



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. [Reminders](#) - 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

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Data Retention

Configuration

Custom Fields

Document Types

Benefits

Notification Settings

New Notification

Changes in..	Notify	Extra Emails	Actions
Bank Account	Payroll		
Payroll	Payroll		
Salary	Payroll		
HR Information	Managers		

From here, select [New Notification](#)

Admin / HR / Notification Settings

- Permissions
- Users & Access
- Notifications
- Reminders
- Import / Export Data
- Admin Panel Access
- Data Retention
- Configuration
- Custom Fields
- Document Types
- Benefits

Notification Settings

New Notification
←

Changes in..	Notify	Extra Emails	Actions
Bank Account	Payroll		
Payroll	Payroll		
Salary	Payroll		
HR Information	Managers		

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

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Admin / HR / Notification Settings

- Permissions
- Users & Access
- Notifications
- Reminders
- Import / Export Data
- Admin Panel Access
- Data Retention
- Configuration
- Custom Fields
- Document Types
- Benefits

New Notification
✕

Changes in..* Please select..

Notify

- HR Admin
- Payroll
- Managers
- Staff

How notification will be sent is set by individual preference in Communication / settings but you can add extra emails to be added here:

Additional emails
(separated by comma)

Title Template

HR tool: {HR section name} has been {action} by {name} for user {hr user}

Notification Template

{name} has made changes for user {hr user} on {HR section name} in HR tool on {date stamp}

 {changes here}

 Click {link} to view the details

Add Notification
Cancel

- **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.

Once you have made the changes to all sections, select [Add Notification](#)

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Admin / HR / Notification Settings

Permissions
Users & Access
Notifications
Reminders
Import / Export Data
Admin Panel Access
Data Retention
Configuration
Custom Fields
Document Types
Benefits

Notification
New Notification
Changes in..
Bank Account
Payroll
Salary
HR Information

Changes in..* Please select..

Notify

- HR Admin
- Payroll
- Managers
- Staff

How notification will be sent is set by individual preference in Communication / settings but you can add extra emails to be added here:

Additional emails (separated by comma)

Title Template
HR tool: {HR section name} has been {action} by {name} for user {hr user}

Notification Template
{name} has made changes for user {hr user} on {HR section name} in HR tool on {date stamp}

{changes here}

Click {link} to view the details

Add Notification Cancel

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 Settings

Permissions
Users & Access
Notifications
Reminders
Import / Export Data
Admin Panel Access
Data Retention
Configuration
Custom Fields
Document Types
Benefits

Reminder Settings
New Reminder

Trigger	Reminder Time	Notify	Extra Emails
Date of Birth	1 week before	Managers	
Employment Expiry	1 month before	HR Admin, Managers	
Probation End	10 days before	HR Admin, Managers	
Permit/Visa Expiry	1 month before	HR Admin	

From here, select [New Reminder](#)

Trigger	Reminder Time	Notify	Extra Emails
Date of Birth	1 week before	Managers	
Employment Expiry	1 month before	HR Admin, Managers	
Probation End	10 days before	HR Admin, Managers	
Permit/Visa Expiry	1 month before	HR Admin	

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

Trigger* Please select...

Reminder Time* Please select...

Notify

- HR Admin
- Payroll
- Managers
- Staff

Set email reminders for important dates

Additional emails (separated by comma)

Title Template It's {reminder time} to go until {trigger} for {name}

Reminder Template HR reminder
it's {reminder time} to go until {trigger} for {name}
Click {link} to view the details

[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).

When you are happy with the configuration of this reminder, select [Add Reminder](#)

Reminder

New Reminder

Trigger

Date of Birth

Employment Exp

Probation End

Permit/Visa Exp

New / Edit Reminder

Trigger*

Please select...

Reminder Time*

Please select...

Notify

- HR Admin
- Payroll
- Managers
- Staff

Set email reminders for important dates

Additional emails
(separated by
comma)

Title Template

It's {reminder time} to go until {trigger} for {name}

Reminder
Template

HR reminder

it's {reminder time} to go until {trigger}
for {name}

Click {link} to view the details



Add Reminder

Cancel