sesame

General configuration and workplaces

Your company's most valuable information in one tool.

Sesame Time

Sesame Advanced

HR Starter

Professional Plan

Enterprise Plan

File for the administrator

Hello!

Welcome to Sesame, the software that simplifies HR management.
In this file, we will explain what the functionality "**General Configuration and Workplaces**" is and how you can set it up in your dashboard.
We will take you step by step, so don't worry. We are here to help you with whatever you need!

Content

1. Configuration

The configuration section is the backbone of Sesame. Here you can set up everything related to **schedules, holidays, absences, automations**… In addition, here you can manage general configuration aspects such as **departments, roles** or **workplaces**. Shall we start?

1.1. General configuration

Go to the left bottom and click on “**Configuration**”, you will be able to:

- Edit general company information and tax information.

- Limit some features.

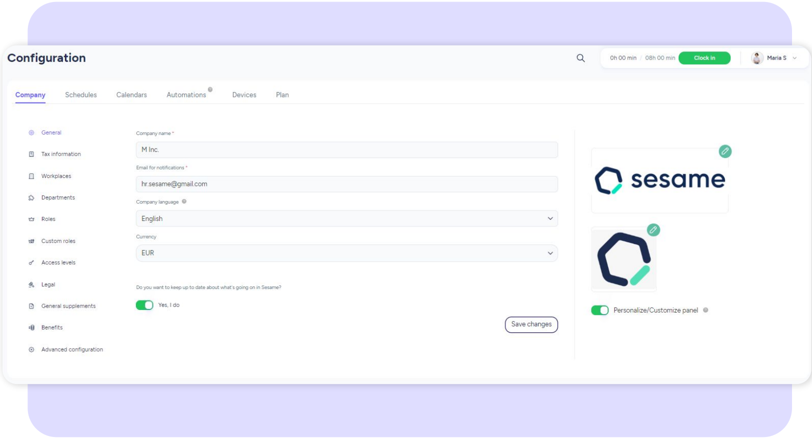
- Create and assign departments.

- Assign roles and access levels to employees.

- Create general supplements.

- Upload legal documents

- Create benefits and make advanced configuration settings

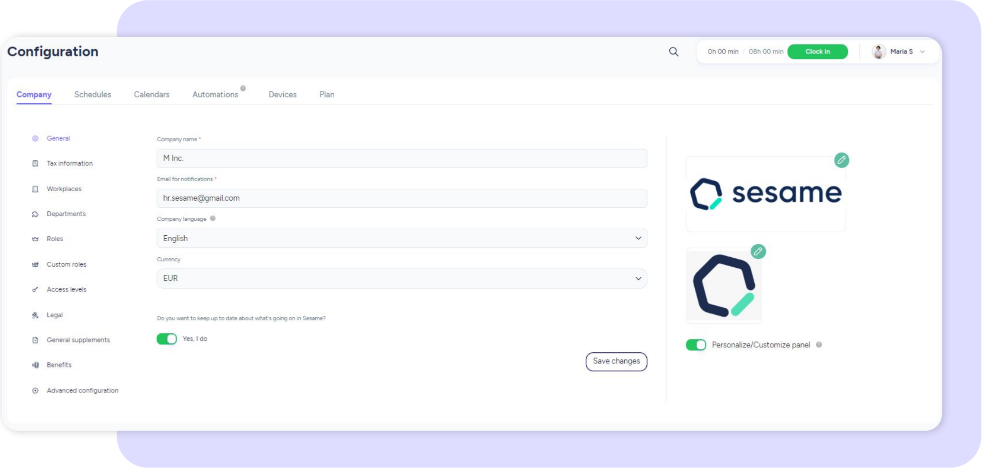


General Company Configuration

Company configuration >> Company >> General

In this section you can upload your company's logo and **customise** some features. Additionally, you can enter your desired email for account-related notifications and choose the default language.

Is your staff from multiple countries? Don't worry! Even if you set a default language for the account, employees will be able to change the language of their profile later on.



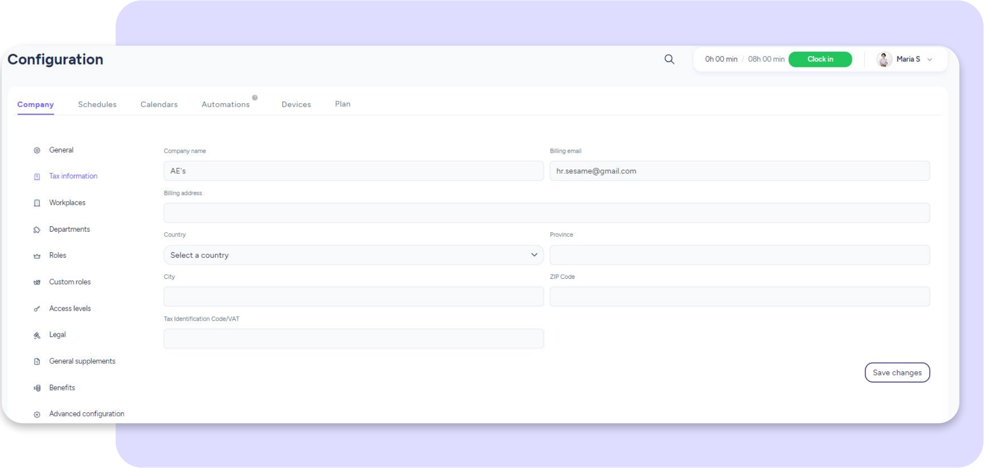
2. Tax information

Company configuration >> Company >> Tax information

In this section, you can enter complete and accurate details of your company's essential tax information.

Make sure you have the most up-to-date and accurate information about your company's tax:

- **Company name**
- **Billing email**
- **Billing address**
- **Country**
- **Province**
- **City**
- **ZIP Code**
- **Tax identification code/VAT**



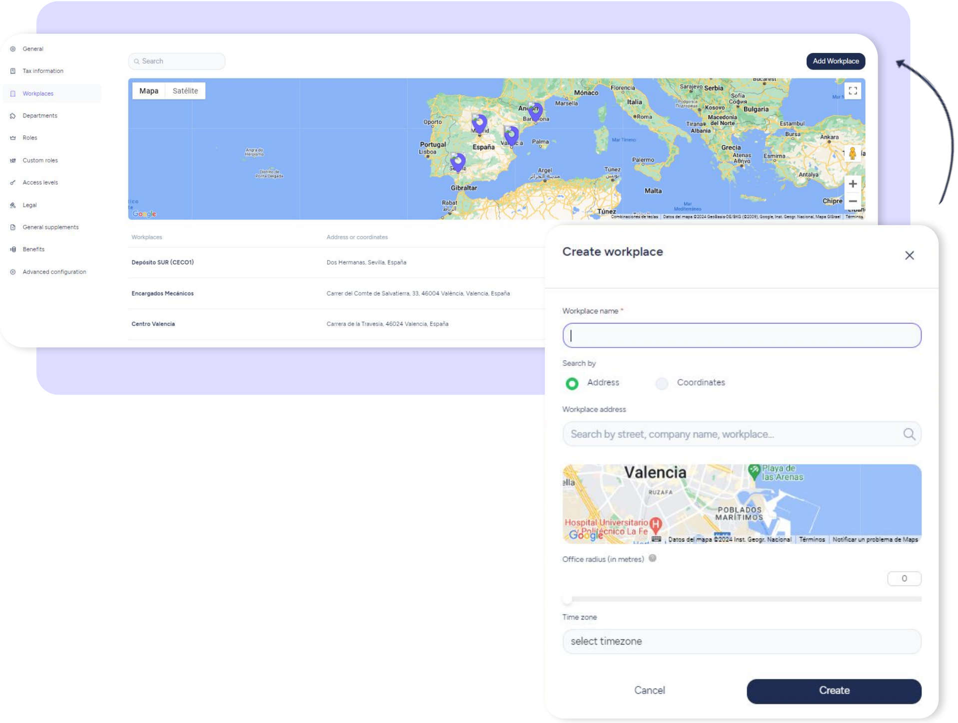
2. Workplaces

Configuration >> Workplaces >> Add workplace

Does your company have multiple offices or sites located around the world? In Sesame you can enter all workplaces and add their location and timezone. Once added, they will appear on the map and you will see each workplace's information.

Configuration >> Company >> Workplaces >> Click on "Employees"

Do you need to add staff members to an office? To **add employees** to a workplace, just go to the employee column and click on the number you see. Select the employees you want to assign from the drop-down menu and click on **"Assign employees"**

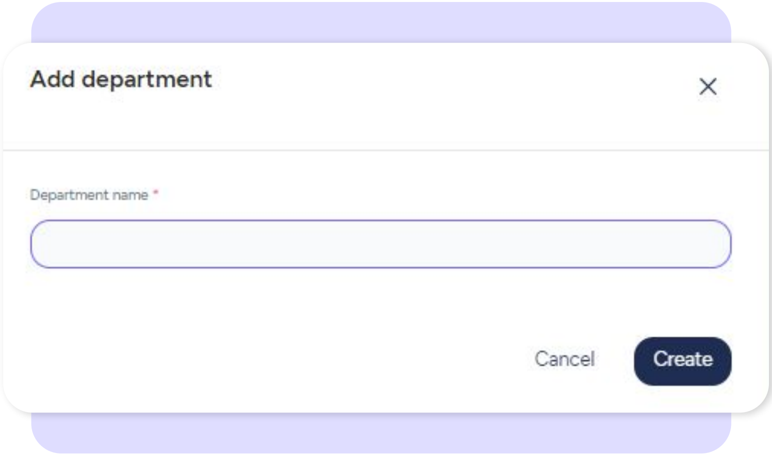


4. Departaments

Configuration >> Company >> Departments >> Create department

In this section, you can create the departments that your company has. Once you set them up, you will see a list with the department names. If you click on "**Employees**", you can add the users that belong to this department.

Are there employees that perform multiple tasks in different areas? Don't worry! Each employee can belong to as many departments as you need. Practical, right?



4. Roles

4.1. Higher roles

Owner
This role will be assigned by default to the account creator. This person may access all functionalities and has complete permissions, full visibility and editing power over all employees in the account. It is the only role than can manage company groups. Therefore, it is the only one that will be able to assign business roles and generate new companies.

Administrator
It will have the same visualizing and editing power over employees as the owner but not be able to manage company groups. This is the main difference with the owner. By default it will have the "Payroll" section locked until permission to access it is granted.

HR
This role is intended for request validation, both for holidays and time off and clock ins/outs.
It is responsible for the management of all these requests unless there is a person in charge assigned to do it.

In terms of accessibility, it has the same accessibility as the administrator.

The HR chat is also their responsibility. This chat, once installed, can only be viewed by this role. Users with the HR role are responsible for handling conversations with employees who use the chat.

4.2. Lower roles

Manager

This role has the same rights as the administrator. The only difference is that managers will be able to manage employees that are not assigned to any department or workplace.

Workplace manager

A workplace manager can create new users, set up their employee profiles, holidays, schedules, workdays etc. They will also manage their team's issues and requests from the employees in the workplaces they administrate.

Department manager

A department manager can create new users, set up their employee profiles, holidays, schedules and workdays. They will also manage their team's time off, holidays and clocks ins/outs from employees in the workplaces they administrate.

Employee

All employees except for the first owner will be created with this role by default, although later they can be assigned any other type of role. Employees will only be able to clock in/out, request holidays and time off, track time for tasks and projects, respond to evaluations or check their individual information.

4.3. Lower roles

Custom roles are roles that are directly given to an employee to carry out a very specific function.

Communicator
This role can send announcements to all staff members through Announcement section.

System manager

The system manager is responsible for the whistleblowing channel and for managing all irregularities reported through the channel.

Project Administrator

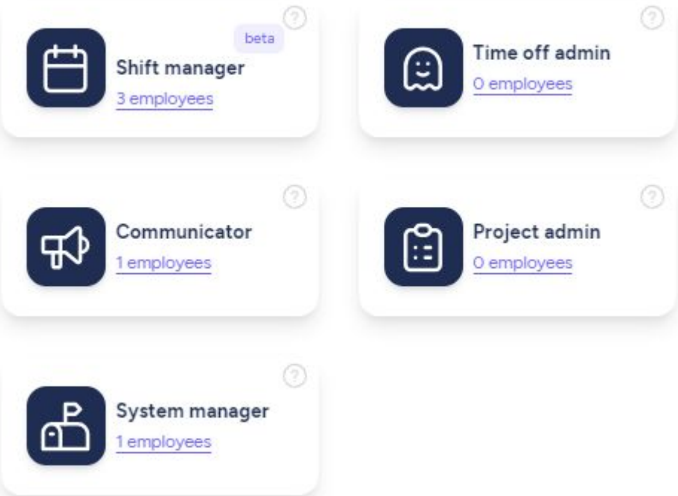
The employee assigned this role will be enabled to use the Tasks functionality and will be able to view all the projects under his administration.

Time off Administrator

This role is responsible for managing time off that has been previously configured as specific time off.

Shift manager

Any employee can be assigned this role, regardless of having other roles assigned to them or not. The administrator will configure which employees can manage the schedules and then choose which users they will manage the schedules for.



5.1. How to assign roles in a team step by step?

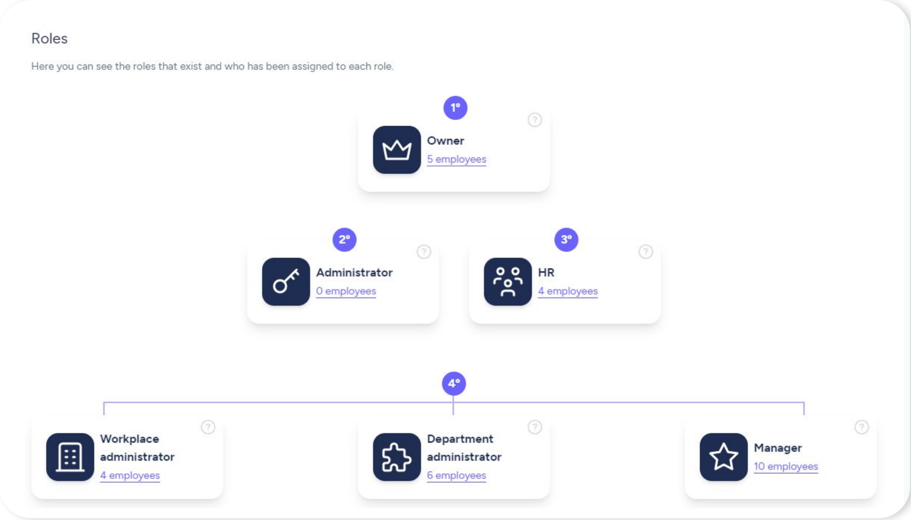
Configuration >> Company >> Roles >> Click on X employees >> Assign

Next to each role, there is a "**+**" symbol. You have to select the employees to whom you are going to assign this role from the list and in which departments.

If you want a role to be assigned to all departments, just click on "**All departments**" and then on "**Apply role**". It is that easy and simple to create roles associated with different areas and departments.

Configuration >> Company >> Advanced configuration >> Labour agreements >> Add labour agreement

Here you may simply add the labour agreements that exist in your company and apply them to employees. Create as many as you need to! **Add a labour agreement** by entering its name, code and total annual hours. Once created you can assign it to the corresponding employees.



Company group

In case you have a company group you can create it following these steps: activate “company group”, add its name and click on “Update”. From then on, the "**Companies**" section will appear on the left bar. In this section you can create as many companies as you need and assign roles to employees of each of them.

6. Access levels

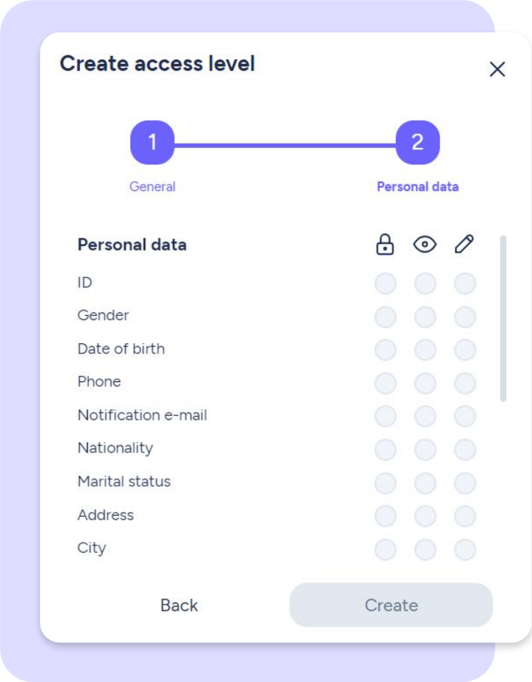
Create different access levels and decide which of your employees' **personal information** will be available to the **lower roles**.

Go to **Settings >> Company >> Access Levels**.

Enter the name and description and choose the information that the roles can access.

This is the data you can choose what kind of access they have:

- ID
- Gender
- Date of birth
- Phone
- Notification email
- Nationality
- Marital status
- Address
- City
- Province
- ZIP code
- Country
- Business Phone
- Emergency contact
- Personal email
- Employee origin
- External employee ID



For each of these you can choose one of three options: **blocked** (padlock), **with access to see** (eye) and **with edition permits** (pencil).

Select "**Create**" to finalise the creation of this new access level. Once the configuration has been created, the new access level will appear alongside the other access levels already created.

Select the one you are interested in and assign it to the employees through the "**Add employee**" icon.

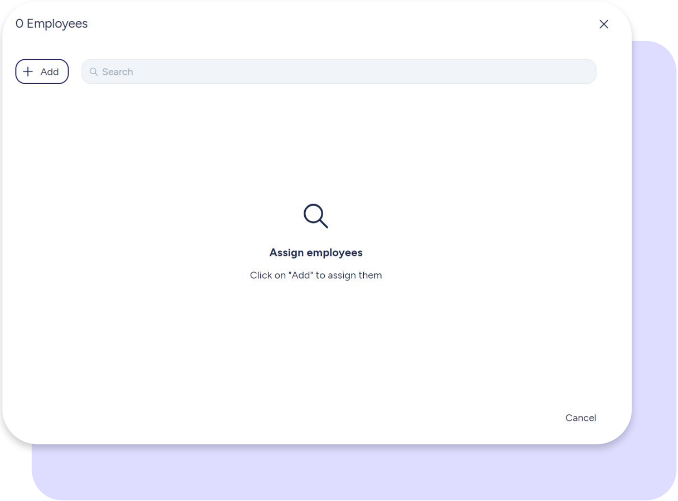
You can always **delete** the configuration you created.

How will data be displayed to lower roles depending on the type of configuration?

- **Blocked data**: lower roles will see asterisks.
- **With access to see**: they will see data in a faint colour.
- **With edition permits**: they will see data and will be able to edit it.

7. Legal

In this section you can view all legal documents related to your Sesame subscription.



8. General supplements

Configuration >> General supplements

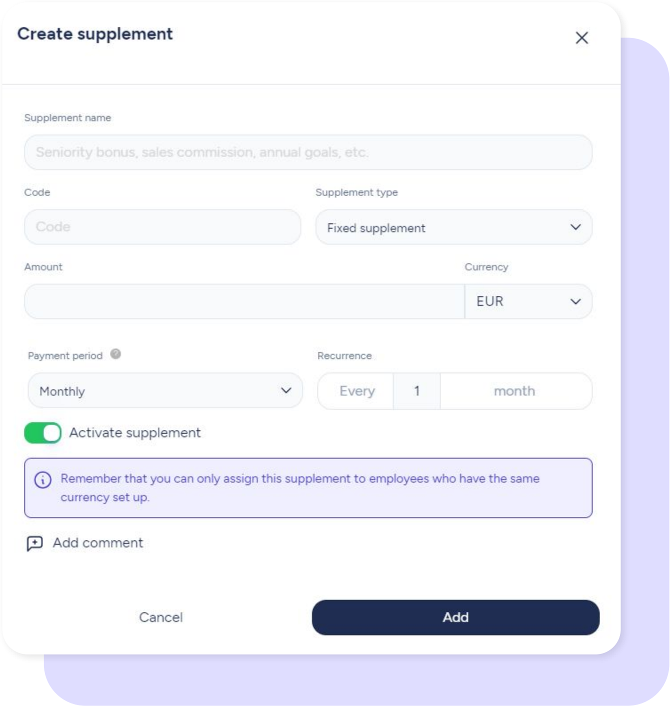
Create general supplements and assign them to your employees when necessary.

Create a general supplement by accessing **Configuration > General supplement > Create supplement > Fill out the fields > Add.**

The supplement will appear in the list along with the other general supplements.

You can then assign a general supplement to an employee from Contracts in their employee profile.

Keep in mind that you can only assign a supplement if it's set up with the same currency and payment period as the employee's payment conditions.



9. Advanced configuration

Configuration >> Advanced configuration

Labour law

Sesame adapts to your country's legislation with custom tools. You can also manually activate or deactivate each functionality regardless of your country.

Labour agreements

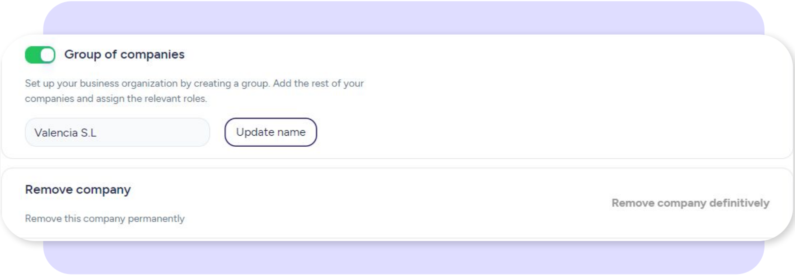
From the agreements section you can configure all labour agreements in your company and apply them to your team. Click on "**Add**" and start configuring your agreements. You can then assign them to your team from the "**Employees**" column.

Group of companies

Do you have multiple companies? In this section you may create your own group of companies. Add the group's name and click on "Update name".

Remove company

Here you can permanently delete your company from Sesame. To avoid errors, the system will ask you for a second confirmation before deleting your company.



Grow your company.
Empower your team!

Do you still have questions? In our help center you can find many resolved queries. If that's not enough, we'd love to hear from you!

Contact us, we are just one phone call away: **+34 96 062 73 51**.

Email us, we will reply as soon as possible: **soporte@sesametime.com**