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.

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