



HR tool configuration options

Introduction

There are three separate parts to the configuration of the HR tool admin panel:

- [Custom Fields](#)
- [Document Types](#)
- [Benefits](#)

The configuration options will reflect what can be viewed & edited from the front-end of the HR tool. Here we will go over how to set each configuration option and what it will look like from the front-end of the application.

All configuration areas can be found via **Admin > HR > Configuration**.

Custom Fields

The Custom Fields option allows for users to add up to an additional four fields to the **HR Information** and **Payroll Information** sections in the user's HR section:

Admin / HR / Custom Fields

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Data Retention

Configuration

Custom Fields

Document Types

Benefits

Custom Fields

HR Information

Visible	Field name
<input type="checkbox"/>	<input type="text" value="Custom_1"/>
<input type="checkbox"/>	<input type="text" value="Custom_2"/>
<input type="checkbox"/>	<input type="text" value="Custom_3"/>
<input type="checkbox"/>	<input type="text" value="Custom_4"/>

Payroll Information

Visible	Field name
<input type="checkbox"/>	<input type="text" value="Custom_5"/>
<input type="checkbox"/>	<input type="text" value="Custom_6"/>
<input type="checkbox"/>	<input type="text" value="Custom_7"/>
<input type="checkbox"/>	<input type="text" value="Custom_8"/>

Save

To add a new field, type the name of the field in the **Field name** and check the Visible checkbox for it to appear on the front-end:

Custom Fields

HR Information


Visible	Field name
<input checked="" type="checkbox"/>	<input type="text" value="Date of Birth"/>
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>

Payroll Information

Visible	Field name
<input checked="" type="checkbox"/>	<input type="text" value="Company Loan"/>
<input checked="" type="checkbox"/>	<input type="text" value="Employee Pension"/>
<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>

From the front-end of the HR tool, these added fields will be visible in the **Personal** and **Contract** tabs:

Human Resources Tool / Profile



Claromentis Administrator

System Administrator

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

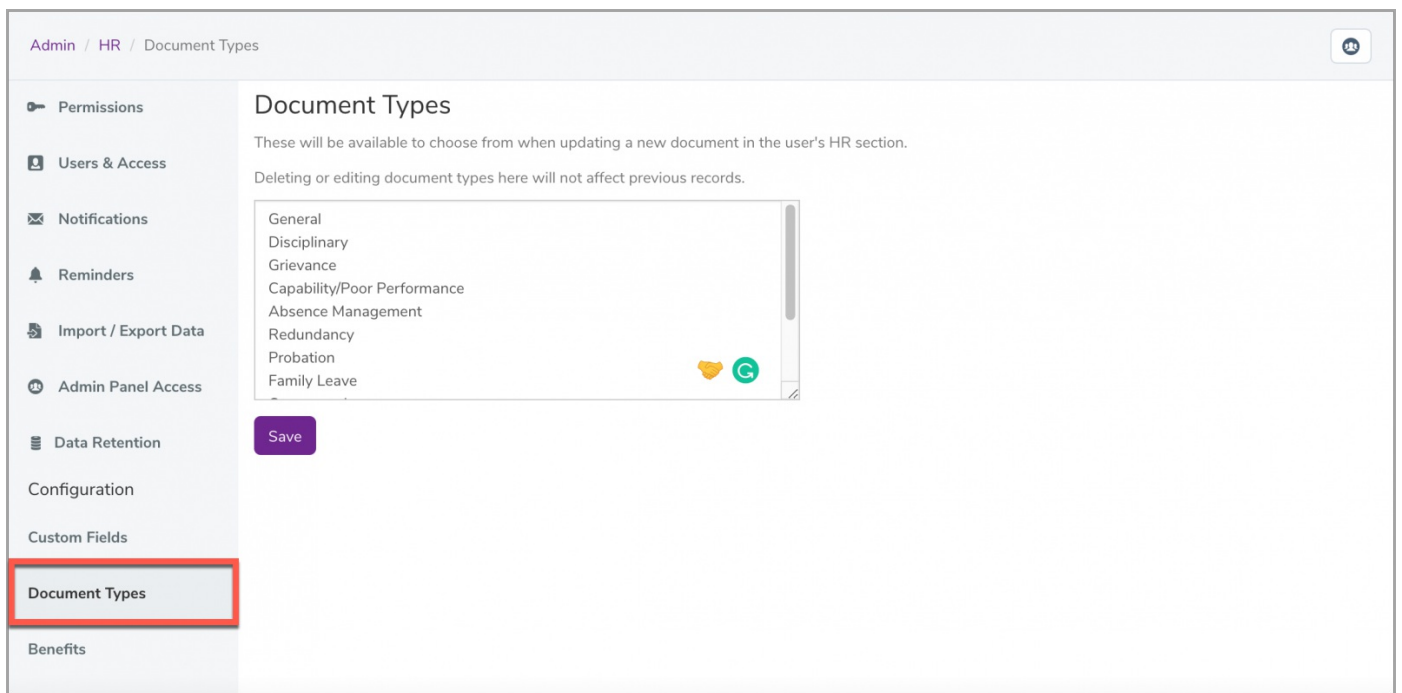
Company Loan

Data retention policy: 5 years from employment end date.

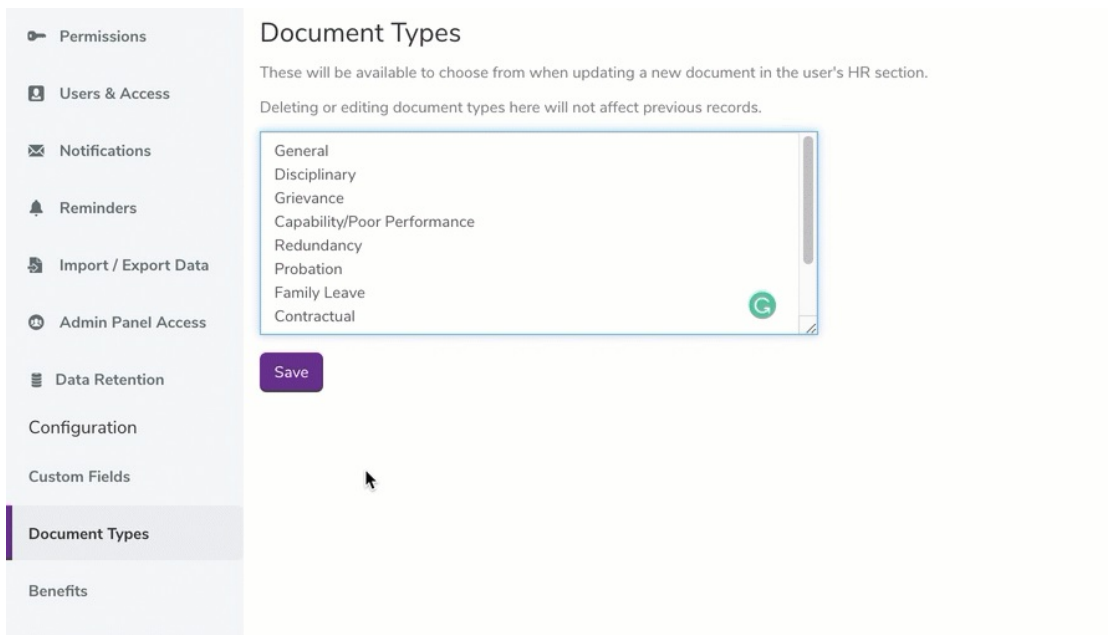
Reminder: This information will only be visible to those with permissions granted via the HR admin panel.

Document Types

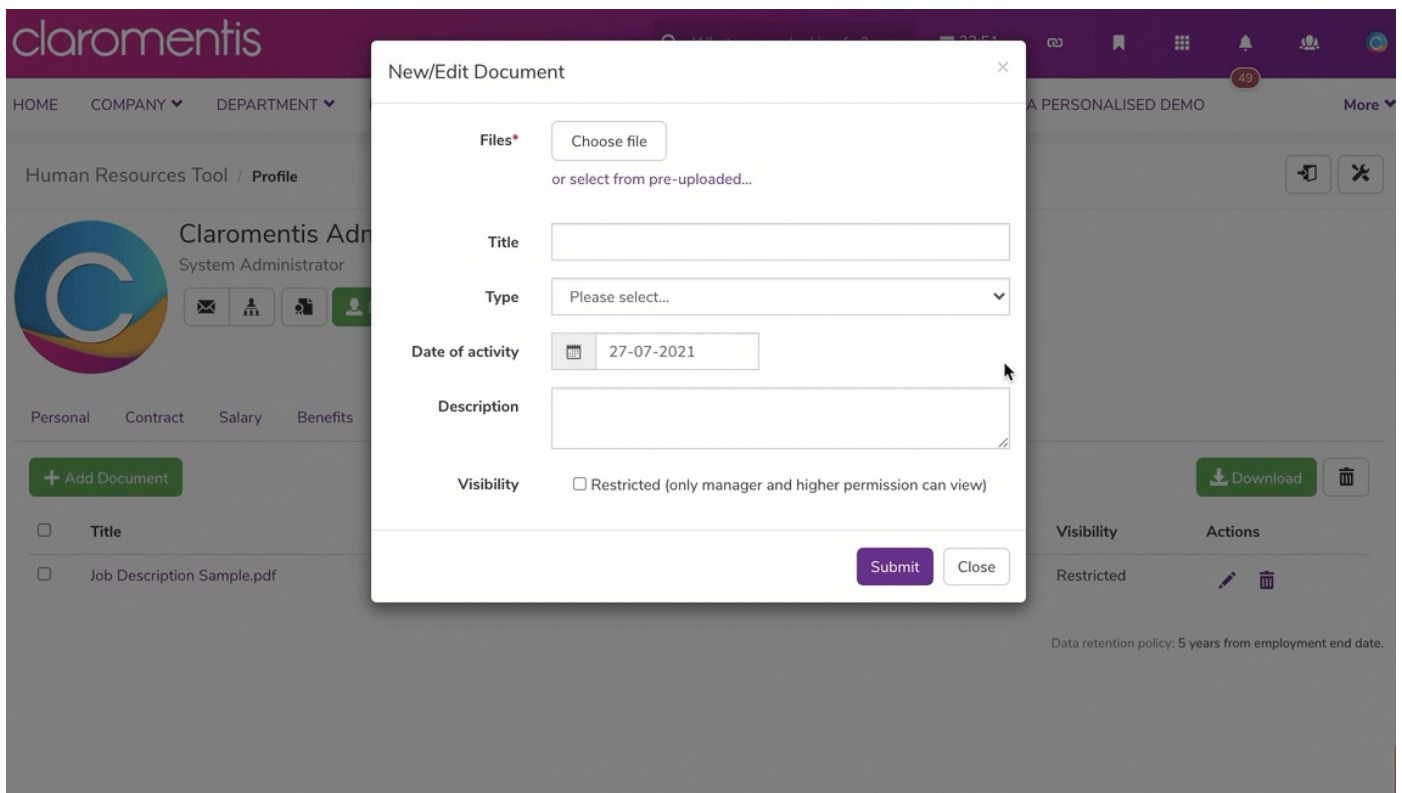
The Document Types option allows for more options to be available from the **Document Type** list when adding a document in the user's HR section:



To add or edit a new document type, enter the **Type** on the list and save the changes for it to appear on the front-end:



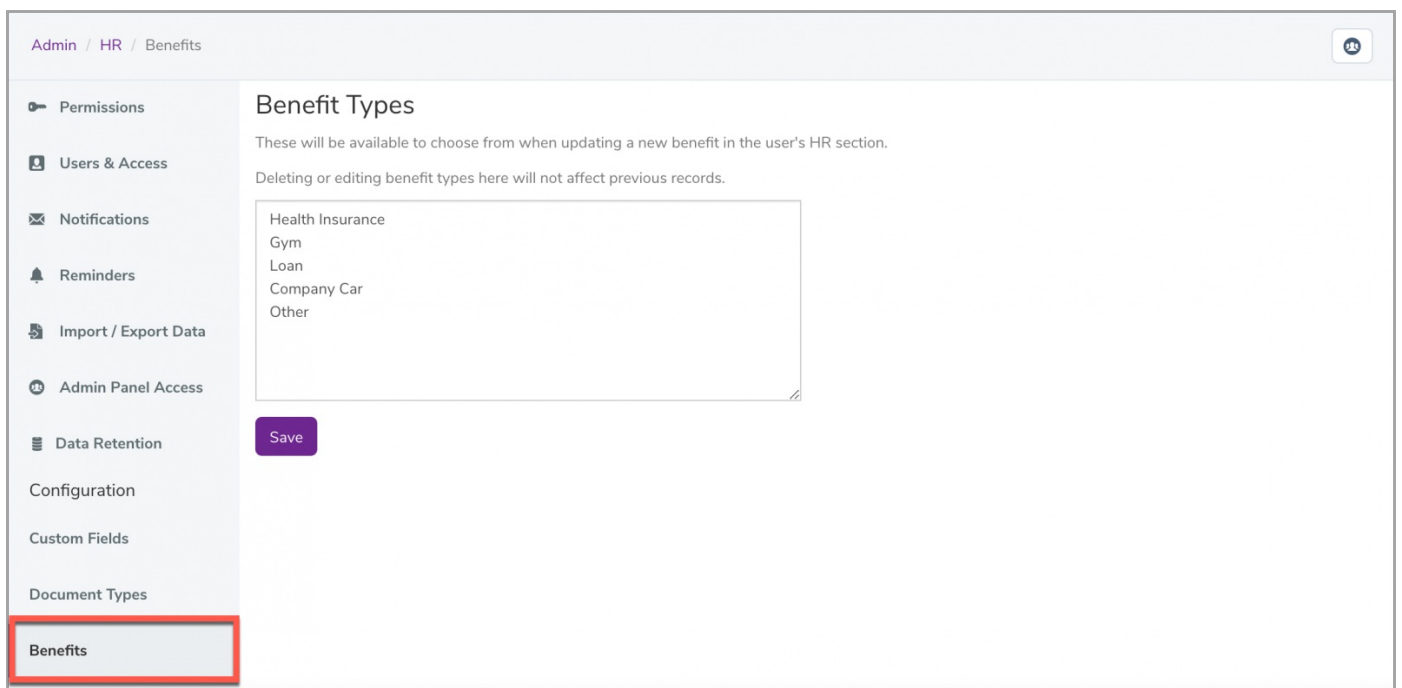
From the front-end of the HR tool, any new document type added to this list will appear with any existing options upon uploading a new document:



Reminder: Only users with permissions via the HR admin panel will be able to add, edit, and /or delete documents from the front-end of the HR tool.

Benefits

Similar to the document types, the Benefits option allows you to select additional options from the **Benefits Type** list in the user's HR section:



To add or edit a new benefit type, enter the **Type** on the list and save the changes for it to appear on the front-end:

Permissions

Users & Access

Notifications

Reminders

Import / Export Data

Admin Panel Access

Data Retention

Configuration

Custom Fields

Document Types

Benefits

Benefit Types

These will be available to choose from when updating a new benefit in the user's HR section.

Deleting or editing benefit types here will not affect previous records.

Health Insurance

Gym

Loan

Other

Save

From the front-end of the HR tool, any new added benefits will be available for users to choose from:

claromentis

HOMECOMPANY▼DEPARTMENT▼

Human Resources Tool / Profile

C

Claromentis Admin

System Administrator

✉

👤

📄

👤

Personal

Contract

Salary

Benefits

Benefits

Type	Supplier	Description	Start Date	End Date	Actions
Gym	The Gym		21-07-2021		<div>✎</div> <div>🗑</div>
Health Insurance	Blue Health Insurance	To be reviewed and renewed annually	01-03-2021		<div>✎</div> <div>🗑</div>

Data retention policy: 5 years from employment end date.

New/Edit Benefit

Type*

Please select...

Supplier

Start Date

27-07-2021

End Date

Description

SubmitClose

+ New Benefit

Reminder: Only users with permissions via the HR admin panel will be able to add, edit, and /or delete benefits from the front-end of the HR tool.

To find out more about HR permissions, check out our guide [here](#).

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

Created on 27 July 2021 by [Veronica Kim](#)

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