:** allocate a score to this candidate, this will give you the ability to distinguish between high and low potential candidates to help with your short-listing process.
- **Documents:** upload or view any documents against the candidate file.
- **Notes:** store or view any notes which have been added to the candidate file.
- **Interview:** schedule an interview with this candidate – this will also be added as an entry to the recruitment calendar.

- **Offer:** make an offer of employment to the candidate.
- **Complete:** once a candidate has completed your process and accepted the job offer, completing them will create an active employee file and move all captured information, documents and notes into the employee module.

Peformance

The performance management module offers many different tools to aid with the assessment of your employees' performance.

The performance module can be accessed via the 'bar chart' icon in the main menu.



Performance module

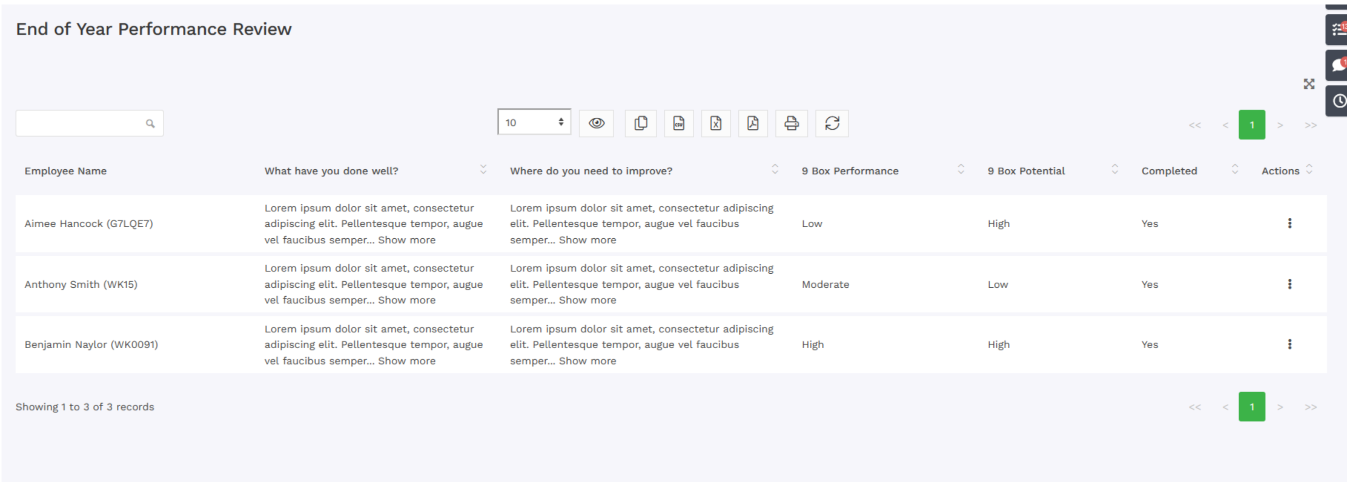
There are numerous tools within the Performance Module which are available within this menu:

- **9-Box Grid:** a visual, grid representation of your employee's performance against their potential to reach higher positions within the company.
- **Manage 360 feedback process:** the ability to request and download 360 feedback requests.
- **Programs:** view or allocate high or low performance programs to your employees
- **Review Forms:** the ability to view, edit or add responses to published performance review forms.
- **Schedule a review:** review scheduling allows you to use the calendar to schedule review meetings with your employees. The employee will be notified by email of the details and an entry added to their calendar.
- **Warnings:** the ability to add and view any performance warnings which have been given to employees.

Performance reviews

Once an employee has completed their performance review, their manager will receive an email notifying them that there are new responses to view. Responses can be viewed by going to Performance > Reviews and clicking through the specific reviews using the view option to view or the add option to add an entirely new entry.

Selecting the view option will allow you, as a manager to view employee's responses in a table view. From here, you also have the ability to update forms which have already been submitted using the edit option.



Once the form is ultimately completed, the manager should edit the form and set a 'Completed' field to 'Yes'. In doing so, the system will recognise that this particular form has been completed and prohibit any editing to be done in the future.

Any previously completed reviews are stored against the Employee file where they can be accessed via the 'Reviews' icon beneath the employee card.

naturalhr
TRANSFORMING BUSINESS

Looking for support?

Here's how you can find help

Ask your administrator

Your system administrator will be able to resolve the majority of your questions. If you are not sure who your system administrator is, this is typically someone in the HR department.

Support site

Training videos explaining how to use many of NHR's modules can be accessed by visiting: **http://training.naturalhr.com**
A knowledgebase library of support articles can be accessed by visiting: **https://support.naturalhr.com**