



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 "HR Tool Access" from CODEDEV claromentis. The form includes a header with the logo, a sub-header "HR Tool Access" with a key icon, and a message: "Accessing HR Tool requires an extra layer of security. Please confirm your email and create a special HR Tool only access password." Below this are three input fields: "Email" (containing "managers@claromentis.com"), "HR Password", and "Retype your password". At the bottom, there is a purple "Submit" button and a "Go Back" link.

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	<input type="text" value="View All"/>	<input type="text" value="View All"/>	<input type="text" value="View Own"/>	<input type="text" value="View Subordinate"/>
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](#)

[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

✉️ 👤 🏠 [Back to User Profile](#)

Personal Contract Salary Benefits Documents History

Profile

Legal Name 🔒 Mikyla Christian

Gender 🔒 Female

Marital Status 🔒 Single

Nationality 🔒 British

Passport No 🔒 7827971

NI Number 🔒 SC2342343

Security Pass 🔒

HR Information

Account Name 🔒 Mikyla 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...

📄 Import CSV

Export Personal & Contract

Salary

Benefits

📄 Export CSV

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	Visible	Field name
<input checked="" type="checkbox"/>	Security Pass	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	

[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

- Rourke
- 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*

Reminder Time*

Notify

- Rouque
- HR Admin
- Payroll
- Staff
- Managers

Set email reminders for important dates

Additional emails (separated by comma)

Title Template

Reminder Template

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:

Admin / HR / Users

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Configuration

Custom Fields

Document Types

Benefits

10 [entries per page]

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

Showing 1 to 10 of 11 entries

Send an invite to all inactive users ←