Link to article: https://discover.claromentis.com/knowledgebase/articles/827/hr-tool-configuration-options



Introduction

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

- <u>Custom Fields</u>
- 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 Field	s					٢		
Permissions	Custo	m Fields						
Users & Access	HR Infor	HR Information 🖲			Payroll Information ()			
Notifications	Visible	Field name	Visi	ible	Field name			
Notifications		Custom_1			Custom_5			
Reminders		Custom_2			Custom_6			
🗴 Import / Export Data		Custom_3			Custom_7			
Admin Panel Access		Custom_4			Custom_8			
Data Retention	Save							
Configuration	Save							
Custom Fields								
Document Types								
Benefits								

Custom Fields							
HR Information ()		Payroll Information 📵					
Visible	Field name	Visible	Field name				
	Date of Birth		Company Loan				
			Employee Pension				
Save							

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

Human Resources Tool /	Profile				× 0
System A	mentis Administrato Administrator	rofile			
Contract Details			Payroll Information		
Terms	Permanent Fixed-Term		Pay date		
Start Date			Is director	⊖ Yes ⊚ No	
Continued Service Start Date			Student Loan	⊖ Yes ● No	
End Date			Company Pension	⊖ Yes No	
End Date			Company Loan 🖲		
Probation End					
Employment Expiry					
Permit/Visa Required	⊖ Yes ● No				
Permit/Visa Expiry					
Notes					
Submit Cancel				Data retention policy: 5 years from em	ployment 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:

Admin / HR / Document Ty	/pes	•
Permissions	Document Types	
Users & Access	These will be available to choose from when updating a new document in the user's HR section. Deleting or editing document types here will not affect previous records.	
Motifications	General Disciplinary	
Reminders	Grievance Capability/Poor Performance	
Import / Export Data	Absence Management Redundancy	
Admin Panel Access	Probation 🤛 🤤 G	
Data Retention	Save	
Configuration		
Custom Fields		
Document Types		
Benefits		

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:

 Permissions 	Document Types
Users & Access	These will be available to choose from when updating a new document in the user's HR section. Deleting or editing document types here will not affect previous records.
Notifications	General
Reminders	Disciplinary Grievance Capability/Poor Performance
Import / Export Data	Redundancy Probation
Admin Panel Access	Family Leave G
Data Retention	Save
Configuration	
Custom Fields	*
Document Types	
Benefits	

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:

claromentis	New/Edit Deeres		X		R			. <u>(0)</u> .	
	New/Edit Docum				NALISED	DEMO	-49-		More N
Human Resources Tool / Profile	Files*	Choose file or select from pre-uploaded						P	*
Claromentis Adr System Administrator	Title								
	Туре	Please select	~						
	Date of activity	27-07-2021	ħ						
Personal Contract Salary Benefits	Description								
+ Add Document	Visibility	Restricted (only manager and higher permission can view					🛃 Downl	oad	Ē
Title				Visil	oility	,	Actions		
Job Description Sample.pdf		Submit Clo	ose	Rest	ricted		/ 💼		
				Data r	etention pol	icy: 5 yea	s from emp	oloyment e	end date.

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:

Admin / HR / Benefits		٠
Permissions	Benefit Types	
Users & Access	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.	
Notifications	Health Insurance Gym	
Reminders	Loan Company Car	
Import / Export Data	Other	
Admin Panel Access		
Data Retention	Save	
Configuration		
Custom Fields		
Document Types		
Benefits		

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	Benefit Types
Users & Access	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.
Motifications	Health Insurance Gym
Reminders	Loan Other
Import / Export Data	
Admin Panel Access	G
Data Retention	Save
Configuration	
Custom Fields	•
Document Types	
enefits	

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

clarome	entis	New/Edit Benefit		×		R		•	<u>.@1</u>	
		Herry Edit Benefit			A PERSON	ALISED	DEMO	49		More
Human Resource		Type*	Please select	~					P	×
		Supplier							Ľ	~
	Claromentis Adn System Administrator	Start Date	27-07-2021							
		End Date								
		Description								
Personal Contrac	t Salary Benefits			le						
Benefits				Submit Close				•	New Ben	efit
Туре	Supplier	Descr	iption	Start Date	E	ind Date		Action	s	
Gym	The Gym			21-07-2021				1	Ō	
Health Insurance	Blue Health Insurance	ce To be	reviewed and renewed annually	01-03-2021				1	Ō	
					Data rete	intion poli	icy: 5 years	s from en	nployment e	and date.

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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