

How to set HR permissions

Overview

This article will outline details on how to set up roles within the HR tool and what the various permissions within the applications include.

Roles

By default there are 4 roles available. These are HR Admin, Payroll, Staff and Managers. You can add in or change these roles if needed.

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	Member
HR Admin	
Payroll	
Staff	
Managers	

From this screen you will also need to put particular users into each role. To do this click on the pencil icon next to the relevant role and assign a user group or role into the members section.

Permissions

You can now define what permissions each role will have. The first thing to set is who that role is able to view.

The options are

- None - where they won't be able to view any HR information at all
- View Own - They will be able to access and view their own HR information
- View All - Can view HR information for every user
- View Subordinates - Only view the HR information for subordinates based on the settings from their profile org chart settings in the people admin panel.

You will then have the following options.

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"/> Managers	<input type="checkbox"/> Staff
View	<input type="text" value="View All"/>	<input type="text" value="View All"/>	<input type="text" value="View Subordinate"/>	<input type="text" value="View Own"/>
Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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 checked="" 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

These will all sit under various tabs when looking at a users HR information from the front end.

Access

Once you have set up your users in different roles they will appear in the user list. You are able to send out an invite for all users to login and set their own HR password, from the users and access tab.

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Users & Access

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Name	HR Email	HR Role	Status	Account
Abigail Clark		Staff	Inactive	Send Invi
Alan Metcalfe		Staff	Inactive	Send Invi
Alison Kelly		Staff	Inactive	Send Invi
Amelia Jackson		Staff	Inactive	Send Invi
Anne Wilkins		Staff	Inactive	Send Invi
Austin Glover		Staff	Inactive	Send Invi
Barclay Martin		Staff	Inactive	Send Invi
Brian MacDonald		Staff	Inactive	Send Invi
Charles Johnston		Staff	Inactive	Send Invi
Claire Bond		Staff	Inactive	Send Invi

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

For more information on the HR tool please take a look at our other articles and if you have any further questions please submit a ticket [here](#).

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