

# HR Tool Initial Setup and Configuration

### Step 1: Set up HR Administrators

After installation, the only user who can access the HR Admin panel is the user with ID:1 which is typically the Claromentis Administrator.

As part of the on-boarding process, you need to nominate at least 2 members of HR administrators. These users are going to have full access to the HR admin panel to configure the system further.

- 1. Navigate to Admin Panel > HR Admin
- 2. Users will be prompted to set up to create a new HR password. This password is an extra layer of security to access HR-related functionality.

CODEDEV <b>claromentis</b>
🕲 HR Tool Access
Accessing HR Tool requires an extra layer of security. Please confirm your email and create a special HR Tool only access password.
Email
managers@claromentis.com
MR Password Retype your password
Submit
Go Back

## Step 2: Set up HR Roles & Rights

By default there are 4 roles available, click the edit (pencil) icon to assign the following roles to the appropriate users.

- HR Admin: These users will be able to view and edit all HR information belonging to all members of staff.
- Payroll: These users will be able to view Salary & Benefit tabs belonging to all members of staff.
- Staff: Set users who are going to be using the HR tool.
- Managers: These users will be able to see HR information on their subordinates only based on the Org Chart.

Click on the **Rights** tab to customise what each group can do further. This is an important step to ensure your system is secure. Here is our recommended setup:

Admin / HR							
R Permissions	Roles & Rights						
Users & Access	Specify who has rights to view, e	dit and run reports on HR rec	ords				
Notifications							
Reminders		Role					
		HR Admin	Payroll	Staff	Managers		
Import / Export Data	View	View All \$	View All \$	View Own \$	View Subordinate \$		
Admin Panel	Edit						
Access	View Salary & Benefit						
Configuration	Add/Edit Salary & Benefit						
Custom Fields	Delete Salary & Benefit						
Document Types	View Restricted Documents						
Document Types	Add Documents						
Benefits	Edit Documents						
	Delete documents						
	View History			0			
	Run Reports	0					

# Step 3: Populating HR Data

### 3.1 Manual Input

As an HR admin or user with permission to edit as defined in the permission matrix above, navigate to each user's profile and click on the**HR Tool** button:





Click on the appropriate tab and complete the fields:

	Back to User Profile					
onal Contract Salary Be	nefits Documents His	tory	Bai	nk Account I	Details	
	Legal Name 🖲	Mikyla Christian	Ac	count Name	Mikya Christian	
	Gender 🖲	Female	¢ Ad	count No 🖲	1233456	
	Marital Status (9	Single	\$ Bi	ank Name 🖲	HSBC	
	Nationality 🖲	British	\$	IBANS 🖲		
	Passport No 🖲	7827971		Sort Code 🖲	60-11-11	
	NI Number 🖲	SC2342343		Swift code (BIC) (9)	123456789	
	Security Pass (9)		B	ank Address (9	1 Holborn Road London SE1	
lotes						
Reference: Martin Gyde - martin@iobsite.comlo	bSite					

Please note: Only fields with value will be visible in the view mode. The shield icon indicates that the following fields are encrypted in the database.

#### 3.2 Bulk Import

If you have existing HR Data elsewhere using Import & Export feature is an efficient way to get these data populated.

```
Admin / HR / Import / Export Data
R Permissions
                      Import / Export Data
Users & Access
                         Import Personal & Contract
                                                                        $
                                                                                   Export 🛛 Personal & Contract
                                                                                           Salary
Motifications
                                    Choose file
                                                                                            Benefits
A Reminders
                                  or select from pre-uploaded...
                                                                                             Export CSV
                                   🛓 Import CSV
Import / Export
Data
Admin Panel
Access
Configuration
Custom Fields
Document Types
Benefits
```

```
Simply navigate to Admin > HR Admin > Import / Export Data:
```

## **Step 4: Configure Custom Fields**

Under configuration options, you can set the following items to personalise the HR system for your company. The following fields are encrypted:

Admin / HR / Custom Fields				
N Permissions	Custom	Fields		
Users & Access	HR Inforr	nation ()	Payroll Ir	nformation (a)
Notifications	Visible	Field name	Visible	Field name
Reminders	0	Security Pass		
Import / Export Data				
Admin Panel Access				
Configuration				
Custom Fields	Save			
Document Types				
Benefits				

- Custom Fields: Extra fields for HR and Payroll if required
- Document Types: List of type of HR documents you wish to store in the system.
- Benefits: List of available benefits that your company offer.

## **Step 5: Configure Notification**

Notification is useful to alert relevant people of changes in the HR data, click on New Notification to start creating a new notification rule.

Below is an example to notify the member of Payroll when there are changes in Bank Account detail:

Bank Account
Rouque
HR Admin
Payroll
Staff
Managers
How notification will be sent is set by individual preference in Communication / settings but you can add extra emails to be added here:
G
HR tool: {HR section name} has been (action) by (name) for user (hr user)
{name} has made changes for user {hr user} on {HR section name} in HR tool on {date stamp}
{changes here}

### **Step 6: Configure Reminders**

A reminder is useful to notify certain people regarding dates which are stored in HR. For instance, you may want to remind the line managers and HR admins 1 week before the probation date ends.

New / Edit Reminder

Probation End
1 week before
Rouque
HR Admin
Payroll
□ Staff
Managers
Set email reminders for important dates
It's {reminder time} to go until {trigger} for {name}
HR reminder
it's {reminder time} to go until {trigger}
for {name}
Click {link} to view the details

## Step 7: Launch your HR System

The final step is to launch and tell your users about the HR system, under Users & Access you can see a list of users who have HR profiles and current account statuses.

From this panel, you can send an invite to all inactive users or individually:

Permissions	Users & Access				
Users & Access	10	<b>Q</b> Search			1 2
Notifications	Name	HR Email	HR Role	Status	Account
Reminders	1231231 12323		Staff	Inactive	Send Invite
Import / Export Data	Claromentis Administrator	admin.user@claromentis.com	HR Admin, Staff	Active	Reset
	Jade Fitch	jade@email.com	HR Admin, Staff	Active	Reset
Admin Panel Access	Ken 2 Adams	mike@claromentis.com	Staff	Active	Reset
	Ken Adams	ken@claromentis.com	Staff	Active	Reset
Configuration	Michael Christian	mike@claromentis.com	Staff, Managers	Active	Reset
Custom Fields	Michelle Christian	michellesugarart@gmail.com	Staff, Managers	Active	Reset
ocument Types	Mikyla Christian	christianmikyla@gmail.com	Staff	Active	Reset
<i>a</i> .	Rainbow Unicorn		Staff	Inactive	Send Invite
Senetits	sugar bun-bun bun		Staff	Inactive	Send Invite

Last modified on 30 November 2023 by Hannah Door