



## 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

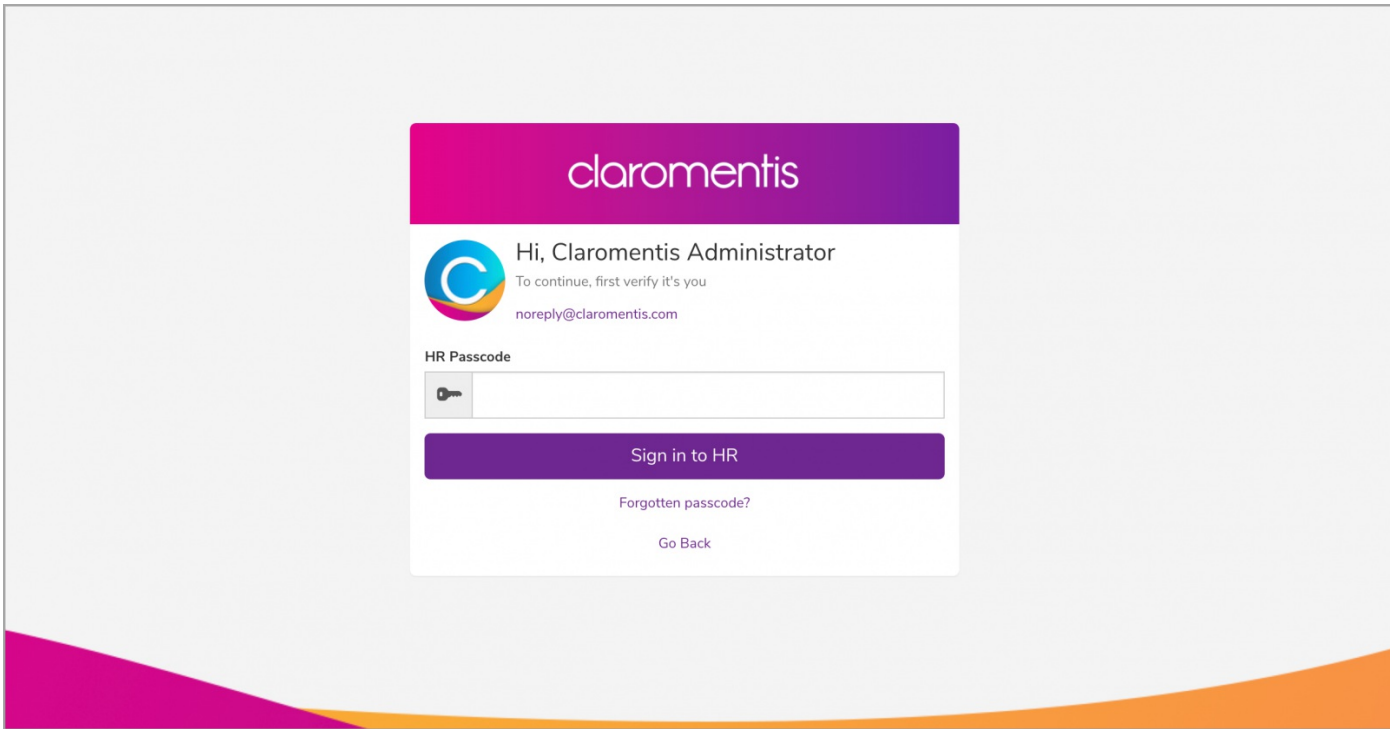
select 

A screenshot of the Claromentis Administrator profile page. The page shows the user's profile information, including their name, title, address, and contact details. A red arrow points to the 'HR Tool' button in the top navigation bar. The right sidebar shows tweets and a video preview for Claromentis 9.

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:




**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:

Human Resources Tool / Profile



Claromentis Administrator

System Administrator



Back to User Profile

Personal

Contract

Salary

Benefits

Documents

History

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

HR Information

Bank Account Details




**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




A green rectangular button with a white user icon and the text '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

HR Information

Bank Account Details

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

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

HR Information

Bank Account Details

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

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:

**claromentis**

HOME COMPANY ▼ DEPARTMENT ▼

Human Resources Tool / Profile

Claromentis Admin System Administrator

Personal Contract Salary Benefits

Salary and Pay Rate

Effective Date Pay Rate Contract Type Weekly Hours Notes Actions

Data retention policy: 5 years from employment end date.

**New/Edit Pay or Term**

Effective Date\* 01-08-2021

Pay Rate\* \$ 0.00 Please select... ▼

Contract Type\* Please select... ▼

Weekly Hours

Notes

Submit Close

+ New Pay or Term

## Benefits

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

Personal	Contract	Salary	<b>Benefits</b>	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		

Data retention policy: 5 years from employment end date.

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

Personal	Contract	Salary	<b>Benefits</b>	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		

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:



**claromentis**

HOME COMPANY ▼ DEPARTMENT ▼

Human Resources Tool / Profile

Claromentis Admin  
System Administrator

Personal Contract Salary Benefits

**New/Edit Benefit**

Type\* ▼  
 Please select...  
 Health Insurance  
 Gym  
 Loan  
 Company Car  
 ✓ Other

Supplier

Start Date

End Date

Description

Submit Close

**Benefits**

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

Data retention policy: 5 years from employment end date.

## Documents

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

Personal Contract Salary Benefits **Documents** History

[+ Add Document](#) [Download](#)

<input type="checkbox"/>	Title	Description	Type	Date of activity	Visibility	Actions
<input type="checkbox"/>	Job Description Sample.pdf	This is a draft edition.	General	21-07-2021	Restricted	

Data retention policy: 5 years from employment end date.

New documents can be added using [+ Add Document](#)

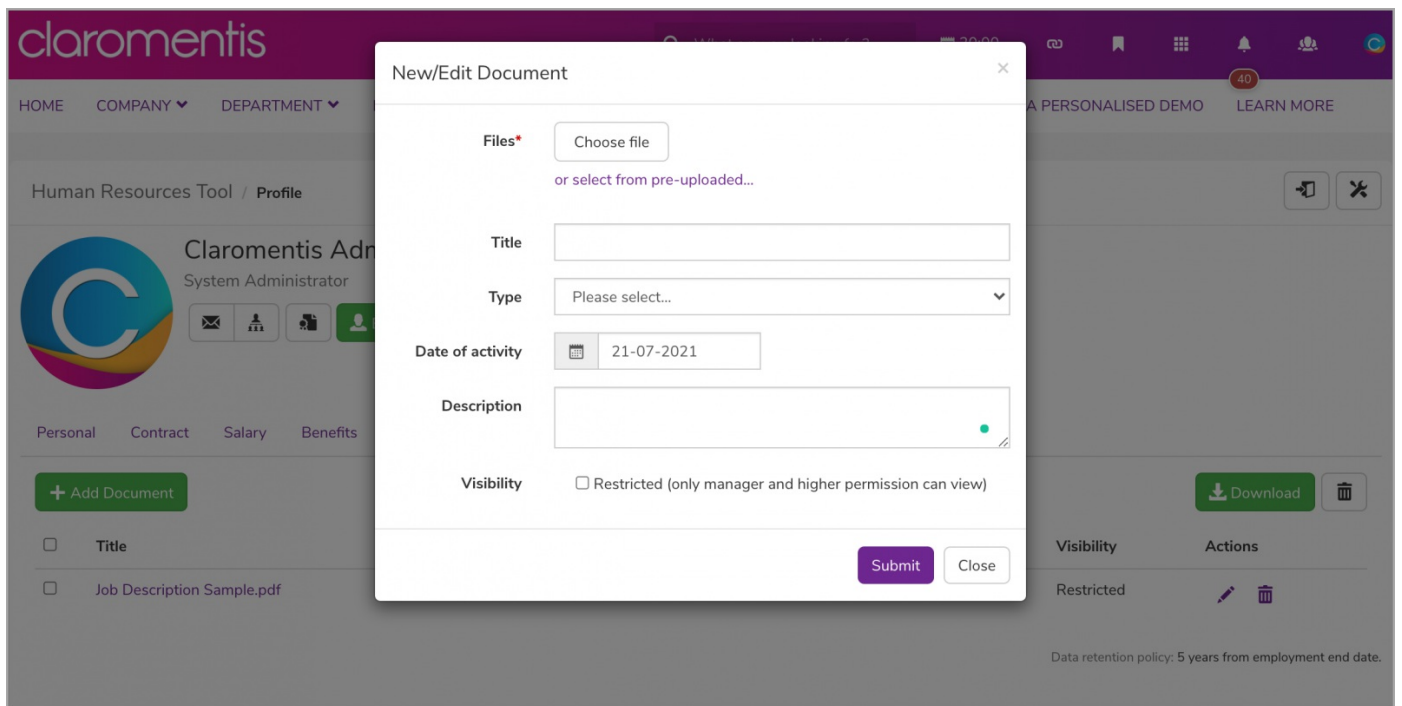
Personal Contract Salary Benefits **Documents** History

[+ Add Document](#) [Download](#)

<input type="checkbox"/>	Title	Description	Type	Date of activity	Visibility	Actions
--------------------------	-------	-------------	------	------------------	------------	---------

Data retention policy: 5 years from employment end date.

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

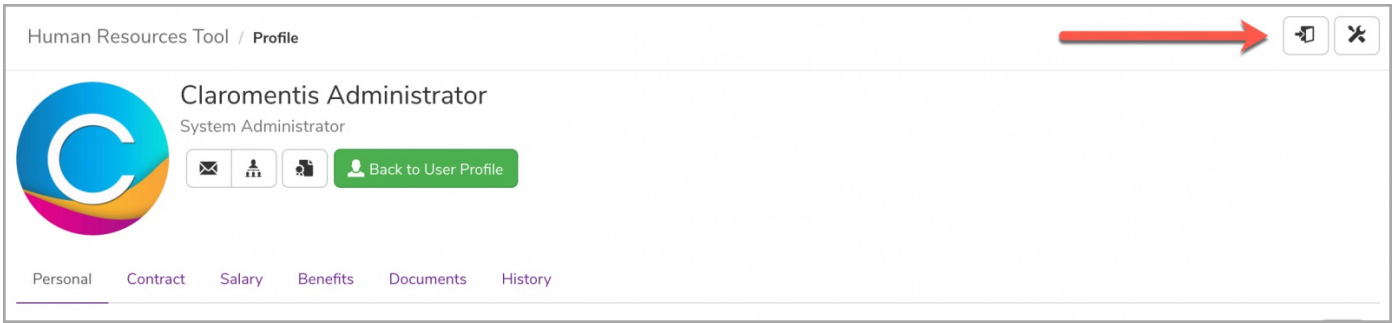
From the 'History' tab, any information that has been added or change in the user HR profile, such as edits to user details and/or content will be automatically logged:

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		

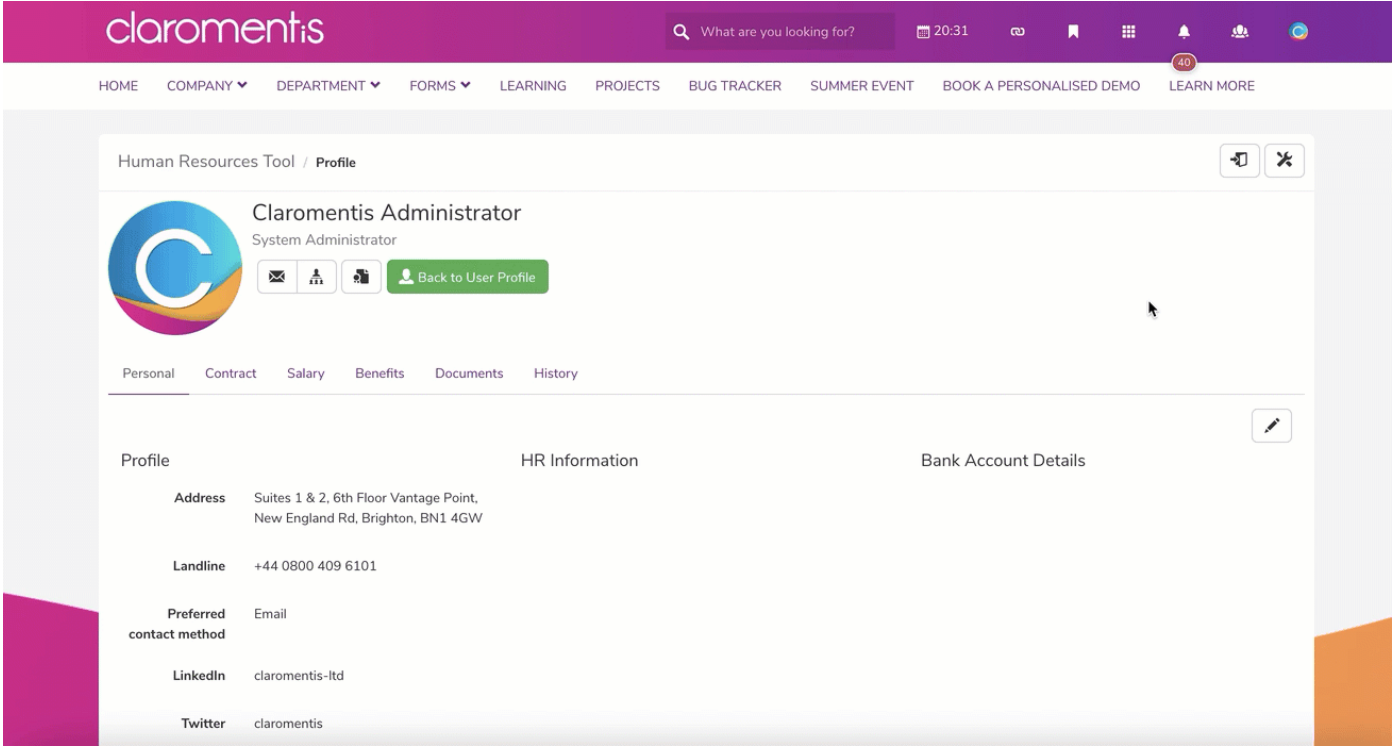
## Exiting the HR tool

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