# Employee Access Manual

Is there a Help Manual for Employee Self-Service Users?

Welcome to BambooHR! We are excited that you will be using BambooHR to keep track of and manage your employee information. Depending on the customized settings your company has selected, you can view your information, and in some cases edit information based on the access granted by your Administrator. Additionally, you will have access to your time off history, as well as be able to request time off right within the system.
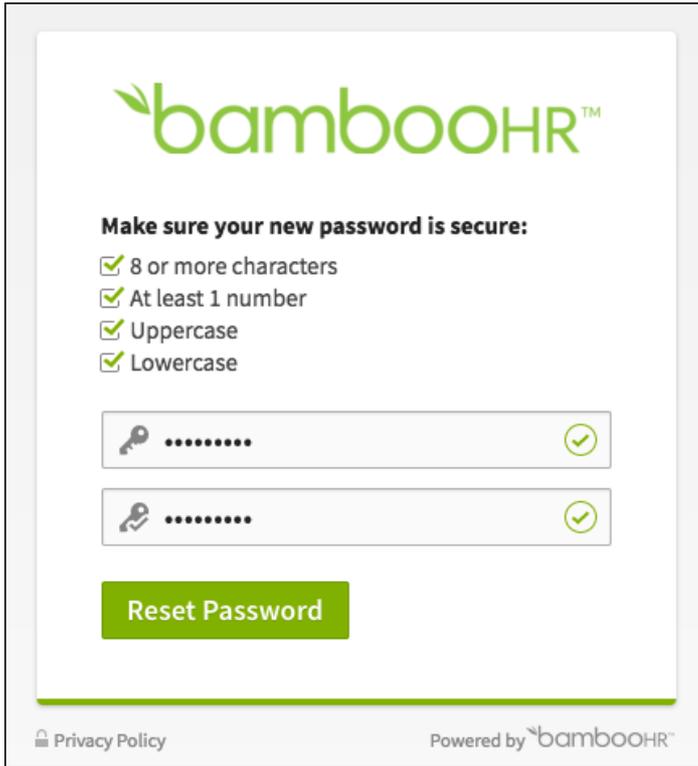
This manual is designed to walk you through the BambooHR experience. If you have any further questions, please reach out to your Manager or HR Administrator.

Welcome Email
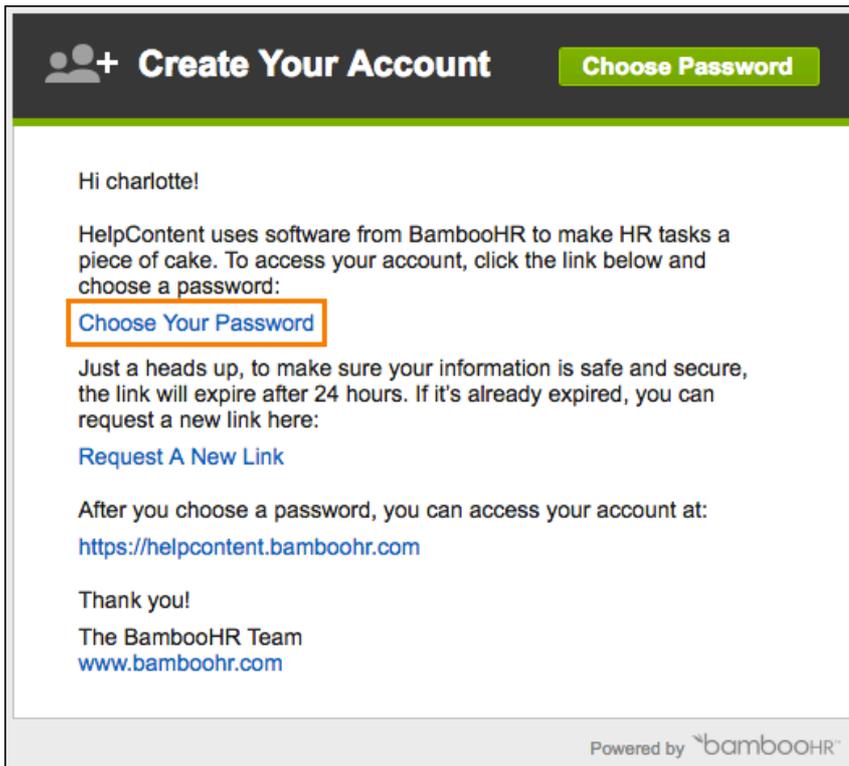
When your access to BambooHR has been enabled, you will receive an email notification. Click on the link to "Choose your password."

Set Your Password

On the next screen, enter the password you would like to use and confirm it in the second box. Click the "Reset Password" button. Once your password is saved, you will automatically be logged into BambooHR.

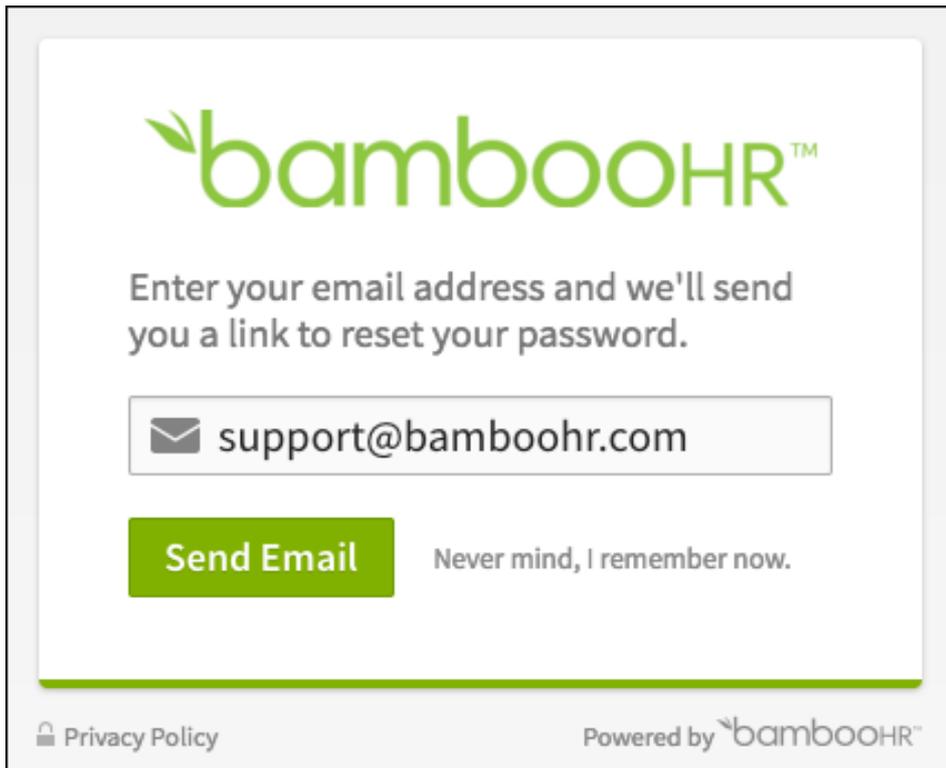# What do I do if I Forgot my Password?

Navigate to your Login Screen
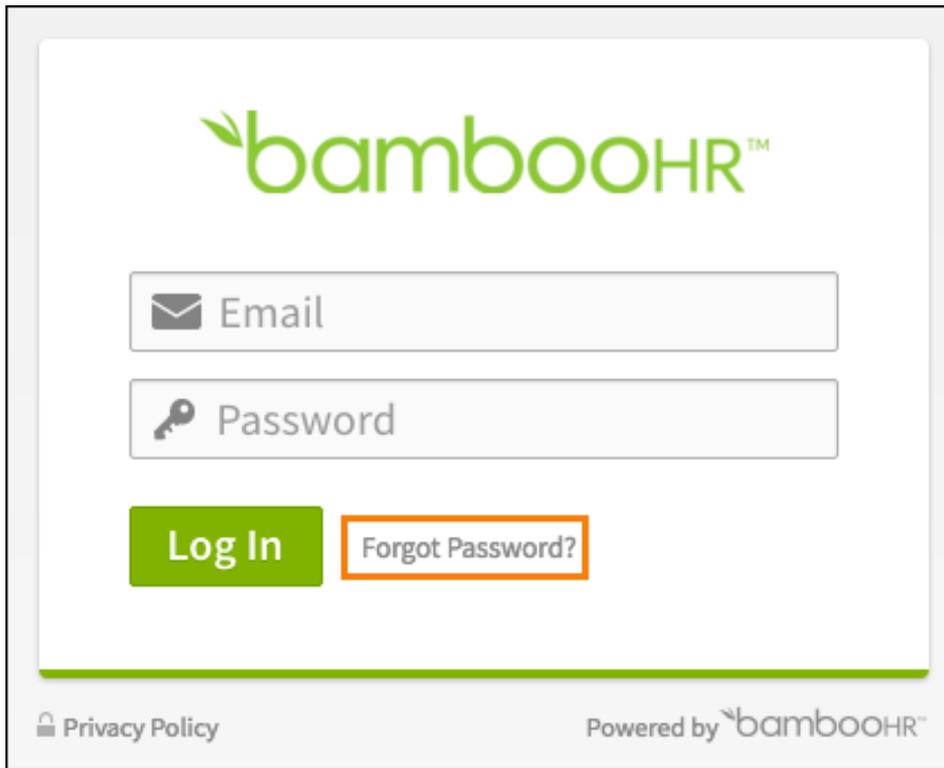
If you have forgotten your password, please go to your BambooHR URL and click the "Forgot password?" link.

Enter your email address

Enter your work email address, and click the "Send email" button. We'll send an email to that address with a password recovery link. Please note that this link will only be valid for 24 hours after it is sent.
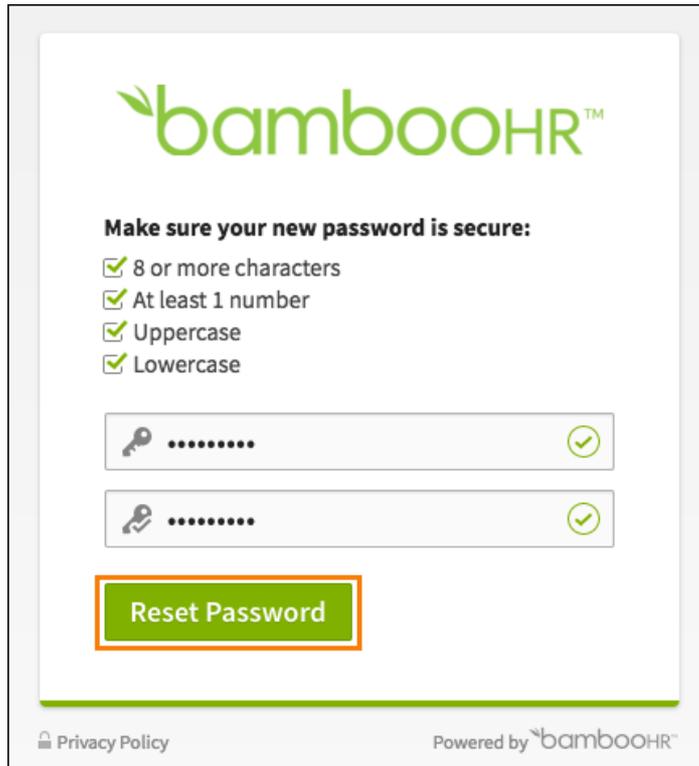
Reset Your Password

Click on the "Reset Your Password" link in the email message.

Create a New Password

You will now be taken to a new page where you can choose a new password. Enter your new password in the first box, and then re-enter it once more into the second box to confirm. Click the "Reset Password" button, and your new password will be saved.

You can now log into your account using your email address and new password.

Log in
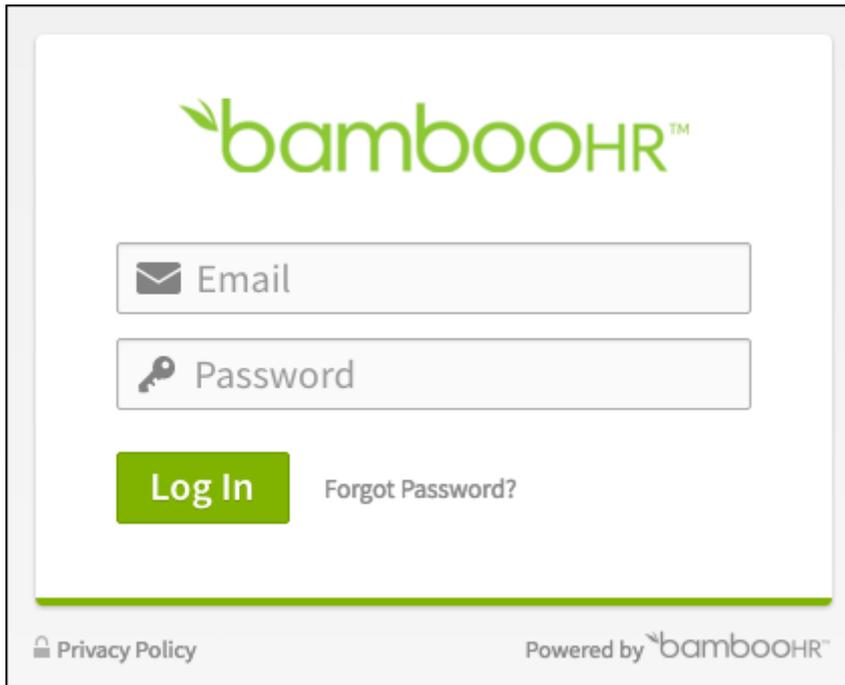
For future logins, use your email address and your new password that was just created to log into your BambooHR account.

> 💡 If you are having trouble, [check out our tips for logging in](#). If that doesn't solve the issue for you, please contact your HR administrator.

BambooHR Tabs

As an Employee Self-Service user, you have access to view Home, My Info, Employees, and the Files tabs. Employees will only be able to view personal information for themselves in BambooHR.

Bamboo Home
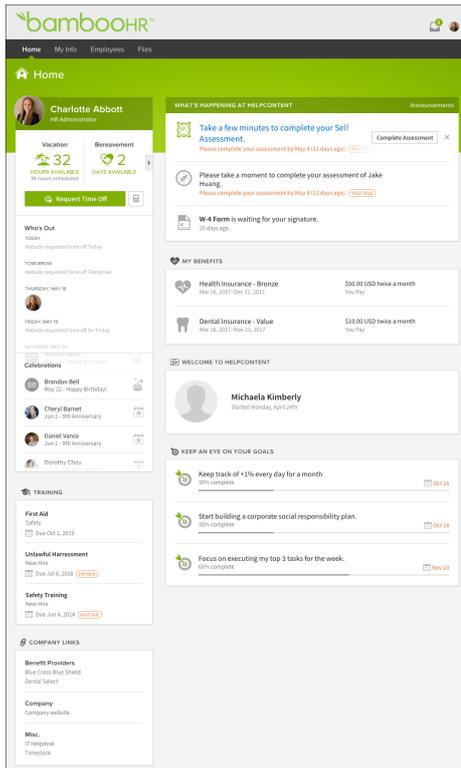
Home shows company-wide, as well as personal information widgets, that include information relating only to the individual employee. The available company-wide widgets are: Welcome to Company, Celebrations, Company Links, and Who's Out. Personal widgets include: My Benefits, What's Happening, My Info, Goals, and My Training. The widgets displayed on Home are determined by the Administrator of your BambooHR account.

My Info

BambooHR allows you to view, and in some instances, edit your detailed information. Access to fields and editing capability is granted by the Administrator for your account. To view your details, you will want to click on "My Info" when logged into BambooHR.

Employees

The Employees tab has two viewing options: Company Directory and Organization Chart. The Company Directory shows contact information for all employees in the company. Click on your own name in the directory to be taken to your My Info tab. The Org Chart shows the reporting structure of your company. Both views need to be enabled by an administrator in order for it to be accessible to all employees.

💡   If you are using Chrome, check out [BambooHR's Chrome extension](#)!

Files

The Files tab shows any Company files that have been shared with you. The administrator will need to share at least one file with you in order for the Files tab to show.

How do I Update my Information?

If a field is available for you to update, you will be able to click into the field and enter new information, select a new option from a drop-down list, etc. After updating the information within the field, click the "Save" button.

Depending on the type of access you have, the change will be saved immediately or it will go through the approval process. Read below to learn about each type of change.

Updating Information without Approval

Depending on the individual field settings in Employee Access Levels, you may have the option to update field information without needing approval for the changes to become effective.

To make a change to a field that does not require approval, click into the field and enter the changes and then click the "Save Changes" button. The changes will be effective immediately and the old information will be overwritten. Please note that because this particular access does not require approval, a notification email is not sent out, and the information is immediately updated and saved.

Updating Information with Approval

Depending on the individual field settings in Employee Access Levels, you may have the option to update field information but it will require approval before the change becomes effective.

To make a change to a field that does require approval, click into the field and enter the changes and then click the "Save Changes" button. Once you save your changes, the request will be submitted and an email will be sent to the approver(s). Once the change is approved, you will be notified via email and you will see the changes on your profile.

If a field has pending changes, you will see the message above and you will not be able to make changes until action has been taken on the current request. If you would like to cancel the request, you can click the icon above to be taken to the sent requests section of your inbox in order to comment on the request or cancel it.

> Each time the "Save" button on a tab is clicked, a request will be submitted. So, if you changed the City and clicked Save, then changed the Country and clicked Save, two separate requests would be generated (one for each field change). If multiple changes on one tab need to be made, it is best to make all field changes, and then click the Save button once. Each field change will then be included in one single change request.

Information Update Request

When a change to a field that requires approval is made, an email will be sent to the appropriate individual notifying them that they have a request that needs to be reviewed. This email notification will include the names of the fields that were updated, and depending on the field, it will show the new information. The approver can click "View Request" to see the entire update request.

Inbox

You can view your sent requests by going to your Inbox in the top right corner of the page when you are logged into BambooHR. Click on "Sent Requests" to see all sent requests including Information Updates and Time Off Requests. You can change the Item Status in the top right corner to view all types of requests: Approved, Denied, Pending, and Cancelled.
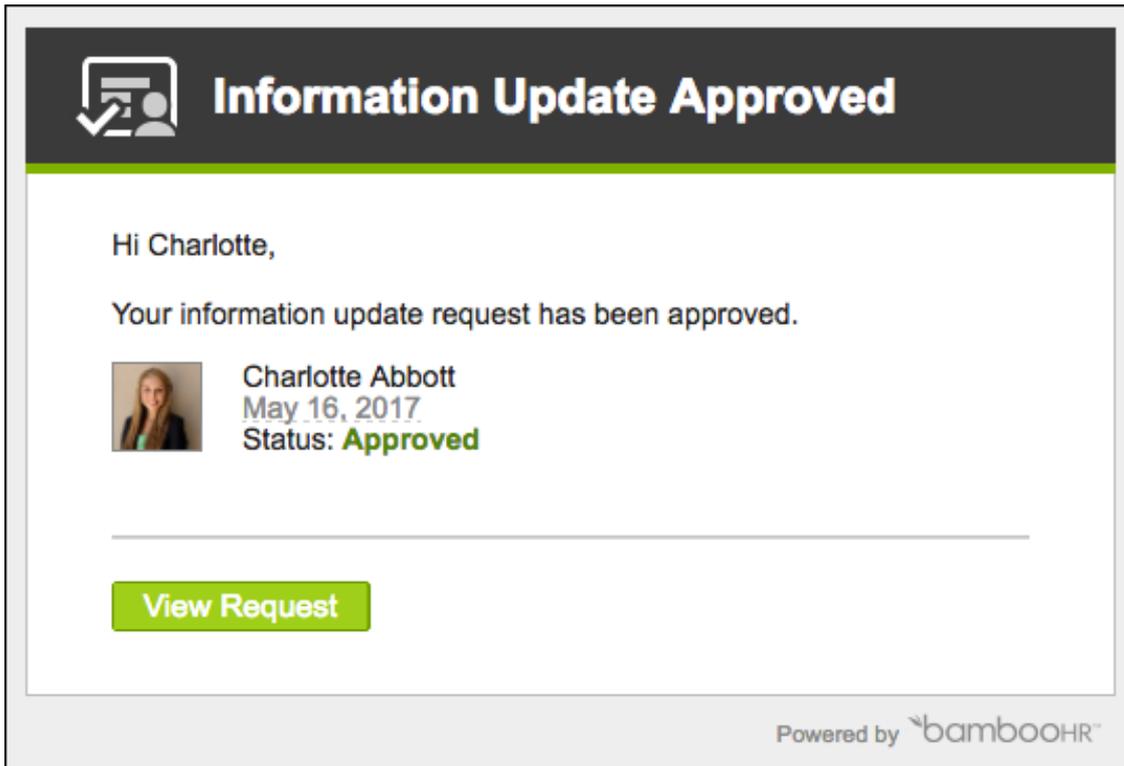
Request Details

Click on the request to view the specific details. The previous information will be shown on the left, and the new information will display on the right. If it is new information, then it will show as "added." If the request is still pending, you will see the option to cancel it in the top right corner.
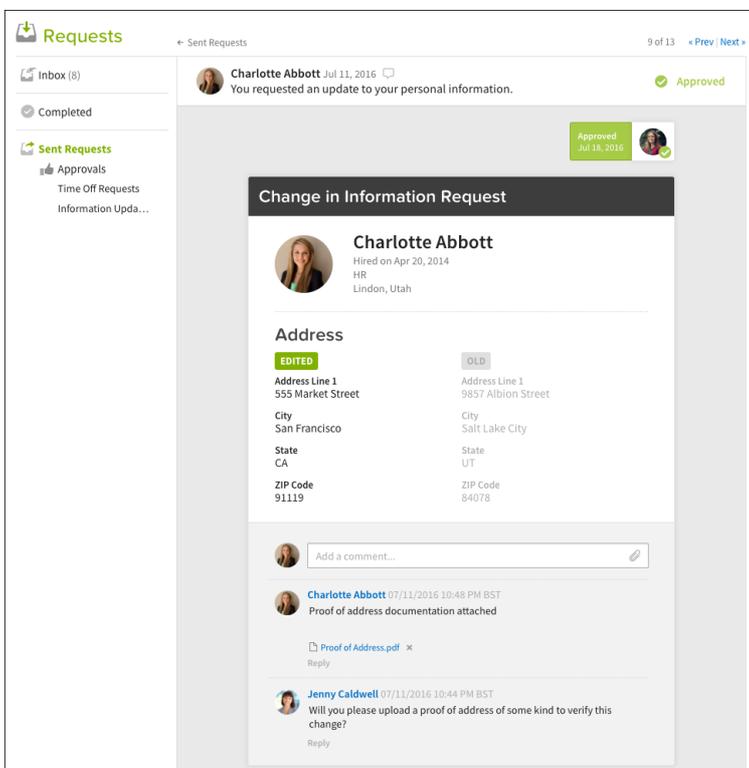
Comments can be added about the request in the Comments box. To do this, click into the box and type the comment, and then click "Post." The approver will be notified of any comments made on the request. All comments are saved with the request even after it is approved, denied, or canceled. Additionally, a file can be attached to the request by clicking the paper clip icon in the comment box. If a file is attached, it will automatically be uploaded to your "Workflow Attachments" folder on the Documents tab.

Approval/Denial Notification

When a request has been approved or denied, you will receive an email notification. If a comment was made at the time of the approval/denial, it will show in the notification. Click the "View Request" button to see the request details in your inbox.

How do I Request Time Off and what is the Approval Process?

This section will show you how to request time off and what will happen through the appoval process when you submit your request.

Submit Request

BambooHR allows you to request time off directly from Home. To do so, click on the "Request Time Off" button in the My Info widget. Fill out the information required regarding the date(s), amount of time requested, and the Time Off Type that the request is associated with. By clicking "Send Request" the request will be submitted. Notes are a great way to describe more specifically what the time off is being used for, and we encourage you to use the note field with each request.

Once you click "Send Request," your request will be submitted and sent to the appropriate individual(s) for review. Once the request has been approved, you will be able to view it by going to your Time Off Tab (located under My Info) and reviewing under the "Upcoming Time Off" Table or by selecting the appropriate time off type in the history table, then click "Requests."

> ♀ Access to time off information is determined by the Administrator for your BambooHR account.

Will I be Notified if I have a Negative Time Off Balance?

Negative Balance
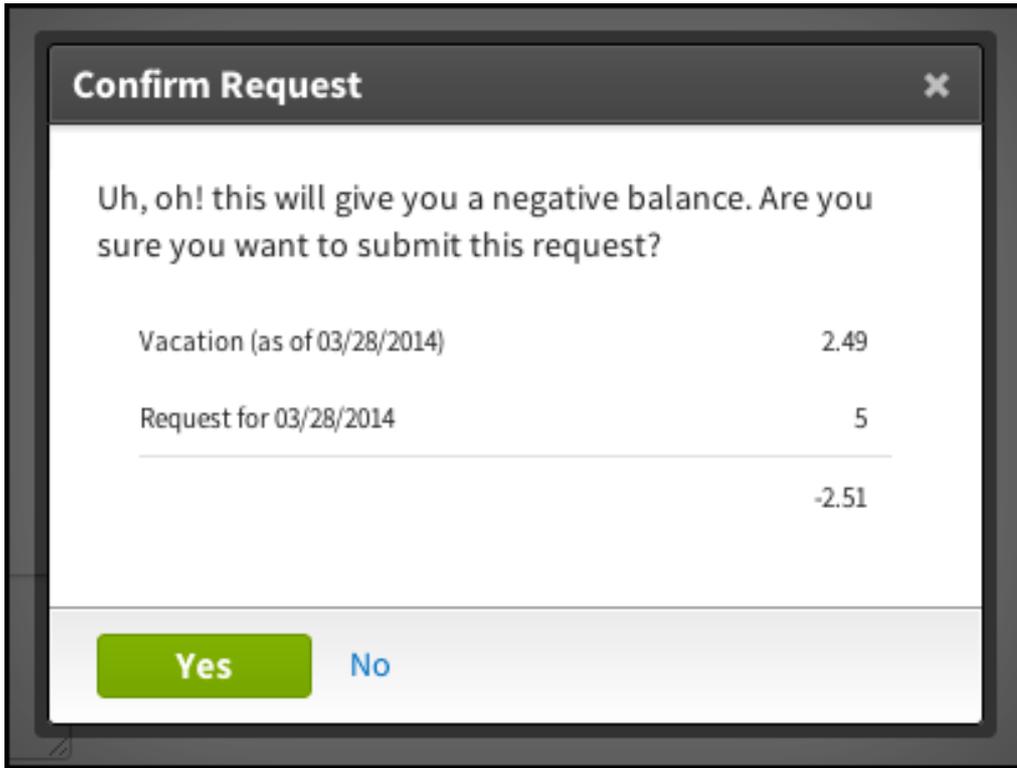
When you request time off that will result in a negative balance, a warning will be displayed. This warning will let you know what your available balance will be on the date that you requested time off, as well as the negative balance that will result if you continue with the request. You can then choose whether or not to continue with the request submission.

Email Notification

After a Time Off request has been submitted, you will see a confirmation message in BambooHR. The email notification of the Time Off Request will be sent through the approval process. If there are multiple approvers set up in the workflow for your company, it will need to be approved by all before the request will officially be approved in BambooHR.

Time Off Request Approval

Once a Time Off request has been submitted, the approver will be able to click "Review this request in BambooHR" in the email notification and will be taken directly to the pending time off request. He or she can approve or deny directly through the email. Additionally, the approver can go to the Inbox in the top right corner of the screen when logged into BambooHR in order to take action on the request.

Requests can be approved or denied, and when either action is taken, an email notification is sent back to the requester to notify them of the decision.

Approved Request Email Notification

Your time off has been approved!

Charlotte Abbott,

Your time off request for 8 hours of Vacation on Mar 1st has been approved by Jennifer Caldwell.

MAR 01 — Vacation
8 hours
Status: **Approved**

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Denied Request Email Notification

bambooHR™

Time Off Denied

Jennifer Caldwell denied a time off request for Charlotte Abbott.

Charlotte, your time off request has been denied

MAY 12 — 8 hours - Vacation
Status: **Denied**

Jenny Caldwell – May 16, 2017
Sorry, we have too many people out this day.

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Time Off Request History

When a request is approved, the requested amount will show as "Scheduled" under the available balance for that time off type. However, the Earned/Used history for that Time Off Type will not reflect the change until the time off has been taken.

To see a detailed reflection of Time Off requests that have not yet occurred, click on the "Requests" link in the History table on your Time Off tab.

How do I Cancel or Update my Time Off Request?

A Time Off request can be canceled or edited provided the time off is still pending, or the date for the request is still in the future. Requests for time frames that have already passed or requests that have already been denied cannot be canceled.

Cancel or Update a Time Off Request

Click on the time off balances in the My Info widget on Home. Or, click on the "My Info" tab and then navigate to the "Time Off" tab.

Select the desired Time Off Type in the top left corner of the History table, then select to show "Requests." Click on the status link for the request you would like to update.

> 💡 If you would like to see requests for a specific year, you can change "2017" to the desired year in the top left corner of the table.

The pop-up will show the details of the request. Simply cancel the request or make changes to the request and save it. If changes are made to the time off request, it will go through the approval process again.

How do I View my Time Off Balances?

Home

You can review current time off balances in the My Info widget on Home. The My Info widget gives a general view of the current balances for each time off type and will show if there are any days/hours scheduled. To view your time off balances in more detail, click on one of the balances.

Time Off History

The top of the Time Off tab shows each of the Time Off Types as well as the balances associated with that type. The Available balance is the net amount of time you have including any future approved time off requests that have not yet occurred, which show as scheduled.

The History table gives you the option to select a Time Off Type, and show the Earned/Used or Request history for that type. The Earned/Used history will show any past time off requests, accruals or balance adjustments. The Request history will show all requests for that specific type, this includes approved, denied, and canceled requests.

The Upcoming Time Off table will show all upcoming approved time off and company holidays.

Can I Calculate my Future Balances?

Calculate Balance

Navigate to your time off tab and click the "Calculate Balance" button that appears when hovering over the time off type.

Select the Time Off Type and future date to see what the balances will be at that point in time. The Accrual Details will show any future approved time off requests as well as any accruals that will happen before the future date.

Where can I View the Who's Out Calendar?

Home
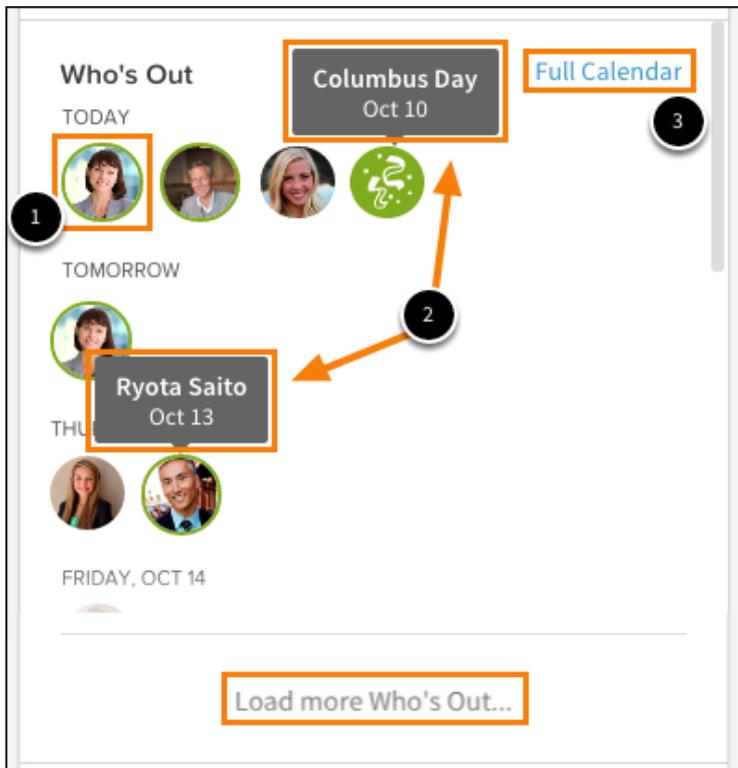
When logged into BambooHR, go to the "Who's Out" widget on Home. In this widget you can:

1. View your direct reports at a quick glance by the brand colored border around their avatar in the widget display.
2. Hover over an employee's avatar to show the full date range the employee will be out for. Additionally, hover over a holiday to show the holiday name and date range.
3. Click the "Full Calendar" link to see the Who's Out information in a calendar view. Additionally, a link to the iCal feed is available within the Full Calendar. Keep in mind that iCal access is determined by your administrator.

Who's Out Calendar

1. Change the view of the calendar to show by week, 2 weeks or month.
2. Scroll through the future months to see upcoming, approved Time Off Requests and Company Holidays.
3. Filter options allow you to filter the calendar to only show employees from a specific Department, Location, Division, Job title, Employment Status or your Circle (Peers, Direct Reports, and your Manager). If you have not set a filter, the calendar will automatically show all employees.
4. Select what you'd like to show on the calendar: Holidays, Birthdays, Anniversaries and Weekends. If your company is using the "iCal" feature, you can set up an iCalendar feed with your google, mac or outlook calendar. This way the selected events will show up in your calendar program instead of having to log into BambooHR to see them.

> 💡 Did you know BambooHR has a mobile app? Be sure to download it so you can get quick access to request time off, view the Who's Out calendar, and company directory!

What's Next?

Do you need to update your Emergency Contacts?

Would you like to make sure that your dependents are up to date?

Do you need to upload your photo to personalize your BambooHR profile?