naturalhr
TRANSFORMING BUSINESS

Employee self-service guide

A complete guide to Natural HR for employees.

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 self-service 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

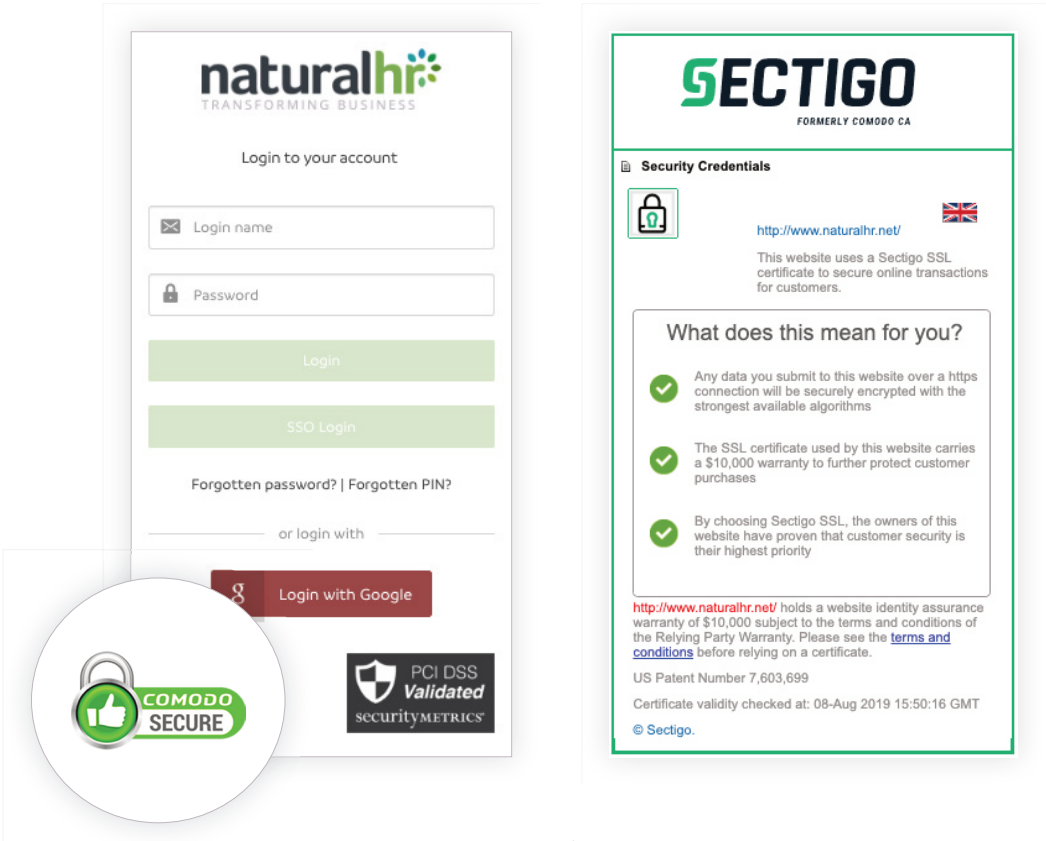
The URL to log into Natural HR is **https://www.naturalhr.net/login**

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/login

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 login box to verify that the SSL (secure) 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

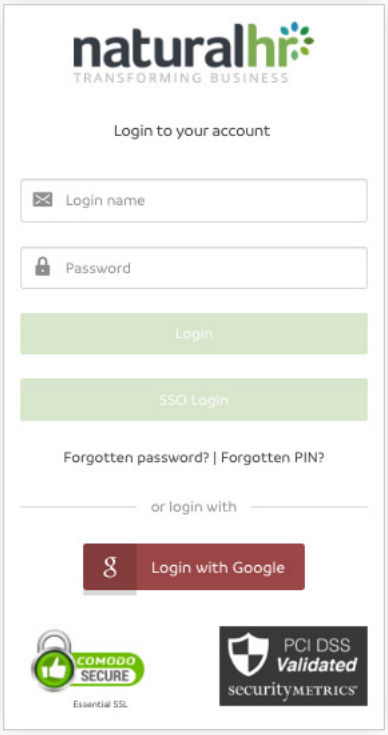
When your account was created, you'll have been given a unique username and password and you should use these to log in by entering the correct values in the relevant box.

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.

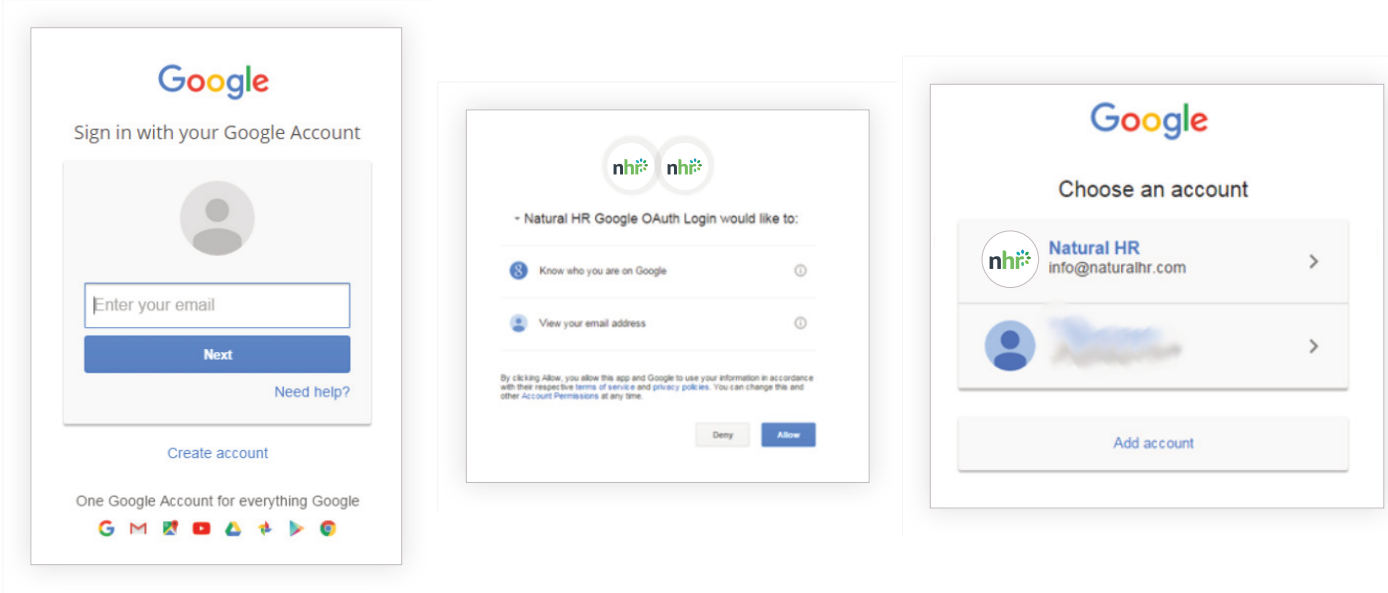
The actual process to log in will depend on whether you are logged in to Google at the time or not.

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.

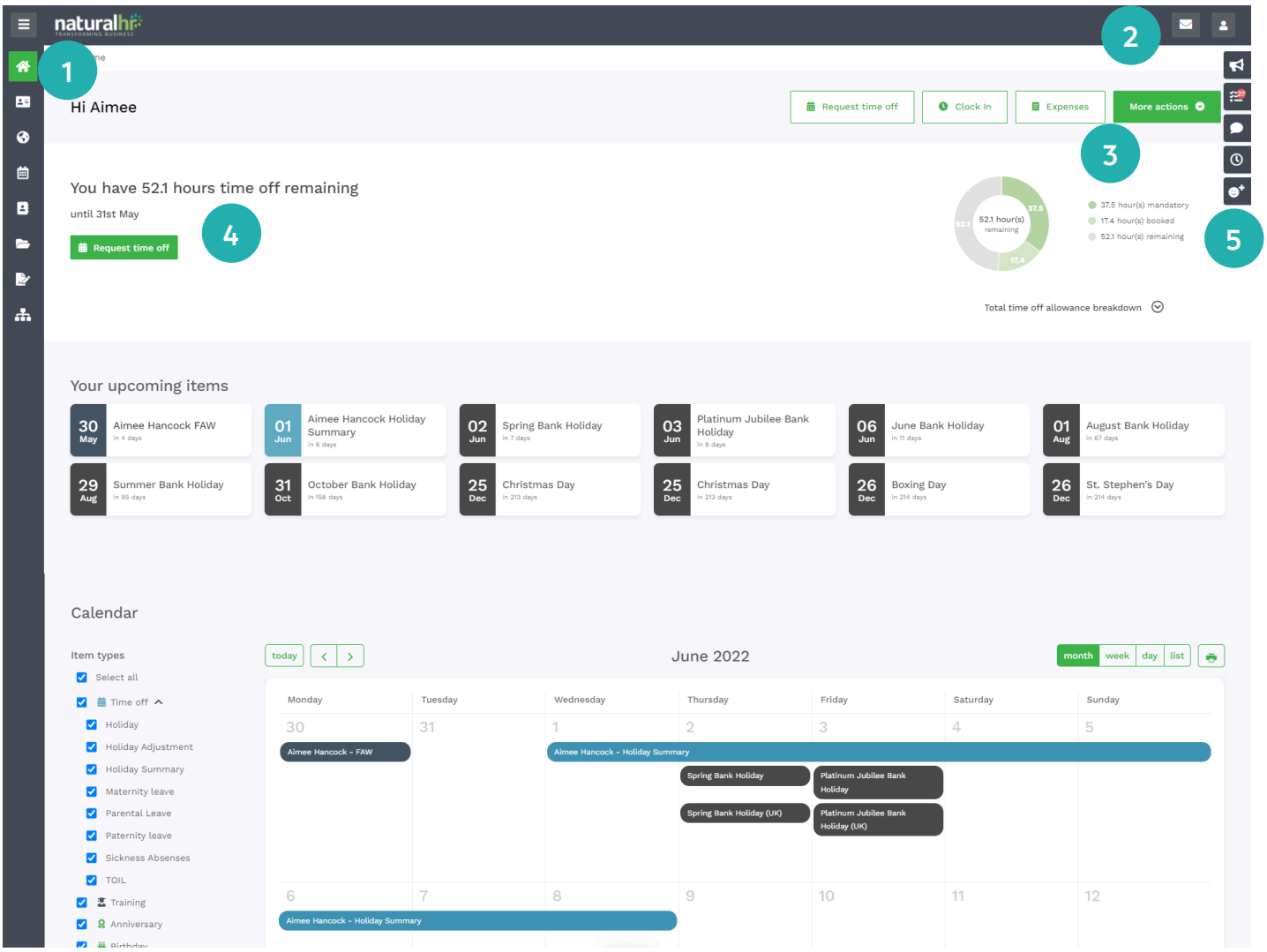
If you receive a notice that your Google account is not authorised to log in, then there are two possible causes:

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


naturalhr
1
2
3
4
5
Hi Aimee
Request time off
Clock In
Expenses
More actions
You have 52.1 hours time off remaining
until 31st May
Request time off
52.1 hour(s) remaining
37.5 hour(s) mandatory
17.4 hour(s) booked
52.1 hour(s) remaining
Total time off allowance breakdown
Your upcoming items
30 May Aimee Hancock FAW in 4 days
01 Jun Aimee Hancock Holiday Summary in 6 days
02 Jun Spring Bank Holiday in 7 days
03 Jun Platinum Jubilee Bank Holiday in 8 days
06 Jun June Bank Holiday in 11 days
01 Aug August Bank Holiday in 67 days
29 Aug Summer Bank Holiday in 95 days
31 Oct October Bank Holiday in 158 days
25 Dec Christmas Day in 213 days
25 Dec Christmas Day in 213 days
26 Dec Boxing Day in 214 days
26 Dec St. Stephen's Day in 214 days
Calendar
Item types
Select all
Time off
Holiday
Holiday Adjustment
Holiday Summary
Maternity leave
Parental Leave
Paternity leave
Sickness Absenses
TOIL
Training
Anniversary
today
June 2022
month
week
day
list
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Aimee Hancock - FAW
Aimee Hancock - Holiday Summary
Spring Bank Holiday
Platinum Jubilee Bank Holiday
Spring Bank Holiday (UK)
Platinum Jubilee Bank Holiday (UK)
Aimee Hancock - Holiday Summary

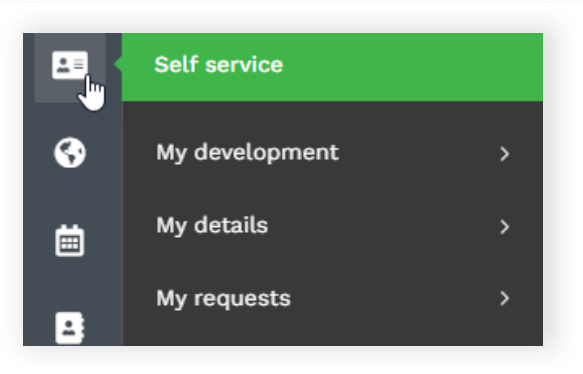
1. **Main menu:** from here you can access all the functionality and features of your version of Natural HR.

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

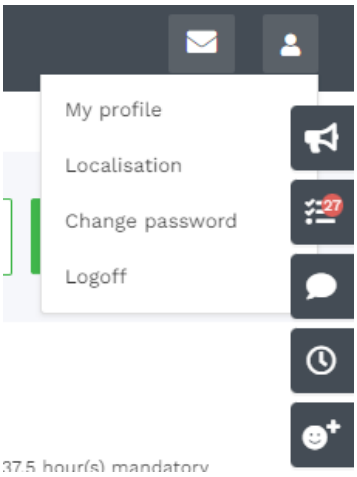
3. **Quick launch:** quick access to the main functions of the system.

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

5. **To do lists and announcements:** contains links to announcements, workflows & notices, social stream, clock in/out and employee pulse



Self service menu



Profile menu and To do list menu

Changing your password

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

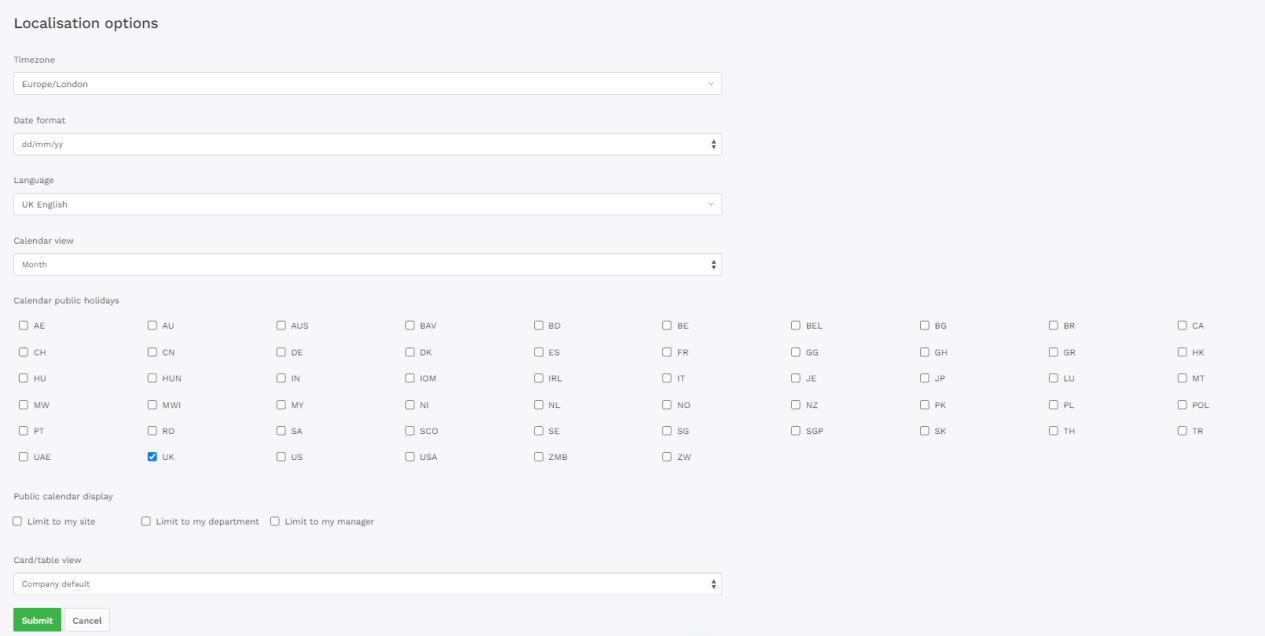
If you do not change your password for 90 days, you'll be required to do so on your next log in.

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:

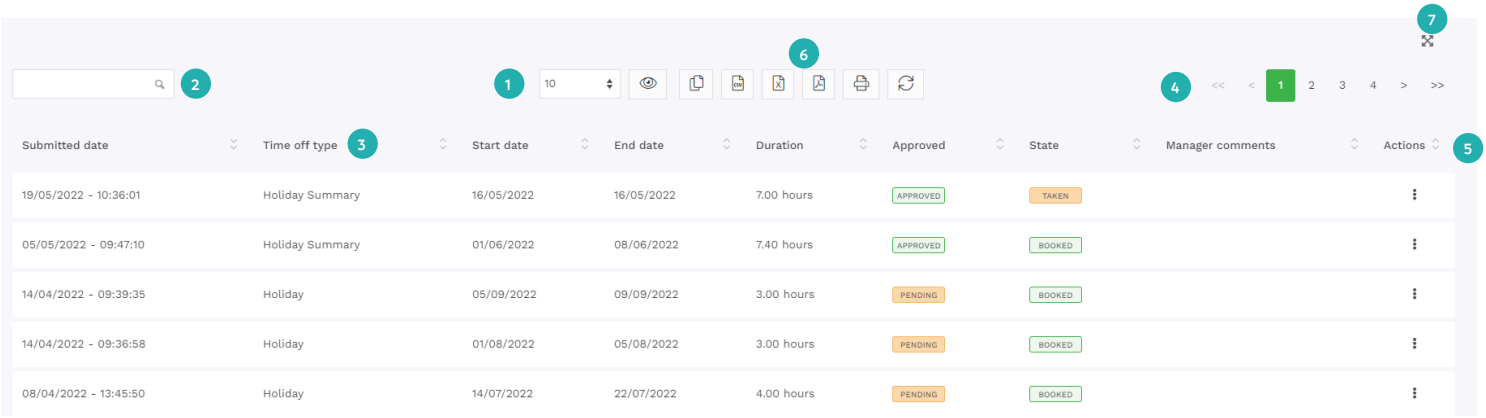


Table layout

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. Within the table 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.

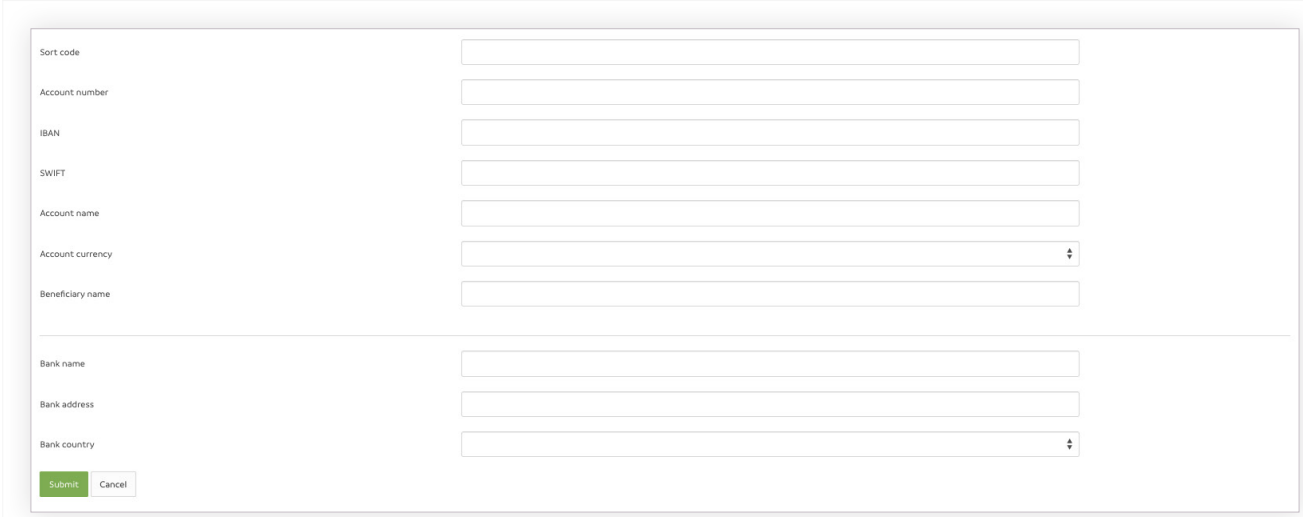
5 The actions column in the actual table shows what actions you can take against each row. The actual contents of the action column will vary according to the data type and the status of the record but commonly you can edit, delete and view many items. If you are unsure what an item in the actions column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

Documents

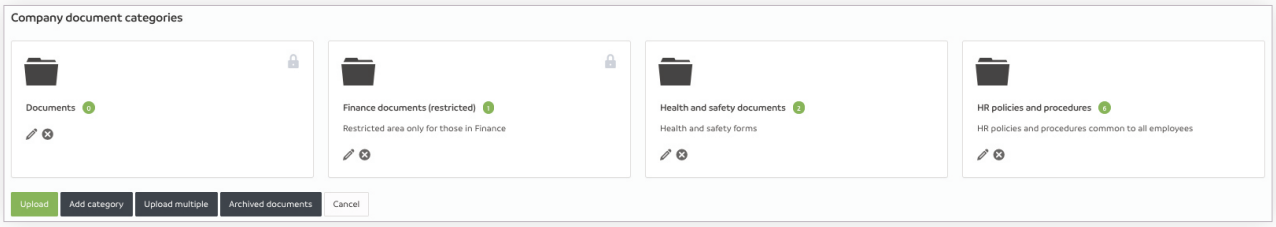
Within Natural HR there are two types of documents: company documents and employee documents.

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.

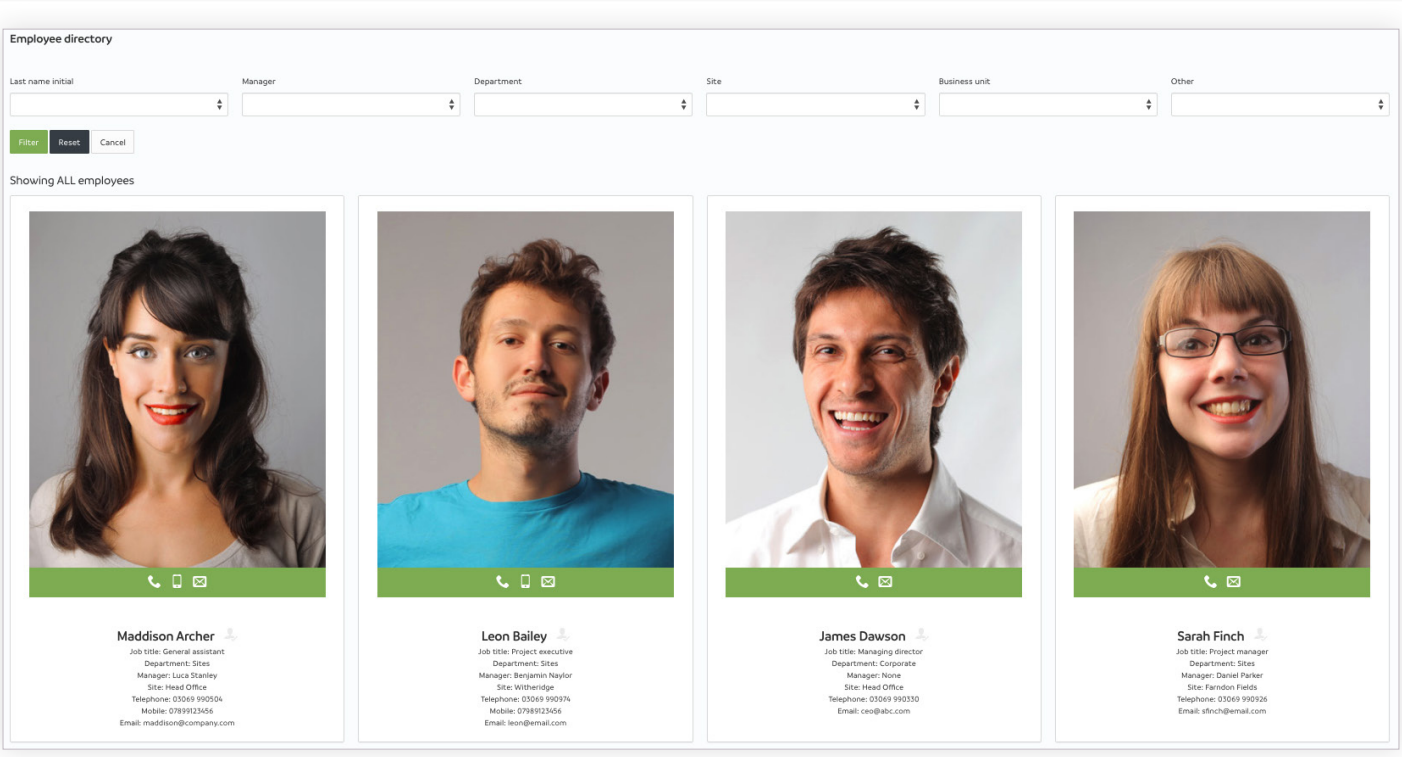


Documents

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.

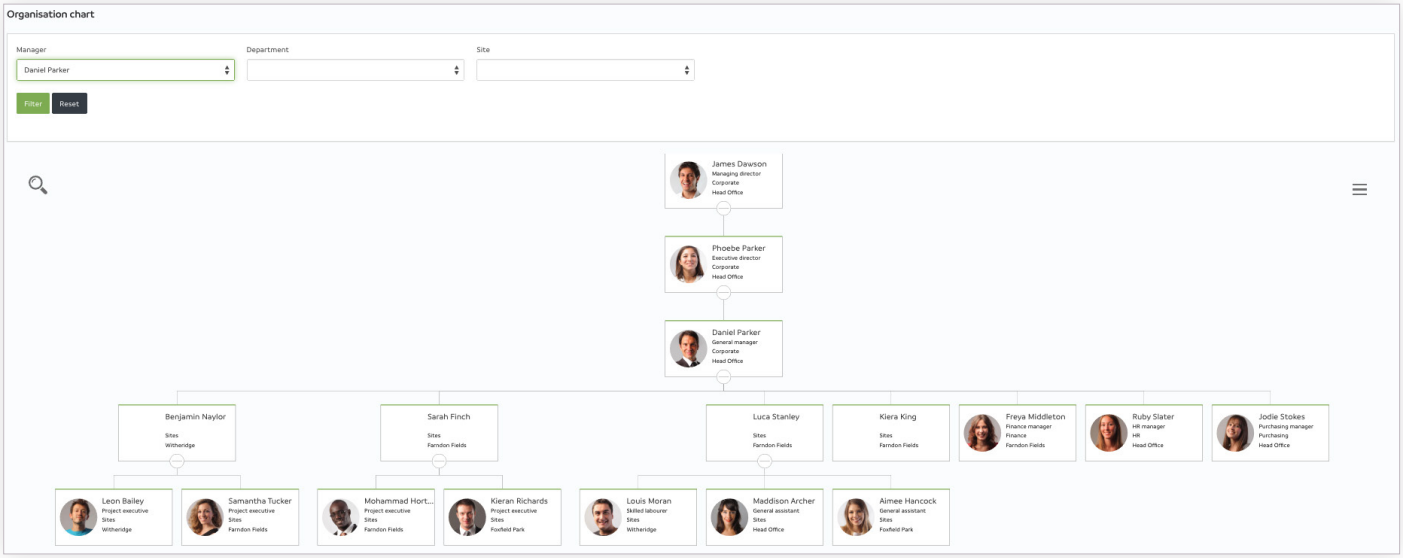


Emoloyee directory

Organisation chart

Natural HR includes an organisation chart which displays work information on each employee along with the company structure.

Using the controls above the organisation chart, you can interact with the chart in a number of different ways. The chart controls allow you to: search for a particular user, print the org chart, navigate the chart vertically or horizontally and zoom in, or out of the chart display.



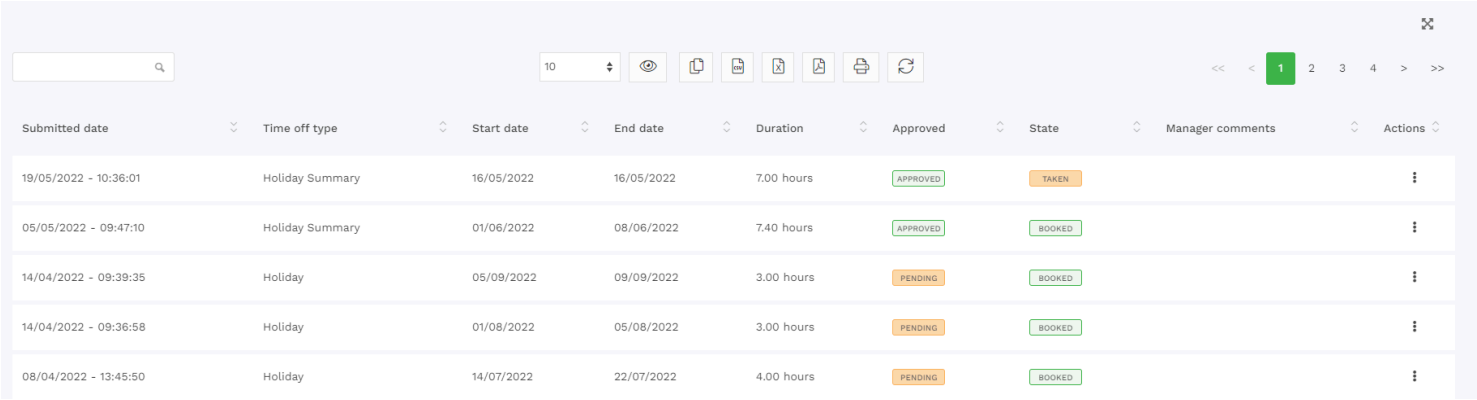
Organisation chart

Time off

Requesting time off

To request time off you can do one of three things:

1. Click Request time off in the Quick launch on the home page.
2. Click Request time off in the profile menu dropdown.
3. Click Self Service, Time off request and then click Add.



Submitted date	Time off type	Start date	End date	Duration	Approved	State	Manager comments	Actions
19/05/2022 - 10:36:01	Holiday Summary	16/05/2022	16/05/2022	7.00 hours	APPROVED	TAKEN		
05/05/2022 - 09:47:10	Holiday Summary	01/06/2022	08/06/2022	7.40 hours	APPROVED	BOOKED		
14/04/2022 - 09:39:35	Holiday	05/09/2022	09/09/2022	3.00 hours	PENDING	BOOKED		
14/04/2022 - 09:36:58	Holiday	01/08/2022	05/08/2022	3.00 hours	PENDING	BOOKED		
08/04/2022 - 13:45:50	Holiday	14/07/2022	22/07/2022	4.00 hours	PENDING	BOOKED		

Time off

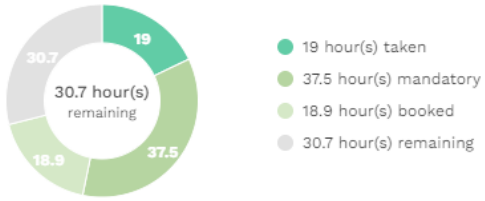
Time off balance

Within Natural HR your time off balance will be shown in the following form. Within the 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 display 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.



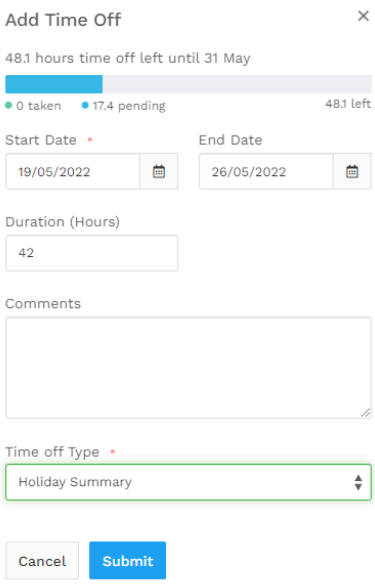
Time off balance

Booking time off

When you request time off, you'll be presented with pop up with different options within it.

The only options you will need to fill in are the start and end dates for the leave along with selecting the correct time off type.

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, for example) and those without (such as Sickness, for example).



Requesting time off

When a particular type has an allowance (above left), 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, the duration will tell you how many days or hours this request consists of and then click submit.

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 supporting document.

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 include:

- Start and end date are required.
- Start date must be before 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.

Email notifications

When you submit a time off request, an email will be sent to your manager asking them to process the request and, when they do so, you'll get an email confirmation telling you what action they have taken. Additionally, you can view the ten most recent actions on the home page for your requests or go to Self Service/Time off request and scroll down to the table to show you all your requests and their status.

Editing and deleting time off requests

If you want to edit or delete a time off request, then the start date of the request is used to determine if you're able to do so.

If the start date for a request is in the past, you are only able to view the request and not to edit or delete the request. Should you need to edit or delete a request in the past you should speak to your manager or HR. If the start date for a request is in the future, you may edit the request in which case it will be resubmitted for approval or delete the request which will notify your manager.

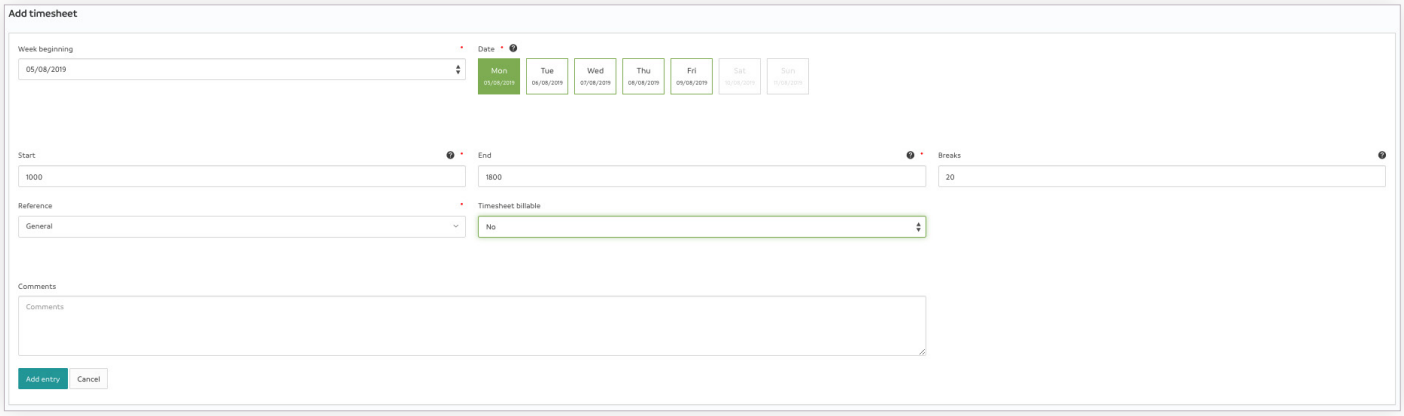
Timesheets

Adding timesheets

To add a timesheet, you can do one of two things:

1. Click Add timesheet in the Quick launch on the home page.

2. Click Self Service, Timesheets and then click Add.



Adding a timesheet

When adding a timesheet, the actual layout may be slightly different to the above depending on your company settings, however the actual workflow itself is the same.

1. Choose the week for which you want to submit the timesheet from the week beginning dropdown.

2. Choose the date for the timesheet (this might be in a graphical form as above or a dropdown).
Tip: In the graphical layout, you can choose more than one day by pressing ALT on your keyboard and left click to select multiple days.

3. Choose a reference from the list provided or enter a reference if no drop down is provided.

4. Enter a start and end time – these need to be in the format of HH:MM. If you use the time picker widget, then the format will automatically be correct but if you enter manually then ensure it is correct.

5. Enter any breaks, if applicable. This should be in minutes – for example, 90.

6. Enter any comments, if applicable.

7. Click Add entry.

Once you have done this you have entered one entry and not yet submitted the timesheet. You could then add another line for the same day or another day until all entries are added.

Once all of the entries are added, you need to click Cancel to go back to the Timesheets module where you'll see a list of all your timesheets.

Any timesheets which have entries but which are not submitted will be marked as Draft – you'll then need to confirm the timesheet by clicking the Confirm icon in the Actions column (third icon along with the tick).

If the row is highlighted in red, this means the timesheet has been in draft for more than 14 days.

Expenses

Adding expenses

To add expenses, you can do one of two things:

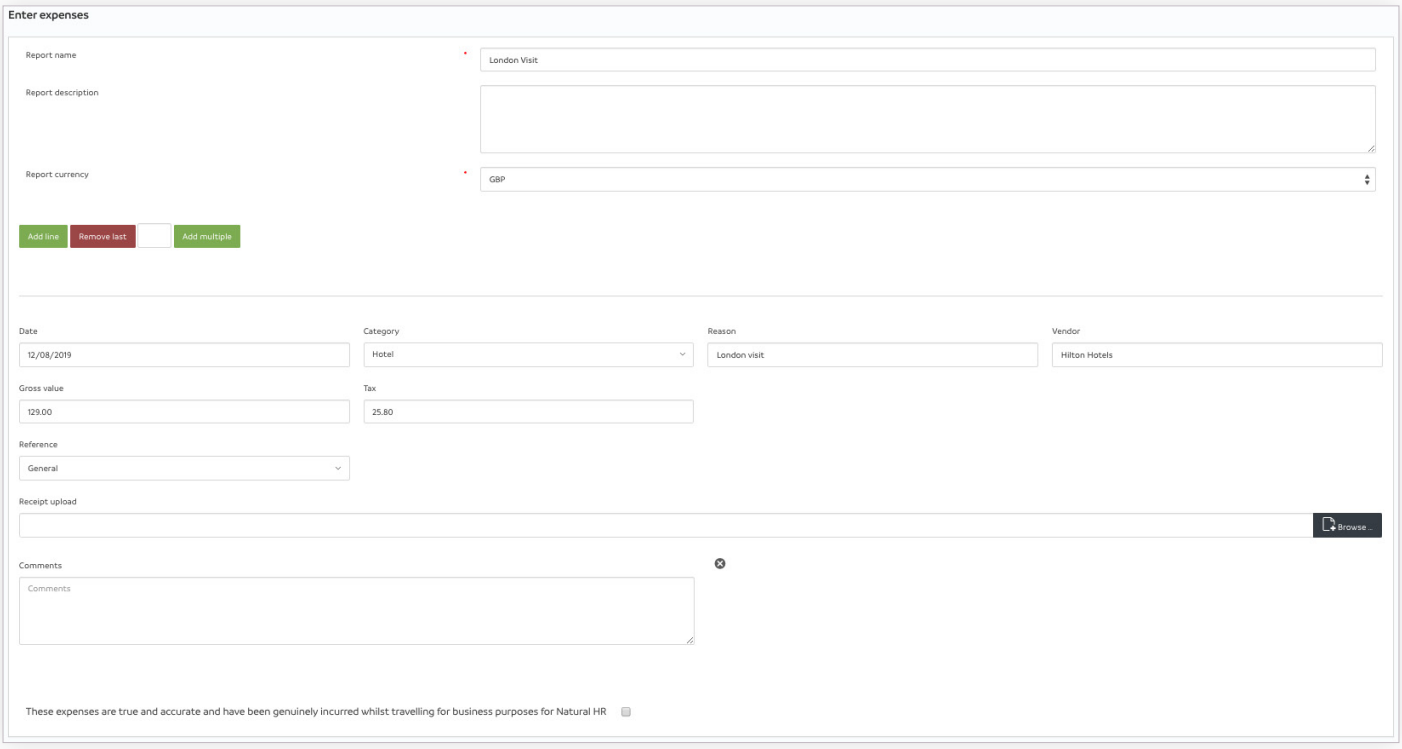
1. Click Add expenses in the Quick launch on the home page.

2. Click Self Service, Expenses and then click Add.

Submitting a claim

When entering an expense claim the actual process can vary significantly depending on how your company has chosen to use the module.

For the purposes of this guide, we have assumed that your company requires you to upload electronic receipts – if this is not the case then you can ignore the section on receipts.



Submitting an expense claim

When entering an expense claim you first enter the common claim details including the report name and currency and then you add one or more lines to the claim.

To add multiple lines, you can click `Add' in the middle left of the screen which adds an additional line – the maximum lines you can have on one claim is 50.

Additionally, you can delete a line using the X icon next to comments or delete the most recently added line using Remove Last.

Most of the actual boxes on the claim are self-explanatory – the only two which are worthy of mention are value and receipt.

When entering the value please do not enter any currency symbols – just enter the number itself. Also, when choosing if you have a receipt for this line or not, this does not impact your need to upload receipts. This field is purely informational and is used to indicate if any particular line has or has not a receipt included.

Once you have entered all your lines you then should click Confirm and upload receipts. You then will see the file uploader where you can add your receipts.

Approval workflow
The actual approval workflow varies according to settings but the available options are:

Draft	You have saved the claim but not yet submitted it
Receipts are required but not yet uploaded	Your claim requires receipts but you have not yet uploaded the receipts
Awaiting approval by approver 1	The claim has been submitted and is awaiting approval by the first approver
Awaiting approval by approver 2	The claim has been submitted and is awaiting approval by the second approver
Approved	Your claim has been approved
Rejected	Your claim has been rejected
Approved, pending payment	Your claim has been approved and is now pending payment
Paid	Your claim has been approved and marked as paid

Mileage

Adding mileage

To add a mileage claim, you can do one of two things:

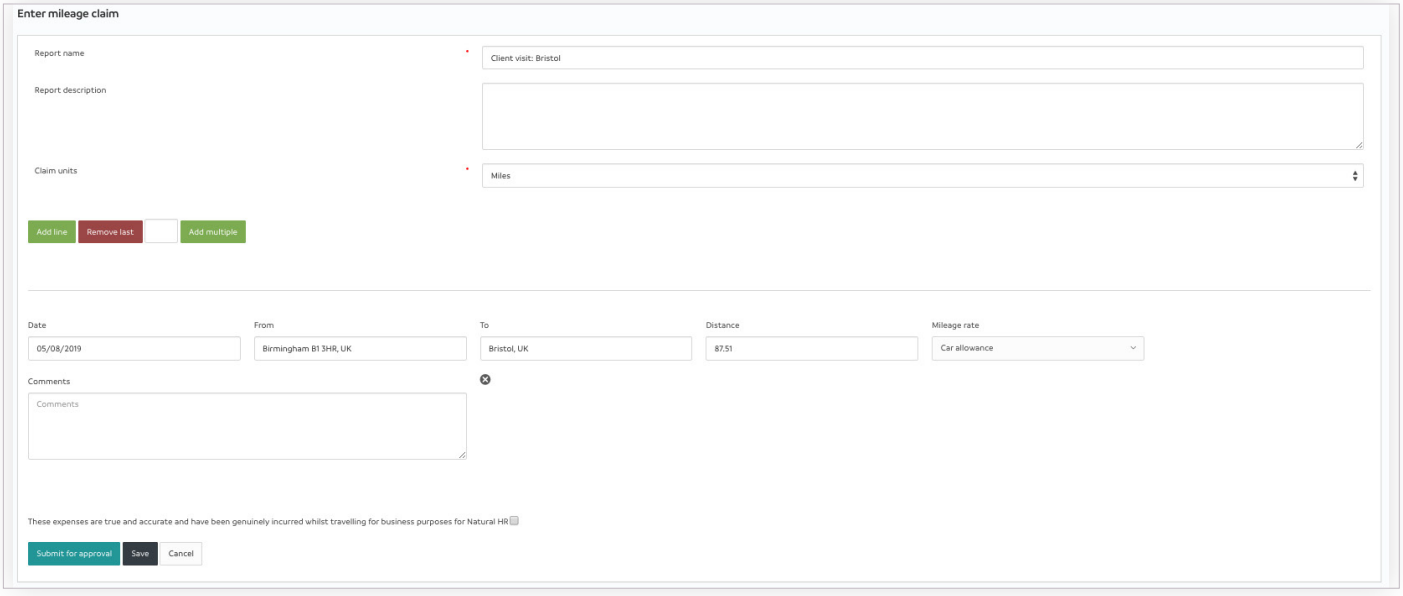
1. Click Add mileage in the Quick launch on the home page.

2. Click on the Self Service icon, Mileage and then click Add.

Submitting a claim

The workflow for mileage mirrors the workflow for expenses almost entirely. The only two exceptions are the data captured and there is no requirement to upload receipts for mileage claims.

When submitting a mileage claim, you should choose the unit (miles or kilometers) rather than currency in expenses and enter the date, from, to and distance. There is no requirement to upload receipts so you can simply click Submit for Approval once you have added all your lines and accepted the declaration.



Submitting a mileage claim

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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**