



## 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:

A screenshot of the Claromentis HR tool admin panel login screen. The page has a white background with a purple header bar at the top containing the 'claromentis' logo. Below the header, there is a white card with a purple border. Inside the card, on the left, is a circular logo with a blue 'C' and a yellow 'C'. To the right of the logo, the text reads 'Hi, Claromentis Administrator', 'To continue, first verify it's you', and 'noreply@claromentis.com'. Below this, there is a label 'HR Passcode' and a text input field with a key icon on the left. Under the input field is a purple button labeled 'Sign in to HR'. Below the button are two links: 'Forgotten passcode?' and 'Go Back'. The bottom of the page features a decorative wave pattern in purple and orange.

**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:

Admin / HR

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Data Retention

Configuration

Custom Fields

Document Types

Benefits

Roles & Rights

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

Roles

Rights

Add new role

Role	Member
HR Admin	User: Claromentis Administrator User: Pippa Fraser User: Nigel Davies User: Playground Admin
Payroll	
Managers	
Staff	

Submit

## Roles & permissions

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

Admin / HR

Permissions

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Admin Panel Access

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Benefits

Roles & Rights

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

Roles

Rights

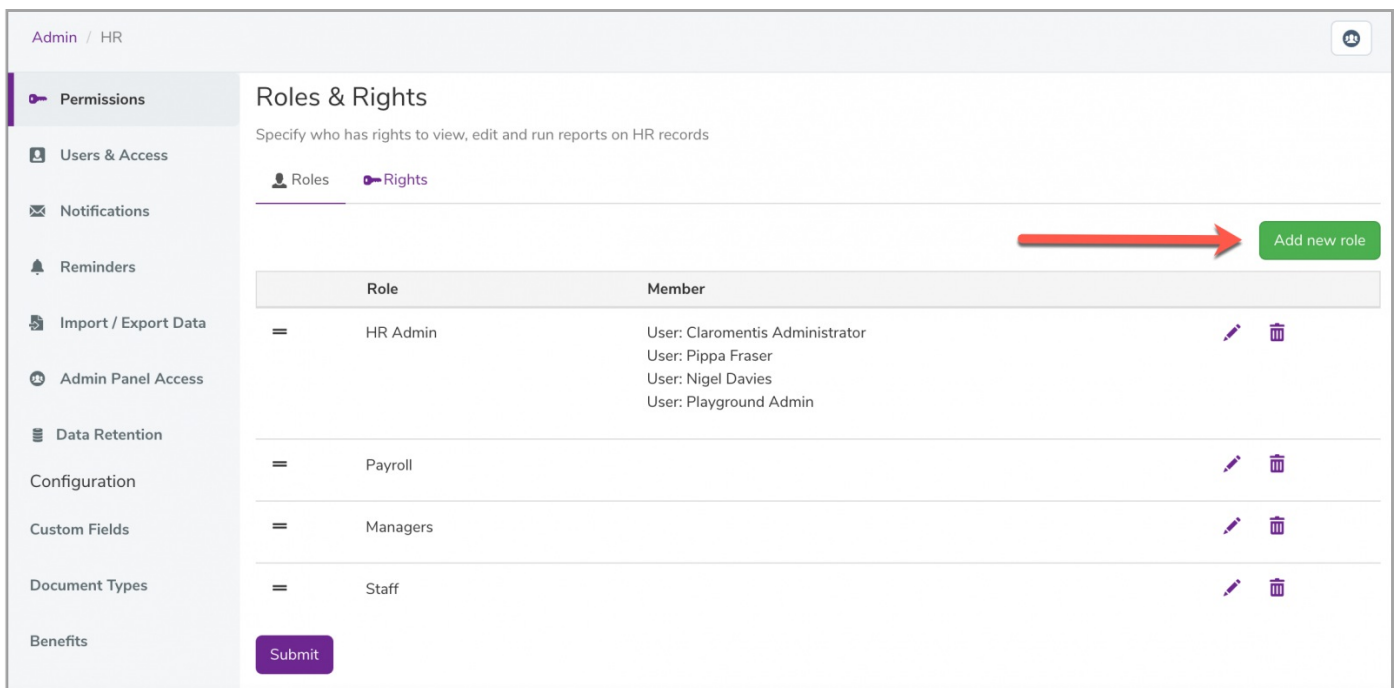
Add new role

Role	Member
HR Admin	User: Claromentis Administrator User: Pippa Fraser User: Nigel Davies User: Playground Admin
Payroll	
Managers	
Staff	

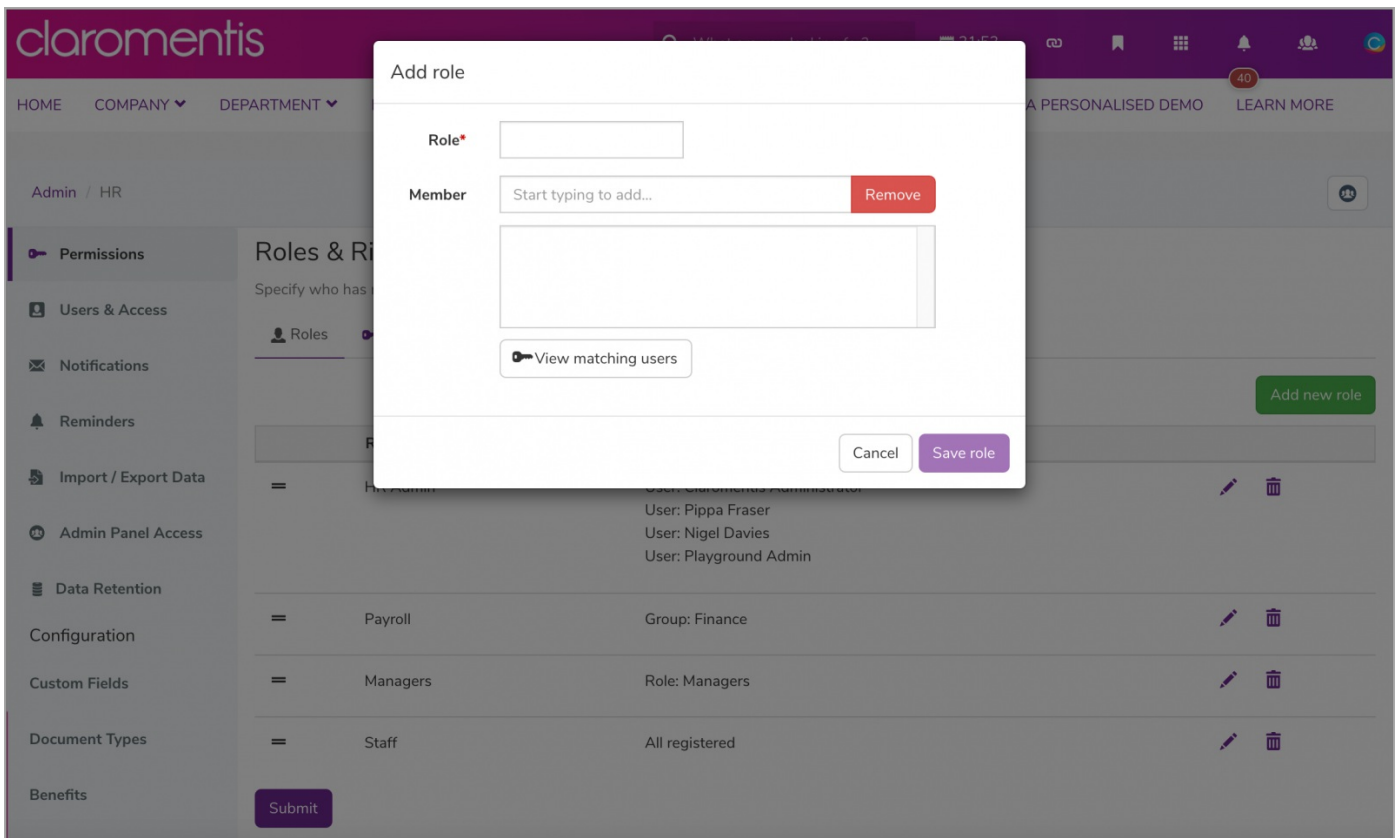
Submit

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:

Admin / HR

Permissions

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## Roles & Rights

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

Roles

Rights

Add new role

Role	Member	
HR Admin	User: Claromentis Administrator User: Pippa Fraser User: Nigel Davies User: Playground Admin	<div></div>
Payroll		<div></div>
Managers		<div></div>
Staff		<div></div>

Submit

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

claromentis

What are you looking for?

22:05

40

HOME

COMPANY

DEPARTMENT

FORMS

LEARNING

PROJECTS

BUG TRACKER

SUMMER EVENT

BOOK A PERSONALISED DEMO

LEARN MORE

Admin / HR

Permissions

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## Roles & Rights

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

Roles

Rights

Add new role

Role	Member	
HR Admin	User: Claromentis Administrator User: Pippa Fraser User: Nigel Davies User: Playground Admin	<div></div>
Payroll	Group: Finance	<div></div>
Managers	Role: Managers	<div></div>
Staff		<div></div>

Submit

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

Admin / HR

Permissions

Users & Access

Notifications

Reminders

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Roles & Rights

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

Roles

Rights

Add new role

Role	Member	
HR Admin	User: Claromentis Administrator User: Pippa Fraser User: Nigel Davies User: Playground Admin	<div><div></div><div></div></div>
Payroll		<div><div></div><div></div></div>
Managers		<div><div></div><div></div></div>
Staff		<div><div></div><div></div></div>

Submit

**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:

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Data Retention

Configuration

Custom Fields

Document Types

Benefits

Roles & Rights

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

Roles

Rights

Add new role

Role	Member	
HR Admin	User: Claromentis Administrator User: Pippa Fraser User: Nigel Davies User: Playground Admin	<div><div></div><div></div></div>
Payroll	Group: Finance	<div><div></div><div></div></div>
Managers	Role: Managers	<div><div></div><div></div></div>
Staff	All registered	<div><div></div><div></div></div>

Submit

## 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.

## Roles & Rights

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

 Roles

 Rights

	Role			
	<input type="checkbox"/> HR Admin	<input type="checkbox"/> Managers	<input type="checkbox"/> Payroll	<input type="checkbox"/> Staff
View	<div>View All</div>	<div>View Subordinate</div>	<div>View All</div>	<div>View Own</div>
Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Salary & Benefit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add/Edit Salary & Benefit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Salary & Benefit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Restricted Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View all history	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Run Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit

**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:

## Roles & Rights

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

 Roles  Rights

	Role			
	<input type="checkbox"/> HR Admin	<input type="checkbox"/> Managers	<input type="checkbox"/> Payroll	<input type="checkbox"/> Staff
View	View All ▼	View Subordinate ▼	View All ▼	View Own ▼
Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Salary & Benefit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add/Edit Salary & Benefit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Salary & Benefit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Restricted Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View all history	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Run Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit

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			
	<input type="checkbox"/> HR Admin	<input type="checkbox"/> Managers	<input type="checkbox"/> Payroll	<input type="checkbox"/> Staff
View	<div>View All</div>	<div>View Subordinate</div>	<div>View All</div>	<div>View Own</div>
Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Salary & Benefit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add/Edit Salary & Benefit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete Salary & Benefit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Restricted Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View all history	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Run Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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:

Admin / HR / Users

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Data Retention

Configuration

Custom Fields

Document Types

Benefits

Users & Access

10 entries per page

Search

1

2

3

4

5

Name	HR Email	HR Role	Status	Account
Abigail Clark		Staff	Inactive	<a href="#">Send Invite</a>
Alan Metcalfe		Staff	Inactive	<a href="#">Send Invite</a>
Alison Kelly		Staff	Inactive	<a href="#">Send Invite</a>
Amelia Jackson		Staff	Inactive	<a href="#">Send Invite</a>
Anne Wilkins		Staff, Managers	Inactive	<a href="#">Send Invite</a>
Austin Glover		Staff	Inactive	<a href="#">Send Invite</a>
Barclay Martin		Staff	Inactive	<a href="#">Send Invite</a>
Brian MacDonald		Staff	Inactive	<a href="#">Send Invite</a>
Charles Johnston		Staff	Inactive	<a href="#">Send Invite</a>
Claire Bond		Staff	Inactive	<a href="#">Send Invite</a>

Showing 1 to 10 of 69 entries

[Send an invite to all inactive users](#)



**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':

### Users & Access

10 entries per page

Search

1

2

3

4

5

Name	HR Email	HR Role	Status	Account
Abigail Clark		Staff	Inactive	Send Invite
Alan Metcalfe		Staff	Inactive	Send Invite
Alison Kelly		Staff	Inactive	Send Invite
Amelia Jackson		Staff	Inactive	Send Invite
Anne Wilkins		Staff, Managers	Inactive	Send Invite
Austin Glover		Staff	Inactive	Send Invite
Barclay Martin		Staff	Inactive	Send Invite
Brian MacDonald		Staff	Inactive	Send Invite
Charles Johnston		Staff	Inactive	Send Invite
Claire Bond		Staff	Inactive	Send Invite

Showing 1 to 10 of 69 entries

[Send an invite to all inactive users](#)

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

claromentis

HOME COMPANY DEPARTMENT

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Send Invite

A notification will be sent to 68 users to setup HR email and passcode

Send Invite Cancel

Name	HR Email	HR Role	Status	Account
Abigail Clark		Staff	Inactive	Send Invite
Alan Metcalfe		Staff	Inactive	Send Invite
Alison Kelly		Staff	Inactive	Send Invite

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

## Users & Access

10 entries per page

Search

1 2 3 4 5

Name	HR Email	HR Role	Status	Account
Abigail Clark		Staff	Inactive	Send Invite
Alan Metcalfe		Staff	Inactive	Send Invite
Alison Kelly		Staff	Inactive	Send Invite
Amelia Jackson		Staff	Inactive	Send Invite
Anne Wilkins		Staff, Managers	Inactive	Send Invite
Austin Glover		Staff	Inactive	Send Invite
Barclay Martin		Staff	Inactive	Send Invite
Brian MacDonald		Staff	Inactive	Send Invite
Charles Johnston		Staff	Inactive	Send Invite
Claire Bond		Staff	Inactive	Send Invite

Showing 1 to 10 of 69 entries  
[Send an invite to all inactive users](#)

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

claromentis

HOME COMPANY ▼ DEPARTMENT ▼

Admin / HR / Users

Permissions

Users & Access

Notifications

Reminders

Confirm Invite

A notification will be sent to the User to setup HR email and passcode

Send Invite Cancel

10 entries per page

Search

1 2 3 4 5

Name	HR Email	HR Role	Status	Account
Abigail Clark		Staff	Inactive	<a href="#">Send Invite</a>

**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;

### Users & Access

10 entries per page

Search

1 2 3 4 5

Name	HR Email	HR Role	Status	Account
Claromentis Administrator	noreply@claromentis.com	HR Admin, Staff	Active	Reset

**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.

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Last modified on 30 November 2023 by [Hannah Door](#)

Created on 21 July 2021 by [Veronica Kim](#)

Tags: [admin](#), [hr](#), [hrtool](#), [permissions](#), [user guide](#)