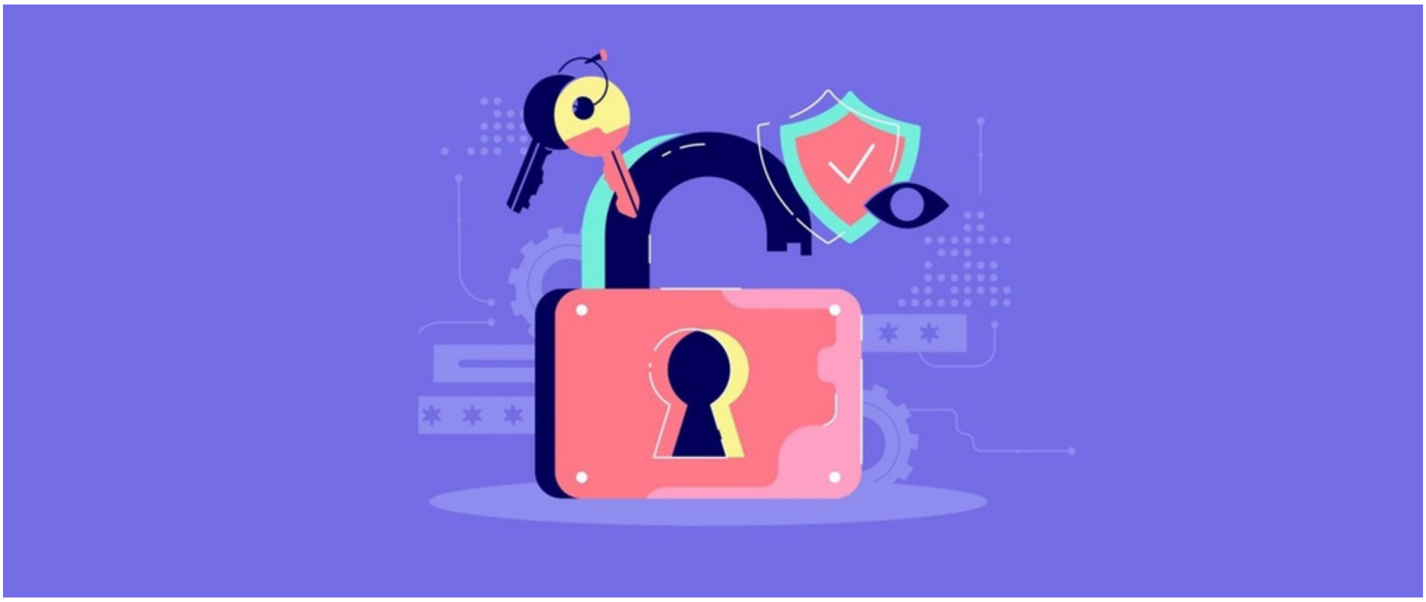
Link to article: https://discover.claromentis.com/knowledgebase/articles/825



How to set HR permissions

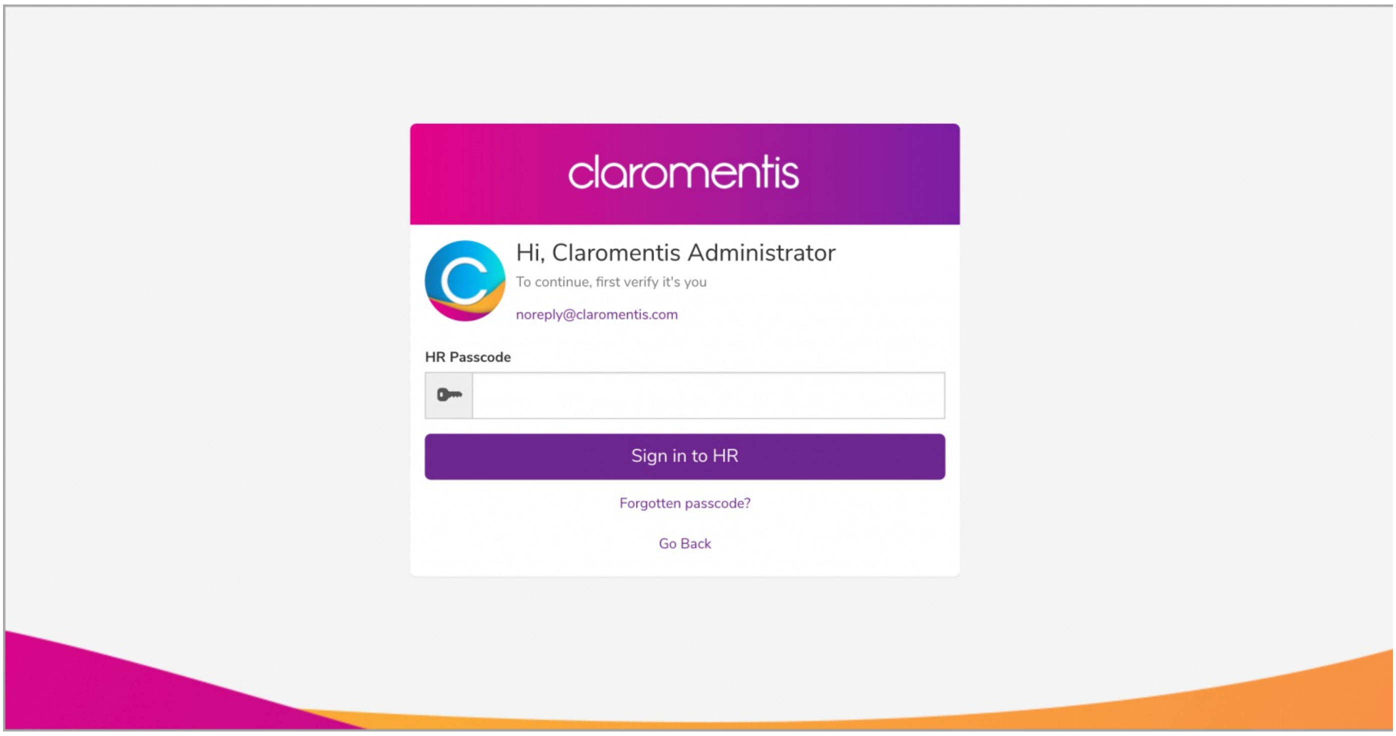
The HR tool allows for Role-based permissions to be used to manage and access different HR information.

Permissions for each role are defined in the admin panel of the HR tool. We will cover the following 4 areas and outline details on how to set up roles within the HR tool and what the various permissions within the applications include.

- HR tool admin panel
- Roles and permissions
- Rights and permissions
- Inviting users to the HR tool

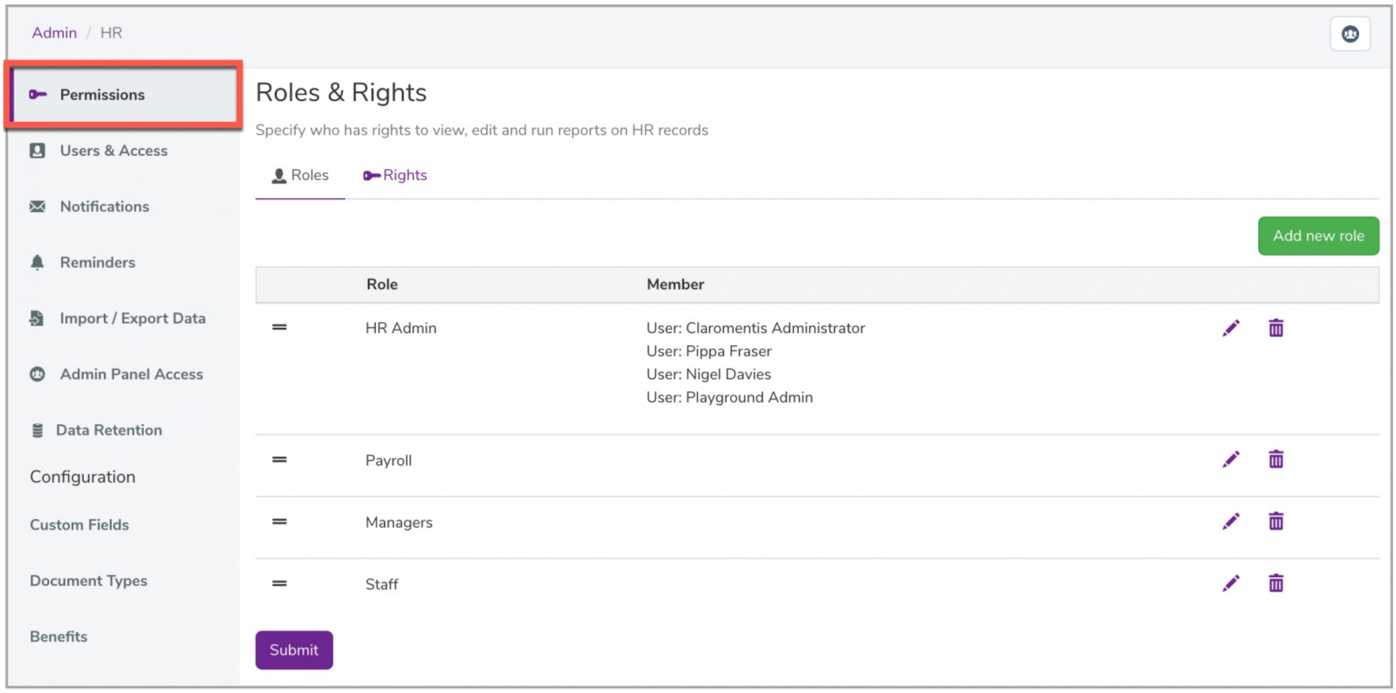
HR tool admin panel

When navigating to **Admin > HR**, you will be required to provide your personal HR Passcode:



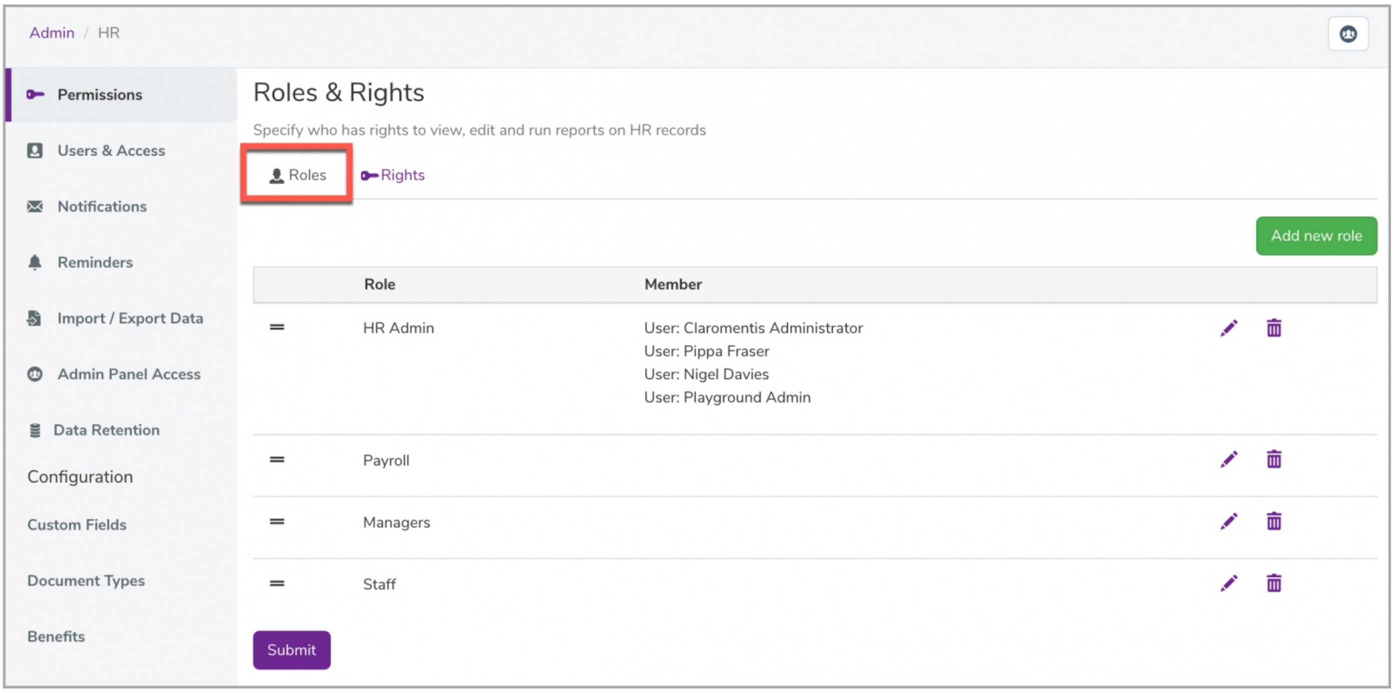
Reminder: If you have forgotten your HR passcode, click on 'Forgotten passcode?' to reset your passcode. Before you do so, please ensure your email address is correct.

Upon logging in, the first area you will be presented with is **Permissions** where you will see both the **Roles** & **Rights** tabs:

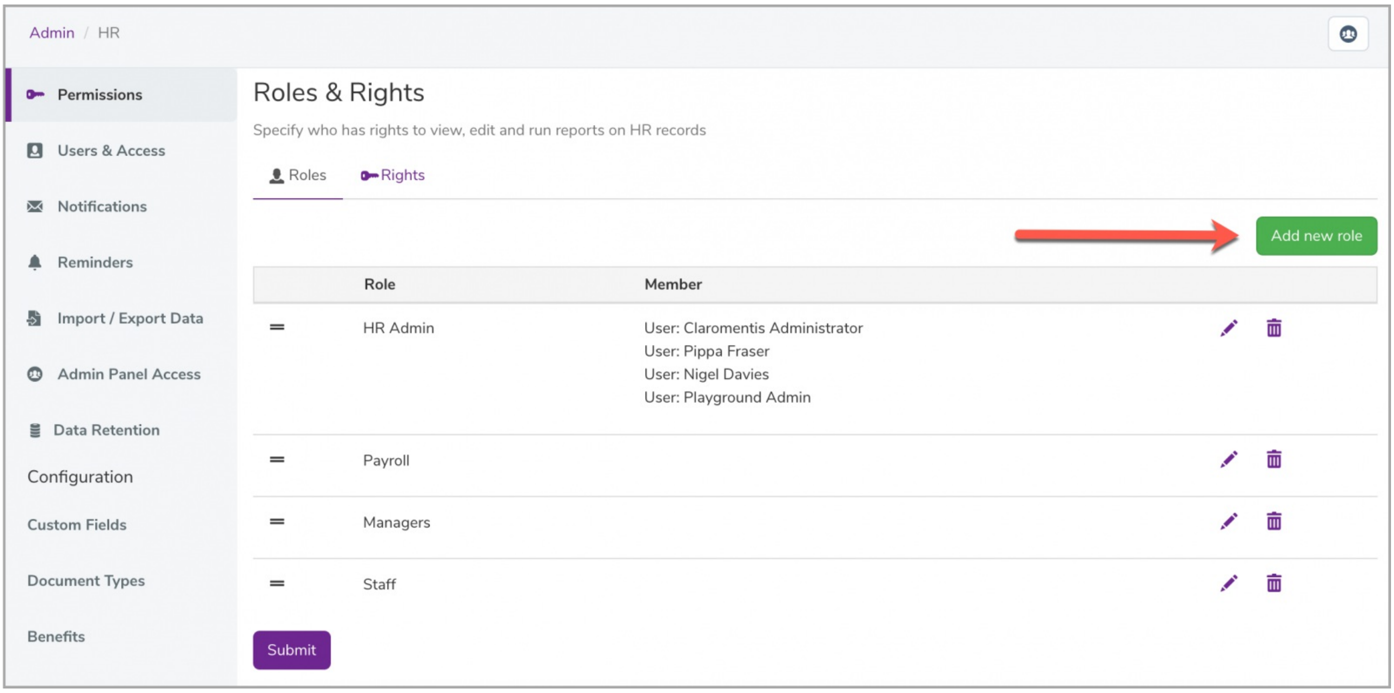


Roles & permissions

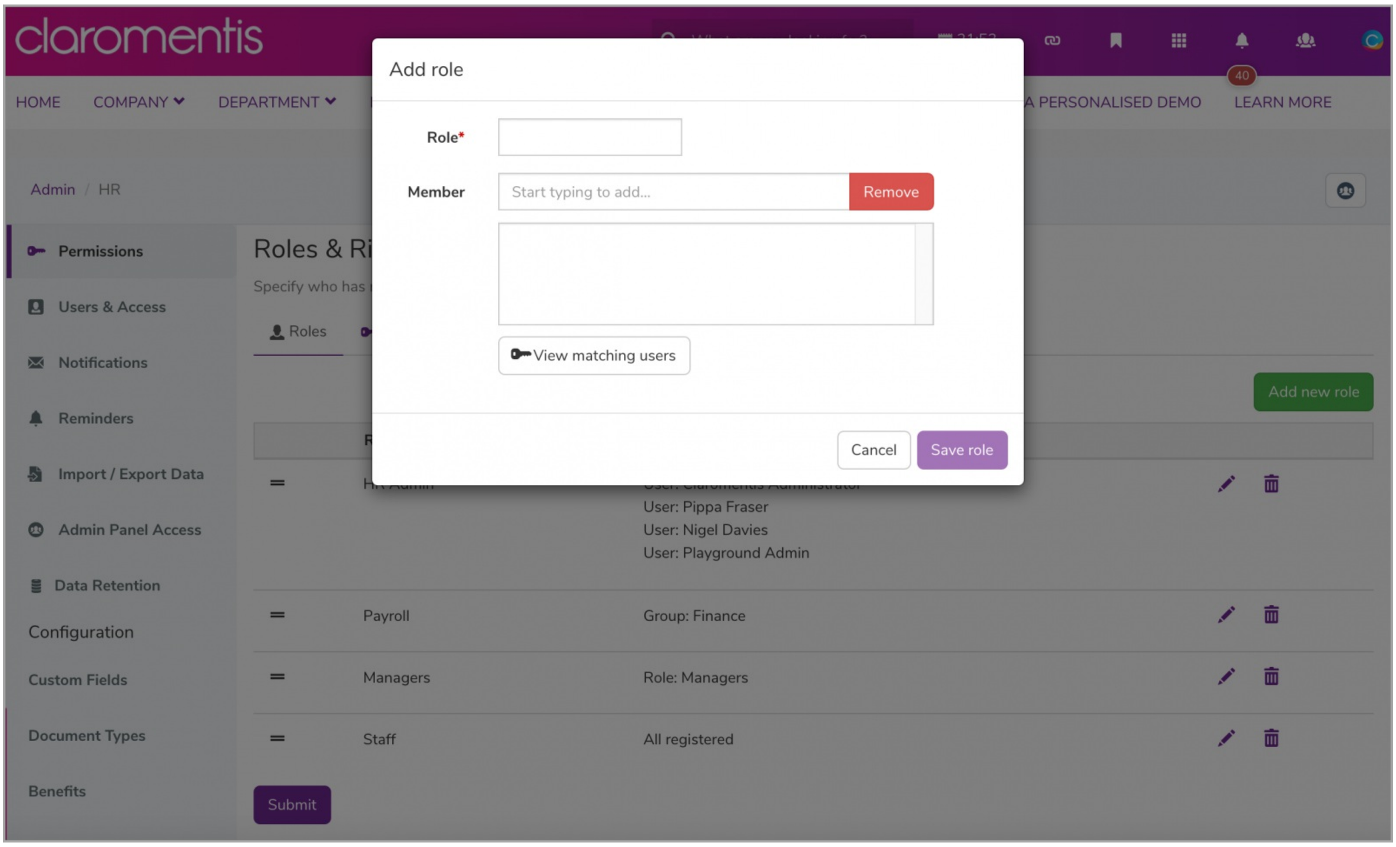
By default, there are 4 roles available in **Roles**. These are HR Admin, Payroll, Managers, and Staff roles:



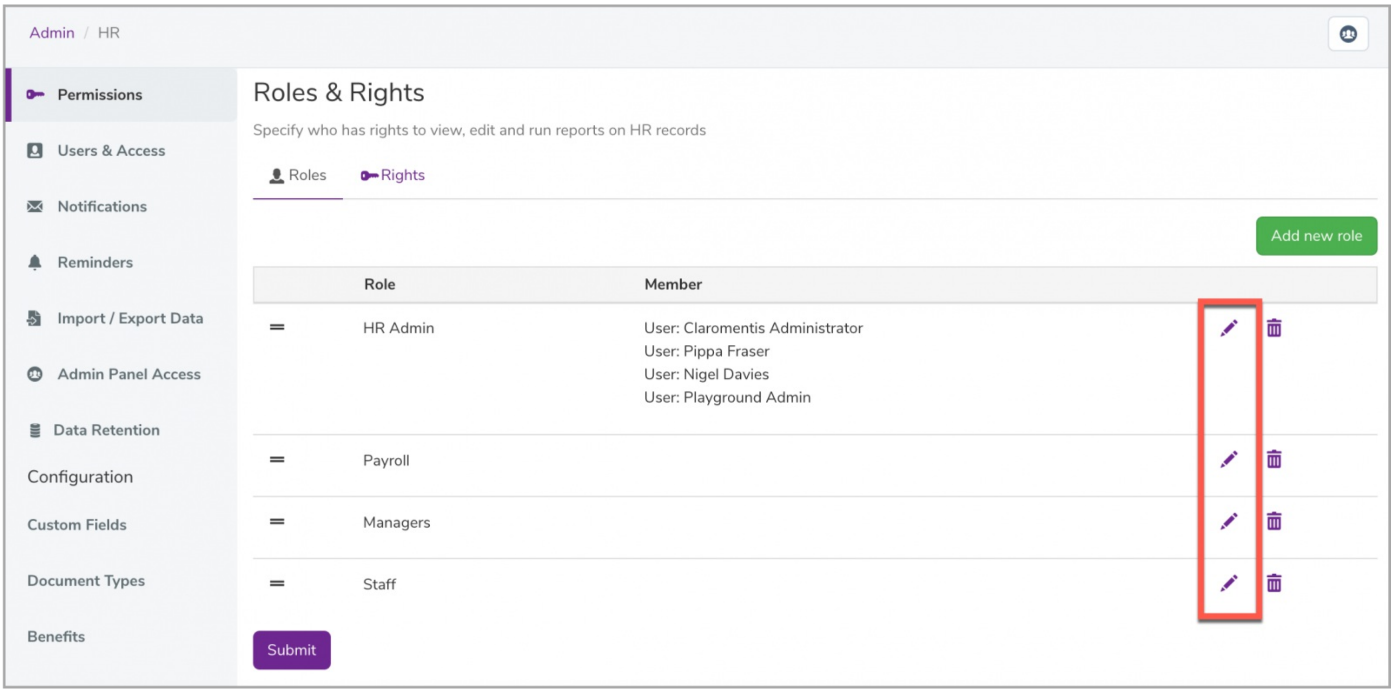
To add more Roles, simply select Add new role



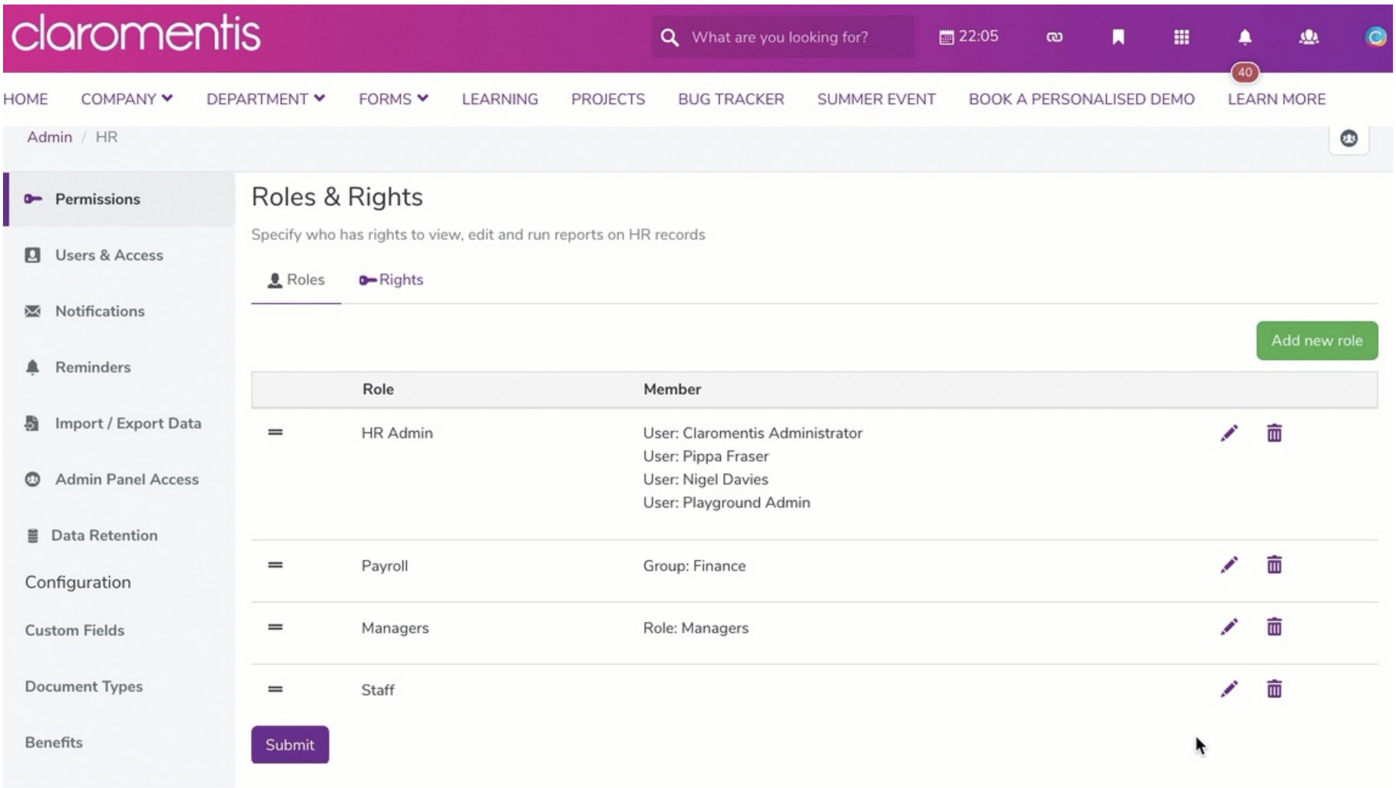
When creating a new role, you will be required to name the Role. You can also start adding users to this role:



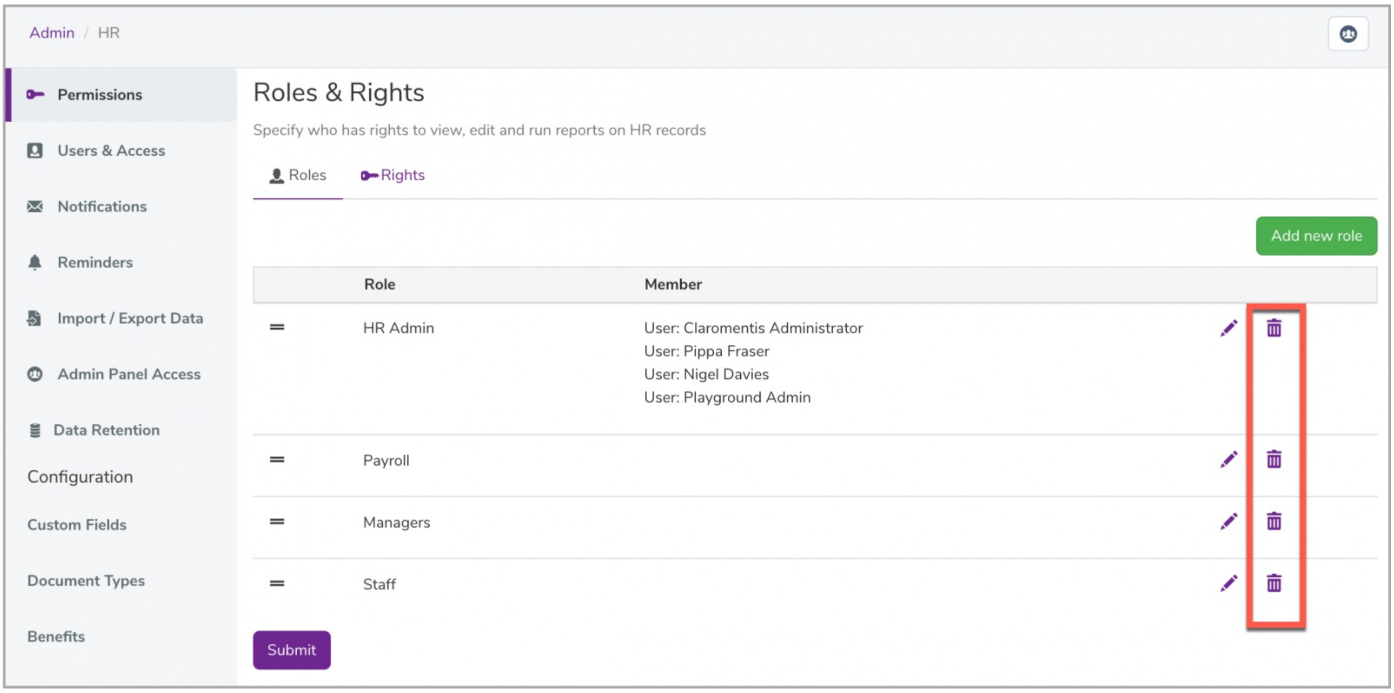
To edit any existing Roles, click on the pencil icon found next to the relevant role:



From here, you can change the name of the Role and/or assign (or delete) a user group or role as needed:

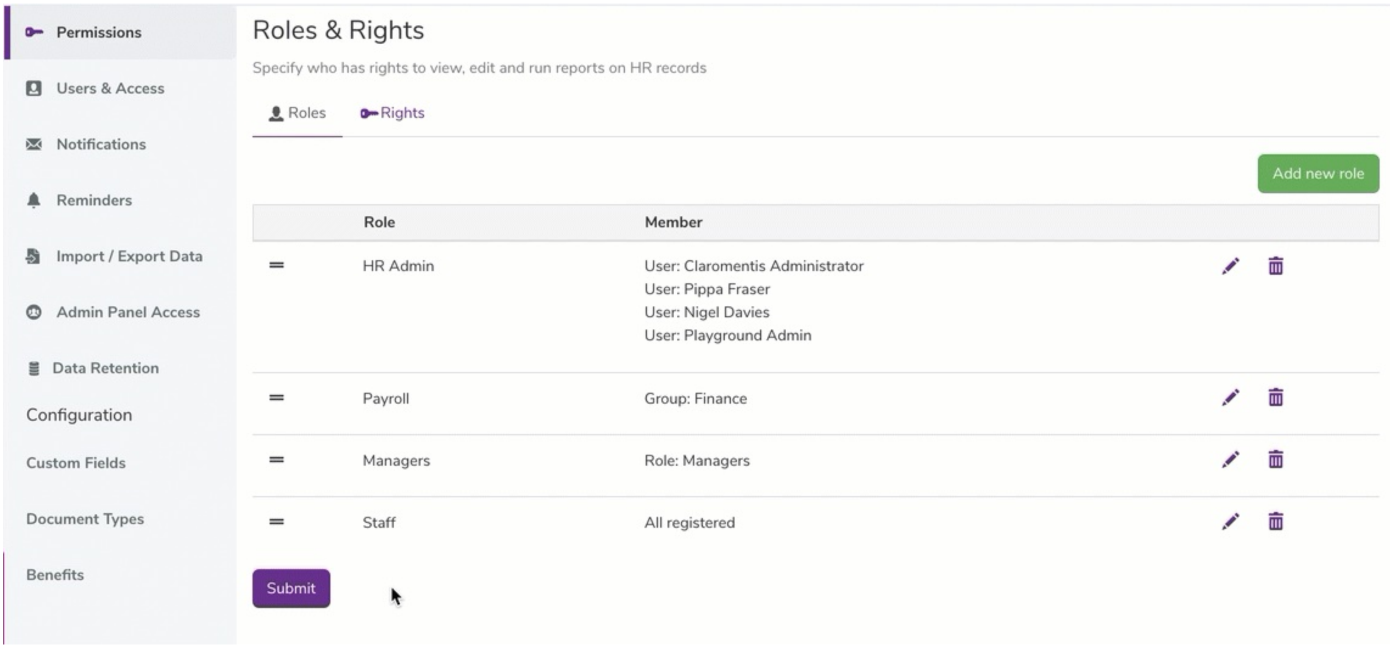


To delete any existing Roles, click on the trash can icon found next to the relevant role:



Reminder: Deleted roles cannot be restored and will need to be re-created.

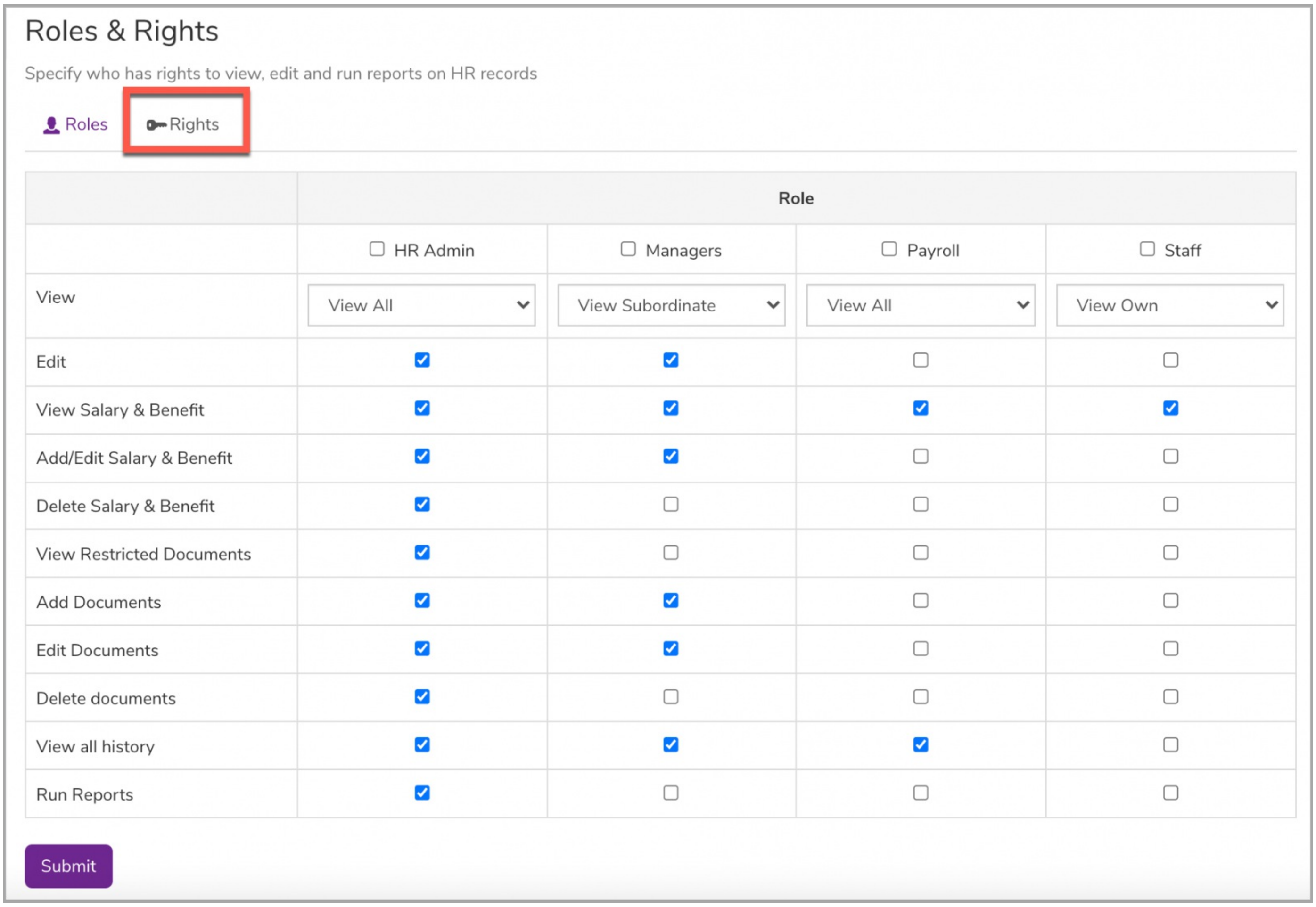
To change the order of the Roles displaying, use our click & drop feature:



Rights & Permissions

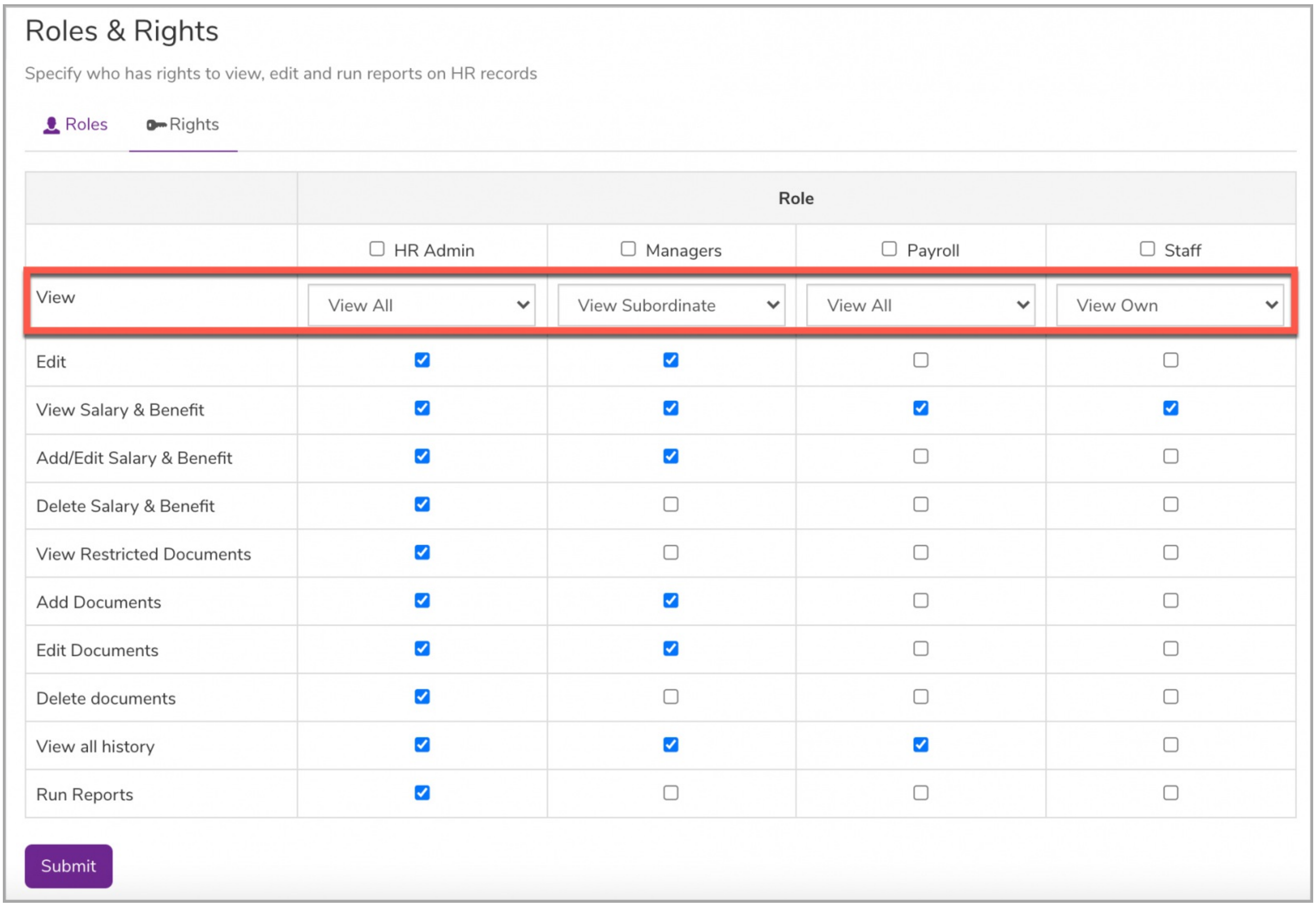
Once you have the roles named and the appropriate users assigned, head to **Rights**.

Notice the Roles are automatically added and have permissions set by default.



Please note: Newly added roles will not have any permissions in the first instance and will have to be configured.

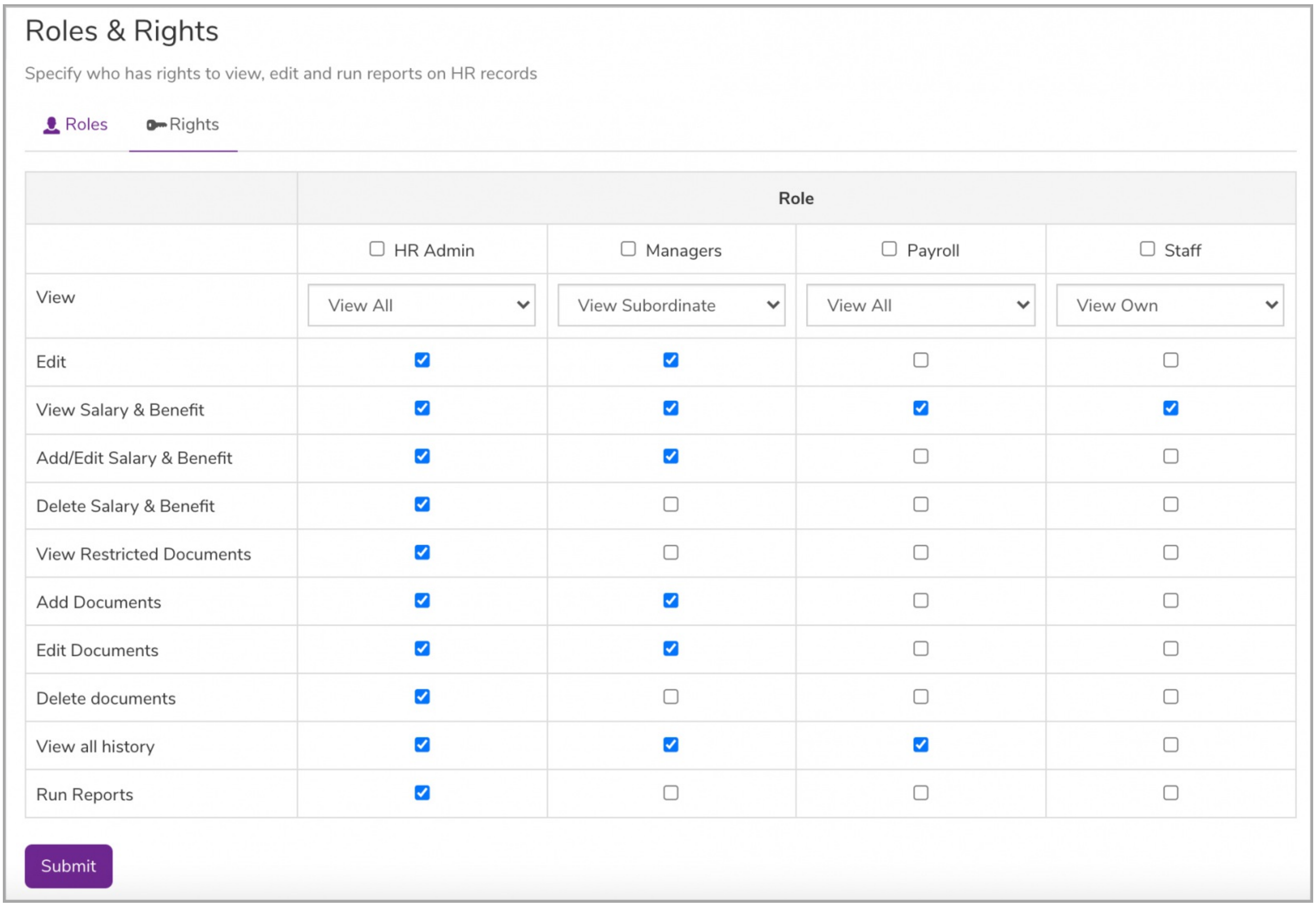
You can now define what permissions each role will have. The first thing is to set the 'View' permission which indicates who/what users in that Role is able to see:



Here are the following 'View' options:

- **None:** This role will not be allowed to view any HR information at all.
- **View Own:** This role will be able to access and view only their own HR information.
- **View All:** This role can view all HR information for every user.
- **View Subordinates:** This role can view only the HR information for sub-ordinates based on the settings from the org chart in the People admin panel.

Set the remaining permissions per Role by checking the appropriate box(es).



Roles & Rights

Specify who has rights to view, edit and run reports on HR records

Roles | Rights

	Role			
	☐ HR Admin	☐ Managers	☐ Payroll	☐ Staff
View	View All	View Subordinate	View All	View Own
Edit	☑	☑	☐	☐
View Salary & Benefit	☑	☑	☑	☑
Add/Edit Salary & Benefit	☑	☑	☐	☐
Delete Salary & Benefit	☑	☐	☐	☐
View Restricted Documents	☑	☐	☐	☐
Add Documents	☑	☑	☐	☐
Edit Documents	☑	☑	☐	☐
Delete documents	☑	☐	☐	☐
View all history	☑	☑	☑	☐
Run Reports	☑	☐	☐	☐

Submit

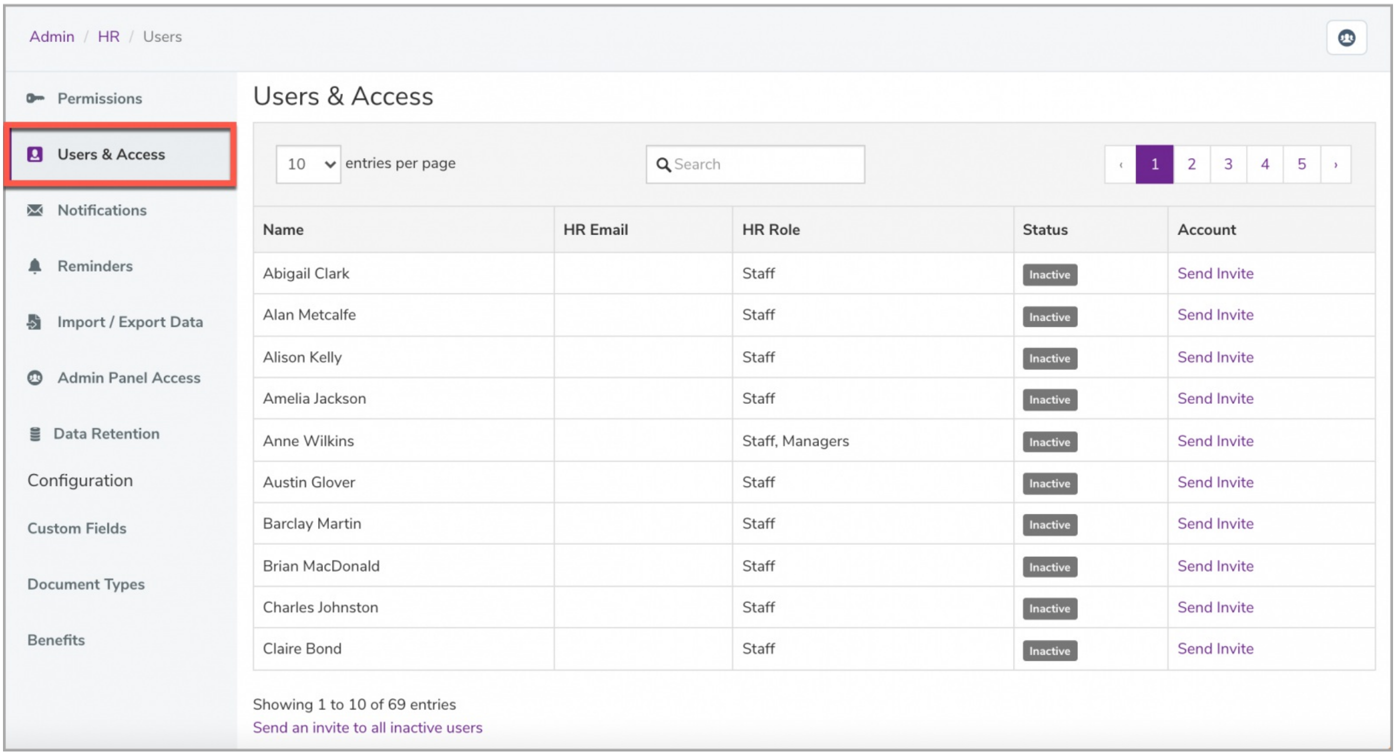
Reminder: Be cautious of the permissions that are granted in this area as this will be directly linked to what users can see from the front-end of the HR tool.

For more information on the front-end of the HR tool and what these permissions correspond to, click here.

Inviting users to the HR tool

Next, make sure to head to **Users & Access**.

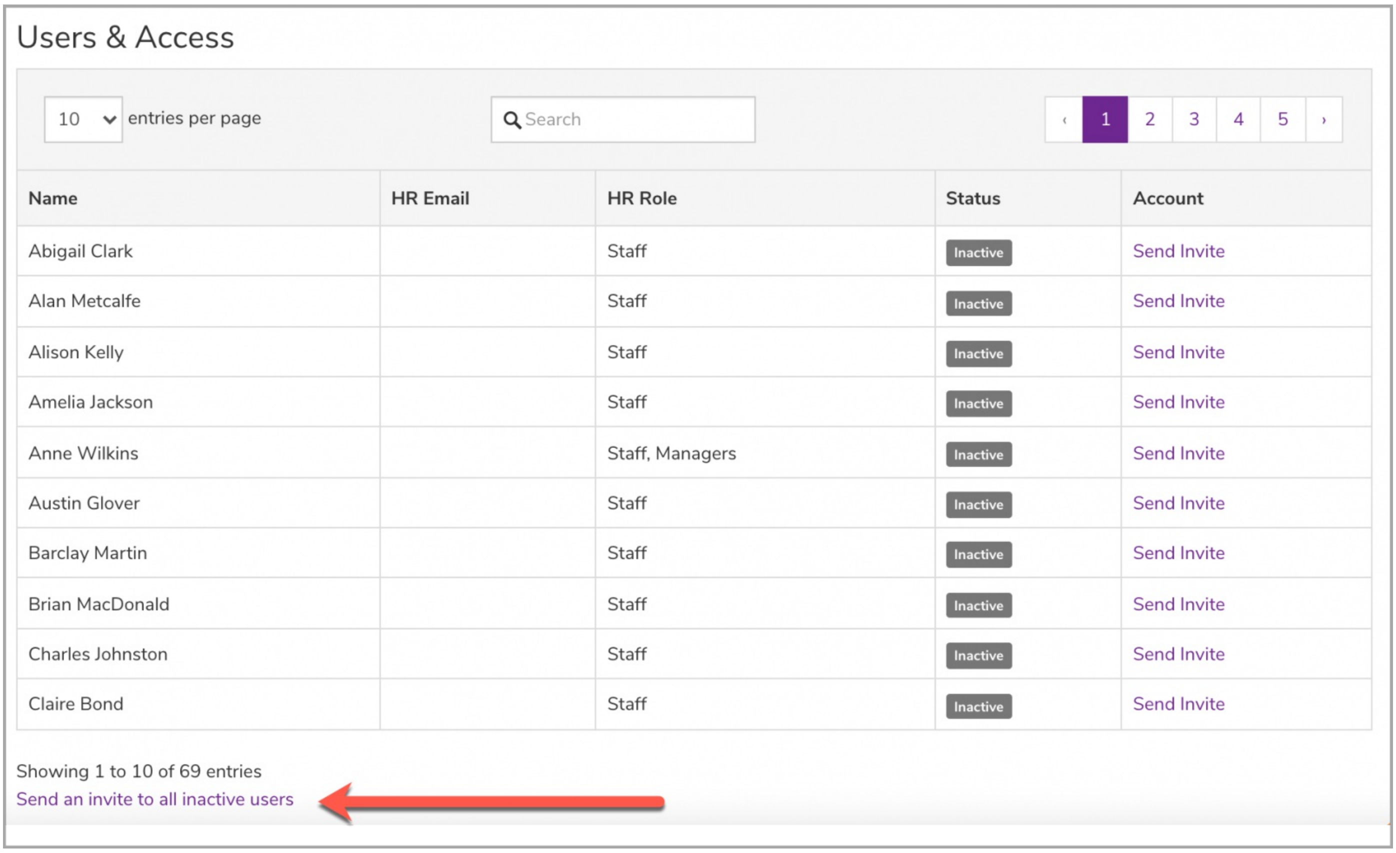
All the users who have been set up in different Roles will appear in the user list:



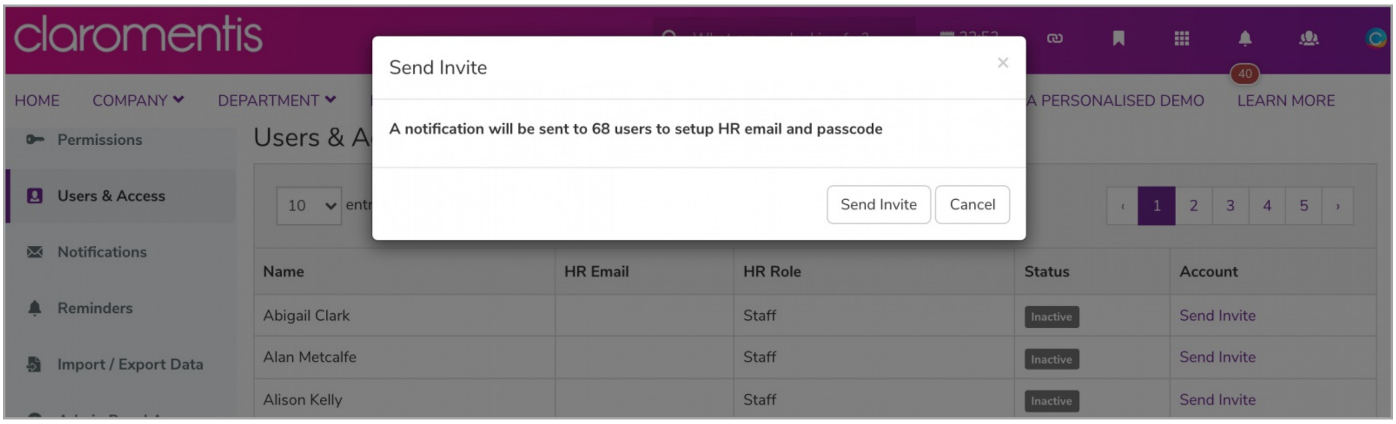
Please note: By default, all users will be 'Inactive' meaning they do not yet have the HR tool enabled.

You will be able to send out invitations for all users to enable the HR tool and set their own HR passwords. There are two options to send invites:

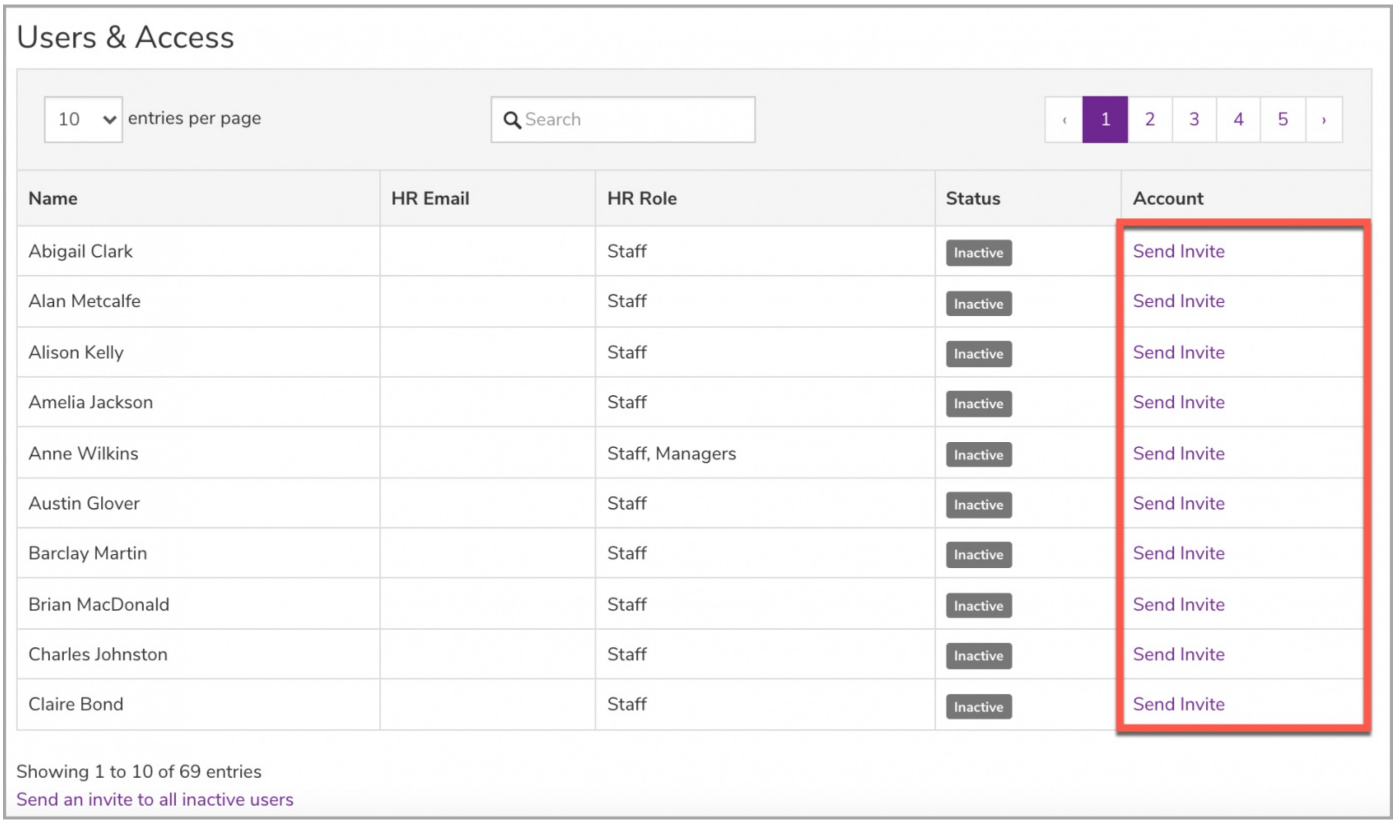
1. Send an invite to all inactive users - Selecting the below option found at the bottom of the page to trigger an email invite to all users who are currently set to 'Inactive':



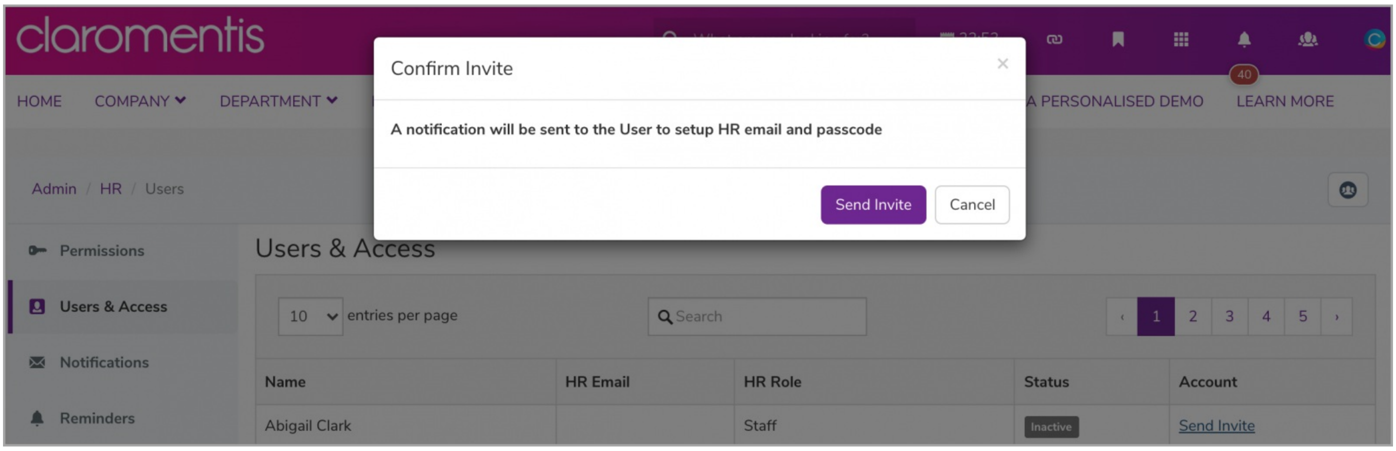
You will see the number of users this invite will be sent to and be required to confirm the action:



2. Send an invite to individual users - Selecting the 'Send Invite' option will trigger an invite to the specified user:

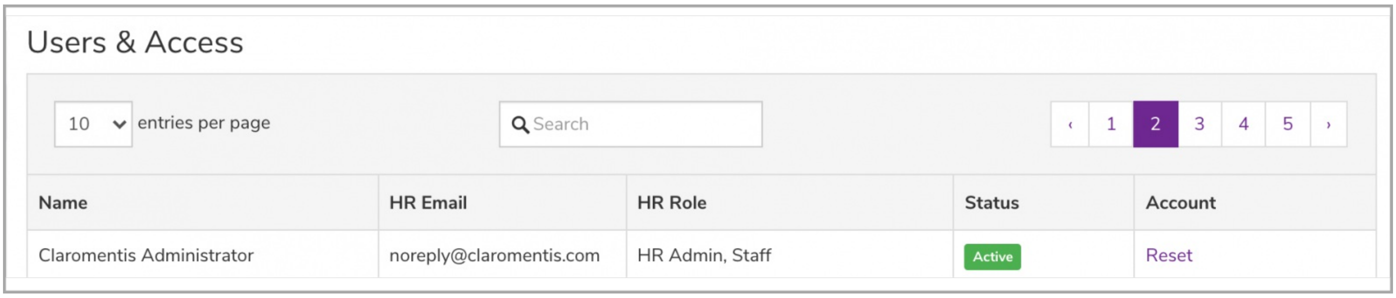


This will prompt you to confirm the action for the invitation to be sent:



Please note: With both options, users will receive an email invite where they can create a special HR-only security passcode. Each user will always be required to enter their passcode to access the HR tool.

Once users have accepted the invitation and created a passcode, user status will change from 'Inactive' to 'Active' to help you keep track of users using the HR tool;



Please note: The HR email is identical to the email set in user profiles in the People application, so please ensure users have entered the correct email address.

Last modified on 30 November 2023 by Hannah Door

Created on 21 July 2021 by Veronica Kim

Tags: admin, hr, hrtool, permissions, user guide