Link to article: https://discover.claromentis.com/knowledgebase/articles/424/hr-tool-initial-setup-and-configuration

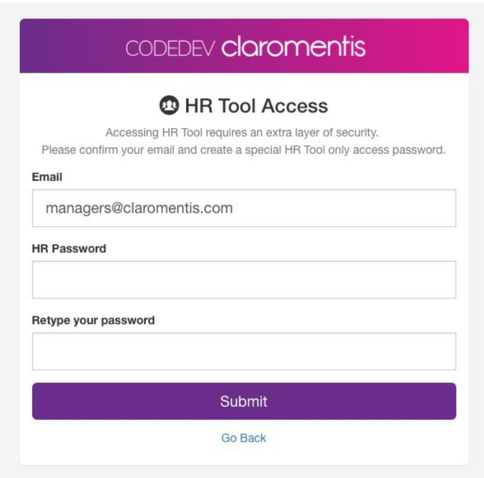
HR Tool Initial Setup and Configuration

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.

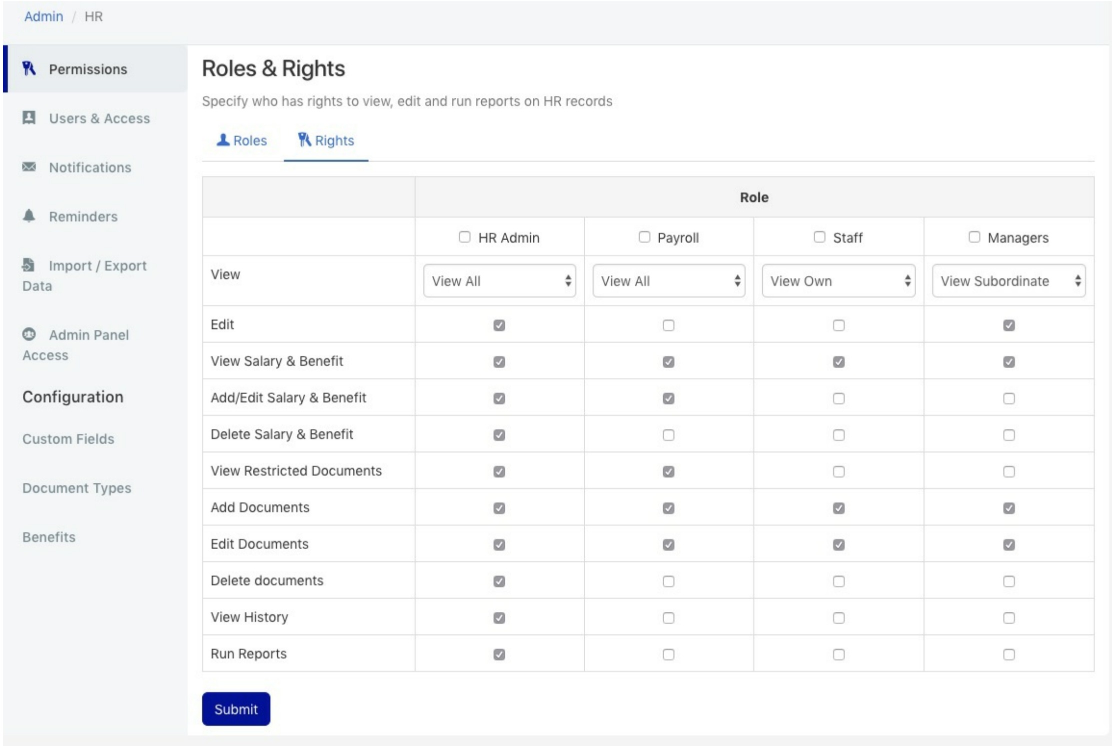


Step 2: Set up HR Roles & Rights

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.

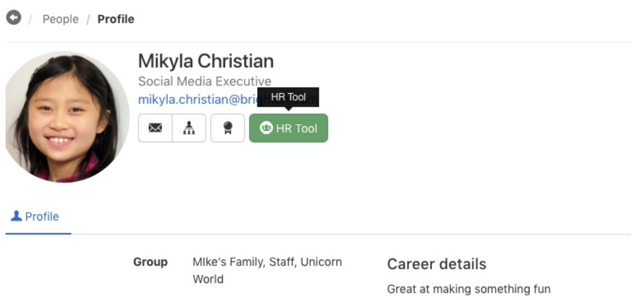
Click on the **Rights** tab to customise what each group can do further. This is an important step to ensure your system is secure. Here is our recommended setup:



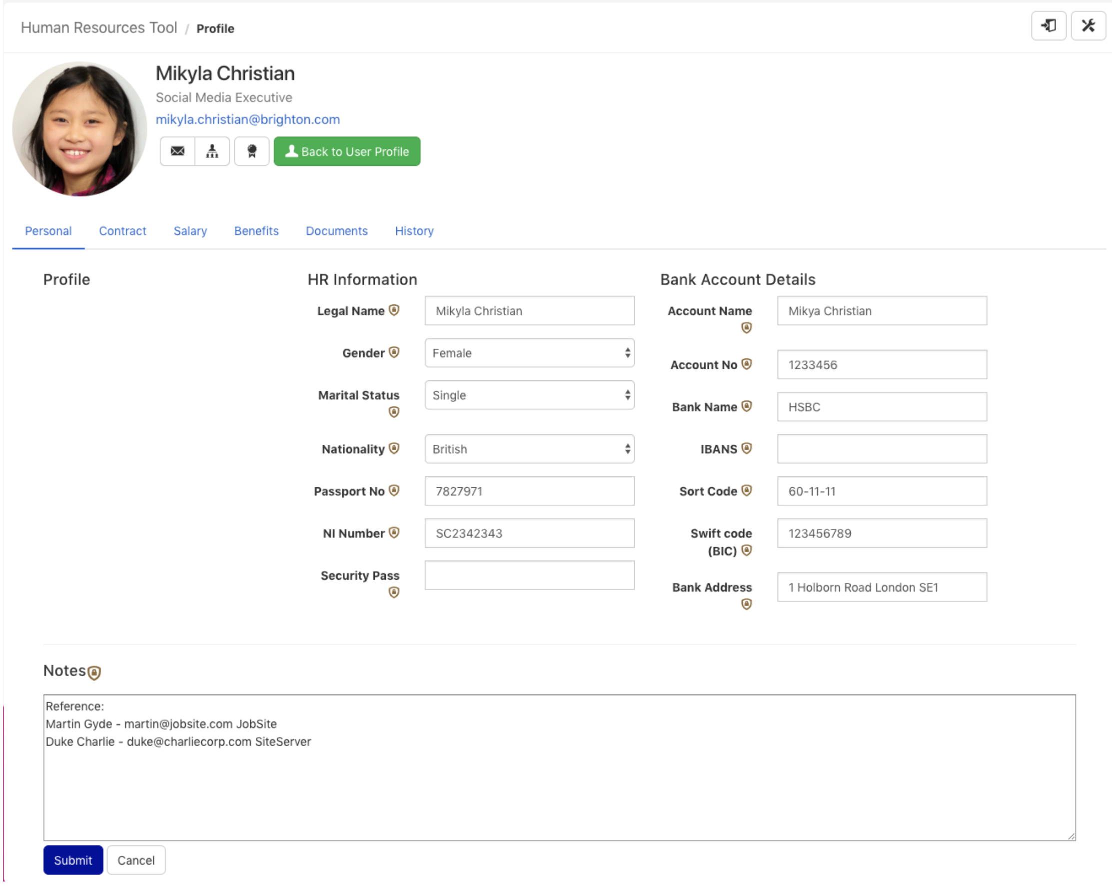
Step 3: Populating HR Data

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:

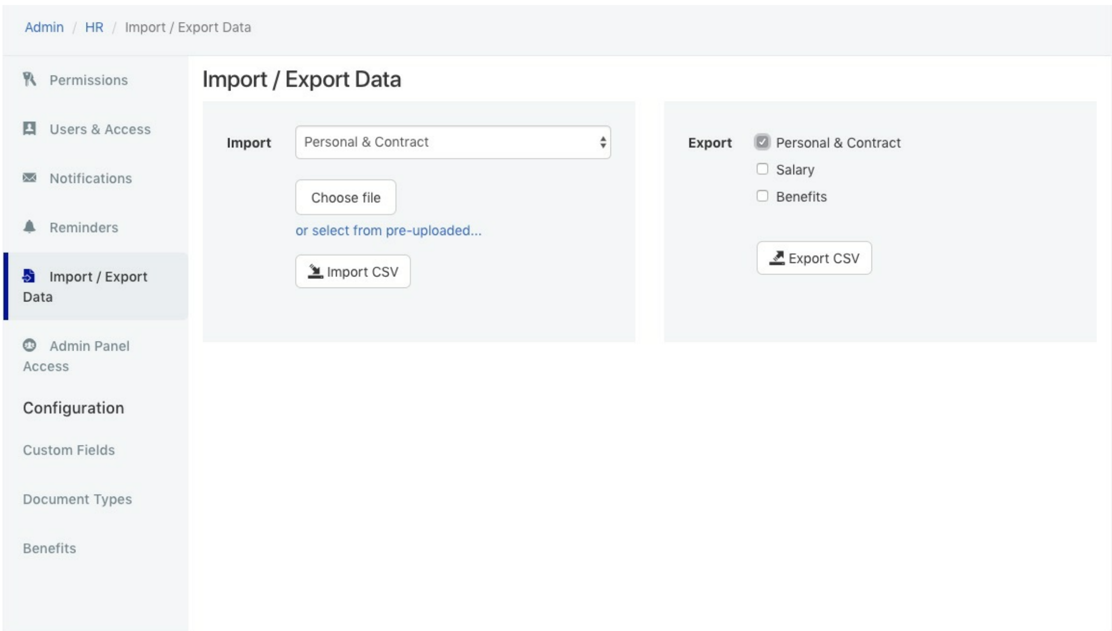


Please note: Only fields with value will be visible in the view mode. The shield icon indicates that the following fields are encrypted in the database.

3.2 Bulk Import

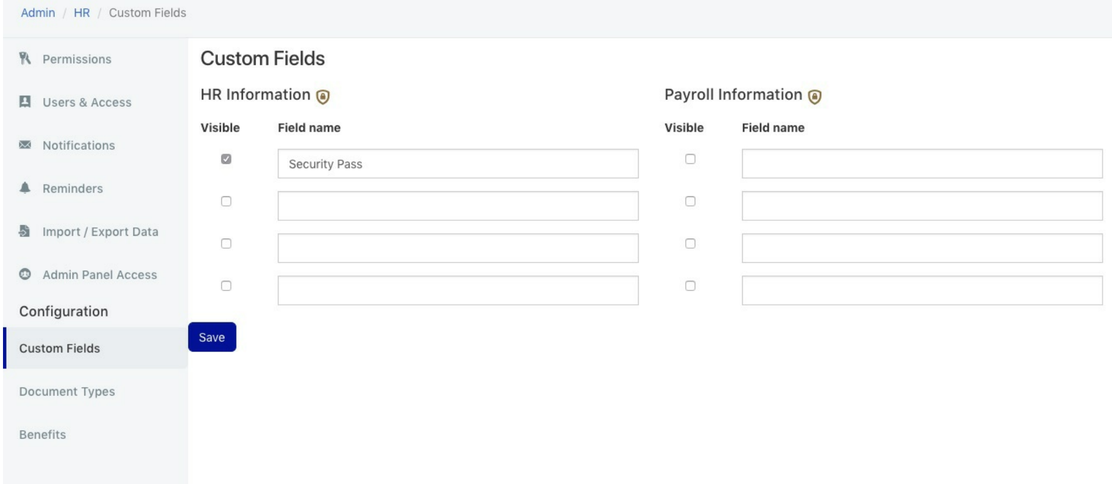
If you have existing HR Data elsewhere using Import & Export feature is an efficient way to get these data populated.

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



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:

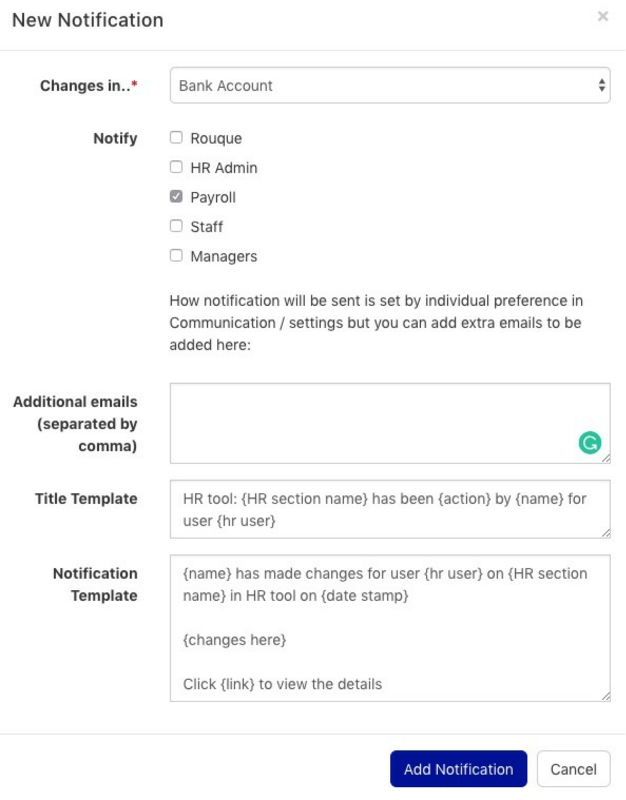


- **Custom Fields**: Extra fields for HR and Payroll if required
- **Document Types:** List of type of HR documents you wish to store in the system.
- **Benefits:** List of available benefits that your company offer.

Step 5: Configure Notification

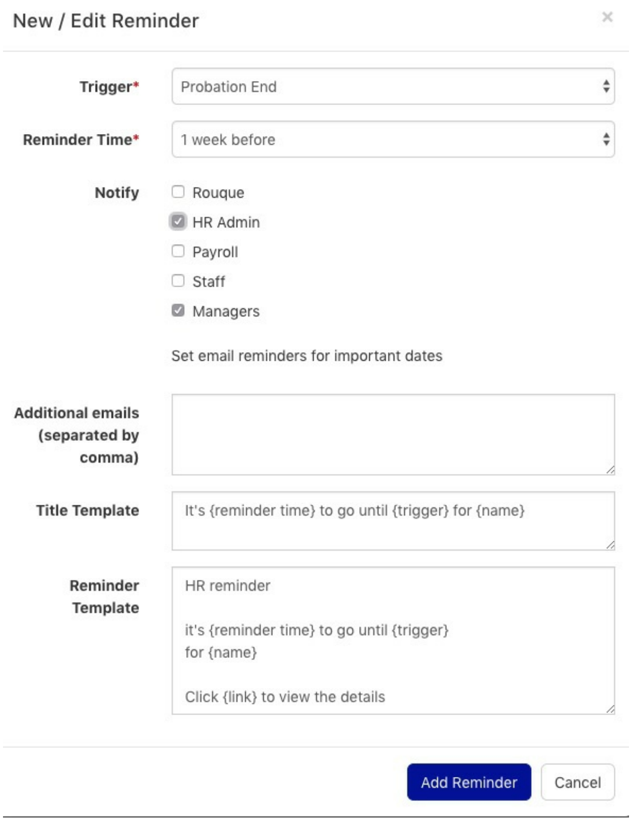
Notification is useful to alert relevant people of changes in the HR data, click on New Notification to start creating a new notification rule.

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



Step 6: Configure Reminders

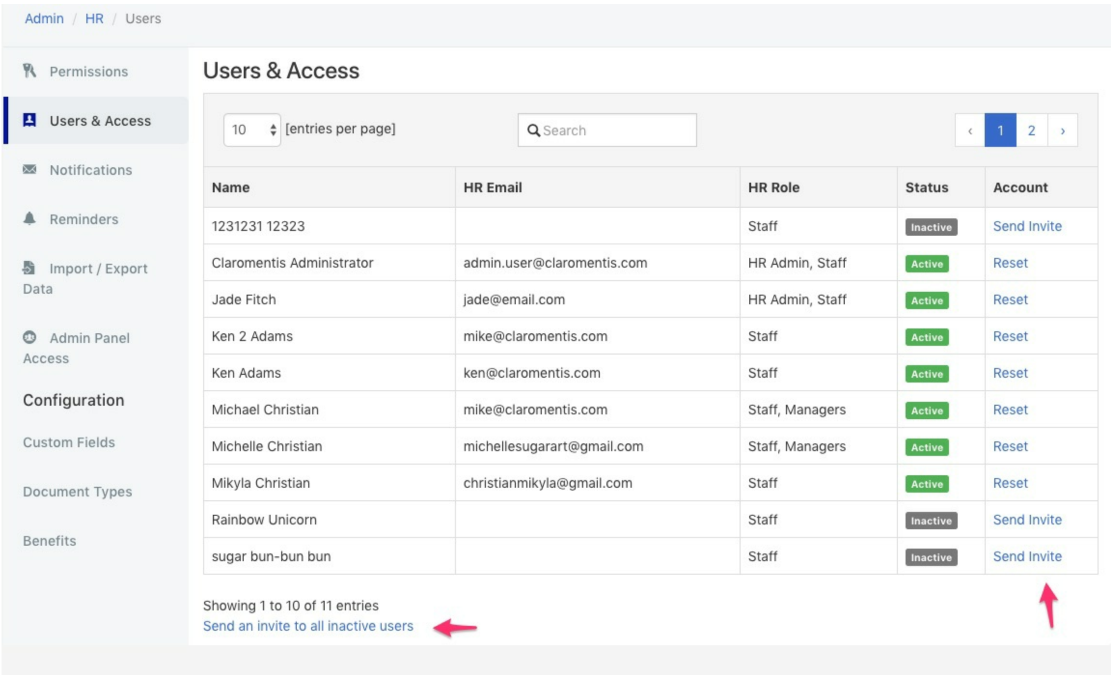
A reminder is useful to notify certain people regarding dates which are stored in HR. For instance, you may want to remind the line managers and HR admins 1 week before the probation date ends.



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:



Last modified on 30 November 2023 by Hannah Door

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