




Get Familiar with CakeHR in 5 Easy Steps

Short User Manual for **Employees**





Welcome to CakeHR software,
the perfect HR system for companies of any size, designed with you, the user, in
mind. Dedicated to help solve HR
challenges so that you can focus on the important stuff!

Our technology is a fully-featured HR platform, created to streamline common processes and includes modules such as, Timesheets, Shift Scheduling, Expenses & Performance, Recruitment and Leave Management.

This quick setup guide will give you a brief introduction to the software and help you navigate through the basics in just 5 easy steps.

STEP 1 / Set up your Dashboard

Provides a quick view of assigned tasks and access to core functions and information

The screenshot shows the CakeHR dashboard for user Amber West. The interface includes a sidebar with navigation links: DASHBOARD, CALENDAR, TIMESHEETS, SCHEDULE, OKRS, MY PROFILE, COMPANY, DOCUMENTS, TIME OFF, REPORTS, and RECRUITMENT. The main content area features several widgets: a 'Welcome, Amber' message, a 'My tasks' list with items like 'Christopher Taylor asked to complete performance review about Charles Vital due in 2 days' and 'Amber West Create a competitive analysis report template due in 8 days', an 'Upcoming time off' section showing a business trip and work from home, a 'Product Development - Next two weeks' calendar, a 'Quick feedback' section with a thumbs up icon and a message from Christopher Taylor, a 'My balance' section showing vacation (17 days left), sickday (3 days used), work from home (6 days left), and business trip (4 days left) balances, and an 'Anniversaries' section listing birthdays and work anniversaries. A chatbot icon is visible in the bottom right corner. Callouts point to various features: 'Shows a list of all tasks that have been assigned to you' points to the 'My tasks' widget; 'Easily modify or delete your upcoming time-off requests' points to the 'Upcoming time off' widget; 'View your team's calendar 2 weeks in advance for easy planning' points to the 'Product Development - Next two weeks' calendar; 'Additional widgets you can add to your dashboard. Personalise and change the background picture to suit your own style' points to the top navigation bar; 'Delete or move your widgets, so you only view the information you want to see' points to the widget headers; 'Shows the most recent feedback received from colleagues. Quick, real-time recognition in view to keep you motivated!' points to the 'Quick feedback' widget; 'Your remaining balance available in each time-off policy that is applicable to you' points to the 'My balance' widget; 'Celebrate the work anniversaries and birthdays of your colleagues' points to the 'Anniversaries' widget; and 'Chatbot to contact CakeHR support' points to the chatbot icon.

Shows a list of all tasks that have been assigned to you

Easily modify or delete your upcoming time-off requests

View your team's calendar 2 weeks in advance for easy planning

Additional widgets you can add to your dashboard. Personalise and change the background picture to suit your own style

Delete or move your widgets, so you only view the information you want to see

Shows the most recent feedback received from colleagues. Quick, real-time recognition in view to keep you motivated!

Your remaining balance available in each time-off policy that is applicable to you

Celebrate the work anniversaries and birthdays of your colleagues

Chatbot to contact CakeHR support



STEP 2 / Quick extensions and side dashboard

Extensions that allow for fast and easy access to all key functions

Shared company calendar that can be synchronised with your Google calendar

Monitor your personal, team and company goals to see if you are staying on track

View the company directory and org chart

Access to personal and company documents, relevant to you

The screenshot shows the CakeHR dashboard for user Amber West. The interface includes a sidebar with navigation links: DASHBOARD, CALENDAR, TIMESHEETS, SCHEDULE, OKRS, MY PROFILE, COMPANY, DOCUMENTS, TIME OFF, REPORTS, and RECRUITMENT. The main content area is divided into several sections:

- My tasks:** A list of tasks with due dates and completion status. Tasks include: Christopher Taylor asked to complete performance review about Charles Vital (due in 1 day), Amber West Create a competitive analysis report template (due in 8 days), Amber West Update user manual (due in 57 days), and Training "Webinar" Guide your team to success" (Due in 11 days).
- Upcoming time off:** A section showing upcoming time off requests. It includes a green button to '+ ADD TIME OFF' and a blue button for 'HISTORY'. Two requests are listed: Amber West Business trip on 26/07/2019 - 27/07/2019, 1 day, and Amber West Work from home on 30/07/2019 - 31/07/2019, 2 days (awaiting approval).
- Product Development - Next two weeks:** A calendar view showing the schedule for the next two weeks. It includes a table with dates and names of team members: Amber West (Product director), Charles Vital (Programmer), and Christopher Taylor (Project manager).
- Quick feedback:** A section for providing feedback. It includes a thumbs up icon and a message from Christopher Taylor: "I've noticed that our new employees have been how to succeed in our culture. That's great. They really appreciate it".
- My balance:** A section showing the user's balance of various types of time off. It includes: Vacation (17 days left, 3 days used), Sickday (3 days used), Work from home (6 days left, 0 days used), and Business trip (4 days left, 1 day used).
- Anniversaries:** A section showing upcoming anniversaries. It includes: Michael Espinoza is celebrating his birthday today, Jessica Hicks is celebrating her birthday today, and Dinesh Tripathi has 7 year work anniversary in 9 days (01/08/2019).

A dropdown menu is open in the top right corner, showing options like 'New time off', 'Quick feedback', 'Schedule 1-to-1', 'New OKR', 'New document', 'New expense', and 'New task'.

Request time off at the click of a button

Request or leave quick feedback

Submit your expenses to the company for approval



STEP 3 / Look up colleagues in the employee database

View the company directory and easily filter to select your team or see an overview of the company structure

Access to company's organisational chart. See who is part of what team and view reporting structures

List of all colleagues, can be filtered based on their team or location

cake

Search

CakeHRDemoViktorija

Amber West

DASHBOARD

CALENDAR

TIMESHEETS

SCHEDULE

OKRS

MY PROFILE

COMPANY

DOCUMENTS

TIME OFF

REPORTS

RECRUITMENT

DIRECTORY

ORG CHART

Accounting, HR, IT, Managem...

All locations

Everyone

14 of 20 employees

Amber West
Project manager

Charles Vital
Programmer

Christopher Taylor
Product director

Dinesh Tripathi
CFO

Jessica Hicks
Human Resources

John Williams
Head of Marketing

Katherine Burrows
Accountant

Lily Howe
Programmer

Malu Kortman
Head of HR

Matilda Garner
Programmer

Max Savage
Office administrator

Melwin Olofsson
Programmer

Miles van Maaren

Skander Jans
Account director

First name

Last name

Date of hire

Teams

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Directory can be reordered by first, last name or date of birth

Want to know who is who? Click to view colleague's information card



STEP 4 / Set up your employee profile

Manage your personal information such as profile picture, password, notifications, language and other preferences

Keep track of all assets that are assigned to you

Add your short term and long term personal development goals to easily track and monitor progress

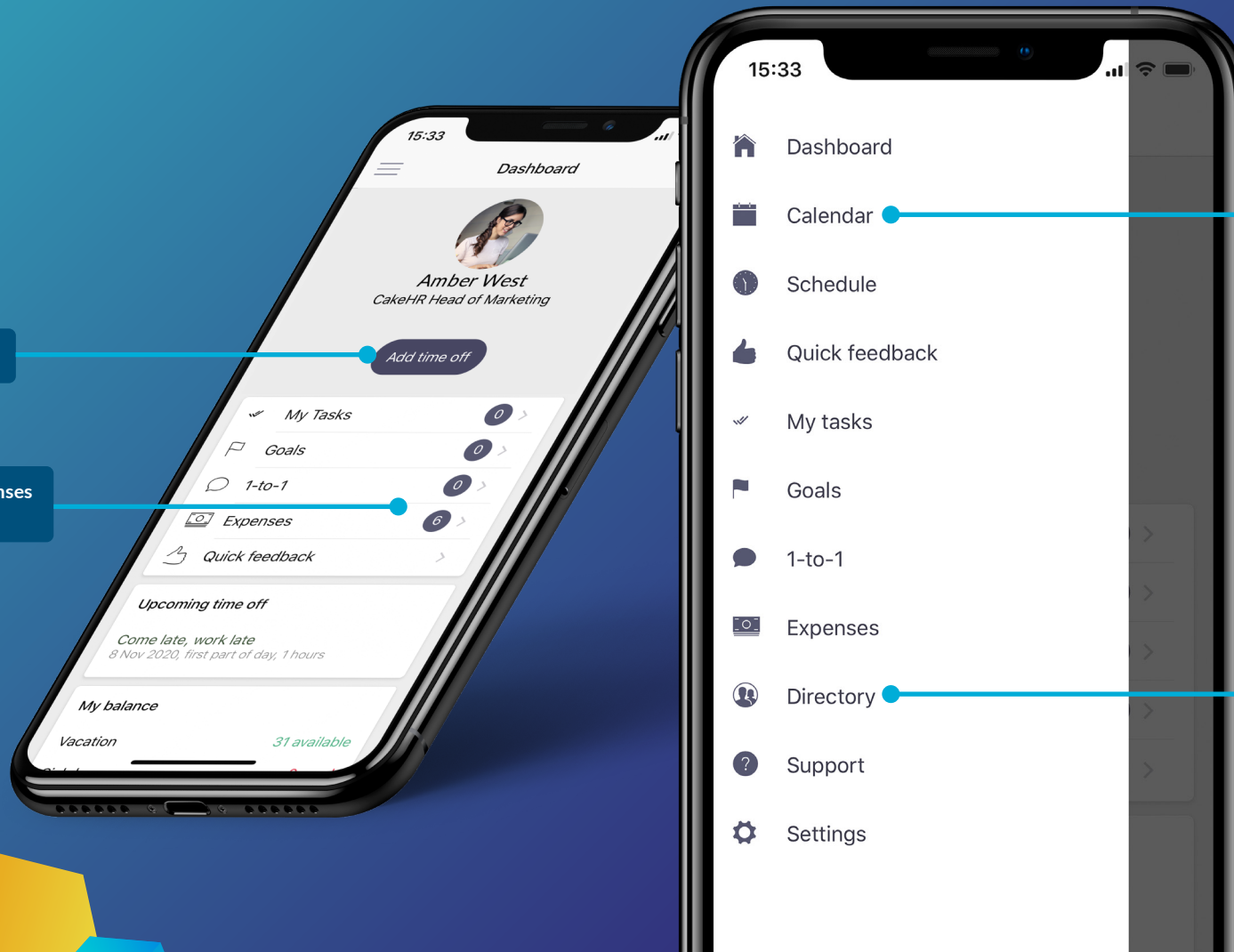
Change language, notifications and password

Adjust language, notifications and change password

The screenshot displays the CakeHR interface for an employee named Amber West. The sidebar on the left contains navigation links: DASHBOARD, CALENDAR, TIMESHEETS, SCHEDULE, OKRS, MY PROFILE (highlighted), COMPANY, DOCUMENTS, TIME OFF, REPORTS, and RECRUITMENT. The main profile area shows a profile picture, name (Mrs. Amber West), position (Project manager), and previous positions (Motion designer, Graphic designer). It also lists contact information (work email, work phone), employment start date, status (Full-time), direct manager (Christopher Taylor), team (Product Development), and location (London). A 'PERSONAL SETTINGS' button is visible at the bottom of the profile area. A modal window titled 'Personal settings for Amber West' is open, showing a dropdown for language (set to English), a checkbox for 'Send notifications by email' (checked), and a 'CHANGE PASSWORD' button. The modal also includes 'CANCEL' and 'SAVE' buttons.

STEP 5 / Get remote access by downloading the CakeHR Mobile App

Download our free app from the App Store or Play Store and gain quick and easy access to your calendar, time-off requests, expenses, as well as the ability to assign and accept tasks while you are on the go.



Request time-off

Submit new expenses
for approval

Keep track of who is
currently out of office

View colleagues contact
information

