

## How to use the HR tool from the front-end

### Overview


From the front-end, the HR tool can be accessed via the People application. Users will be able to see different information based on the permissions granted by the HR tool admin.

This article will go over how to access users' HR information and set up various user information as a user.

- [Accessing the HR tool](#)
- [HR user-profile page](#)
- [HR tool and overview of user information](#)
- [Exiting the HR tool](#)

For more information on the initial HR setup and configuration, click [here](#).

### Accessing the HR tool

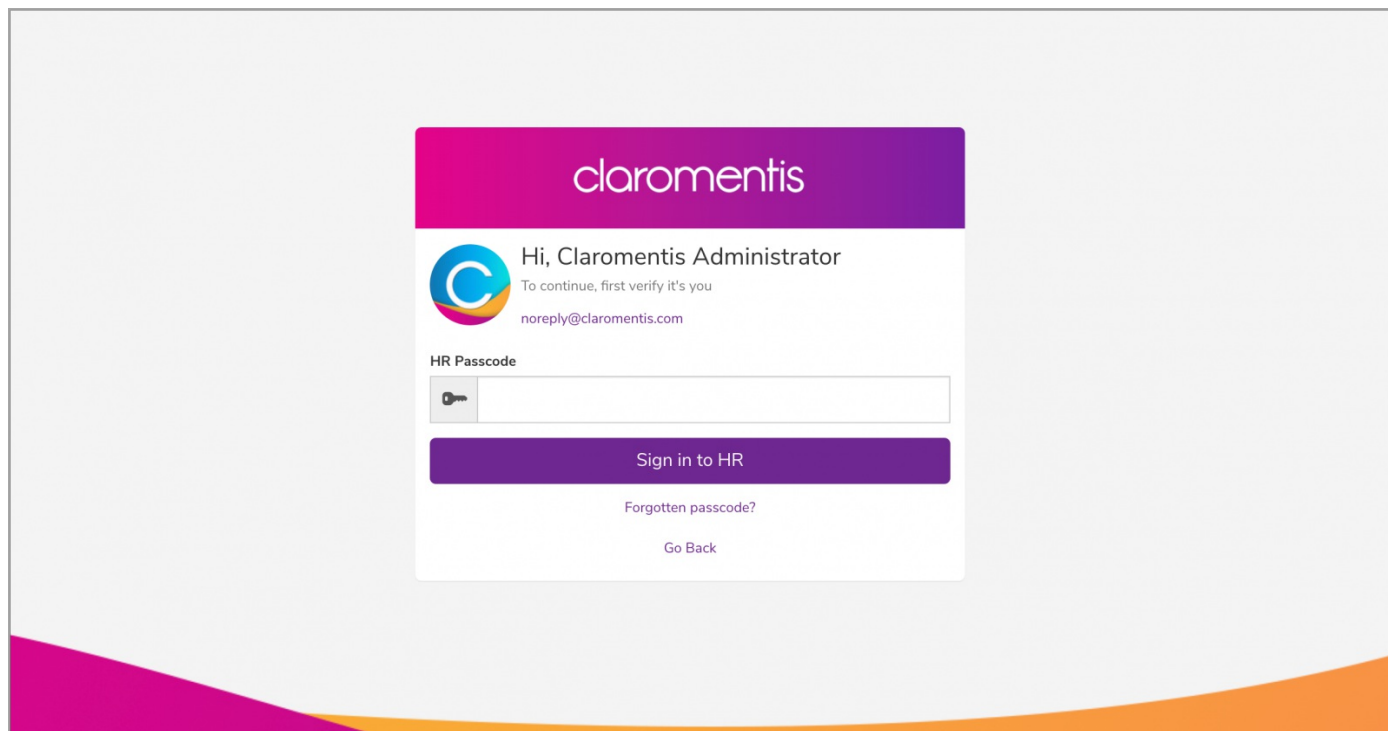
From the front-end of the People application, head to your personal user-profile and select  HR Tool

A screenshot of the Claromentis Administrator profile page. The page is titled "People / Profile" and shows the profile of "Claromentis Administrator" (System Administrator). The profile includes a circular logo with a stylized 'C' and a list of social media links (Facebook, LinkedIn, Twitter, YouTube). A red arrow points to the "HR Tool" button, which is a green button with a white icon of a person and a gear. The profile also displays contact information: Address (Suites 1 &amp; 2, 6th Floor Vantage Point, New England Rd, Brighton, BN1 4GV), Landline (+44 0800 409 6101), Preferred contact method (Email), and LinkedIn (claromentis-ltd). On the right side, there are sections for "Tweets by @Claromentis" and a "YouTube @YouTube" video titled "Claromentis 9 Preview".

With HR tool permission, you can also access other users' HR information by heading to their user-profile and selecting the HR Tool button.

**Please note:** If you do not see this button, please check with your HR tool administrator that the HR tool has been enabled for you.

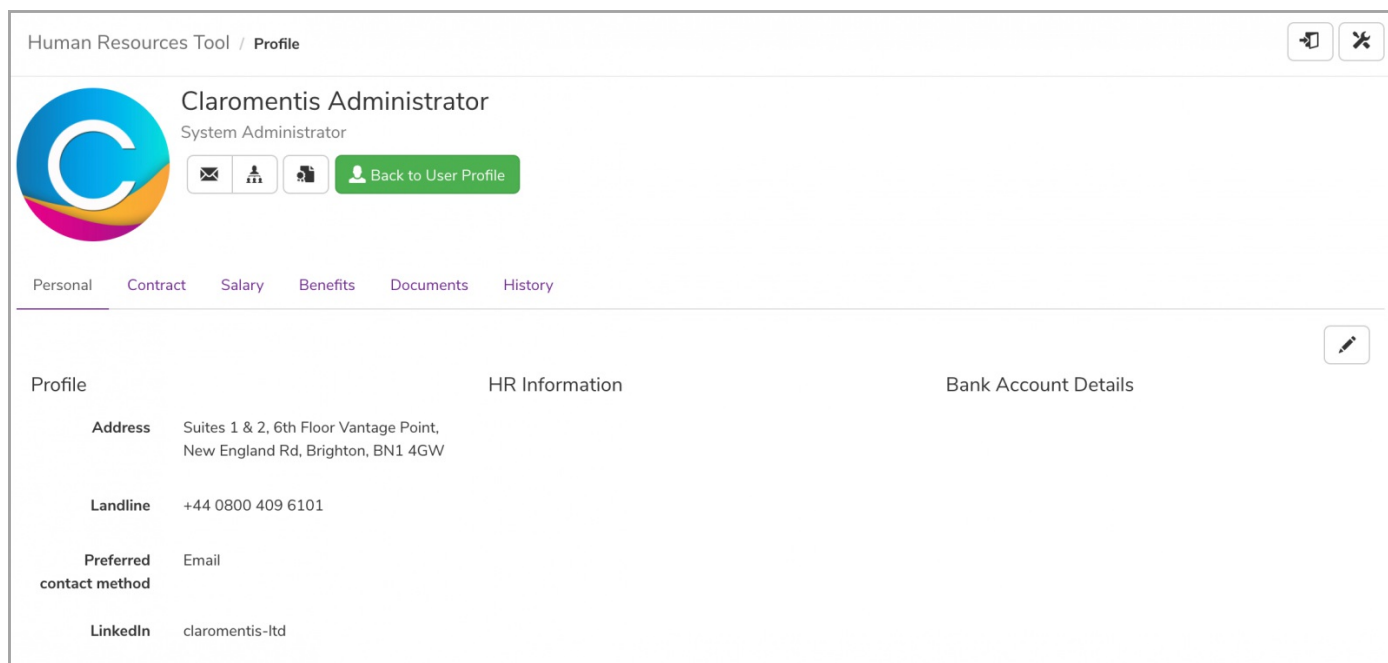
Upon accessing the HR tool, you will be prompted to provide your personal HR Passcode:

The image shows a login interface for the Claromentis HR tool. At the top, there's a purple header with the 'claromentis' logo. Below it, a white card contains the text 'Hi, Claromentis Administrator' and 'To continue, first verify it's you' followed by the email 'noreply@claromentis.com'. There is a section for 'HR Passcode' with a key icon and a text input field. Below the input field is a purple 'Sign in to HR' button. At the bottom of the card are two links: 'Forgotten passcode?' and 'Go Back'. The background is a light grey gradient with a purple and orange wave at the bottom.

**Reminder:** If you have forgotten your HR passcode, click on 'Forgotten passcode?' to reset your passcode. Before you do so, please ensure your email address is correct.

## HR user-profile page

When taken into the HR tool, you will be presented with the HR tool profile page:


The image shows the 'Human Resources Tool / Profile' page. At the top, there's a header with the title and two icons (refresh and close). Below the header, there's a profile section with the Claromentis logo, the name 'Claromentis Administrator', and the role 'System Administrator'. There are three icons (email, people, and a document) and a green 'Back to User Profile' button. Below this, there's a tabbed interface with tabs for 'Personal', 'Contract', 'Salary', 'Benefits', 'Documents', and 'History'. The 'Personal' tab is selected. The main content area is divided into three columns: 'Profile', 'HR Information', and 'Bank Account Details'. The 'Profile' column contains fields for 'Address' (Suites 1 & 2, 6th Floor Vantage Point, New England Rd, Brighton, BN1 4GW), 'Landline' (+44 0800 409 6101), 'Preferred contact method' (Email), and 'LinkedIn' (claromentis-ltd). There is an edit icon in the top right corner of the main content area.

**Reminder:** Depending on what permissions have been set for you from the HR admin panel, you will be able to view and edit any details within these areas.

For more information on HR tool permissions, click [here](#).




If for any reason you need to go back to the People application, click [Back to User Profile](#)

Human Resources Tool / Profile



Claromentis Administrator

System Administrator



Back to User Profile

PersonalContractSalaryBenefitsDocumentsHistory

## HR tool & user information

Continue reading to get an overview of each of the HR tabs.

### Personal

From the 'Personal' tab, details on the user's **Profile** will be shown as well as any **HR Information** and **Bank Account Details**:

PersonalContractSalaryBenefitsDocumentsHistory

Profile

Address

Suites 1 & 2, 6th Floor Vantage Point,  
New England Rd, Brighton, BN1 4GW

Landline

+44 0800 409 6101

Preferred contact method

Email

LinkedIn

claromentis-ltd

Twitter

claromentis

HR Information

Bank Account Details

Notes

Data retention policy: 5 years from employment end date.

Information can be added and edited as needed. With the correct permissions, a pencil icon in the top right-hand corner will appear.

PersonalContractSalaryBenefitsDocumentsHistory

Profile

Address

Suites 1 & 2, 6th Floor Vantage Point,  
New England Rd, Brighton, BN1 4GW

Landline

+44 0800 409 6101

Preferred contact method

Email

LinkedIn

claromentis-ltd

Twitter

claromentis

HR Information

Bank Account Details

Notes

Data retention policy: 5 years from employment end date.

Select this pencil icon and edit the following fields:

Personal
Contract
Salary
Benefits
Documents
History

Profile

HR Information

Legal Name
Gender
Marital Status
Nationality
Passport No
NI Number

Bank Account Details

Account Name
Account No
Bank Name
IBANS
Sort Code
Swift code (BIC)
Bank Address

Notes

Submit
Cancel

Data retention policy: 5 years from employment end date.

**Reminder:** Profile information can be added and edited directly from the People application rather than the HR tool.

## Contract

From the 'Contract' tab, the **Contact Details** and **Payroll Information** will be listed:

Personal
Contract
Salary
Benefits
Documents
History

Contract Details

Terms
Permanent
Permit/Visa Required
No

Payroll Information

Is director
No
Student Loan
No
Company Pension
No

Data retention policy: 5 years from employment end date.

With the correct permissions, there will be a pencil icon in the top right-hand corner.

Personal
Contract
Salary
Benefits
Documents
History

Contract Details

Terms
Permanent
Permit/Visa Required
No

Payroll Information

Is director
No
Student Loan
No
Company Pension
No

Data retention policy: 5 years from employment end date.

Select this pencil icon to edit any of the following fields:

Personal
Contract
Salary
Benefits
Documents
History

Contract Details

Terms

☐ Permanent
☐ Fixed-Term

Start Date

Continued Service Start Date

End Date

Probation End

Employment Expiry

Permit/Visa Required

☐ Yes
☒ No

Permit/Visa Expiry

Notes

Submit
Cancel

Payroll Information

Pay date

Is director

☐ Yes
☒ No

Student Loan

☐ Yes
☒ No

Company Pension

☐ Yes
☒ No

Data retention policy: 5 years from employment end date.

## Salary

From the 'Salary' tab, the **Salary** and **Pay Rate** information is shown:

Personal
Contract
Salary
Benefits
Documents
History

Salary and Pay Rate

+ New Pay or Term

Effective Date	Pay Rate	Contract Type	Weekly Hours	Notes	Actions
01-08-2021	£ 00000 Per Year	Full Time			<div></div> <div></div>

Data retention policy: 5 years from employment end date.

With permissions, you can add a new payment term by clicking **+ New Pay or Term** and/or edit/delete an existing payment term by selecting the pencil icon or trash can, respectively:

Personal
Contract
Salary
Benefits
Documents
History

Salary and Pay Rate

+ New Pay or Term

Effective Date	Pay Rate	Contract Type	Weekly Hours	Notes	Actions
01-08-2021	£ 00000 Per Year	Full Time			<div></div> <div></div>

Data retention policy: 5 years from employment end date.

When adding a new payment term, the following information will be required: (1) Effective Date, (2) Pay rate and term, (3) Contract Type:

**New/Edit Pay or Term**

Effective Date\*

Pay Rate\* \$  Please select...

Contract Type\* Please select...

Weekly Hours

Notes

+ New Pay or Term

Effective Date Pay Rate Contract Type Weekly Hours Notes Actions

Data retention policy: 5 years from employment end date.

## Benefits

From the 'Benefits' tab, the types of **Benefits** and corresponding details will be noted:

Personal

Contract

Salary

Benefits

Documents

History

Benefits

+ New Benefit

Type	Supplier	Description	Start Date	End Date	Actions
Health Insurance	Blue Health Insurance	To be reviewed and renewed annually	01-03-2021		<div><div></div><div></div></div>

Data retention policy: 5 years from employment end date.

More benefits can be added by selecting  and/or edit/delete existing benefits that are listed by using the pencil icon or trash can, respectively:

Personal

Contract

Salary

Benefits

Documents

History

Benefits

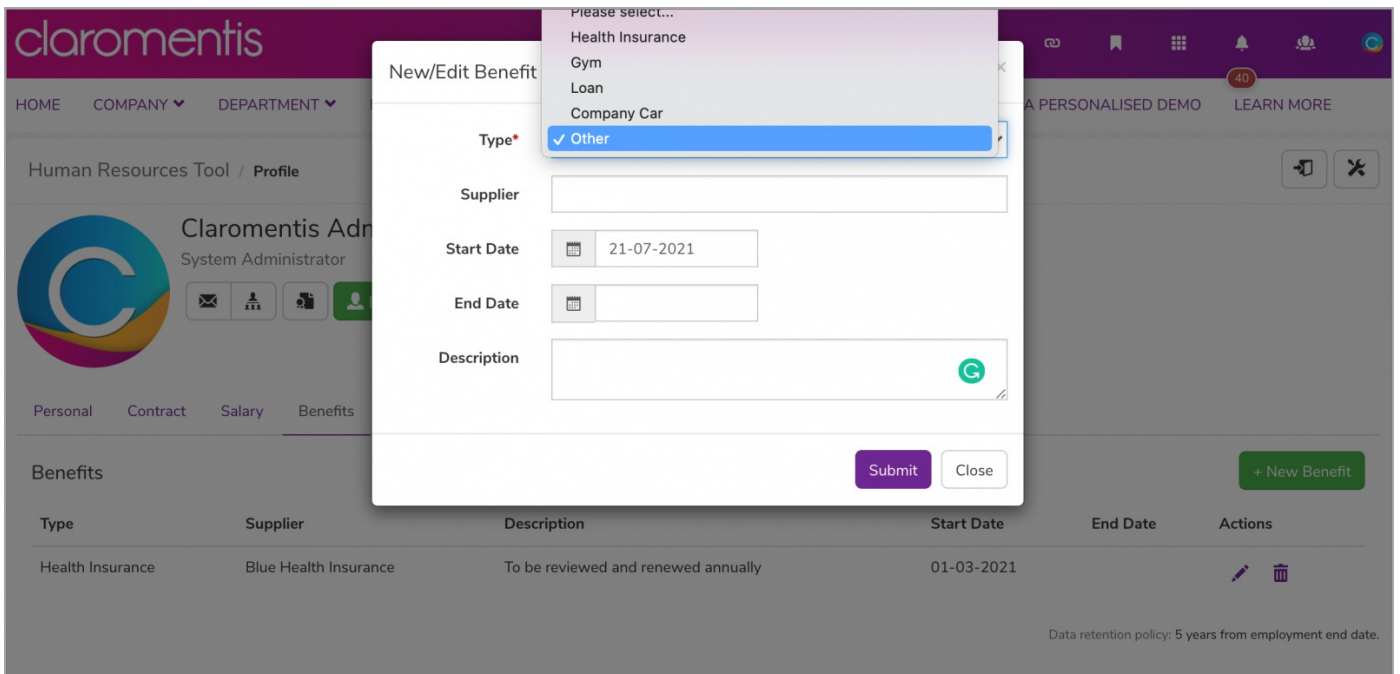
+ New Benefit

Type	Supplier	Description	Start Date	End Date	Actions
Health Insurance	Blue Health Insurance	To be reviewed and renewed annually	01-03-2021		<div> <div></div> <div></div> </div>

Data retention policy: 5 years from employment end date.

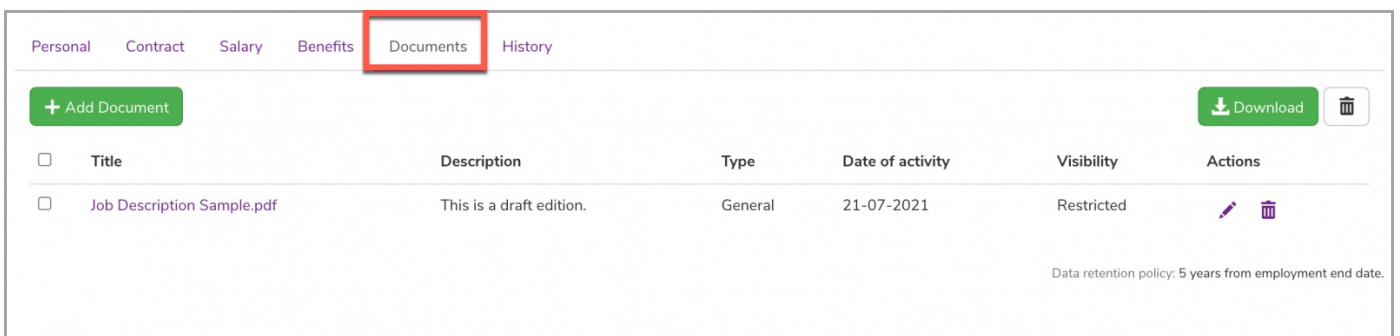
When adding a benefit, the Type of benefit will be required which you can choose from the drop-down menu. All other information is optional:





## Documents

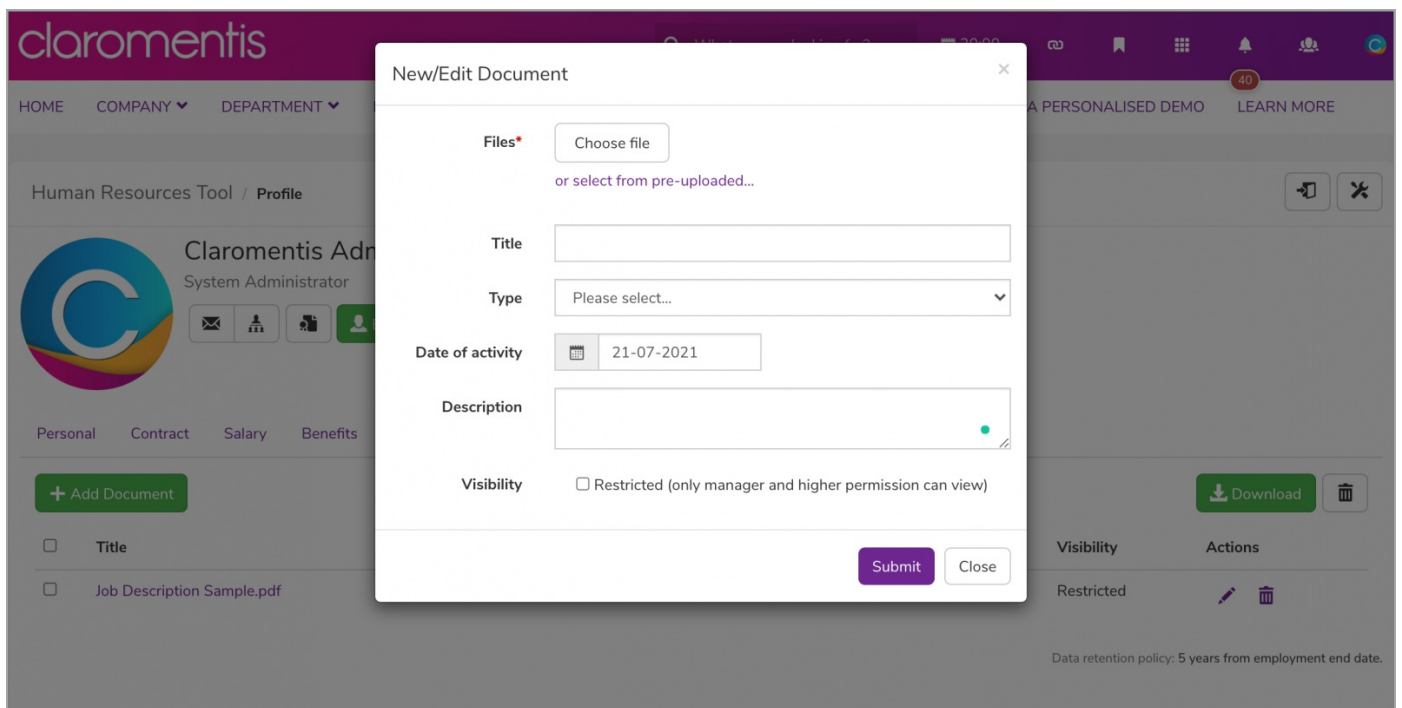
From the 'Documents' tab, any HR-**Documents** will be listed (i.e. Job Descriptions, CV, Background checks):



New documents can be added using



When adding a document, there will be an option to choose a document from your PC or from the list of pre-loaded Documents (This list shows pre-uploaded files which you've uploaded, but not used yet.)



Additionally, existing documents can be downloaded using  or deleted by selecting the trash can icon:



## History

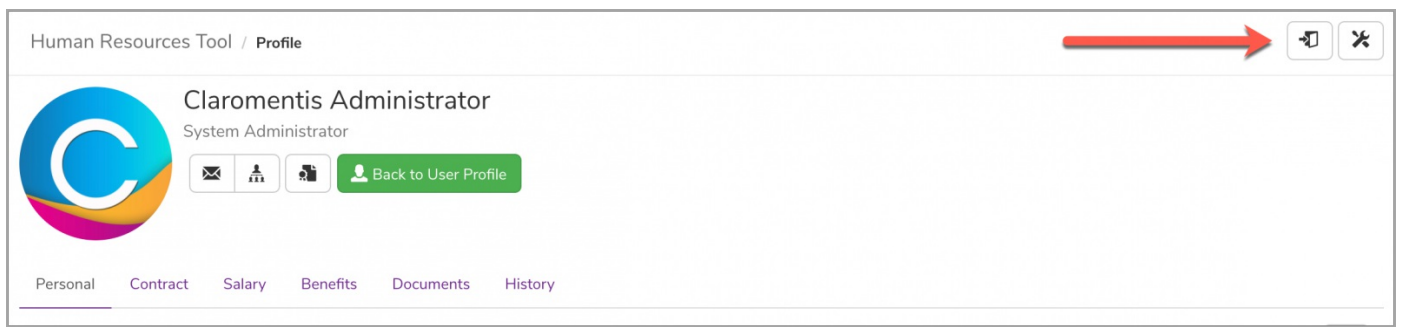
From the 'History' tab, any information that has been added or change in the user HR profile, such as edits to user details and/or content will be automatically logged:

Personal	Contract	Salary	Benefits	Documents	History
Date / Time	User Name	Category	Details ⓘ		
21-07-2021 19:58	Claromentis Administrator	Documents	Documents added. Field "Title" is "Job Description Sample.pdf" Field "Type" is "General" Field "Date of activity" is "21-07-2021" Field "Description" is "This is a draft edition." Field "Visibility" is "Restricted"		
21-07-2021 19:43	Claromentis Administrator	Benefits	Benefits added. Field "Type" is "Gym" Field "Supplier" is "The Gym" Field "Description" is empty Field "Start Date" is "21-07-2021" Field "End Date" is empty		
21-07-2021 19:40	Claromentis Administrator	Benefits	Benefits added. Field "Type" is "Health Insurance" Field "Supplier" is "Blue Health Insurance" Field "Description" is "To be reviewed and renewed annually" Field "Start Date" is "01-03-2021" Field "End Date" is empty		

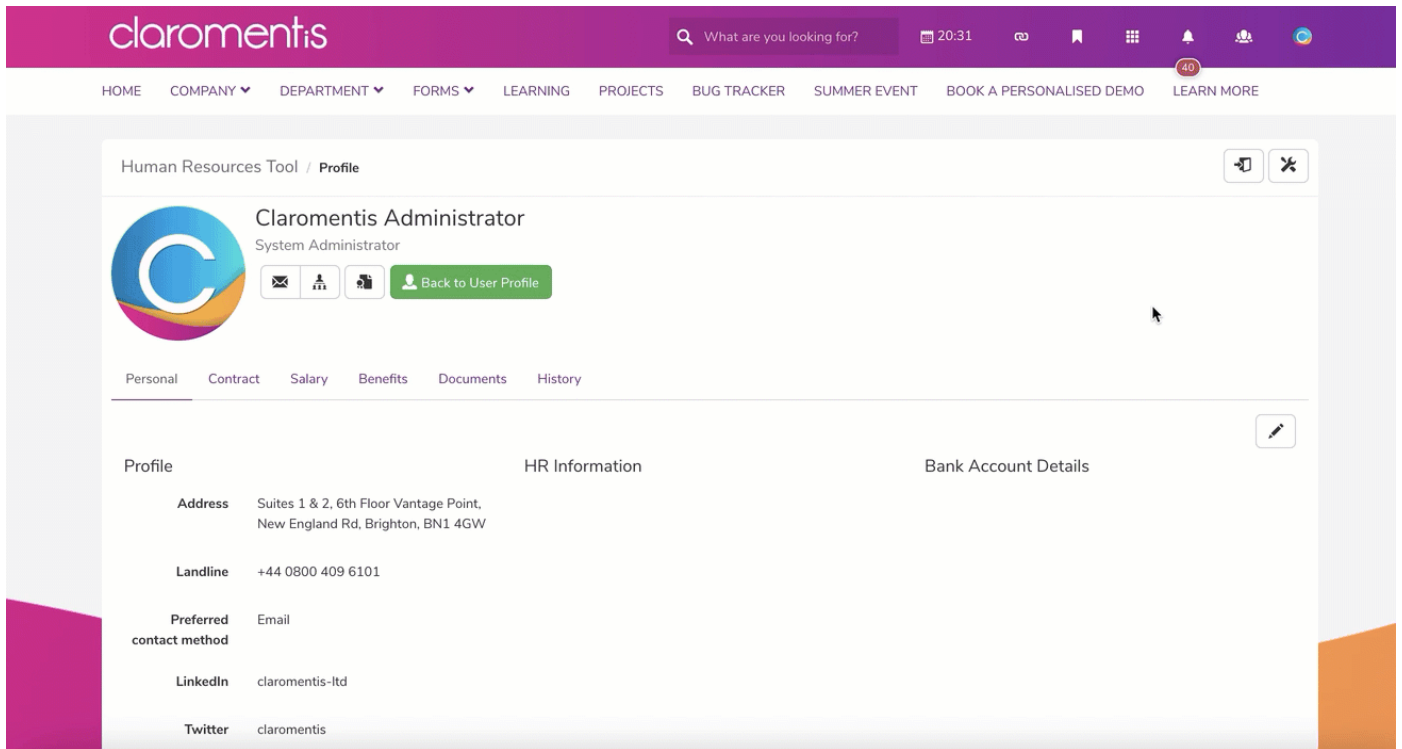
## Exiting the HR tool

When you are done making edits to a user's HR profile, remember to sign out from the HR tool. You can do so by clicking the following option:





Following this, you will be logged out from the HR tool:



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

Created on 21 July 2021 by [Veronica Kim](#)

Tags: [front end](#), [hr](#), [hrtool](#), [people](#), [user guide](#)