sesame

Automations

Set up the activity of your HR software

File for the administrator

Hello!

Welcome to Sesame, the software that simplifies HR management.
In this file, we will explain what you can find in the "**Automation**" section 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!

Content

1. Automations

Automations are designed to **simplify** and **streamline** both employee and administrator management. They can be set for all employees or by department. If necessary, you can edit notifications and automations customised by employee.
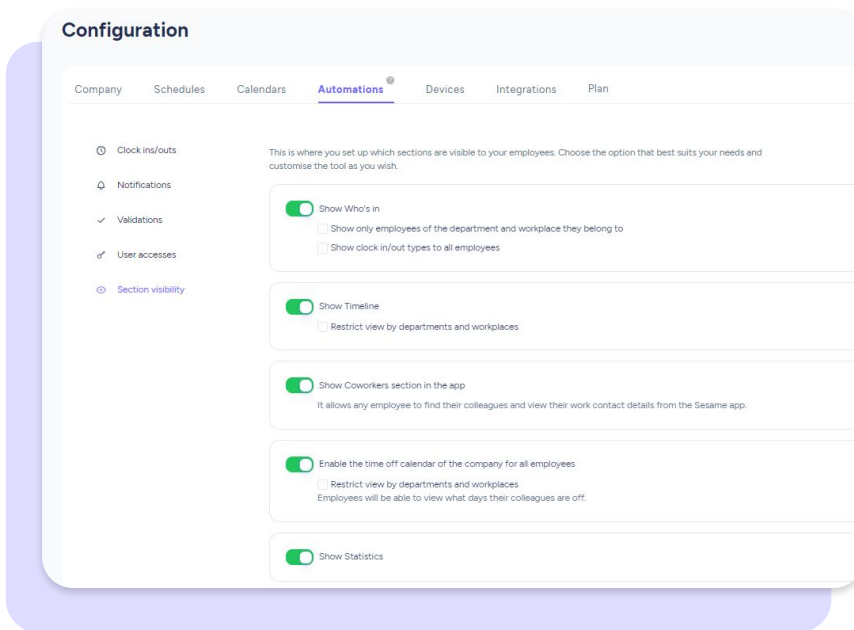
Clock ins/outs

Notifications

Validations

User permits

Section visibility

1.1. Automations.
Clock ins/outs

Automations >> Clock ins/outs

1. When the assigned schedule is completed the system will clock out

Once their schedule is finished, the system won't let them clock in again. To keep tracking time, they will have to make a clock in request.

2. Auto clock out in case the employee forgets to do so

If employees forget to clock out, the system will create a clock out when the time established by the company arrives. An incidence will be generated and employees will be able to request an update of their working hours.

3. Send open clock in/out report at [time]

The system sends an email with open clock ins/outs of the day to employees with HR roles.

4. Workday rounding

The system will round up clock in and clock out times according to the preset schedules. You can configure the clock in and clock out rounding separately.

5. Block the ability to clock in before the employee's start time

When activating this setting employees will not be able to clock in before their preset start time. When trying to do so, they will see a notification explaining that they cannot clock in yet.

6. Restrict clock ins/outs by IP

It restricts your company's types of clock in/out so that your employees can only access from the IPs you set up according to their clock in/out type.

Workday rounding

CLOCK IN TIME

Clock in/out rounding 30 minutes after the employee's entry time

Apply to existing clock ins/outs Before And After of the employee's entry time

Apply to All clock ins of their working day.

HORA DE SALIDA

Clock in/out rounding 30 minutes after the employee's exit time

Apply to existing clock ins/outs Before And After de la hora de salida del empleado.

Apply to All clock outs of their working day.

7. Show last clock in/out change as information

The employee and the time of the last clock in/out change will be displayed.

8. Allow employees to self-manage clock ins/outs

Employees will be able to edit their own clock ins/outs.

You can apply all these automations to all members of a department:

Automations >> Department >> Clock ins/outs

1. When the assigned schedule is completed the system will clock out

2. Auto clock out in case an employee forgets to do so [hora]

3. Block the ability to clock in before the employee's start time

4. Allow employees to self-manage their clock ins/outs

You will be able to block department administrators from disabling this automation.

5. Send open clock in/out report at [time]

1.2 Automations. Notifications

Automations>> Notifications

1. Number of minutes of prior notification before working day start

To prevent employees from forgetting to clock in at the beginning of their working day, the system will notify them as many minutes in advance as you set up in this section.

2. Notify employee [X] minutes before ending his/her (working day) so that he/she doesn't forget to clock in/out

To prevent employees from forgetting to clock out at the end of their working day, the system will notify them as many minutes in advance as you set up in this section.

3. Number of minutes to notify employees on their phone when they forget to compute tasks

This notification will warn employees (after the minutes you establish) to not forget to report the time spent on their projects and tasks.

4. Grace period

Set the courtesy minutes you give your employees in relation to their start time. If this notification is activated, administrators will know which of their employees have arrived later than the preset start time.

5. Notify [higher/lower roles] X minutes after their working day is supposed to start

After the configured minutes the system will notify that no clock in was carried out.

6. The system will send an email every time there is a clock in/out

Once employees have clocked in/out an email will be sent to the administrator with all the information regarding the clock ins/outs of their employees.

7. Block the sending of emails to employees every time there are changes in their holidays and absences

Users won't receive notifications per email when there are changes in their holidays or absences.

8. Block the sending of emails to the administrator every time there are changes and/or approvals in the holidays and absences of the employees they manage.

If you activate this option, the administrator will not receive notifications in their email about these changes.

9. Send end-of-contract notice when the time remaining is [time] to [role]

If you activate this option, your chosen role or validator with access will receive an email with this information. Notification time must be lower than end-of-contract date.

10. Send a trial period end notice when the remaining time is [X] to [higher or lower role]

If you activate this option, your chosen role or validator with access will receive an email with this information. Notification time must be lower than end-of-contract date.

11. Notify employees about shift changes
The system will send a notification with the shift changes made.

12. Block email sending to (Admin/Employee) every time there are clock in/out creation or edit requests
If you activate this option, admins and/or employees will not receive notifications in their emails when there are clock in/out creation or edit requests.

13. Send notification to (higher or lower role) every time an employee uploads a document to the document manager.
Employees with the selected roles will be notified by email and in their app every time an employee uploads a new document.

14. Block all notifications for administrator and employees.
By activating this setting, no notifications will be received on the panel, the App, or by email.

15. Notify [Higher/Lower role] when an employee profile is modified.
A notification will be sent to the selected role whenever there are changes in any field of an employee's personal, work or custom data.

16. Allow employees to add an expiration date for a document. Notify X days before the document's expiration date::
- Employee
- Role

A notification will be sent to the selected role when employees or admins upload a document with expiration date to their document manager.

1.3 Automations.
Validations

Activate clock in/out validation

The system will **send employees an individual report of their clock ins/outs** so that they can validate it. The sending can be done either automatically or manually.
- Select the roles that can manage validations.
- Choose the validation period from monthly, weekly or daily.

a) Set a date and time for sending the validation report to employees: activating the automatic validation sending will allow you to choose a specific date and time when you want the clock in/out report is sent to the employees.

b) Send a reminder: activate the sending of a reminder via email so employees are reminded to validate their clock in/out. You can set a number of days after the report has been sent and the reminder will be sent.

c) Activate a date for automatic validation: activate this option at the same time as you set a number of days after the report has been sent in order to automatically validate as long as the employee has not previously validated.

1.4 Automations.
User permits

1. Restrict validations of holiday requests between different-level validators

In case of having double validation activated: The second responsible person can be restricted from validating without the prior approval of the first responsible person.

2. Block editing, accepting and cancellation of clock ins/outs to a role

You can remove the permissions for accepting and canceling clock ins/outs from the role you select.

3. Block editing My profile in the employee view

Employees won't be able to edit the information in their profile.
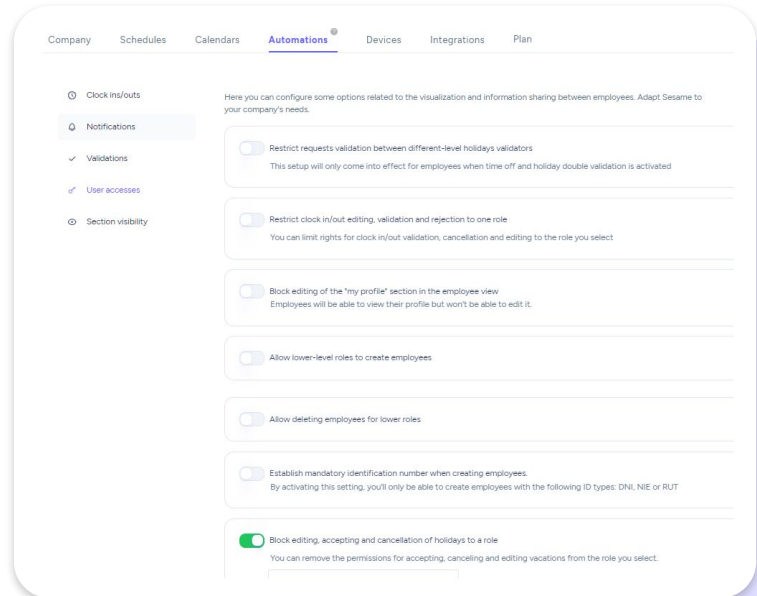
4. Allow lower-level roles to create employees

5. Allow deleting employees for lower roles

6. Establish mandatory identification number when creating employees

By activating this setting, you'll only be able to create employees with the following ID types: DNI, NIE or RUT.

7. Block editing, accepting and cancellation of holidays to a role

You can remove the permissions for accepting, canceling and editing vacations from the role you select.

8. Show the remote work absence

If it's activated, admins and employees will be able to use the remote work absence.

9. Automatically disable an employee when their contract ends

When you disable an employee, they will no longer be able to access Sesame. Their information will be saved so that you can re-enable them.

1.5 Automations.
Section visibility

1. Show Who's in to all employees.
Employees will be able to see which team members are working, remote working, on holiday or absent. You can also restrict the display so that they can only see the status of their department or workplace colleagues.

2. Show Timeline to all employees.
The timeline will display the clocking in and clocking out of employees throughout the day. As in who's in, in case you want employees to see only their workplace or department colleagues, you will have to restrict the view.

3. Show Coworkers in the App.
It allows any employee to find other colleagues and view their work contact details from the Sesame App.

4. Make the company's time off calendar available to all employees.
Employees will be able to see the days that colleagues are absent.

5. Show 'Statistics'.

6. Show 'Clock ins/outs'.
When a company deactivates this, the whole section 'Clock ins/outs' will be deleted for EVERYONE in the EMPLOYEE section.

7. Show 'Organizational Chart'.
The employee will be able to see how the company is organised.

8. Display 'Employee portal'.
A section where employees can quickly consult their information.

9. Show information on 'Workspace Booking'.
The employee will be able to see the names of those who are making the booking, the description, and the guests.

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**