



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

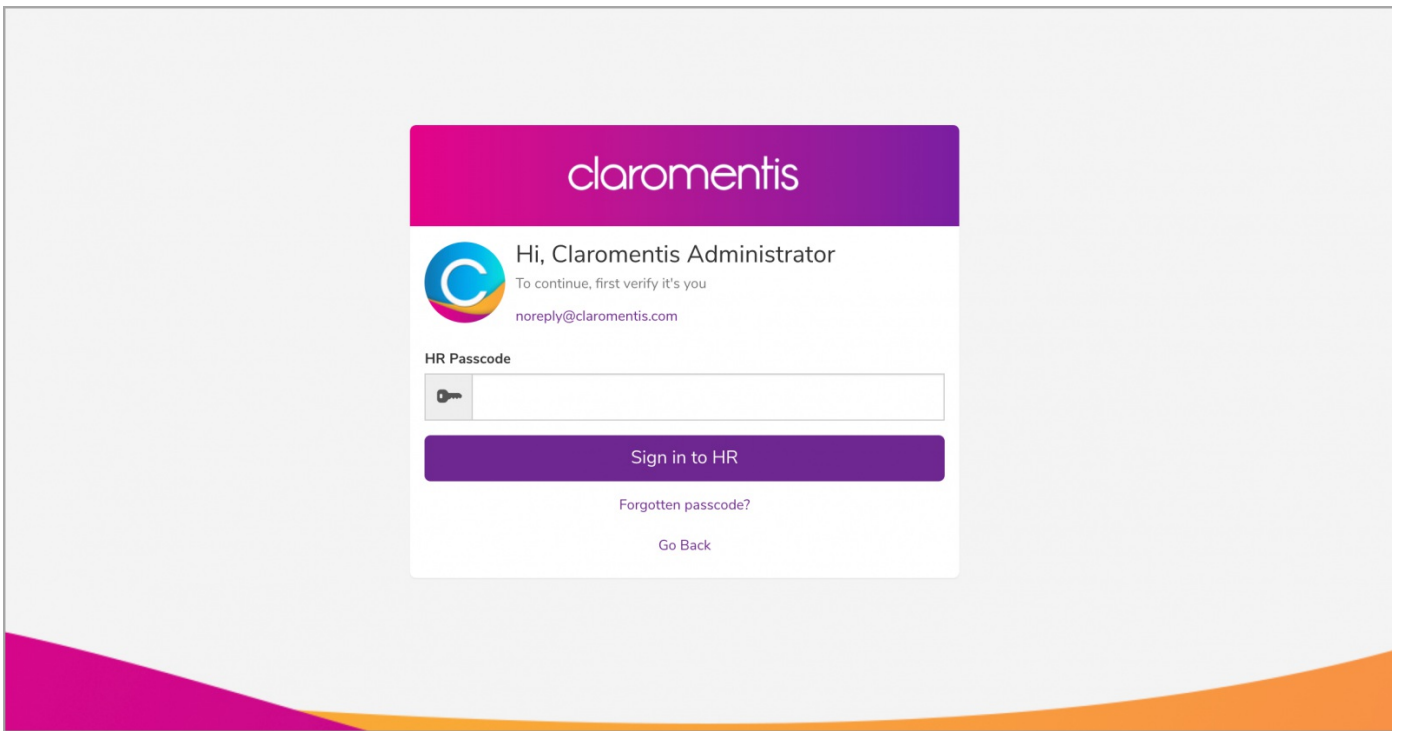
From the front-end of the People application, head to your personal user-profile and select 

A screenshot of the Claromentis user profile page. The profile is for 'Claromentis Administrator', a System Administrator. The page shows various details like address, landline, and preferred contact method. A red arrow points to the 'HR Tool' button in the profile header. On the right, there are tweets and a YouTube video preview for 'Claromentis 9 Preview'. The top navigation bar includes icons for home, people, profile, settings, and other functions.

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 **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

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

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Back to User Profile

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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**:

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

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.

Personal
Contract
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Profile

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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 **Contract 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

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

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

Data retention policy: 5 years from employment end date.

With permissions, you can add a new payment term by clicking 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

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

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

Benefits

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

Personal Contract Salary **Benefits** Documents History

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.

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

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:

New/Edit Benefit

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

Supplier

Start Date

End Date

Description

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

<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.

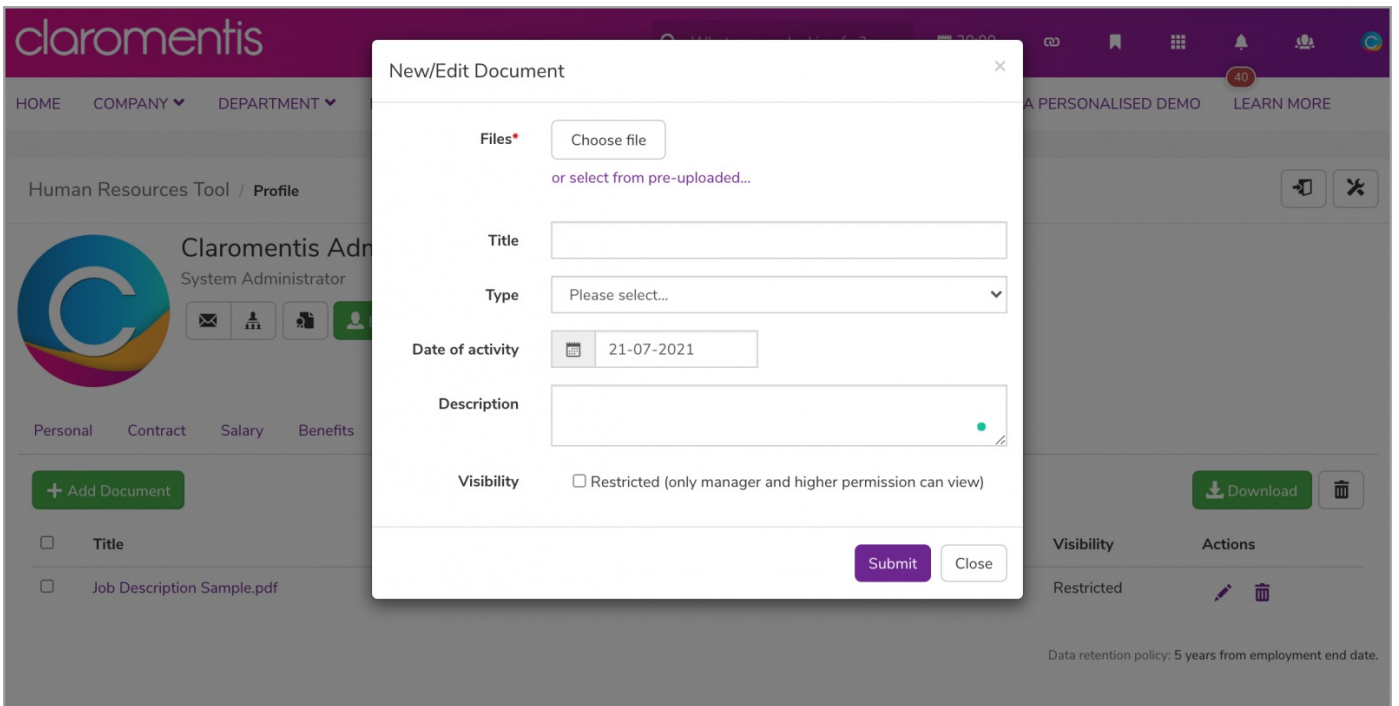
New documents can be added using

Personal Contract Salary Benefits Documents History

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

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:

Human Resources Tool / Profile →  



Claromentis Administrator







System Administrator




Back to User Profile



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

claromentis

20:31










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Human Resources Tool / Profile  



Claromentis Administrator

System Administrator




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Profile

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Bank Account Details



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](#)