



# Tasks and projects

Manage and plan your company's work pace

Sesame Time

Sesame Advanced

**HR Starter**

Professional Plan

**Enterprise Plan**

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File for the administrator

# Hello!

Welcome to Sesame, the software that simplifies HR management.

In this file, we will explain what the “**Tasks and projects**” section is and how you can install it in your dashboard.

We will take you step by step, so don't worry. We are here to help you with whatever you need!

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# 1. Tasks and projects

Imagine seeing at all times what tasks your employees are working on or knowing the profitability of the activities of your company and even your team's productivity.

With Sesame you can **create projects** and **assign** them to your employees. **Create tasks, assign them to your team and track the time** it takes to complete them. Besides, if you work with multiple clients you can create them in the system and assign them their corresponding projects.

Do you want to use this functionality from now on? First you need to install it: click on **Apps** and look for the **"Tasks"** card. Once you are done, you will find it in your panel's menu right away!

## **Tasks**

Optimise task tracking. Measure the cost and profitability of each project and keep track of your productivity.

Uninstall

## 2. How to create projects, clients and tags?

It's time to organise your workload! In order to be able to create tasks effectively, we will first see how to create projects, tags and clients.

### “Tasks” >> “Projects” >> “Create your first project”

Edit the main information of the project: add its name, ID, client name, and pick a colour. Now you are ready to click on “**create project**”!

### “Tasks” >> “Projects” >> “...” >> “Delete”

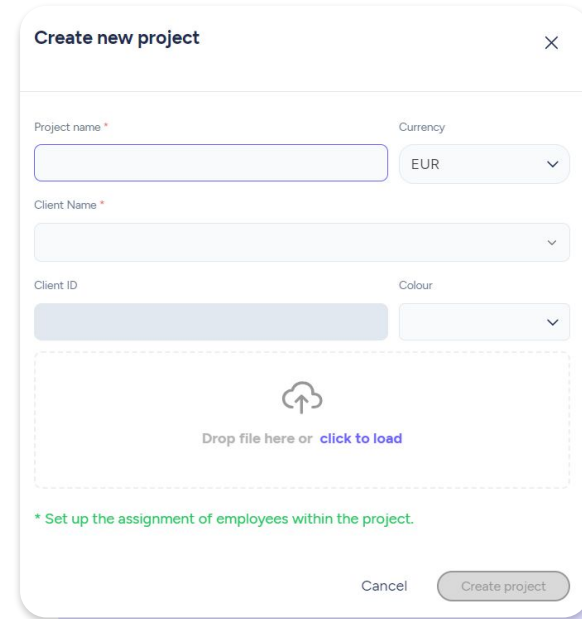
If you want to **delete a project** you can click on “...” in the list and remove it.

### “Tasks” >> “Configuration” >> “Create new client”

**Create clients**, add their main information and assign them their corresponding projects. You will see a list with all your clients and/or their assigned projects.

### “Tasks” > “Configuration” > “Tags”

Assign names and colours to **tags** so that they are easier to identify.



The screenshot shows a modal window titled "Create new project" with a close button (X) in the top right corner. The form contains the following fields and controls:


- Project name \***: A text input field.
- Currency**: A dropdown menu currently showing "EUR".
- Client Name \***: A dropdown menu.
- Client ID**: A text input field.
- Colour**: A dropdown menu.
- A dashed box containing a cloud upload icon and the text "Drop file here or [click to load](#)".
- A green asterisk note: "\* Set up the assignment of employees within the project."
- At the bottom right, there are two buttons: "Cancel" and "Create project".

### 3. How to create tasks and assign them to your employees?

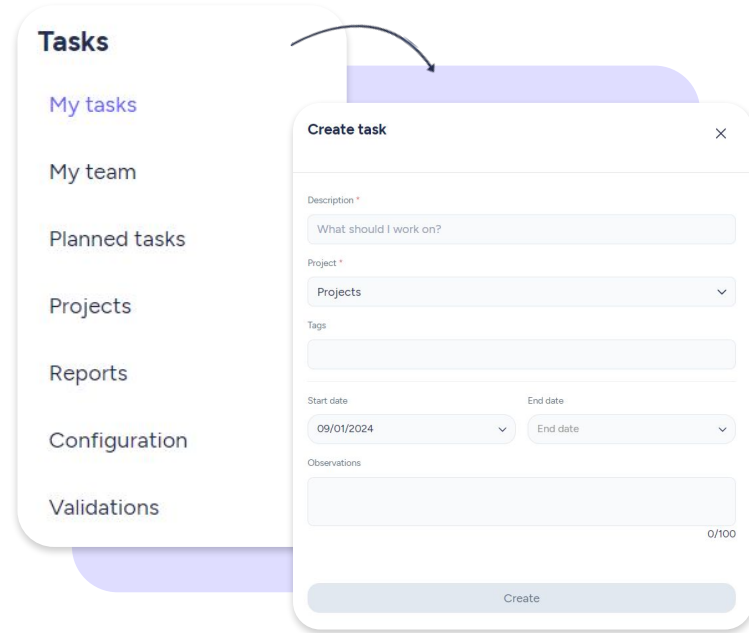
To create tasks from your admin profile you need to go to **Planned tasks** and click on **Create task**. Add a label to each new task and assign it a project and a label.

You can select a **start and end date** for the task. If your task starts and ends on the **same day**, you can add a **start and end time** for the task.

There's also a field to add observations if you need to.

Once you've created your task, it will appear in the Planned Tasks dashboard. You can **assign it to your employees** by clicking the icon  in the Employee column.

Once you've assigned tasks to your employees, they'll see them in their **Tasks** section. Once they've started working on their tasks, you'll see them in the My Team section of your admin view.



The image shows a user interface for creating a task. On the left is a sidebar menu with the following items: **Tasks** (highlighted), My tasks, My team, Planned tasks, Projects, Reports, Configuration, and Validations. The main content area displays the 'Create task' form, which includes the following fields:

- Description \***: A text input field with the placeholder text 'What should I work on?'.
- Project \***: A dropdown menu currently showing 'Projects'.
- Tags**: A text input field.
- Start date**: A date picker showing '09/01/2024'.
- End date**: A date picker showing 'End date'.
- Observations**: A text area with a character count of '0/100'.
- Create**: A button at the bottom of the form.

## 4. Task types

In the My Team view, you can see all the tasks your employees are working on. You will find a selector that allows you to filter the three different types of tasks:

### 1. Active tasks

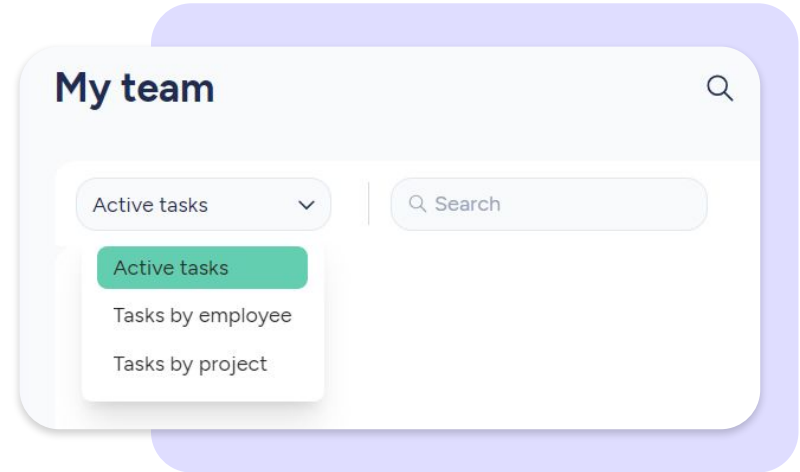
Here you can see in real time what your team is working on.

### 2. Tasks by employee

Here you can see the tasks that each member of your team has completed.

### 3. Tasks by project

Here you can see the time invested in each of your company's projects.

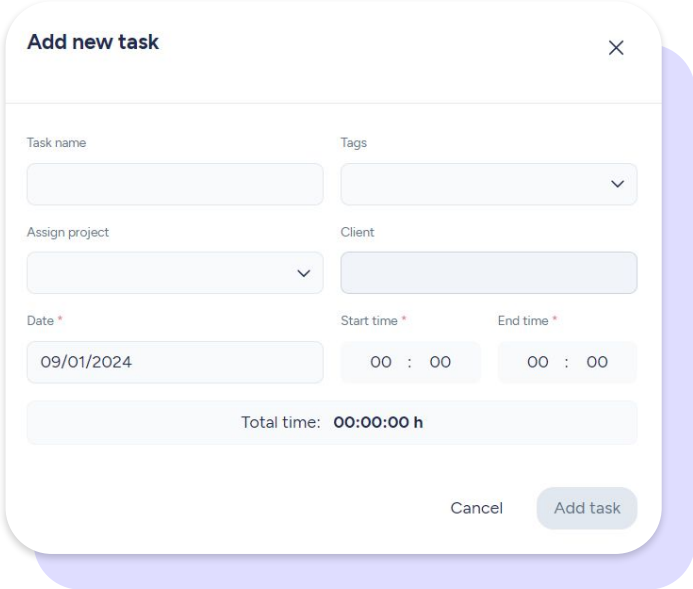


# 5. How to create your own tasks?

All employees can create their own tasks in their Tasks view.

As an admin you'll be able to create your own tasks from both from your admin and employee view in your "My tasks" dashboard. Keep in mind that you need to go to the **Planned tasks** section to create tasks for your employees.

Once you've created a task, you can track the time spent working on it. When you stop the timer and finish the task, it will appear on your 'My Tasks' dashboard. You can display this view as a List or as a Calendar.



The screenshot shows a modal window titled "Add new task" with a close button (X) in the top right corner. The form contains the following fields:

- Task name:** A text input field.
- Tags:** A dropdown menu with a downward arrow.
- Assign project:** A dropdown menu with a downward arrow.
- Client:** A text input field.
- Date \*:** A date input field containing "09/01/2024".
- Start time \*:** A time input field containing "00 : 00".
- End time \*:** A time input field containing "00 : 00".

Below the input fields, there is a summary bar that reads "Total time: 00:00:00 h". At the bottom right of the modal, there are two buttons: "Cancel" and "Add task".

## 6. How to assign projects and tasks to employees?

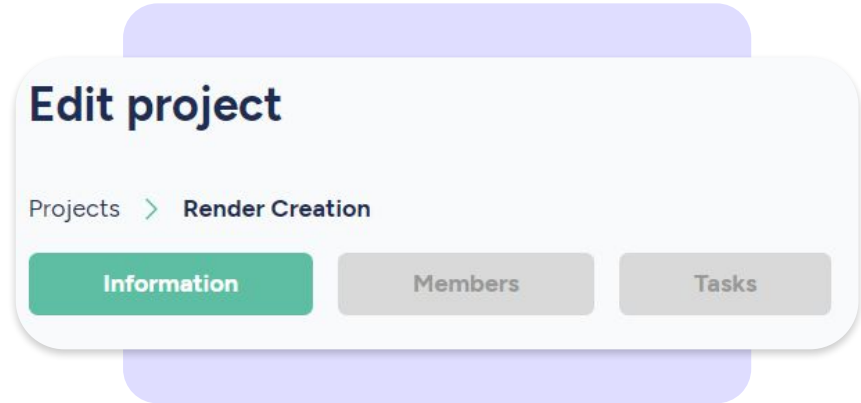
Tasks >> Projects >> Select the project >> Members >> Change configuration >> Assigned employees

If you haven't assigned this project to any employee, you need to click on "**Change configuration**". Once set up, you can make changes by clicking on **Edit assignment**.

From the Projects section, you can assign the **project manager role** to each project.

Access each project by clicking on it and you will see all the information related to the project, such as duration and cost, which you can edit.

You can also see the status of the project and its dependencies.





# 7. How to export tasks reports?

Imagine being able to know how productive your employees are or to detect which project is not profitable (even in its early stages). Interesting, isn't it? That's what **task reporting** is for.

**Tasks >> Reports >>** filter by the criteria you need and **click on download!**

As an admin you can **create reports** on the projects and tasks your employees are working on. Your possibilities are endless: generate your reports filtered by departments, employees, projects, clients, managers and tags. To do this, simply select the filters you want to view and click on the download button. Remember that you can choose between **PDF, EXCEL and CSV** formats.



# 8. Requirements and validation

You can activate these two switches in the **Configuration** section:

- Obligation to assign a project to create or start a task.
- Obligation to assign a project to a customer in order to be created

On the other hand, you can also activate by clicking on a button the project profitability validation so that the system sends a report to the person in charge to review each project. You can choose who will receive these reports, either the project manager or the project administrator. You can also choose the validation period with a day and a time.

In the **'Validations'** view you will see all the projects that are pending validation.

### Requirements

**Tasks**

Obligation to assign a project to tasks  
Activating this setting makes it mandatory to assign a project to the task, otherwise the task cannot be created.

**Projects**

Obligation to assign a project to a customer in order to be created  
Check this option if you want to link the tags with the projects they belong to.

### Validation

Project profitability validation  
The system will send this report to the person in charge so that he/she can review his/her projects within the established period.

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Who will receive these reports? Project manager

Regularity Weekly

Starts on Tuesday

Time when report will be sent 10:00

The report will be sent every Tuesday at 10:00 to project manager. This setting will be available for higher and lower roles.

[Save changes](#)

# 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](tel:+34960627351).

Email us, we will reply as soon as possible: [soporte@sesametime.com](mailto:soporte@sesametime.com)