



## 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.

A screenshot of a web form titled "CODEDEV claromentis" and "HR Tool Access". The form includes a sub-header "Accessing HR Tool requires an extra layer of security. Please confirm your email and create a special HR Tool only access password." It contains three input fields: "Email" (with "managers@claromentis.com" entered), "HR Password", and "Retype your password". A purple "Submit" button is at the bottom, with a "Go Back" link below it.

### 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

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Configuration

Custom Fields

Document Types

Benefits

Roles & Rights

Specify who has rights to view, edit and run reports on HR records

Roles

Rights

	Role			
	<input type="checkbox"/> HR Admin	<input type="checkbox"/> Payroll	<input type="checkbox"/> Staff	<input type="checkbox"/> Managers
View	<div>View All</div>	<div>View All</div>	<div>View Own</div>	<div>View Subordinate</div>
Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
View Salary & Benefit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add/Edit Salary & Benefit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Salary & Benefit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Restricted Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View History	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Run Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


Submit

## 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:

People / Profile





Mikyla Christian


Social Media Executive


mikyla.christian@br... 

HR Tool









Profile

Group


Mike's Family, Staff, Unicorn World

Career details

Great at making something fun

Click on the appropriate tab and complete the fields:




Human Resources Tool / Profile




Mikyla Christian

Social Media Executive

[mikyla.christian@brighton.com](mailto:mikyla.christian@brighton.com)





Personal

Contract

Salary


Benefits

Documents


History

Profile


HR Information

Legal Name 


Mikyla Christian

Gender 


Female

Marital Status 


Single

Nationality 


British

Passport No 


7827971

NI Number 


SC2342343

Security Pass 


Bank Account Details

Account Name 


Mikya Christian


Account No 

1233456


Bank Name 

HSBC


IBANS 

Sort Code 


60-11-11

Swift code (BIC) 

123456789

Bank Address 

1 Holborn Road London SE1

Notes 

Reference:

Martin Gyde - martin@jobsite.com JobSite

Duke Charlie - duke@charliecorp.com SiteServer

Submit

Cancel

**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.

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

Admin / HR / Import / Export Data

Permissions

Users & Access

Notifications

Reminders

**Import / Export Data**

Admin Panel Access

Configuration

Custom Fields

Document Types

Benefits


Import / Export Data

Import

Personal & Contract

Choose file

or select from pre-uploaded...




Export

☒ Personal & Contract

☐ Salary

☐ Benefits



### 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

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Configuration

Custom Fields

Document Types

Benefits

Custom Fields

HR Information

Payroll Information

Visible

Field name

☒

Security Pass

☐

☐

☐

Visible

Field name

☐

☐

☐

☐

Save

- **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:

New Notification

Changes in..\*

Bank Account

Notify

☐ 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:

Additional emails  
(separated by comma)

Title Template

HR tool: {HR section name} has been {action} by {name} for user {hr user}

Notification Template

{name} has made changes for user {hr user} on {HR section name} in HR tool on {date stamp}

{changes here}

Click {link} to view the details

Add Notification

Cancel

## 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.

**Trigger\***

Probation End

**Reminder Time\***

1 week before

**Notify**

☐ Rouque

☒ HR Admin

☐ Payroll

☐ Staff

☒ Managers

Set email reminders for important dates

**Additional emails  
(separated by  
comma)**

**Title Template**

It's {reminder time} to go until {trigger} for {name}

**Reminder  
Template**

HR reminder  
  
it's {reminder time} to go until {trigger}  
for {name}  
  
Click {link} to view the details

Add Reminder

Cancel

## 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:

Admin / HR / Users

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Configuration

Custom Fields

Document Types

Benefits

Users & Access

10 [entries per page]

< 1 2 >

Name	HR Email	HR Role	Status	Account
1231231 12323		Staff	Inactive	<a href="#">Send Invite</a>
Claromentis Administrator	admin.user@claromentis.com	HR Admin, Staff	Active	<a href="#">Reset</a>
Jade Fitch	jade@email.com	HR Admin, Staff	Active	<a href="#">Reset</a>
Ken 2 Adams	mike@claromentis.com	Staff	Active	<a href="#">Reset</a>
Ken Adams	ken@claromentis.com	Staff	Active	<a href="#">Reset</a>
Michael Christian	mike@claromentis.com	Staff, Managers	Active	<a href="#">Reset</a>
Michelle Christian	michellesugarart@gmail.com	Staff, Managers	Active	<a href="#">Reset</a>
Mikyla Christian	christianmikyla@gmail.com	Staff	Active	<a href="#">Reset</a>
Rainbow Unicorn		Staff	Inactive	<a href="#">Send Invite</a>
sugar bun-bun bun		Staff	Inactive	<a href="#">Send Invite</a>

Showing 1 to 10 of 11 entries

[Send an invite to all inactive users](#)

Last modified on 30 November 2023 by [Hannah Door](#)

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