sesame

Sesame Advanced

HR Starter

Plan Professional

Plan Enterprise

Document management

Optimise your company's document management

File for the administrator

Hello!

Welcome to Sesame, the software that simplifies HR management.
In this file, we will explain what “**Document management**” is and how you can install this 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. General folders

Employees' documents are a really valuable asset for your company. It is therefore essential that they are properly organised. In Sesame, you will find two types of folders for storing and sharing your employees' documents.

Firstly, there are the general folders that are created by default.

Go to the menu on the left and search for the tool "Documents" and access "General".

In order to upload documents to each of these folders, click on "**Upload documents**", select the folder in which you want to upload the files and assign it to the corresponding employee.

The same document can be sent to the employee you choose through general folders. Once the file is uploaded, it is stored in each employee folder.

Tickets: it groups all tickets, receipts, invoices and other expenses associated with your employees' work activity like trips, meals, trainings, etc.

Payrolls: it imports on a large scale the payslips of all your employees so that they can access them at any time.
Labour documents: stores all work-related documents of employees. For instance: contracts, qualification certificates, etc.

Supporting documents: all doctor appointment, sick leave or work absence related documents that either employees or administrators upload will be saved here.

Clock in/out pictures: pictures taken during clock in/out through tablet will be stored here.

2. Share documents and custom folders

Custom folders are those that you can adapt to your company's needs. You may create as many as you want by following this path:

Documents >> Shared >> Create folder

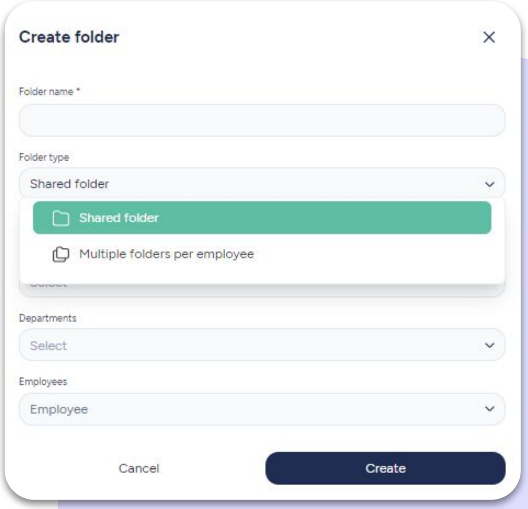
When creating new custom folders, you can create **shared** folders for multiple employees or create individual folders that will be displayed in each employee's profile (**multiple folders per employee**). When you create multiple folders, you can configure it to be a hidden folder for the employee. The higher roles will see it in the employee's profile, however, the employee will not be aware that this folder exists.

Keep in mind that you can send one or more documents to **the entire company** if you click on **Assign to the entire company**.

Before loading documents, it is important that the pertinent folder, where you want to store it, had been created before.

The same document can be sent to the employee you choose through general folders. Once the file is uploaded, it is stored in each employee folder.


Hide for the employee



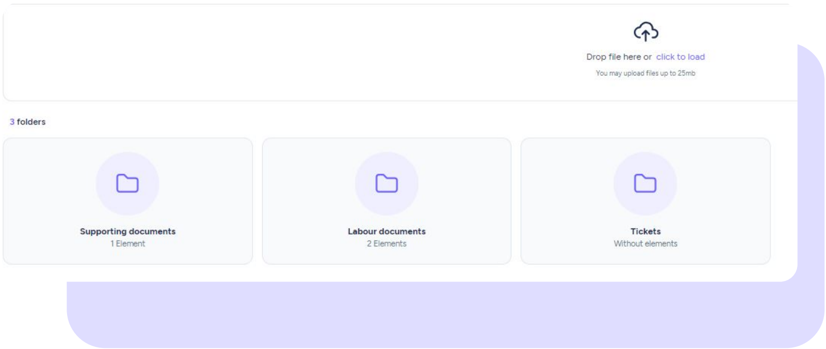
3. Bulk Sending

Through "documents" it is possible to send an extense file to several employees. When uploading a PDF document, the system will cross the type of identification to get the part of the document that corresponds to each employee.

Files >> Bulk sending >> Load documents

The following folders will be available:

- Supporting documents
- Labour documents
- Tickets



4. Document templates

In the Document Templates section of the Document Manager, you will find a very useful tool every time you need to make a bulk sending to your employees of personalised documents with their data.

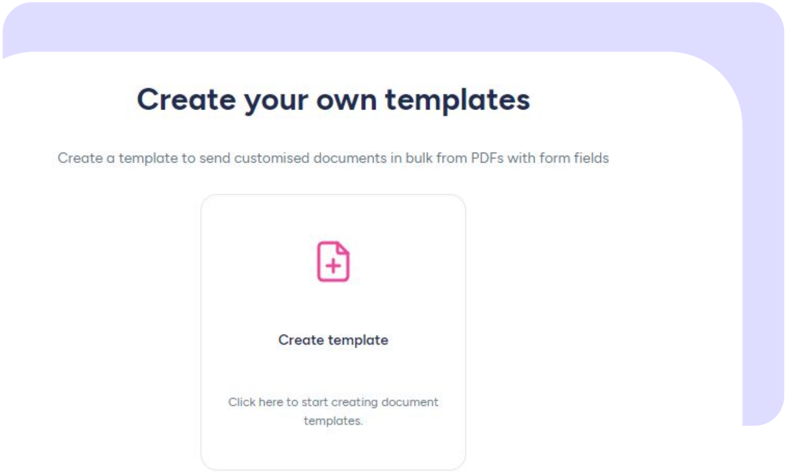
Documents >> Document templates >> Create template

Create a template from a PDF:

Upload a document

Upload a pdf with form fields and fill them in directly with employee data, manually or automatically from Sesame. You can include text fields, checkboxes or drop-down boxes. You will have the option for the employee to fill in the empty fields that you have left once they receive the documentation.

Once you have ready your template, click on **Create Template**.



View all the templates you have created:

In a single view, you will see the templates you have created in a list. You will be able to see the templates already used, which will be saved in a table with the name, who created the template, the date of creation, the last editor and the date of editing. You will also be able to edit the template, delete it and send it.

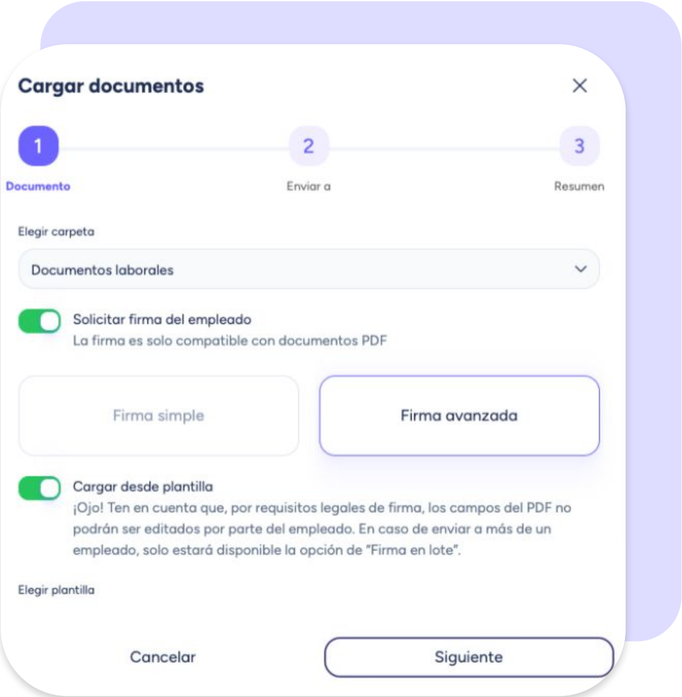
Template sending:

When you click on " Load documents", you will be able to upload a template to the general folders of the document manager. Choose which employees you want to send the templates to. Remember that you can send one or more documents to the **whole company** if you activate the '**Assign to the entire company**' button!

Before uploading any document, it is important that you have previously created the corresponding folder where you want to store it.

Templates sending to be signed:

Send templates in bulk so they can be signed by employees. You can only send templates for signature if they are PDF files and you store them in the Work Documents folder.



5. What is simple signature?

Simple signature allows employees to mark as read the documents uploaded by administrators to the document manager.

Files signed this way will be marked with a timestamp, with the date and time when employees checked them as signed.

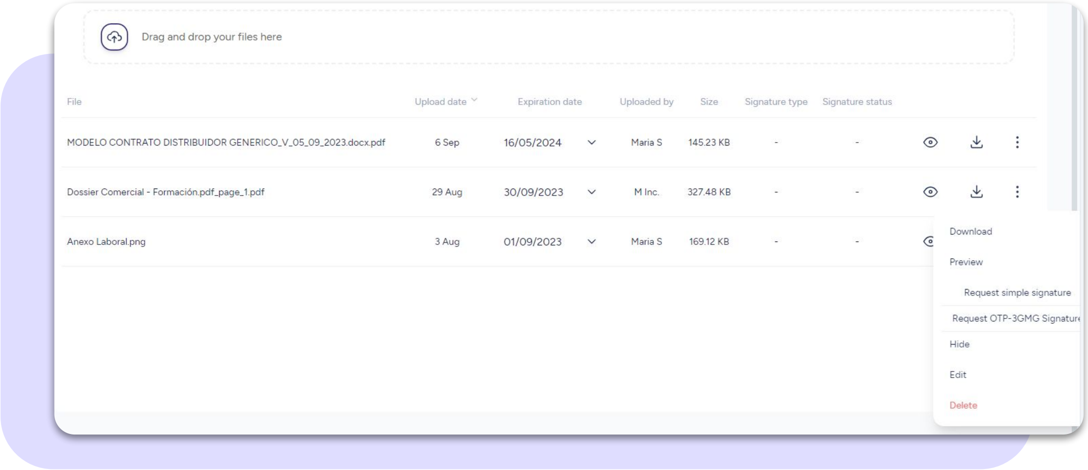
Who can use it? All users having the document manager included in their plan, as this tool is linked to the labour documents folder (**Advanced, Professional** and **Enterprise Plan**).

5.1 How does simple signature work?

As mentioned in the previous slide, simple signature is linked to the document manager, specifically to the **LABOUR DOCUMENTS** folder. Therefore, only **PDF format files** uploaded to this folder can be signed.

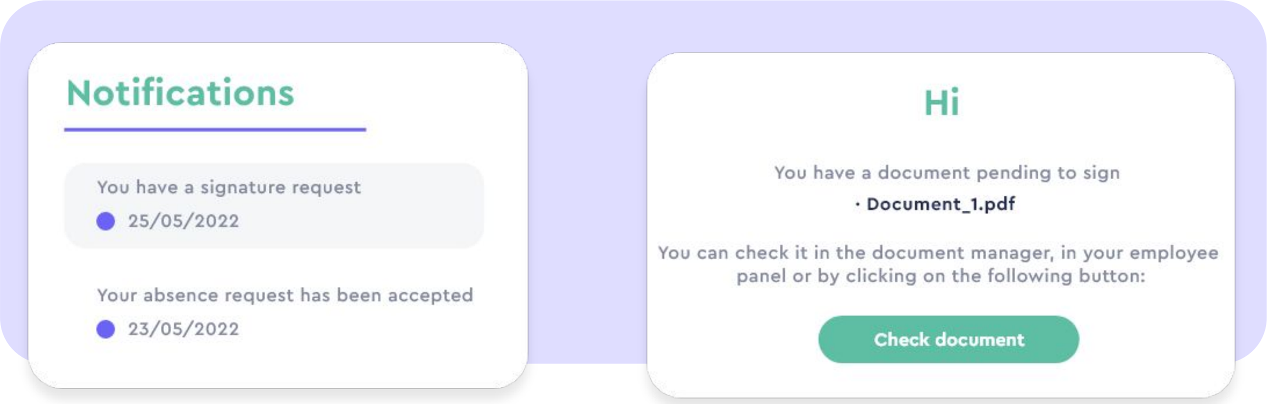
How does it work? Administrators must access the corresponding folder and upload the document. Once the file is uploaded, they will need to select “**more options**” and click on “**request signature**”.

In order to check the progress of the process, the status of the documents sent (pending signature or signed) can be viewed at any time.



5.2 Employee notification

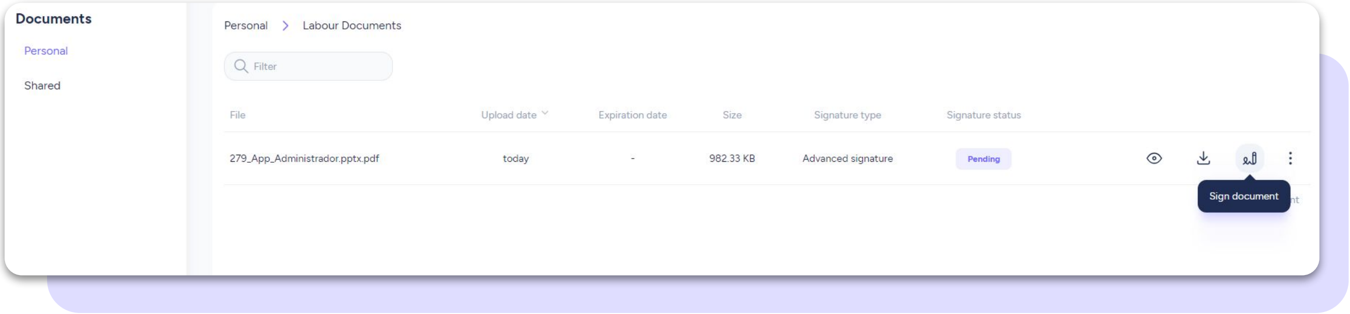
When administrators request signatures, employees will be notified via **email** and in the **alert bell** of their dashboards. This way, they will be able to access the document directly and mark is as signed.



5.3 How will employees sign?

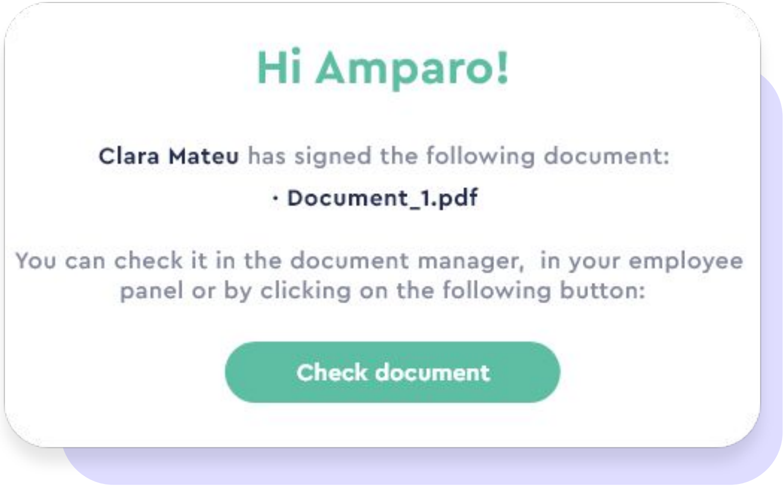
It’s very easy! They will find the documents pending to sign in their labour documents folder. The icon ( ) will appear at the end of each of them. Employees simply need to click on it and proceed to sign the necessary documents.

Additionally, users will be able to view or download documents at any time regardless of their signature status.



5.4. Admin notification

Administrators will be notified once employees have signed their documents.



Grow your company.
Empower your team!

Do you still have questions? In our help centre 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**