



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:

The screenshot shows the 'Custom Fields' configuration page in the HR tool admin panel. The page is titled 'Admin / HR / Custom Fields'. On the left, there is a navigation menu with options: Permissions, Users & Access, Notifications, Reminders, Import / Export Data, Admin Panel Access, Data Retention, Configuration, Custom Fields (highlighted with a red box), Document Types, and Benefits. The main content area is divided into two sections: 'HR Information' and 'Payroll Information'. Each section has a 'Visible' checkbox and a 'Field name' input field. Under 'HR Information', there are four custom fields named Custom_1, Custom_2, Custom_3, and Custom_4. Under 'Payroll Information', there are four custom fields named Custom_5, Custom_6, Custom_7, and Custom_8. A 'Save' button is located at the bottom left of the main content area.

Section	Visible	Field name
HR Information	<input type="checkbox"/>	Custom_1
	<input type="checkbox"/>	Custom_2
	<input type="checkbox"/>	Custom_3
	<input type="checkbox"/>	Custom_4
Payroll Information	<input type="checkbox"/>	Custom_5
	<input type="checkbox"/>	Custom_6
	<input type="checkbox"/>	Custom_7
	<input type="checkbox"/>	Custom_8

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		Payroll Information	
Visible	Field name	Visible	Field name
<input checked="" type="checkbox"/>	<input type="text" value="Date of Birth"/>	<input checked="" type="checkbox"/>	<input type="text" value="Company Loan"/>
<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text" value="Employee Pension"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<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

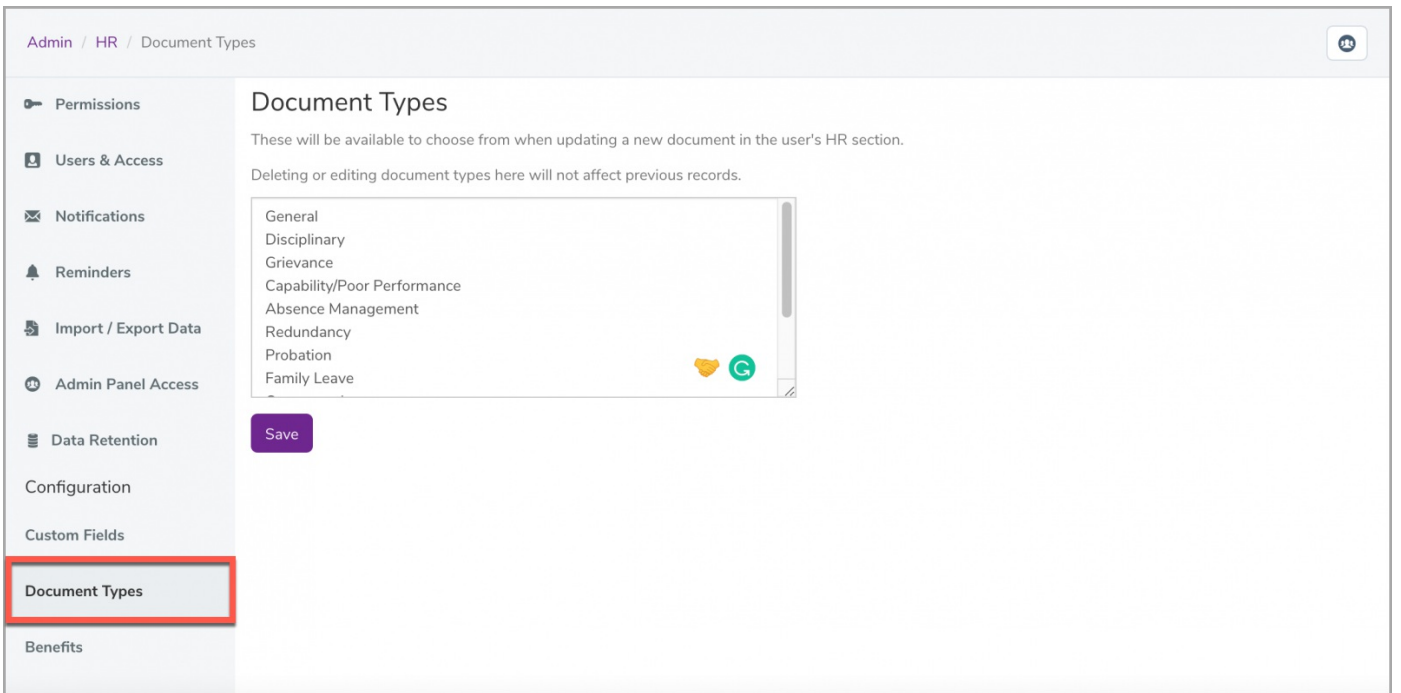
Company Loan

Data retention policy: 5 years from employment end date.

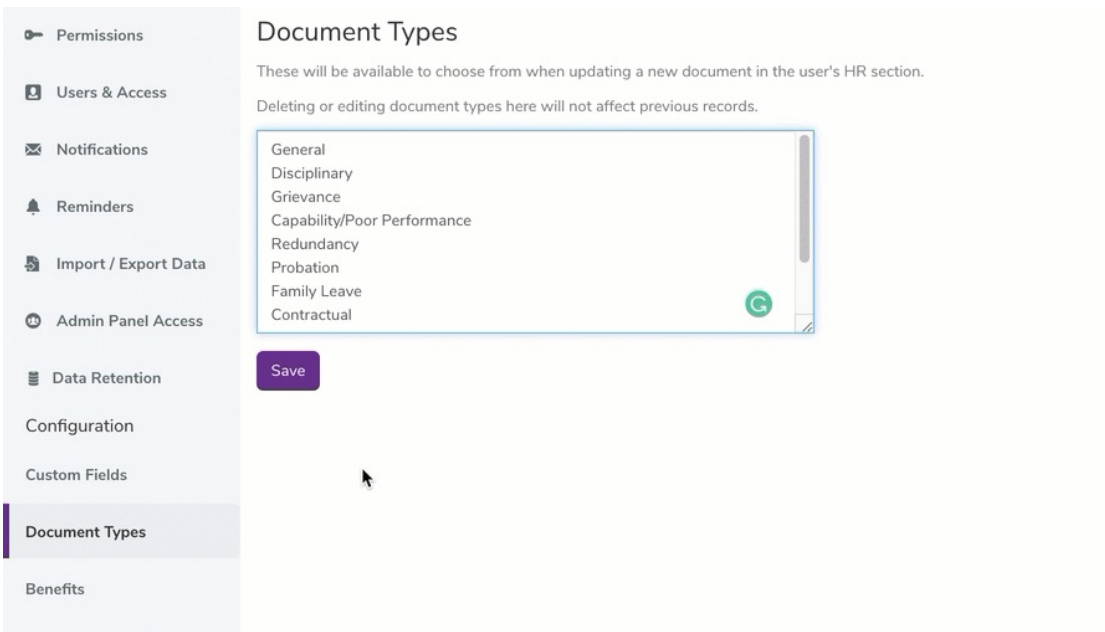
Reminder: This information will only be visible to those with permissions granted via the HR admin panel.

Document Types

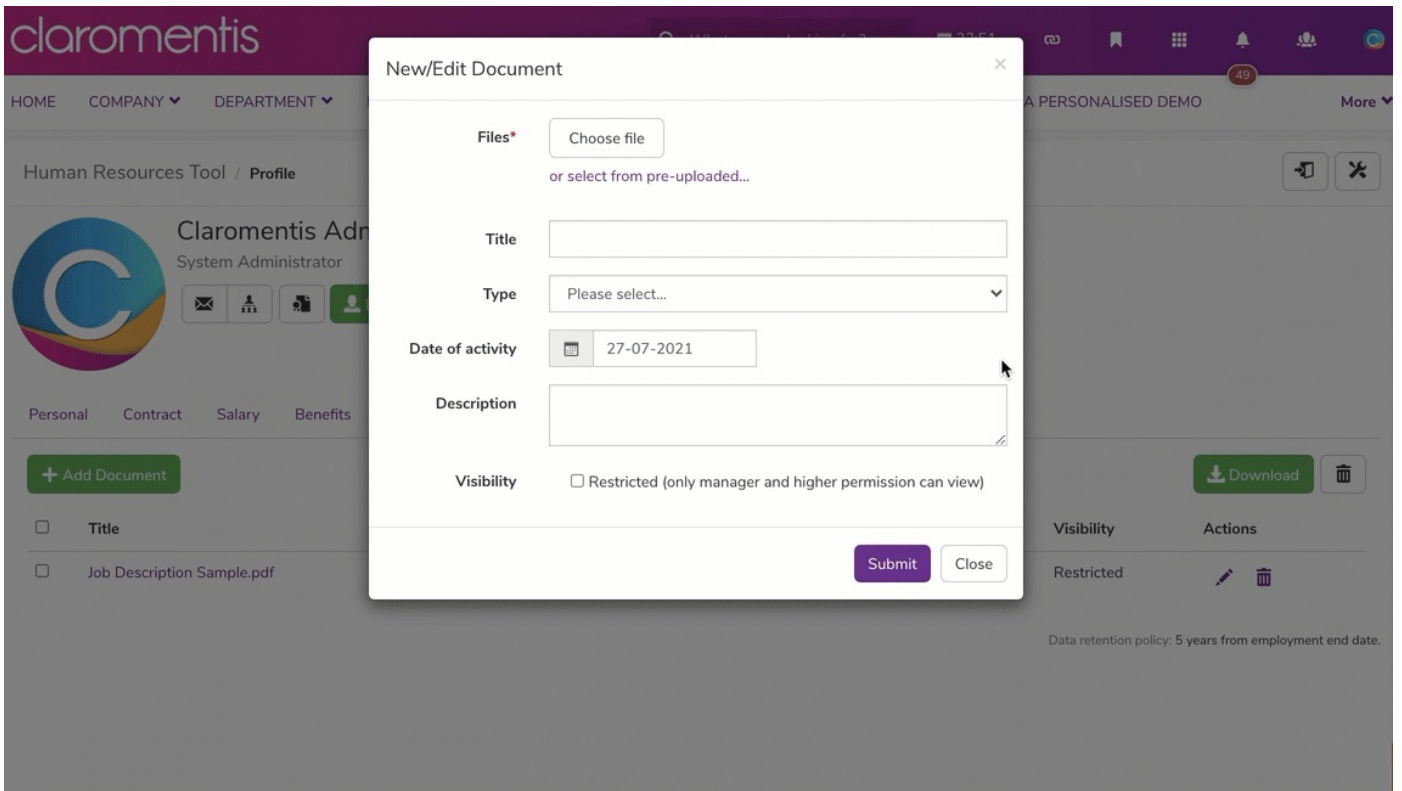
The Document Types option allows for more options to be available from the **Document Type** list when adding a document in the user's HR section:



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:



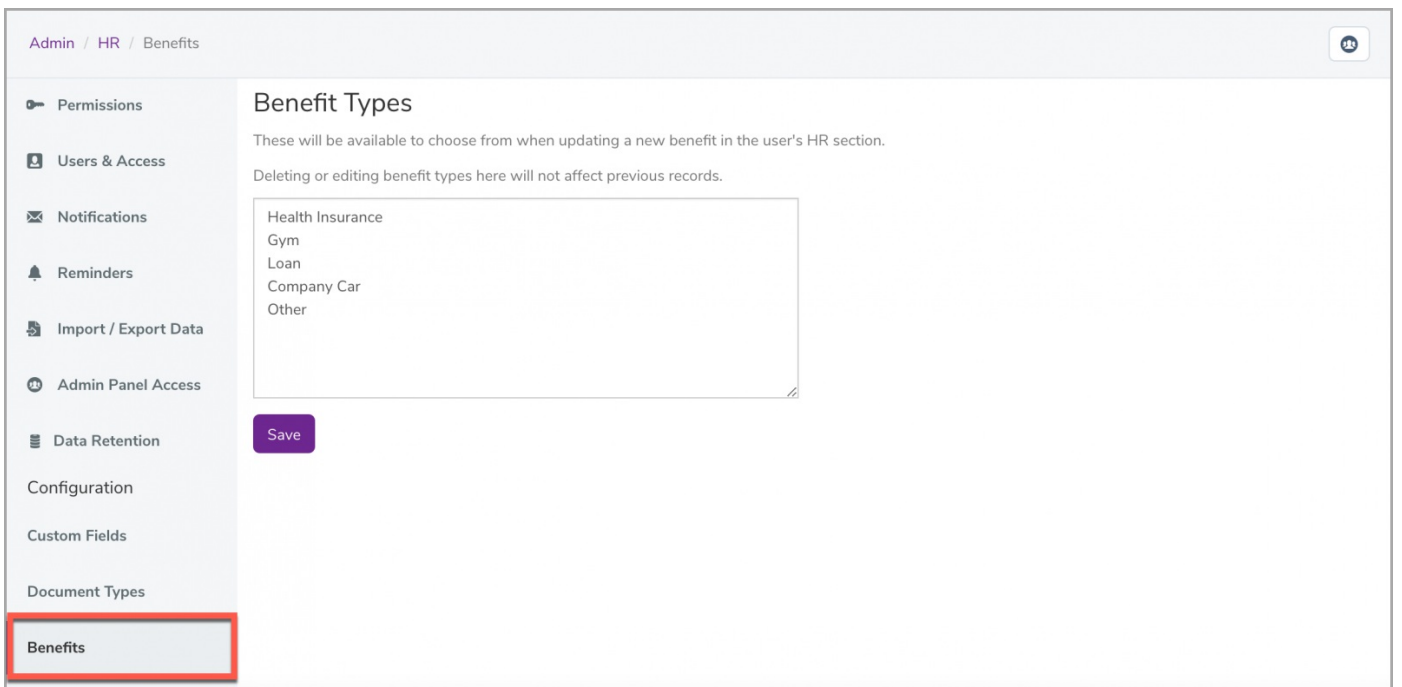
From the front-end of the HR tool, any new document type added to this list will appear with any existing options upon uploading a new document:



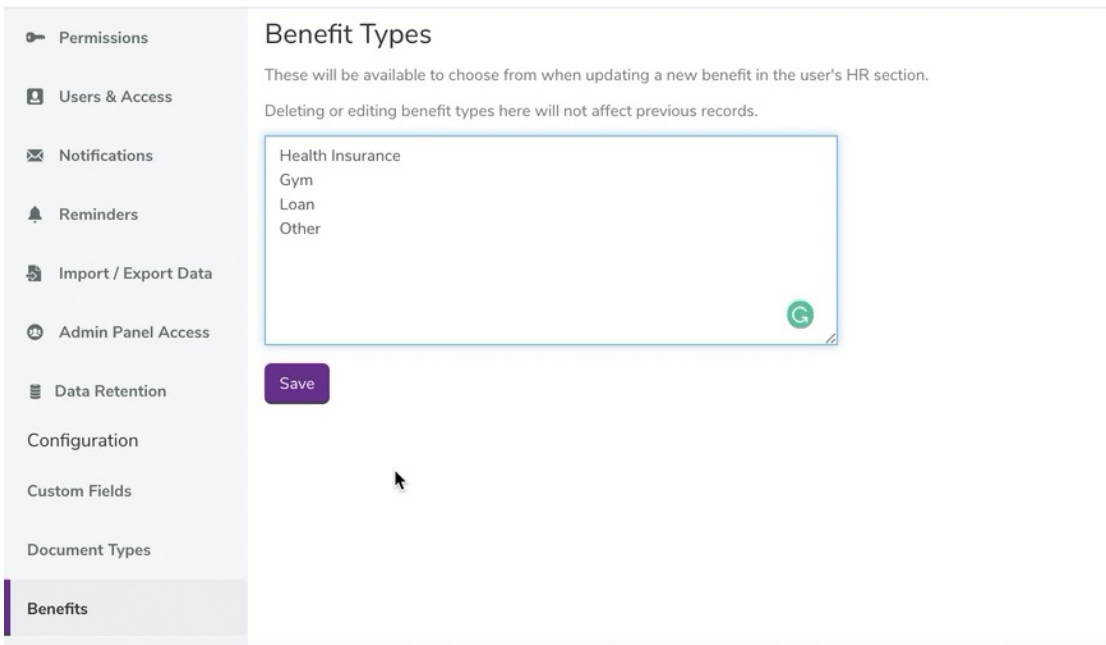
Reminder: Only users with permissions via the HR admin panel will be able to add, edit, and /or delete documents from the front-end of the HR tool.

Benefits

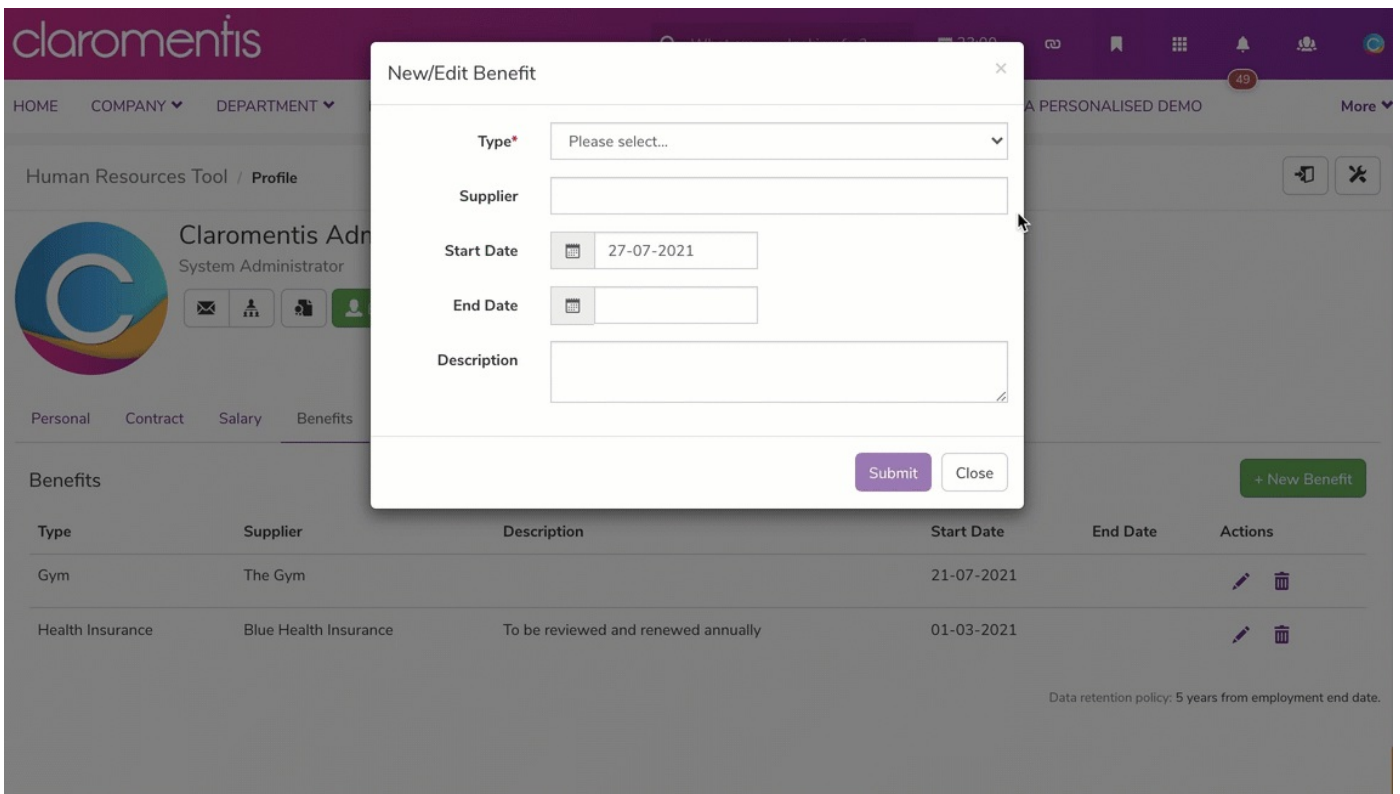
Similar to the document types, the Benefits option allows you to select additional options from the **Benefits Type** list in the user's HR section:



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:



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



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](#)

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