Welcome to HRoes

This guide introduces the main features available to Managers in the HRoes HR system. It follows the Manager Walkthrough recording and uses screenshots of the platform to help you manage day-to-day tasks and support your team.

What you can do in HRoes

Review and complete tasks; access your own records; view employees within your permissions; submit leave requests; review and approve employee holidays; and check calendars and notifications.

Before you get started

1

Sign in to your Manager account

Use the welcome email or account access details supplied by your organisation. Your dashboard is your starting point for tasks and upcoming events.

2

Check your own details

Open your account from the top-right menu. Review your contact information and note that some employment and payroll information may be view-only.

3

Review your responsibilities

Check My Tasks and Holiday Requests regularly for outstanding actions, employee requests and relevant reminders.

4

Understand your permissions

Employee records are available according to the access assigned to your role. Features and data visibility may vary between organisations.

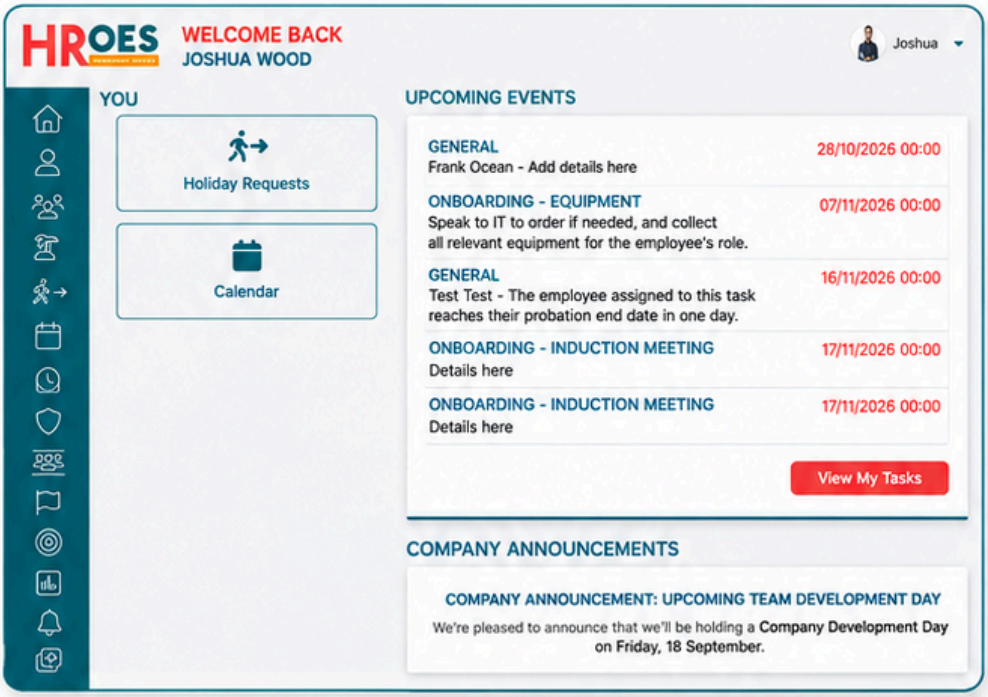
Walkthrough

The following six pages show the Manager screens in the order covered by the video.

HRoes Manager User Guide
Getting started

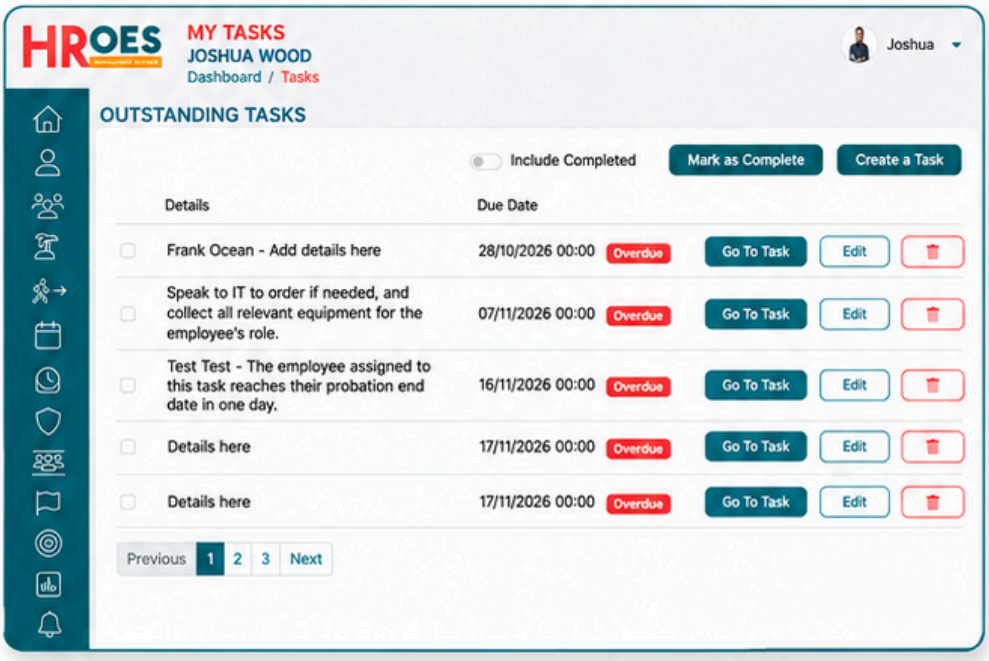
This guide shows managers how to use the main features available to them in HRoes, including tasks, profile access, employee records, holiday approvals, calendars and notifications.

1. Dashboard



- This is the first screen you see after logging in as a manager.
- The dashboard shows quick links such as **Holiday Requests** and **Calendar**.
- The **Upcoming Events** area highlights tasks, reminders and system-generated actions.
- You can also view company announcements and other useful information from here.
- Use the **left-hand menu** to move around the system.

2. My Tasks

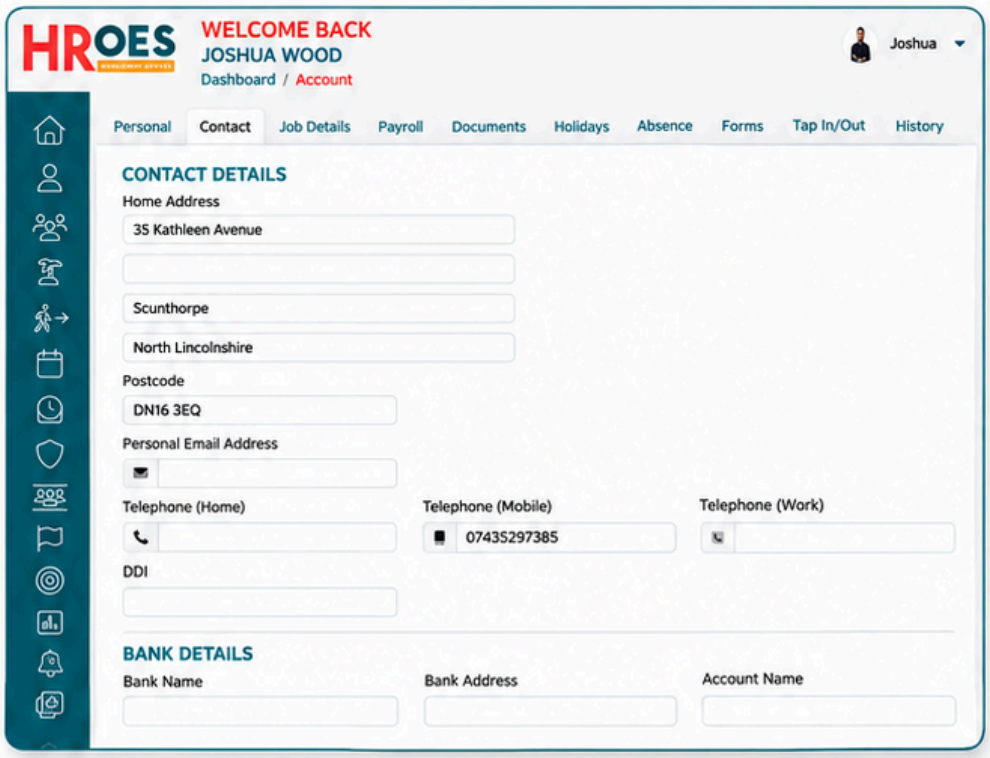


- Open the task list from the dashboard or task area.
- View, edit and create tasks from this page.
- Use **Go To Task** to open the related item in the system.
- System-generated tasks can be marked as complete and removed from the outstanding list.
- Use the **include completed** option if you need to review older tasks.

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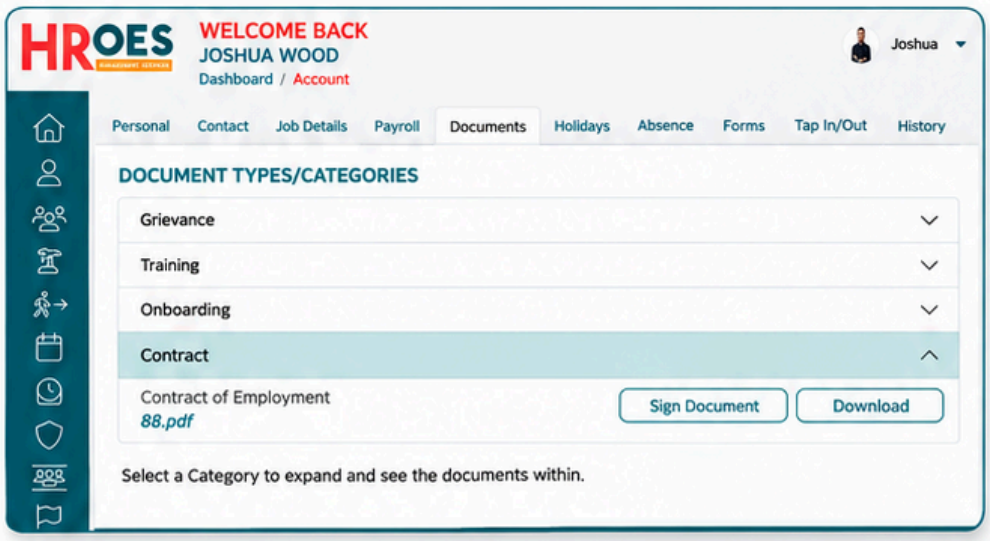
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3. My Account / Profile



- Managers can open their own record from the account name/menu at the top right.
- The profile contains tabs such as Personal, Contact, Job Details, Payroll, Documents, Holidays, Absence, Forms, Tap In/Out and History.
- This is the main place to review and update personal/ contact information.
- Some employment and payroll details may be view-only.

4. Documents

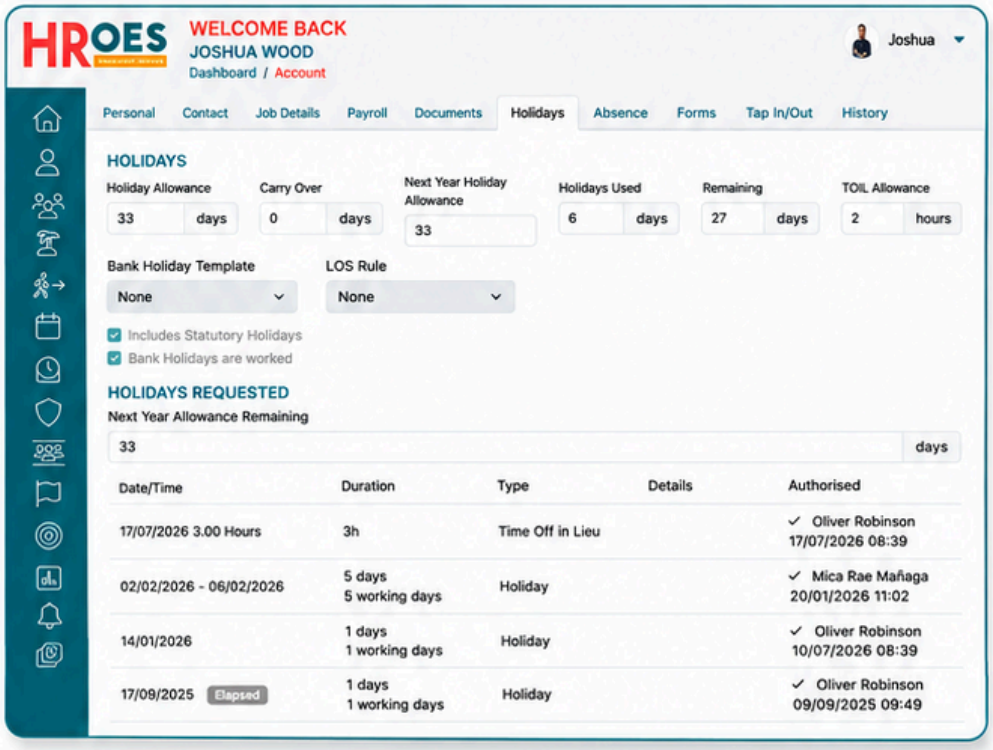


- Documents assigned to you are stored here.
- Expand a category to view files.
- Use **"Sign Document"** when action is required.
- Use **"Download"** to save a copy.
- This area keeps important records available for reference.

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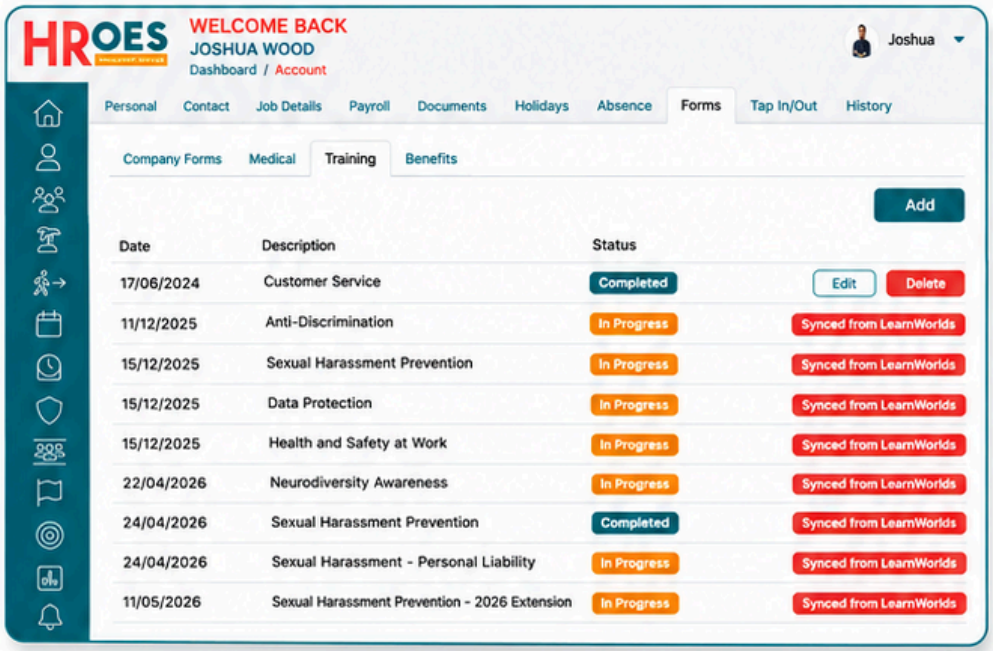
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5. Holidays



- This tab shows your holiday allowance, carry over, holiday used and remaining balance.
- Approved and elapsed requests can be reviewed here.
- Managers can check their own holiday history and balances before making requests.

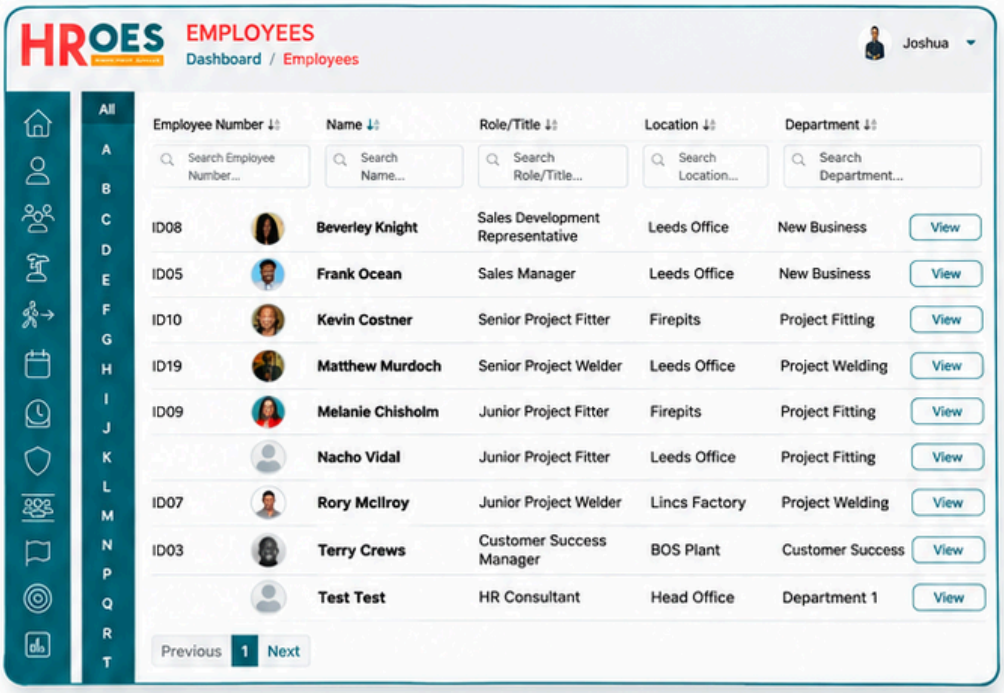
6. Forms



- Forms can be used to record company forms and custom data such as medical, training, or benefits information.
- Use the tabs to switch between different form types.
- Use the **Add** button where available to create a new form entry.
- Statuses help show whether items are complete or in progress.

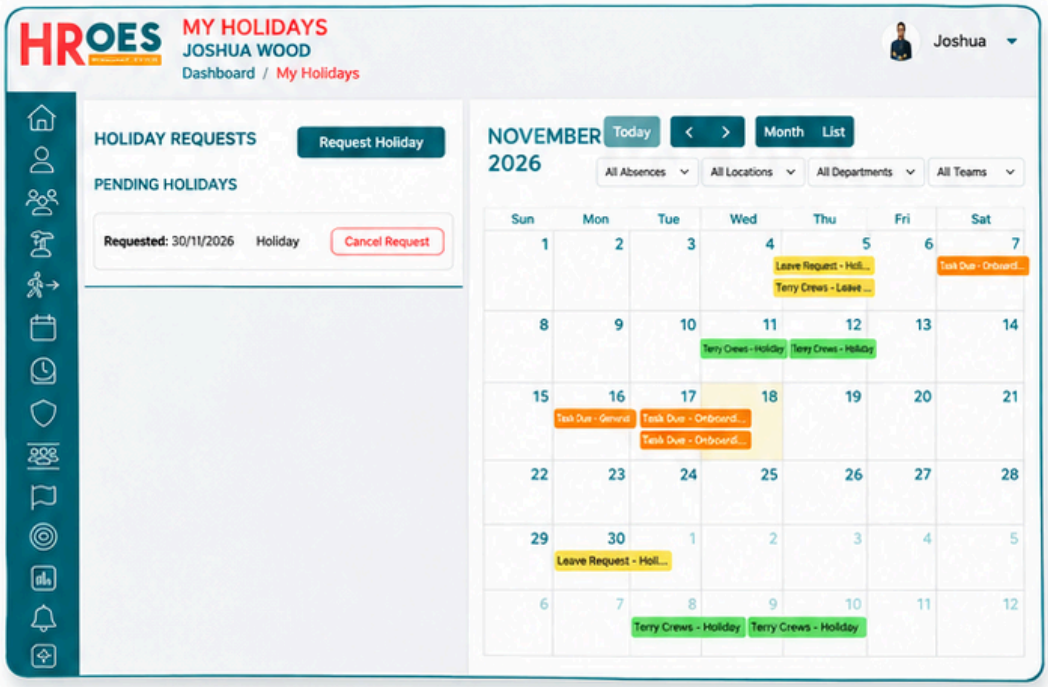
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7. Employees



- The **Employees** tab lets managers view the employees or direct reports available to them.
- Use the search and filters to find a person quickly.
- Click **View** to open an employee record.
- Access to data depends on your permissions.

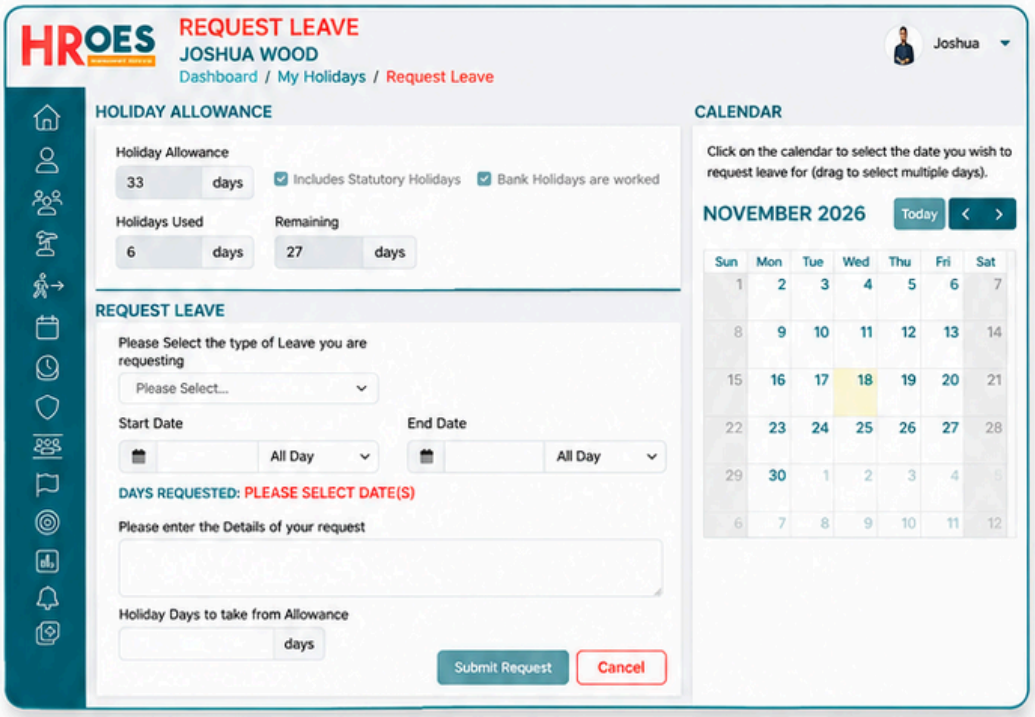
8. My Holidays



- This area shows your holiday requests alongside the calendar.
- Use **Request Holiday** to start a new request.
- Future requests can be cancelled here when cancellation is available.
- The calendar helps you check who is off before booking time away.

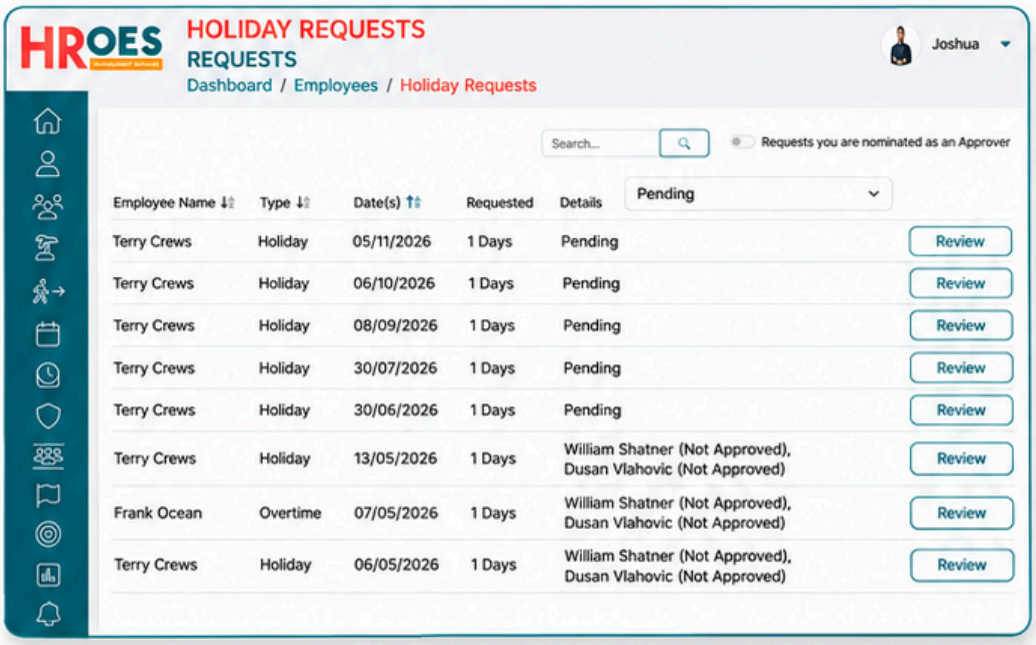
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9. Request Leave



- Choose the **leave type** you are requesting.
- Enter the **start and end dates** or select the days you need in the **calendar**.
- Choose **All Day, AM or PM** where needed.
- Add a short **reason** or details for your request.
- Submit the request using **Submit Request.**

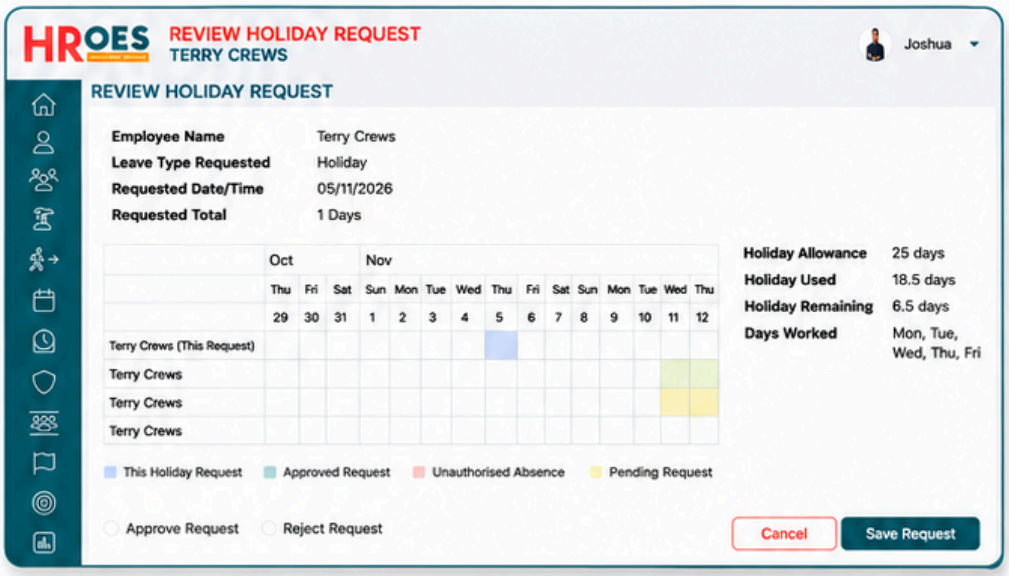
10. Holiday Requests



- Managers can review employee **holiday requests** from this page.
- Use **search, status filters,** and the **approver toggle** to find items.
- Click **Review** to open a request and make a decision.

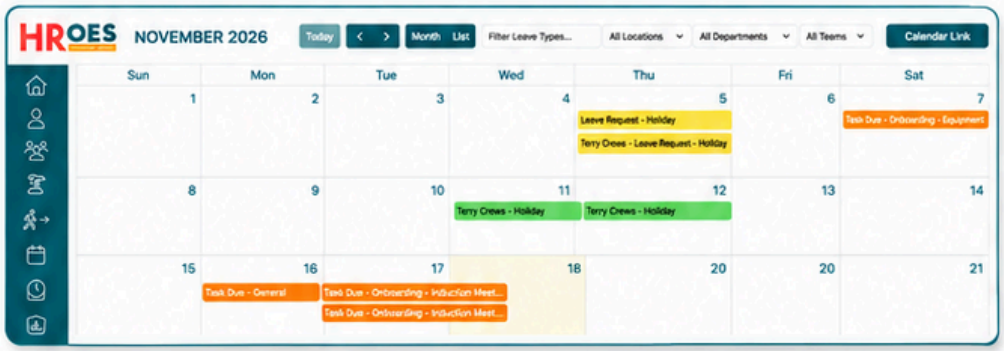
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11. Review Holiday Request



- Review the **employee name, leave type, requested date** and **total**.
- Use the **mini-calendar** and **overlap view** to spot any clashes.
- Check **holiday allowance, holiday used** and **holiday remaining** before deciding.
- Choose **approve** or **reject** and then **save** the request.

12. Calendar & Notifications





- The **Calendar** gives a wider company view of leave and system events.
- Use the **filters** to switch between leave types, locations, departments and teams.
- The **Notifications** page shows recent actions and prompts that may need attention.
- Managers should check notifications regularly for updates such as holidays, appraisals and sickness.

Need help?

Raise enquiries by emailing **customersuccess@hroes.co.uk** or by using the chatbot in the bottom-right corner of the HRoes system. Please include as much detail as possible, and attach screenshots where helpful.

Need help with HRoes?

If you have a question, experience an issue or need help with a feature covered in this guide, please contact the HRoes Customer Success team.

Contact Customer Success

EMAIL

customersuccess@hroes.co.uk

IN-SYSTEM CHATBOT

Open the chatbot in the bottom-right corner of HRoes and submit your enquiry. You can use this option while you are logged in.

What to include in your enquiry

- **The page or feature**

  For example, My Tasks, Employees, Holiday Requests or the Company Calendar.

- **A description of the issue**

  Explain what you were trying to do, what happened and any error message you received.

- **A screenshot, if helpful**

  Show the relevant part of the screen, but avoid sharing passwords or unnecessary sensitive employee information.

A few helpful reminders

Check your tasks and approval queue regularly. Review leave clashes and the employee's allowance before making an approval decision. If a record or action is not visible, your access permissions may be relevant.