Link to article: https://discover.claromentis.com/knowledgebase/articles/824/hr-notification-settings-and-reminders



## Introduction

In the HR tool, there are two types of alerts that you can create:

1. Notifications - Generates an in-system and/or email alerts to users based on changing fields within the HR Tool 2. <u>Reminders</u> - Generates an in-system and/or email alerts to users based on a date field applied to a profile.

This guide will cover the process of creating and setting up these alerts.

## Setting up notifications

Upon accessing the HR tool, head to Notifications:

Admin / HR / Notification Settings								
Permissions	Notification Settings							
Users & Access	New Notification							
Notifications	Changes in	Notify	Extra Emails	Actions				
A Reminders	Bank Account	Payroll			-	Ē		
Import / Export Data	Payroll	Payroll			1	Ē		
	Salary	Payroll			1	ŵ		
Admin Panel Access	HR Information	Managers				<b>İ</b>		
🛢 Data Retention								
Configuration								
Custom Fields								
Document Types								
Benefits								

From here, select New Notification

Admin / HR / Notification Se	ettings					
Permissions	Notification Settings					
Users & Access	New Notification					
Notifications	Changes in	Notify	Extra Emails	Actions		
Reminders	Bank Account	Payroll			1	Ē
	Payroll	Payroll				ŵ
Import / Export Data	Salary	Payroll				ŵ
Admin Panel Access	HR Information	Managers				Ē
Data Retention						
Configuration						
Custom Fields						
Document Types						
Benefits						

#### When creating a notification, there are a variety of sections you will need to configure:

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HOME COMPANY V DI	EPARTMENT 🛩 🛛	Changes in*	Please select.	~	A PERSC	NALISE	D DEMO	40		More ¥
Admin / HR / Notification S	Settings	Notify	HR Admin     Payroll							
Permissions	Notificatio		Managers     Staff							
Users & Access	New Notificatio		How notification will be sent is set by individual preference in							
Notifications	Changes in		Communication / settings but you can add extra emails to be added here:			Actio	ns			
Reminders	Bank Account	Additional emails		_						Ē
Import / Export Data	Payroll	(separated by comma)		1					1	Ē
Admin Panel Access	Salary	Title Template	HR tool: {HR section name} has been {action} by {name} for							<u>ش</u>
G Admin Panel Access	HR Information		user {hr user}	11						<u>ش</u>
Data Retention		Notification Template	{name} has made changes for user {hr user} on {HR section							
Configuration		remplate	name} in HR tool on {date stamp}							
Custom Fields			{changes here}							
Document Types			Click {link} to view the details	1,						
Benefits			Add Notification Can	cel						

- Changes in: Determining factor on what part of the HR Tool needs to change in order for the notification to be sent. Whichever option you specify means an alert will be sent for any and all changes to the section.
- Notify: Users in selected HR roles will be notified by this specific notification. You can include multiple roles or just a single option depending on the nature of the notification.

Reminder: Notification will be received based on individual notification settings via the Communications application (i.e. in-system and/or email)

- Additional emails: Enter an email address(es) to which this notification should be sent. This can be in addition to users in the HR roles or individual users. Multiple email addresses can be entered by separate them with a comma.
- Title Template: The subject of the notification. Some default text in this section is available as standard but can be changed manually for your needs.
- Notification Template: The body of content in the notification. Some default text in this section is available as standard but can be edited as needed. You can also apply expressions to this section and the title to apply a user's name etc.

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HOME COMPANY V DEPARTMENT V		Changes in*	Please select.	~	A PERSO	NALISE	D DEMO	40		More 💙
Admin / HR / Notification Se	ettings	Notify	HR Admin     Payroll							
• Permissions	Notificatio		Managers     Staff							
Users & Access	New Notificatio		How notification will be sent is set by individual preference in							
Notifications	Changes in		Communication / settings but you can add extra emails to be added here:			Actio	ons			
Reminders	Bank Account	Additional emails								Ō
Import / Export Data	Payroll	(separated by comma)								Ō
	Salary	Title Template	HR tool: {HR section name} has been {action} by {name} for							<u>ش</u>
Admin Panel Access	HR Information		user {hr user}	1.						Ē
Data Retention		Notification Template	{name} has made changes for user {hr user} on {HR section name} in HR tool on {date stamp}							
Configuration			{changes here}							
Custom Fields			Click {link} to view the details							
Document Types				11						
Benefits		-	Add Notification Can	cel						
				-						

# Setting up reminders

The process to set up a reminder is very similar to that of a Notification, but with a few minor changes.

### First, head to Reminder:

Admin / HR / Reminder Set	ttings				
Permissions	Reminder Settings				
Users & Access	New Reminder				
Notifications	Trigger	Reminder Time	Notify	Extra Emails	
Reminders	Date of Birth	1 week before	Managers		1
					ā
Import / Export Data	Employment Expiry	1 month before	HR Admin, Managers		1
Admin Panel Access					面
Data Retention	Probation End	10 days before	HR Admin, Managers		1
Configuration					莭
Custom Fields	Permit/Visa Expiry	1 month before	HR Admin		1
					面
Document Types					
Benefits					



Admin / HR / Reminder Set	tings				
<ul> <li>Permissions</li> </ul>	Reminder Settings				
Users & Access	New Reminder				
Notifications	Trigger	Reminder Time	Notify	Extra Emails	
Reminders	Date of Birth	1 week before	Managers		1
A Reminders					亩
📓 Import / Export Data	Employment Expiry	1 month before	HR Admin, Managers		1
Admin Panel Access					亩
Data Retention	Probation End	10 days before	HR Admin, Managers		1
Configuration					Ē
	Permit/Visa Expiry	1 month before	HR Admin		1
Custom Fields					Ē
Document Types					
Benefits					

The configuration options are identical to the Notification options, minus the 'Changes in' field which has been replaced by two new sections:

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HOME COMPANY V DEPARTMENT V	Trigger*	Please select	~	A PERSO	ONALISE	D DEMO			More *
Admin / HR / Reminder Settings	Reminder Time*	Please select	~						
Permissions Reminder	Notify	HR Admin Payroll							
Users & Access		<ul><li>Managers</li><li>Staff</li></ul>							
Notifications		Set email reminders for important dates			Extra Em	ails			
Reminders	Additional emails (separated by								Ē
Import / Export Data Employment Export - Export Data	comma)		1.						✓
Admin Panel Access      Probation End      Data Retention	Title Template	It's {reminder time} to go until {trigger} for {name}	1.						/
Configuration	Reminder Template	HR reminder							Ē
Permit/Visa Exp Custom Fields		it's {reminder time} to go until {trigger} for {name}							✓
Document Types		Click {link} to view the details	1.						
Benefits		Add Reminder	Cancel						

• Trigger: Determining factor on what date specified in the HR Tool will be set for the reminder to be sent. Whichever option you specify means an alert will be sent for any and all changes to the section.

• Reminder Time: Select the time for when you want the reminder to be triggered (can be between the day of to 1 month prior).

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HOME COMPANY V DEPARTM	ENT ♥ I Trigger*	Please select	~	A PERSON	ALISED	DEMO			More
Admin / HR / Reminder Settings	Reminder Time*	Please select	~						
	Notify w Reminder	HR Admin     Payroll     Managers							
	ger e of Birth	Staff Set email reminders for important dates		Ext	tra Ema	ils			1
Reminders	Additional emails (separated by ployment Ex comma)		1.						<b>□</b>
Admin Panel Access      Prot     Data Retention	Title Template	It's {reminder time} to go until {trigger} for {name}	li						<b>□</b>
Configuration Perr Custom Fields	Reminder Template mit/Visa Exc	HR reminder it's {reminder time} to go until {trigger} for {name}							亩 ✓ 亩
Document Types Benefits		Click {link} to view the details Add Reminder	Cancel						

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