Administrator User Manual

Sense HR and extended Sense Workplace ecosystem

Version 1.0
March 2026

Sense Workplace

Document Information

Document Title	Sense HR Administrator User Manual
Product	Sense HR
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Intended Audience

This manual is intended for use by designated Sense HR administrators within your organisation. It covers system configuration, day-to-day administration, and advanced features across both the Sense HR web platform and the AMI mobile application. Content may reference system settings and permissions that are not available to standard employee or manager-level users.

Revision History

Version	Date	Description
1.0	March 2026	Initial release. Complete administrator reference covering Sense HR web platform and extended Sense Workplace ecosystem

Feedback and Corrections

If you find errors in this manual or have suggestions for improvement, please contact the Sense Workplace support team through the in-app Help Centre or at support@senseworkplace.com .

Table of Contents

1 Welcome to Sense HR

Get to know your Sense HR Administrator Manual, how it's structured, and how to use it effectively.

1.1 About This Manual

This Administrator Manual is the complete reference for managing Sense HR, part of the Sense Workplace ecosystem.

It's designed to be intuitive, modular, and aligned with real administrative workflows.

☞ **Purpose**

- Help administrators configure, operate, and maintain the system confidently.
- Provide one verified reference for setup, daily use, and troubleshooting.
- Reduce dependency on customer support through clear, self-service instructions.

☞**Audience**

- HR Managers, HR Officers, or Company Owners acting as HR Administrators.
- Users who have completed implementation or are finalising rollout.

☞ **Scope**

This manual covers all Sense HR functions: Implementation, Core Settings, People Profiles, Calendar, Documents, Reports, and connected products from the ***Sense Workplace*** Ecosystem.

Features available on higher-level plans or as add-ons are clearly marked with a ★. You can explore these where they're part of your subscription, or skip them if they're not currently in use by your organisation. This manual focuses primarily on features that are available across all plans.

Understanding Sense HR and Sense Portal

Sense HR is part of the wider ***Sense Workplace*** ecosystem.

Ecosystem-level configuration across all products — such as branding, customer support access, and security settings—is now managed in ***Sense Portal****,* while day-to-day HR operations are controlled directly in ***Sense HR.***

For more on this structure, see §2 Understanding Sense Workplace and §5 Core System Settings.

1.2 Who This Manual Is For

User Type	Why They Use It	Example Scenarios
HR Administrator	Configure system, manage data accuracy, everyday HR	Setting up and managing profiles and system
HR Manager	Oversee team activity and approve events	Approving leave or signing contracts

User Type	Why They Use It	Example Scenarios
Business Owner	Understand HR processes without HRIS expertise	Overseeing eco-system level settings

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1.3 How to Use This Guide

1.3.1 Navigation Style

How to follow navigation in this manual

Navigation paths show you how to reach the correct area of Sense HR using the main menu (left-hand navigation bar). Every navigation path starts from the Dashboard and looks like this:

```
HR Dashboard › Module (e.g. Settings) › Feature (e.g. Calendar & Planner) …
```

Click the company logo or avatar in the top-left corner at any time to return to the main dashboard. By default, this appears as your organisation's initials, but it will display your company logo if one has been uploaded.

Once you arrive at the area indicated by the navigation path, follow the steps in the order shown to complete the task on the page.

You don't need to explore other menus or settings unless the steps explicitly instruct you to do so, or your task clearly requires it.

Each section also provides context on how the system works, if you want to understand the underlying behaviour more fully.

1.3.2 Learning Approach

The manual follows the *Find → Follow → Do* model:

1. **Find** the topic via Contents Table or Search.
2. **Follow** the numbered steps exactly.
3. **Do** the action in Sense HR.

So, use the contents menu to **find** the section you need, **follow** the navigation path, and **do** the steps to complete your task.

Some procedures include **quick-link cross-references** (for example, *Continue to Calendar setup*) to reflect the natural flow of related tasks, as well as **section references** (for example, *See §…*) that point to additional context or deeper explanation elsewhere in the manual.

1.3.3 Using Interactive Elements

If you are using the online version:

- Click any blue section title to expand content.
- Hover over icons for definitions.
- Hover over images for descriptions.
- Download printable checklists from section footers.

1.3.4 Cross-Product Navigation

Sense HR is part of the wider **Sense Workplace** ecosystem.

When the manual references another product (e.g., *Sense Automate* or *Sense AI (AMI)*), the same login credentials and data apply.

You can switch between licensed products using the product switcher (the Sense logo in the upper-right corner of the web app).

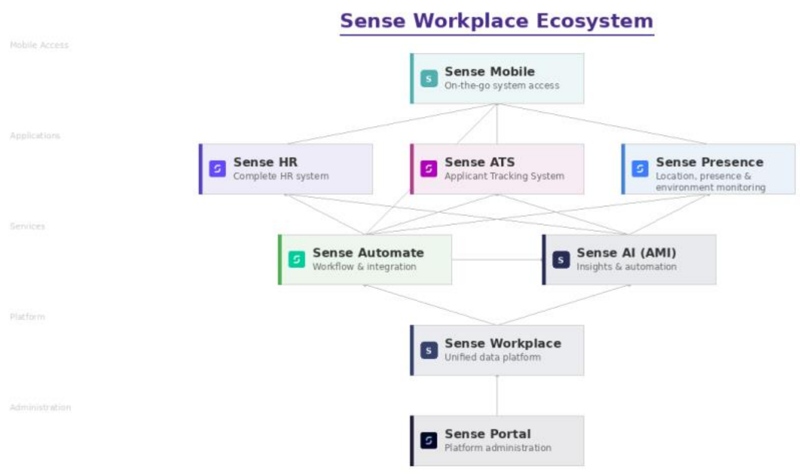


Figure 1: Sense Workplace product architecture

Figure: The Sense Workplace ecosystem — showing how Sense HR connects to Automate, Mobile, AI, Portal, Presence, and ATS.

1.4 In-Guide Symbols and Notation

This guide uses a set of standard icons to visually distinguish different types of information and guidance.

Understanding these icons will help you scan pages quickly and recognise important notes, plan-dependent features, and step-by-step actions.

The table below explains what each icon represents.

Icon System Summary

Icon	Meaning
★	Plan dependent feature or add-on product
1	Numbered steps for tasks
§	Denotes section
✅	Completion indicator
✎	Admin Notes / Company Notes
⚠	Caution / Warning
💡	Tips/ Best Practice

1.4.1 Formatting Conventions

- **Bold** = buttons or menu items (**Save**, **Settings** › **Security**)
- *Italic* = product names or concepts (*Automate*, *AMI*)
- `Monospace` = Navigation paths
- Numbered lists = exact task steps

1.4.2 User terminology

Sense HR uses uniform terms across products (for example):

Term	Meaning
Administrator	User with full control over settings
Limited Admin	User with full control over settings for specified groups
Manager	Supervisor approving requests
Manager with Indirect Reports	Supervisor approving requests, with visibility across the full reporting chain.
Employee	End user of self-service functions with Standard user access

✎ **Note:** *Employee* is used as a generic term for standard user access levels and may also refer to other worker types (such as contractors or volunteers), unless stated otherwise.

1.4.3 Cross Reference Notation

Cross-references appear as **(See § 9.2 Calendar)** or **(Cross-ref → Automate § 12.4)**. In the web and digital editions, these will link directly to sections via HTML anchors.

1.5 Support, Training, and Feedback Channels

1.5.1 Help Centre

Visit the **Sense Workplace Help Centre** for step-by-step articles, videos, webinar registration and FAQs: https://support.sensewp.com/en/

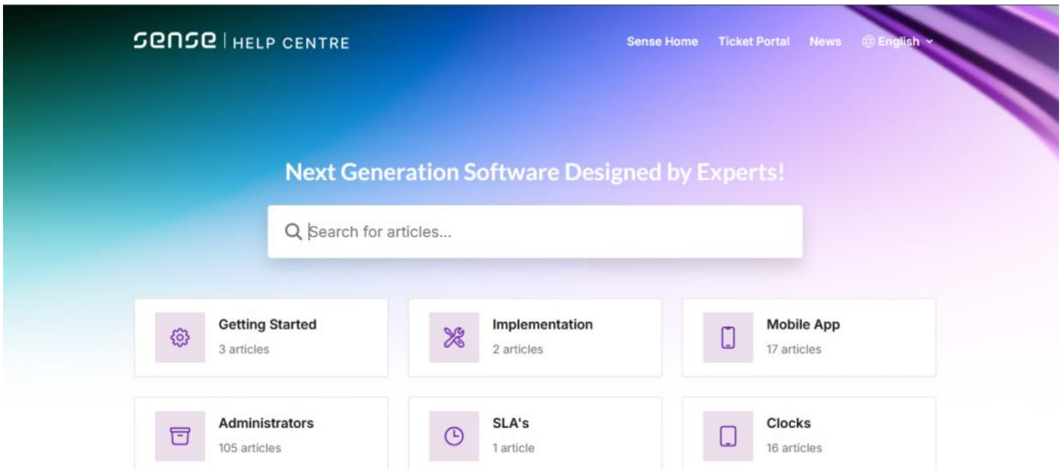
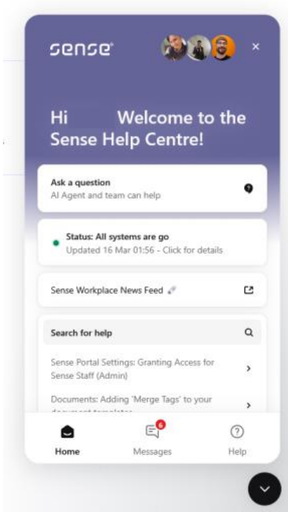


Figure: The Sense Workplace Help Centre homepage with search bar and category navigation.

1.5.2 In-App Help

Click your system-registered name and **Help** in the upper-right corner of Sense HR to open the help centre. Alternatively, click the chat bubble in the lower-right of the Sense HR product.

Closed chat bubble (lower-right corner)



Expanded chat bubble with conversation

1.5.3 How to Navigate the Help Centre

The Sense Workplace Help Centre is a single, unified support site for all Sense Workplace products, including Sense HR. It is hosted on Intercom and provides access to help articles, guidance, and support resources in one place.

From the Help Centre, you can:

- Browse and search help articles
- Access product guidance and FAQs
- Find links to training and support resources
- Open support conversations when needed

The Help Centre is available from within Sense HR and can also be accessed directly in a web browser. Content is shared across Sense Workplace products, so some articles may reference features that are not enabled for your organisation.

Using the Help Centre search effectively

To get the best results from the Help Centre search bar, use simple, specific keywords rather than full sentences.

Best practice tips:

- Use the feature name you're working with (for example, Reports, Screen Designer, Planner Settings).
- Include the task you're trying to complete (for example, create, edit, export).
- Avoid long questions or full sentences — shorter phrases usually return better results.
- If your first search doesn't return what you need, try a synonym or related term.
- Check article titles and overviews first to confirm relevance before following the article

💡 **Tip**
If you're unsure what a feature is called, try searching for what you see in the Sense HR interface, such as a menu name or screen title.

✎ **Note:**
This manual focuses on Sense HR features. Always check whether an article applies to your plan and enabled products.

1.5.4 How to Use the Help Chat Bot

Fin is the AI-powered help assistant available in the Sense Workplace Help Centre. Fin is designed to help you find relevant help articles quickly and answer common questions using Sense Workplace documentation.

You can use Fin to:

- Ask questions in plain language
- Get direct links to relevant help articles
- Clarify how features work before contacting support

Fin is best used as a starting point for help. If your question requires account-specific assistance or cannot be resolved through articles, you can continue the conversation to reach the Sense Workplace support team.

✎ **Note:**
Fin provides guidance based on available documentation. For complex configuration or account-specific issues, contacting support may still be required.

1.5.5 Administrator Training

- **Initial training** during onboarding webinars
- **Refresher sessions** via Help › Webinars
- **Advanced training** on advanced products and features (*Automate*, **Screen Designer**, *Sense AI (AMI)*, etc.)

1.5.6 Feedback and Feature Requests

Feedback submitted in-app via the **Chat Bubble** or via Support will enter the Sense Workplace review queue and are noted in release notes when actioned.

1.5.7 Direct Email Support

Region	Support Hours	Contact
UK / EU	Mon–Fri 08:00–18:00 BST	support@senseworkplace.com

1.6 User Guide & Support: FAQS

Q: What's the best way to navigate this manual?
A: The best way to navigate this manual is to use the **Contents Table** to locate a topic and then follow the numbered steps within that section. You can also search by keyword in the digital version for faster results.

Q: Do I need to read the whole manual before using Sense HR?
A: You don't need to read the whole manual before using Sense HR. Start with the **Rollout** and **Core Settings** sections, then explore other products as you go.

Q: Is this manual the same as the Help Centre articles?
A: This manual is not the same as the Help Centre articles. The manual provides a complete, printable reference, while Help Centre articles give short, task-specific instructions.

Q: How do I use cross-references like "See § 9 Calendar"?
A: You use cross-references like "See § 9 Calendar" to jump to related topics elsewhere in the manual. Click the link in the digital edition or skip to that section in print.

Q: Will the icons look different when I print the manual?
A: Icons look slightly different in print —they appear in greyscale but retain their same meaning and placement.

Q: How do I use cross-references like "See § 9 Calendar"?
A: You use cross-references like "See § 9 Calendar" to jump to related topics elsewhere in the manual. Click the link in the digital edition.

Q: Where can I find training resources for Sense HR?
A: You can find training resources for Sense HR in the **Help Centre** at https://support.sensewp.com/en/ under Training Webinars, and following the registration link.

Q: How do I contact Sense Workplace Support if something goes wrong?
A: You can contact Sense Workplace Support by emailing **support@senseworkplace.com** or using **Chat bubble › Ask a question** within Sense HR.

Q: Can I suggest new features for Sense HR?
A: Yes, Sense Workplace welcomes and encourages feedback and product requests. Suggest new features for Sense HR through **Chat bubble › Ask a question** inside the app. Your suggestions are reviewed by the product team for future roadmap updates.

1.7 Section Summary

You now understand how this manual is structured, how to follow instructions, and how to access help and training for ***Sense HR***. Continue to Section 2 — Understanding Sense Workplace to see how Sense HR fits into the wider Sense Workplace platform.

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2 Understanding Sense Workplace

See how Sense HR connects within the wider Sense Workplace ecosystem so you can understand what lives inside HR and what extends beyond it

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2.1 The Sense Workplace Ecosystem

Sense Workplace is a unified platform of connected workplace products that share a single data core and user identity.

Each product serves a specific operational layer with its own administrative centre within the Sense Workplace web application, while **Sense HR** provides the foundational people data that all other products can feed in to.

Ecosystem Components

Product	Primary Function	Typical User	Relationship to HR
Sense HR	Core HRIS – people records, absence, documents	Admin / HR / Managers	Central data hub
Sense Automate	Workflow automation engine	Admins / Automation specialists	Automate can customise and extend native HR functionality by creating processes or apps that apply business rules automatically. Any manual HR process can be described and automated by reacting to internal events or external triggers
Sense AI (AMI)	Artificial intelligence assistant	Admins / Managers	Provides insights, analysis, & suggestions
Sense Mobile	Employee mobile access	All users	Connects users to HR (and other licensed Sense Workplace products) on the go
Sense Portal	Logo, support and security management	System Owners / Amin	Manages licensing & organisation settings
Sense Presence	Location and attendance hardware & environmental monitoring	Operations / Facilities	Syncs location, presence, and environmental data from connected hardware.
Sense ATS	Applicant tracking system	Talent / Recruiting	Feeds new hire data to HR

2.2 How Sense HR Fits Within the Ecosystem

Sense HR is a **core** product of Sense Workplace. When using Sense HR, every other product draws from or writes to its people database.
When you activate additional products, they extend (not replace) the HR data set.

Example Data Flow (Elite plan)

1 Employee profile created in Sense HR.
↓
2 *Sense Automate* triggers onboarding tasks.
↓
3 Documents generated through AMI and stored in SharePoint via Service Connection.
↓
4 Employee completes tasks in Sense Mobile.
↓
5 Reports draw from combined HR + Automation data.

2.3 Shared architecture and access model

Sense HR is part of the wider Sense Workplace platform, which is built on a shared architecture. Licensed products use the same underlying company and people data, while access to those products is controlled through roles and permissions.

This section explains how login, data, and user experience are structured across Sense Workplace, and what this does — and does not — mean for administrators, managers, and employees.

2.3.1 One Login (Web app)

- Users access the Sense Workplace web app using a single login identity.
- Users sign in to the Sense Workplace web app once, using their assigned credentials.
- Access to products and features is determined by licensing and access roles.
- Users assigned a system administrator role in *Sense HR* have access to all licensed Sense Workplace products through the web app.
- Other users (such as managers and employees) only have access to *Sense HR* features permitted by their assigned access roles.
- Single Sign-On (SSO) supports Microsoft 365 and Google authentication.
- Multi-Factor Authentication (MFA) can be enabled to add additional security, particularly for administrator accounts.

✎ **Note**
The "one login" principle applies to the Sense Workplace web app. *Sense Mobile* is accessed separately and provides a tailored experience.

2.3.2 One Record (Shared Data Source)

All Sense Workplace products use a shared data model.

- Each employee exists as a single profile within Sense Workplace.
- Employee data is not duplicated across products.
- Changes made in one product (for example, updating job details in *Sense HR*) are reflected in other licensed products that use the same data.
- Data sharing occurs automatically based on system configuration and subscription plan.

This shared data model ensures consistency across products while allowing different tools to use the same information for different purposes.

2.3.3 One Experience

Sense Workplace products are designed to feel consistent, while still being purpose-built for different users and contexts.

- Design patterns, terminology, and interaction models are consistent across the Sense Workplace web app.
- This consistency helps reduce retraining when administrators move between products such as *Sense HR*, *Sense Automate*, and *Sense AI (AMI)*.
- Some products, such as *Sense Mobile*, provide a tailored experience designed specifically for employees and managers, while still using the same underlying data.

2.4 Ecosystem Use Scenarios

2.4.1 Example 1 – Team plan: Core HR with Employee Self-Service

A growing organisation with around 20–50 employees uses *Sense HR* (Team) to manage people data and everyday HR processes, alongside *Sense Mobile* for employee self-service.

- Administrators manage employee profiles, documents, events, and reports in the web app.
- Employees use *Sense Mobile* to view their profile, read documents, submit events (such as holiday or sickness), and complete To Dos.
- Managers approve requests and track their team's activity using standard permissions.

This setup provides a single source of truth for employee data and reduces manual HR administration, without requiring advanced configuration.

★ *Automate* and *AI* products may be added later to support scaling

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2.4.2 Example 2 – Professional plan: Structured HR with Standard Automations

A mid-sized organisation (around 100–250 employees) uses *Sense HR* (Professional) to support more structured HR processes as the business grows.

- Administrators rely on standard workflows to support processes such as onboarding, leavers, and document acknowledgements.
- Planner settings and entitlement rules are configured consistently across teams.
- Managers use *Sense HR* to oversee their direct reports, complete approvals, and manage To Dos.
- Reporting is used regularly to support operational and compliance needs.

This plan suits organisations that want consistency and automation in core HR processes, without needing to design custom workflows or data structures.

2.4.3 Example 3 – Elite / Enterprise plan: Customised HR with Advanced Insights

A multi-site company integrates ***Sense HR***, ***Automate***, ***AI (AMI)***, and ***Presence*** hardware.

- HR manages fully customisable people records.

- Automate triggers tasks and safety workflows.
- AMI analyses engagement and turnover risk.
- Presence devices capture attendance data automatically.

2.5 Sense Workplace Ecosystem: FAQS

Q: What is Sense Workplace?
A: Sense Workplace is a connected suite of HR and workplace tools — including Sense HR, *Automate*, *AI*, *Mobile*, *Presence*, *Mobile* and *Portal* — that share one data core and login.

Q: Can I use Sense HR without additional Sense features and products?
A: Yes, you can use Sense HR as a stand-alone HR system for core functions like absence management and document storage. You can add products later without losing data.

Q: Is data shared automatically between products?
A: Yes, data is shared automatically between licensed Sense products and always respects access roles for data visibility.

Q: Do I need separate logins for each product?
A: You don't need separate logins for each product. Sense Workplace uses one login (SSO if enabled) for HR, *Automate*, *AI*, and other products.

Q: What happens if a product like Automate or Presence isn't activated?
A: If a product isn't activated, your data remains stored safely in Sense HR. You can enable the product later and it will access existing records.

Q: How is data kept secure across products?
A: Data is kept secure using encryption, RBAC (role-based access control) permissions, and audited Service Connections. Data action is logged in Reports › User activity, as well as **View history** actions throughout the product.

Q: Will the layout change if I activate new products?
A: The layout won't change drastically when you activate new products — new options may appear in secondary navigation menus, but the overall interface remains consistent across products.

2.6 Section Summary

You've now seen how Sense HR fits within the Sense Workplace ecosystem.
Next, move to Section 3 — Rollout & Go-Live Essentials to learn how to prepare your system for launch and bring your organisation online.

PART I — Getting Started

3 Rollout & Go-Live Essentials

A step-by-step guide to preparing, launching, and verifying your Sense HR system.

3.1 What Is Rollout and Go-Live

In Sense Workplace, rollout and go-live describe two distinct stages of bringing Sense HR into active use within your organisation.

Rollout is the preparation phase. During rollout, administrators configure the system, set up employee data, define working hours and entitlements, assign access roles, and test key processes. The goal of rollout is to ensure Sense HR reflects how your organisation works before employees begin using it.

Go-live is the point at which Sense HR is opened to employees and managers for day-to-day use. At go-live, users are invited to log in, Sense Mobile is introduced (if used), and core processes such as events, To Dos, and document access become active.

✎ Note
Rollout and go-live do not have to happen on the same day. Many organisations complete rollout in stages, then go live once the system is ready for regular use.

3.2 Administrator Objectives and Responsibilities

During rollout, administrators are responsible for:

- Ensuring system configuration reflects company policies and working practices
- Preparing accurate employee data for import and validation
- Verifying entitlement, planner behaviour, and access permissions
- Coordinating internal communication and training
- Acting as a contact for Sense Workplace Support during implementation

Decisions made during rollout directly affect reporting accuracy, entitlement calculations, and employee experience after go-live.

3.3 Rollout Preparation Checklist

This checklist follows the required order of operations for *Sense HR* rollout. Some steps are mandatory for all plans, while others apply only to higher-level plans.

Notify workforce of new HR system coming

Inform employees that a new HR system will be introduced and explain, at a high level:

- What Sense HR will be used for
- When they can expect access
- Whether *Sense Mobile* will be used

Early communication reduces confusion and increases adoption at go-live.

✎ **Note**
Sense Workplace provides an optional pre-rollout email to notify your workforce that a new HR system will be going live soon. This template is available in the support centre at support.sensewp.com and search “pre-rollout”.

Confirm Administrator Login

Ensure at least one administrator can successfully log in to the Sense Workplace web app.
- Set permissions for administrators (see § 6.2.2 Assigning an access role to a user)
- Confirm access to Dashboard, People, Settings, and Reports
- Enable MFA if required by company policy

Confirm Ecosystem Settings

Company-level configuration (such as branding, support access, and security) is managed outside Sense HR and may be handled by Sense Workplace Support prior to rollout.

At this stage, confirm:
- Your organisation is correctly set up within Sense Workplace
- Licensed products are available as expected

✎ **Note**
Administrators manage day-to-day HR configuration within Sense HR, not Sense Portal.

Verify existing people data and documents

Before configuring settings or uploading data:
- Review existing employee records for accuracy
- Confirm starter, leaver, and employment dates are correct
- Validate that key documents are current and approved

Errors at this stage will carry forward into planners, entitlement calculations, and reports.

Configure core Calendar & Planner Settings in Sense HR

Calendar & Planner settings must be reviewed and, if required, configured before bulk upload.

This includes:
- Working hours and schedules (see §5.6 Working Hours Configurations and Schedules)
- Custom sickness reasons and rules (see §5.7 Configuring Event Manager and Event Types)

- Custom Time-off and working events and rules (see as above)

These settings control how planners behave and how entitlement is calculated during and after import.

⚠️ **Critical**
Bulk upload calculations depend on these settings. Changing them after import may require manual corrections in Calendar & Planner Settings or Personal Planner Settings.

★ Configure Screen Designer (Elite / Enterprise only)
If your plan includes **Screen Designer** via `Settings › Screen designer:`

- Finalise screen structures and fields
- Confirm which screens apply to which profile templates
- Validate mandatory fields required for bulk upload

Screen Designer changes should be completed before preparing bulk upload templates.

Prepare templates for bulk upload (inc. new screen designer process)

Download the official bulk upload templates via: `Settings › Bulk upload › Download › Download templates` and prepare them carefully.

- Use only the provided templates
- ★ Export **Screen** templates via: `Settings › Screen Designer › Screens › More Actions (…) Menu › Export`
- Do not rename, reorder, or modify template columns
- Complete templates in the recommended sequence
- Ensure mandatory fields are populated

For complete guidance, refer to the **Sense Bulk Upload Introduction and Guidance** manual.

Upload templates using the bulk upload feature

Use the Bulk Upload feature to upload templates in the required order: 1.EmployeeData.xlsx, 2.EventEntitlementData.xlsx, 3.TimeOffData.xlsx and, if required, 7.CustomPublicHolidayData.xlsx.
✎ **Note:** If 7.CustomPublicHolidayData.xlsx is required, it must be uploaded first.

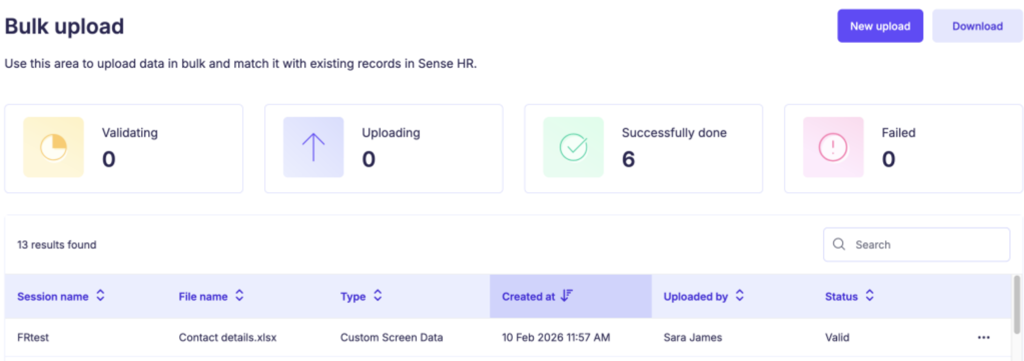

Figure: The Bulk Upload module showing upload status indicators, session history, and file validation results.

- For standard templates upload via: `Settings › Bulk upload › New upload › [select template name]`
- For custom screen templates upload via: `Settings › Bulk upload › New upload › Upload custom screen data › [Select template name]`
- Validate files before upload
- Resolve any errors using inline editing tools
- Confirm successful import for each template

Prepare documents for bulk upload

Download the document folder structure via: `Settings › Bulk upload › Download › Download document structure` and extract

- Prepare documents
    - Accepted file types .pdf, .doc, .docx, .jpg/.jpeg, .png, .xls, .xlsx, .ppt, .pptx.
    - Max file size 10 MB
    - Name documents as you want them to appear in Sense HR and using consistent naming conventions (e.g. Employment Contract.pdf, Passport.jpg, Driving Licence.png)
- Place each document in the correct employee's personal folder
- Zip the entire ConsumerDocs folder

Upload documents using the bulk upload feature

Use the bulk upload feature to upload the ConsumerDocs folder via `Settings › Bulk upload › New upload › Upload documents`

★ Configure access roles (Professional / Elite / Enterprise only)

If using custom access roles:

- Create or adjust roles as needed via `Settings › Access roles`
- Define permissions carefully
- Avoid over-granting access before go-live

Default roles may be sufficient for smaller organisations.

✎ Rollout Checklist Note
For further guidance see § 6.2.1 Access Role Management

★ Configure automations and service connections (Elite / Enterprise only)

Standard system automations will already be available.

At rollout:

- Review standard automations
- Confirm they align with internal processes
- Defer advanced customisation unless required

✎ Rollout Checklist Note

Detailed automation design is covered in the Automate documentation and in § 17 Automation and Workflows in Sense Automate

Initial system check and verification (Before Go Live)

Before inviting users:

- Verify personal planners and entitlement calculations display as expected
- Review `Settings › Calendar & Planner › General` and set relevant ON/OFF options (for example, absence scheme behaviour, heatmap visibility, dashboard sickness widgets).
- Check `Settings › Time & Attendance` to confirm Clock In / Clock Out options are set as required.
- Spot-check employee profiles
- Verify line managers are correctly assigned under `HR Dashboard › People › [Select profile] › Job details`, as these drive approval workflows.
- Verify event rules under `Settings › Calendar & Planner › Event manager.`
- Confirm required events are available to book in the Calendar and Personal Planner.
- Verify email notifications and To Do workflows are triggering as expected.
- Confirm access roles behave as intended for administrators, managers, and employees.
- Verify uploaded documents
- Run and review key reports to confirm data accuracy and completeness.

Assign access roles for additional system administrators and managers

Assign roles to:

- Additional system administrators
- Managers who need team visibility or approval permissions

This ensures managers are ready to operate the system at go-live.

Coordinate training for administrators, managers, and employees where required

See §3.7 Internal Communication and Training

✎ Rollout Checklist Note
Detailed, step-by-step instructions for completing each of the items in the checklist are provided under the relevant sections throughout this manual. Use the section headings and contents to locate guidance for specific settings, features, or workflows as needed.

3.4 First Time Administrator Log In

Administrators receive a Welcome to Sense email with first time login instruction and links.

For subsequent logins:

Navigation Path:
`Browser › https://hr.sensewp.com › Enter credentials › Open organisation workspace`

Field	Description
Email Address	The work email registered in Sense HR.
Password / SSO Option	Use a password or select *Sign in with Microsoft / Google* if your company uses SSO.

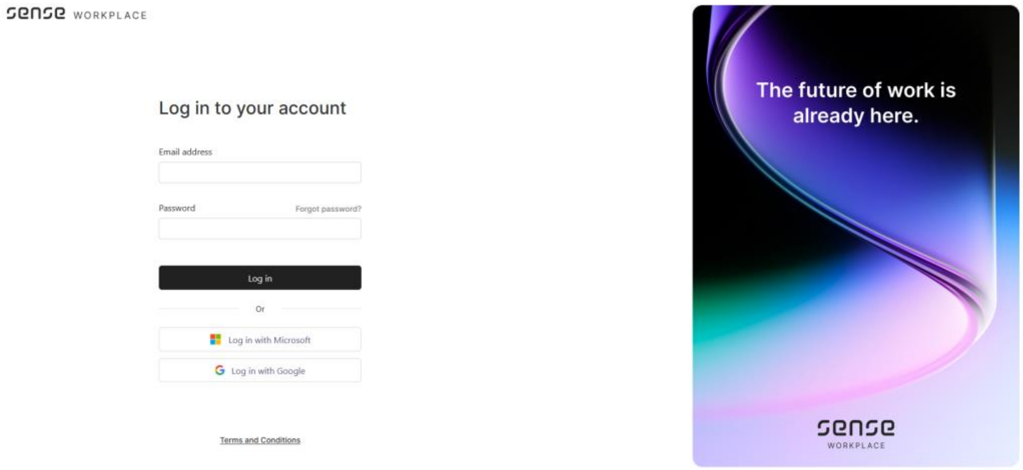

Figure: The Sense Workplace login page showing email, password, and SSO options.

3.5 Bulk Upload

Navigation path:
`HR Dashboard › Settings › Bulk upload`

Bulk upload is used to import employee data during rollout and to extend a live system in a controlled way.

- Depends on specific employee data being present in the system:
  - **Employee ID**
  - Employee **First Name** and **Last Name**
- Depends on completed Calendar & Planner and (if applicable) Screen Designer configuration
- Uses strict template rules for data
- Uses strict structure rules for documents

For full instructions, refer to the **Sense Bulk Upload Introduction & Guidance** document, made available to you as part of the Rollout and Go Live process.

✎ **Note**
The Bulk Upload feature is used to upload new data only. It cannot be used to overwrite or update existing data in Sense HR. Any changes to existing data after import must be made directly in the system.

3.6 Sending Login Invitations

Once the system is verified:

- Send login invitations to employees and managers
- Invitations can be sent individually or in bulk from the People list

See §7.6 Sending Login Invitations

3.7 Internal Communication and Training

Sense Workplace provides role-appropriate training for different user types, including guidance for manager roles (approvals, To Dos, and team visibility) and employee roles (profile access, events, documents, and Sense Mobile). Companion manuals and role-specific Help Centre articles are also available.

Training webinar registration is available at:
https://support.sensewp.com/en/collections/568002-training-webinars

Administrators should reinforce:

- Where and how to log in
- How to access help and training resources
- Who to contact internally for support or questions

3.8 Go-Live Review and Post-Rollout Monitoring

After go-live:

- Monitor early usage
- Ensure all invited users complete registration. You can audit registration status by running a **Profile Information** report and including the **Registration complete?** Field under the **People** section (`Reports › Profile Information`)
- Respond to questions and issues
- Adjust training or guidance as needed

💡 **Tip:**
Address any issues, knowledge gaps, or data inconsistencies early. Resolving them soon after go-live helps prevent confusion and avoids small problems becoming harder to correct later.

3.9 Rollout FAQs

Q: What's the difference between rollout and go-live in Sense HR?
A: The difference between rollout and go-live in Sense HR is that rollout is the preparation phase, where administrators configure settings, prepare data, and verify the system, while go-live is when employees and managers are invited to log in and start using Sense HR for day-to-day tasks.

Q: What must be set up before using the Bulk Upload feature?
A: Before using the Bulk Upload feature, you must configure core Calendar & Planner settings, such as working hours, public holidays, holiday years, and event rules. If you are on

Elite or Enterprise plans, Screen Designer must also be finalised before preparing upload templates.

Q: Do I need to configure Screen Designer before bulk upload?
A: You only need to configure Screen Designer before bulk upload if your organisation is on the Elite or Enterprise subscription and plans to customise screens or fields. Screen structures for standard screens should be finalised before templates are prepared, to ensure successful upload. New data for newly created custom screens can be bulk uploaded later.

Q: When should access roles be configured during rollout?
A: Access roles should be configured after data has been uploaded and core settings are verified, but before go-live, so administrators and managers have the correct permissions when they begin using the system.

Q: Where do I log in to Sense HR?
A: Go to https://hr.sensewp.com and sign in with your work email and password to open your company's Sense HR workspace.

Q: Can I use single sign-on (SSO)?
A: Yes — select *Sign in with Microsoft or Google* if your company uses SSO through Sense Workplace.

Q: How do new employees get first-time access?
A: The system administrator sends an invite from **People › [Select employee profile] › More actions menu (…) › Send Invitation Email**. They'll set a password when accepting the invite.

Q: When should login invitations be sent to employees?
A: Login invitations should be sent after rollout checks are complete and the system has been verified, so employees only gain access once Sense HR is ready for day-to-day use.

Q: How can I see who has completed system registration and logged in for the first time?
A: You can check who has completed their first-time login by running a Profile Information report in Sense HR. Include the Registration complete? field under the People section. This shows which users have successfully completed registration and which users still need to log in for the first time.

3.10 Section Summary

Sense HR is live when all users can sign in at https://hr.sensewp.com, data integrity is confirmed, and company settings are managed through Sense Portal (some settings are via Sense Workplace Support until self-service is fully rolled out).
Use this section's checklist to audit readiness, verify permissions, and confirm operational success during the first two weeks after Go-Live.

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4 Administrator Orientation

Learn how to navigate, personalise, and use the Sense HR Administrator environment confidently.

4.1 Logging In and Access Overview

Administrators access Sense HR through the web application.

Navigation Path:
Open a browser and go to https://hr.sensewp.com/ to log in.

Login Methods

- **Single Sign-On (SSO):** via Microsoft 365 or Google Workspace.
- **Email & Password:** Standard login for smaller organisations.
- **Multi-Factor Authentication (MFA)/ 2 Factor Authentication (2FA):** Optional extra step for enhanced security.

✎ **Note:** MFA and 2FA is managed by an admin via `Sense Portal › Settings › Security`

4.2 The Administrator Dashboard

After logging in, the dashboard provides a summary of key activity.

Main Dashboard Elements

Element	Purpose
Header Bar	Overview and Insights tab, personal profile menu (dropdown from [Name] in upper right)
Left Navigation Menu	Switch between core modules (Dashboard, People, To do, Calendar, Documents, Org Chart, Reports, Settings)
Dashboard Widgets (Overview tab)	Display overview of administrator's To do tasks, Activity feed, Holiday, Team availability, Documents, Upcoming events, and (if active) the Clock in/out widget and Notify sickness widget (see §5 Core System Settings)
Dashboard Widgets (Insights tab)	Display live metrics such as Staff turnover, Headcount/FTE, Single day, Absence rate (depends on company absence scheme), Outstanding holidays (company-wide), Average length of service, Department breakdown, Age group breakdown, Nationality breakdown.

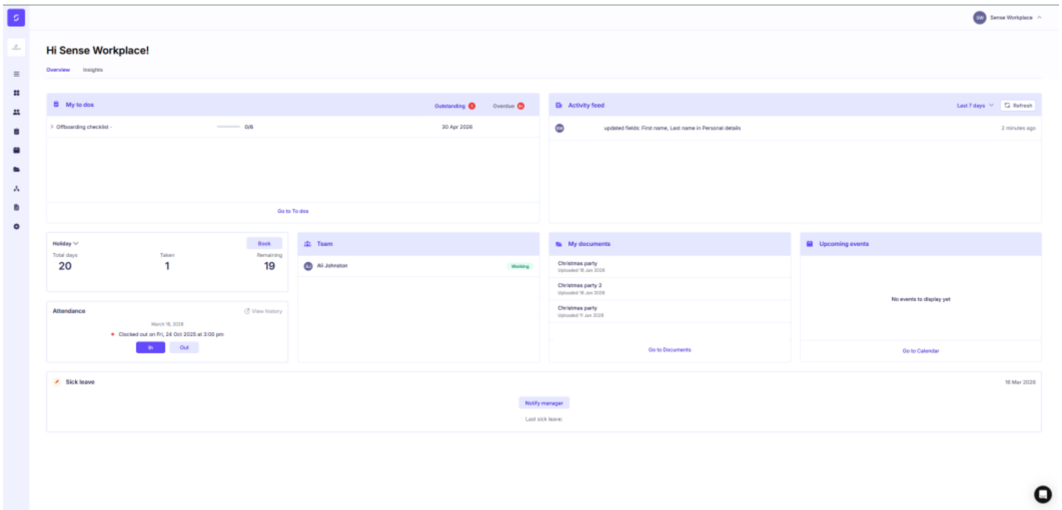


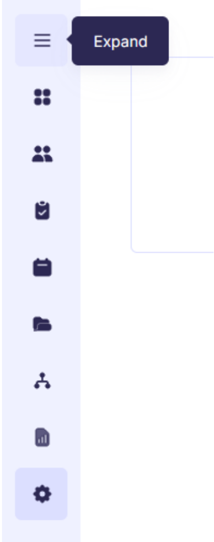
Figure: The administrator dashboard showing the Overview tab with widgets and the left-hand navigation menu.

4.3 Navigating the Sense HR Interface

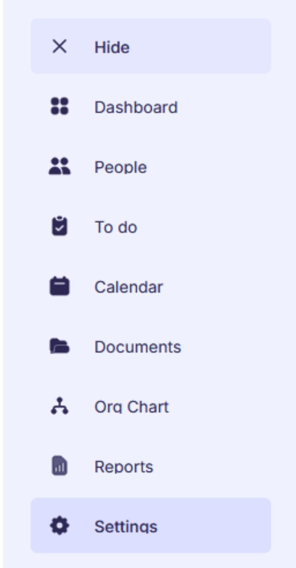
The **left-hand navigation menu** gives access to all Sense HR products available in your subscription.

Product	Purpose	Cross-Reference
People	View and manage employee profiles	§7 People Profiles
To do	View and manage your to do tasks and company-wide to do tasks	
Calendar	Book and edit events, track absences, holidays, and company events	§8 Calendar & Planner Management
Documents	Upload and manage company documents	§10 Document Management
Org chart	View the company organisation chart	§4.7 Org chart
Reports	Run and export data reports	§11 Reports and Data Insights
Settings	Configure core HR settings such as default calendar settings, working hours, events, and clock-in access. This area also provides access to Bulk Upload and plan-specific modules such as Screen Designer, Document Templates, and Access Roles.	§5 Core System Settings

Product	Purpose	Cross-Reference



Collapsed sidebar (icons only)



Expanded sidebar (icons and labels)

4.4 Search and Filtering

Many areas of Sense HR display information in lists, such as People, To dos, Documents, and configuration areas under Settings (for example Calendar & Planner, Event Manager, Screen Designer, and Access roles).

Where a list is available, Sense HR provides search tools and, in most cases, filtering tools to help you quickly find and narrow down the data you're looking for. These tools behave consistently throughout the system to provide a predictable user experience.

4.4.1 Where search and filters are available

Search and, in some areas, filters are available in most list-based areas, including:

- People
- To dos
- Documents
- Reports
- Settings › Calendar & Planner › Working hours
- Settings › Calendar & Planner › Event Manager
- Settings › ★ Screen Designer › Screens
- Settings › ★ Screen Designer › Profile templates
- Settings › ★ Documents (templates)
- Settings › ★ Access roles

Figure: A typical list view with search box and filter controls.

4.4.2 Using search

Use the search box to quickly locate records by typing:

- Full words or partial words
- Names, titles, or identifiers
- Keywords that appear anywhere in the list

Search results update automatically as you type and are useful for fast, broad matching.

Tip:
Search is best used when you already know part of what you're looking for (for example, a person's name or a document title).

4.4.3 Using filters

Filters allow you to narrow results more precisely by applying rules to individual columns or fields. Filters work the same way wherever they appear in Sense HR, including in lists and reports.

Depending on the type of data, you may see different filter options, such as:

- Date filters (for example, before, after, between, this month)
- Value selection filters (selecting specific values)
- Numeric filters (greater than, less than, equals)
- Text filters (contains, starts with, is blank)

You can also:

- Apply multiple rules to a single filter
- Choose whether records must match all rules or any rule

This allows you to refine results step by step until only the records you need remain.

Tip:

Filters are especially useful when working with large data sets or when you need repeatable, consistent results.

✎ **Note**
If expected data is not showing in a list, there may be one or more active filters applied. Check for active filters and use the Clear filters option (available in the upper-left area of list views) to reset the list and display all records.

4.5 Email Notifications and Activity Feed

Email notifications and the Activity feed in Sense HR keep administrators informed about pending approvals, to do tasks, required actions and user activity.

4.5.1 The Activity Feed

Navigation Path:
`HR Dashboard › Overview › Activity feed`

The activity feed gives administrators an overview of recent system activities such as new starters, leavers, changes to key employee details and more. It can be set to today, yesterday, or the last 7 days.

Figure: The Activity feed widget on the administrator dashboard, showing recent system changes.

4.5.2 Email notifications and To Do tasks:

Notification emails and to do tasks are triggered for activities that require administrator action.

Notification Types:

- Pending approvals and requests
- Document actions (to read, to sign)
- Workflow and *Automate* triggers (e.g. onboarding checklists, performance reviews, etc.).

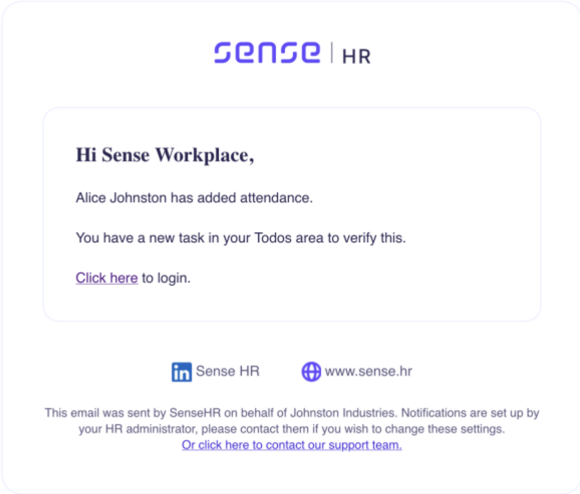


Figure: A Sense HR notification email informing an administrator of a new To Do task requiring action.

4.6 Own Profile and Personal Settings

Administrators can adjust their profile and account details via the **Profile Menu** (top-right corner).

Navigation Path:
`[Name or Avatar](top right) › Manage profile/Help/Logout`

Options Available:

- View and edit your name, email, job title, and other employment data.
- Access the Sense Workplace support site.
- Sign out securely.

✎ **Note:** Administrators can also access their own profile via the People list and selecting their own profile (`Dashboard › People › [select own profile]`)

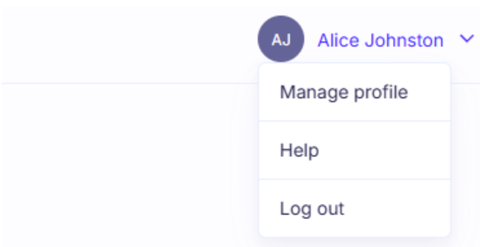


Figure: The profile menu dropdown (upper right) showing Edit Profile, Help, and Log Out options.

4.7 Org Chart

The **Org Chart** provides a visual representation of the company's reporting structure, showing the line management hierarchy across the organisation.

Navigation path:
`HR Dashboard › Org Chart`

The chart is generated automatically from the line manager assignments configured in each employee's **Job Details** screen (see §7.9) and updates in real time whenever reporting lines change — for example, when someone is assigned or removed as a line manager.

All users can view the **Org Chart**. What happens when you click on a person depends on your access role: administrators are taken directly to that person's profile, managers with access to the selected person are also taken to their profile, and standard users or managers without access to that person will see an access denied message.

4.8 Quick Troubleshooting

Issue	Likely Cause	Resolution
Missing dashboard widgets	Product not licensed or disabled in Sense HR settings	Confirm available products with your plan or check the relevant settings (see §5 Core System Settings)
Error message on login	Incorrect credentials / SSO expired	Reset password or reconnect via Microsoft / Google.
No search result	Possible spelling error, missing record, or active filters applied	Check spelling, confirm the record exists, and clear any active filters
Unable to log in or login page appears incorrect	Accessing Sense HR through an incorrect or outdated URL (for example a bookmarked link with forwarding parameters or manually entering an incorrect address).	Open Sense HR using your organisation's official login link or access it from the Sense Workplace website. Avoid using saved or manually typed URLs. Update any bookmarks once you have reached the correct login page.

Example: Incorrect vs Correct Login URL

⚠️ If the login page looks unusual or you cannot sign in, you may be using an incorrect URL.

❌ Incorrect login page:	https://login.sensewp.com/
✅ Correct Sense HR login:	https://hr.sensewp.com/ (Ensure nothing appears after the final forward slash in the address)

4.9 Administrator Orientation: FAQS

Q: How do I log in to Sense HR as an administrator?
A: You log in using your login credentials at https://hr.sensewp.com/. Depending on your configuration, you can sign in via Microsoft 365, Google, or email and password.

Q: Can I enforce multi-factor authentication for all administrators?
A: Yes — you can enforce multi-factor authentication under `Sense Portal › Settings › Security`, choosing "Enable MFA".

Q: What if I forget my password?
A: If you log in using a Sense HR username and password, you can reset it by selecting **Forgot password** on the login page and following the link sent to your registered email.

If your organisation uses **Single Sign-On (SSO)** (for example Microsoft or Google login), the password reset option will not apply. In this case, reset your password through your organisation's normal account recovery process or contact your IT administrator.

Q: What does the main administrator dashboard show in Sense HR?
A: The main administrator dashboard has two main tabs --- Overview and Insights. The overview shows personal widgets summarising To do tasks, Activity feed, Holiday, Team availability, Documents, Upcoming events, and (if active) the Clock in/out widget. The insights tab shows system-wide activity and insights — for example, absence rates, total holidays remaining, and staff turnover.

Q: Can I change what appears on my dashboard?
A: You can customise some aspects of the dashboard. For example, by turning on the Dashboard Clock in/out widget or choosing an Absence scheme.

Q: How do I navigate between different parts of Sense HR?
A: You navigate between different parts of Sense HR using the menu on the left-hand side of the screen. Click on a module name such as **People** or **Calendar** to switch views.

Q: Why don't I see all the modules listed?
A: You may not see all modules if your access role does not include permission to view them, or if certain features (such as Screen Designer or Access Roles) are not available on your subscription plan. Modules and settings are shown based on both your role permissions and the features enabled for your organisation.

Q: Can I expand or collapse the navigation menu?
A: Yes — you can expand or collapse the menu using the burger icon (≡) at the top of the navigation menu. Collapsing gives a larger workspace, while expanding gives more context to the module icons.

Q: How do I change my own profile details in Sense HR?
A: You can change your own profile details by clicking your name or avatar in the top-right corner of the dashboard, selecting **Manage profile**, and editing your information directly by selecting any of the sidebar tabs, for example, Personal details.

4.10 Section Summary

You now understand how to navigate, personalise, and manage the Sense HR administrator environment.
Continue to **Section 5 — Core Administration and System Setup** to begin detailed configuration of your company HR profile, working hours configurations, absence, and event settings.

PART II — Core Administration and System Setup

5 Core System Settings

Configure the key rules and defaults that control how HR processes run day to day within your organisation.

5.1 Overview of Core System and HR Settings (Portal v SHR)

Core System Settings define how Sense HR operates within your organisation's Sense Workplace environment.

Since the introduction of Sense Portal, workplace-level settings—such as branding, customer support access, and security settings—are now managed outside of Sense HR. As Sense Portal continues to roll out, this will also include billing, compliance, and other Sense Workplace–wide settings.

Administrators continue to manage day-to-day HR preferences within the Sense HR administrative centre.

Level	Managed Where	Examples
Company-Level (Organisation)	**Sense Portal / Support**	Organisation profile, branding, support access, and security settings.
Product-Level (Sense HR)	**Sense HR**	HR settings, access roles, reporting.
User-Level	**Sense HR & Sense Mobile**	Personal settings.

5.2 Key Sense HR System Concepts

Before you begin configuring or managing Sense HR, it helps to understand a few core ideas about how the system is designed. These concepts explain how different parts of Sense HR fit together and will make the rest of this manual easier to follow.

5.2.1 Profile and Users

In Sense HR, a **profile** stores information about a person, such as their personal details, job information, planner settings, and documents.

A **user** is what allows someone to log in to the system.

A person can have:

- A profile without login access, or
- A profile that is linked to a user account.

This separation allows you to keep historical records, manage leavers correctly, and control access independently of employee data.

5.2.2 Screens Define Data Collection

Screens are the sections you see when viewing a person's profile, such as **Personal details**, **Job details**, **Training**, or **Leaver details**. Each screen contains fields related to a specific type of information and is accessed using the profile's sidebar.

For most organisations, screens simply act as the **data collection and viewing areas** for each profile. Administrators — and in some cases employees or managers, depending on permissions — can view, add, or edit information on these screens as part of normal day-to-day use.

Screens determine:

- What information can be stored on a profile
- What appears in reports
- What information system processes can use

On **Team** and **Professional** plans, the set of screens is fixed and consistent across profiles. Administrators work with the screens provided and focus on entering and maintaining accurate data.

On **Elite** and **Enterprise** plans, screens can be customised using **Screen Designer**. This allows organisations to add, remove, or modify screens and fields to better match their data requirements. While the level of control differs by plan, the underlying concept is the same: screens define the structure of profile data.

5.2.3 Calendar & Planner Settings Drive Entitlement and Calendar Behaviour

Planner settings on a profile control how working time, holidays, and absence are calculated. These settings bring together working hours, holiday year, public holiday rules, and entitlement configuration.

Holiday entitlement is **calculated**, not entered in isolation. Changes to planner settings affect:

- Future event durations
- Pro-rata entitlement
- Calendar behaviour

- Reporting outcomes

5.2.4 Events are Time-Based Records

Events are any time-based records added to a calendar, such as holiday, sickness, or working events.

Not all events affect entitlement, and different event types behave differently depending on configuration.

Understanding this distinction helps avoid confusion when reviewing calendars and reports.

5.2.5 Access Roles Control Visibility and Actions

Access roles determine what users can see and do in Sense HR. They do not control what data exists — only who can access it.

This separation allows the same data structure to support administrators, managers, and employees with different permissions.

5.2.6 To Dos Coordinate Actions Across the System

To Dos represent **actions that need to be completed** in Sense HR. They are used to prompt users to review information, complete a task, or take action as part of a wider process.

To Dos may be created:

- Manually by users (for example, personal reminders)
- Automatically by the system
- As part of workflows, such as onboarding or leaver processes
- When documents require reading or signing

A To Do does not store employee data itself. Instead, it **links users to the place where the action happens**, such as a profile screen, document, or approval step.

This allows Sense HR to:

- Guide users through multi-step processes
- Track progress and completion
- Coordinate actions across different parts of the system

✎ **Note:** To Dos are used throughout Sense HR to connect features such as Documents, Events, Profiles, and Workflows. Understanding how To Dos work will help you follow processes later in this manual.

5.2.7 Reports Reflect How Your System is Configured

Reports in Sense HR do not create or infer data. They reflect the data that exists based on your screens, planner settings, events, and permissions.

If information does not appear in a report, it usually means the data has not been collected, or configured — not that the report is incorrect.

5.3 Security and Support Access controls, Passwords, MFA, and Single Sign-On

Until full self-service access becomes available in **Sense Portal**, some workplace-level settings are managed by **Sense Workplace Support**.

Setting	Description	Managed Where
Organisation Profile	Legal name, address, registration details.	Account manager
Branding	Company logo across apps.	Sense Portal
Billing & Subscription	Product subscription, billing contact, invoices.	Finance team
Multifactor Authentication	Enable MFA for login	Sense Portal
Customer support system access	Control and monitor Sense Workplace support access	Sense Portal

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5.4 Sense HR Settings Overview

Administrators manage core HR settings, defaults, and templates directly inside Sense HR.

Setting Group	Navigation Path	Purpose
General Calendar & Planner Settings **(****see § 5.5****)**	`HR Dashboard › Settings › Calendar & Planner › General`	Configure default Calendar & Planner settings such as holiday year, public holiday group, FTE, Absence schemes, and the notify sickness dashboard widget.
Working hours **(****see § 5.6****)**	`HR Dashboard › Settings › Calendar & Planner › Working hours`	Set all working hours configurations for all worker types, including schedules where applicable
Event Manager **(****see § 5.7****)**	`HR Dashboard › Settings › Calendar & Planner › Event Manager`	Create and manage working, time-off, and sickness events as bookable events, including icons and colours. Setting up event rules, sickness reasons, approval requirements, carryover

Setting Group	Navigation Path	Purpose
		settings, event booking permissions and visibility.
★ **Time & Attendance recording** (see § 5.8)	`HR Dashboard › Settings › Time & Attendance`	Manage methods for time & attendance recording such as the Dashboard clock-in widget and the Sense Mobile app tile (Professional / Elite / Enterprise only)
★ **Access Roles** (see § 6)	`HR Dashboard › Settings › Access Roles`	Control permissions by role (Professional / Elite / Enterprise only)
★ **Screen Designer** (see §16)	`HR Dashboard › Settings › Screen designer`	Create and manage screens for data capture within People Profiles (Elite / Enterprise only)
★ **Documents** (see §10)	`HR Dashboard › Settings › Documents`	Create and manage document templates for frequently used personal documents

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5.5 General Calendar & Planner Settings

General Calendar & Planner settings define the company-wide defaults used for the company calendar and individual people planners. These settings control how working time, entitlement, and absence are measured and visualised across Sense HR.

Setting defaults is optional but recommended. Defaults help standardise planner configuration across the organisation and are intended to automatically pre-populate planner settings for new people. All defaults can still be changed later at an individual profile level.

✎ **Note**
Full default-propagation functionality is currently being finalised and will be available in an upcoming release.

At present, these settings act as a reference when configuring planners for new employees, rather than automatically applying values to profiles.

Changes made here will not update existing employee planners automatically. Planner settings must still be configured or adjusted within each individual profile where required.

5.5.1 Access General Calendar & Planner Settings

You can access General Calendar & Planner settings from the Settings area.

Navigation path:
`HR Dashboard › Settings › Calendar & Planner › General`

This page contains all general settings for:

- Company calendar behaviour
- People planner defaults
- Absence measurement and visual indicators

5.5.2 Set Company-Wide defaults

The Defaults section allows you to define baseline planner values that can be reused when adding new people.

You can configure:

- **Default Holiday year**
  Select the holiday year used by default (for example, Jan–Dec or Apr–Mar).
- **Default Working hours**
  Select a working hours configuration from the dropdown.
  (Populated from `Settings › Calendar & Planner › Working hours`.)
- **Default Public holiday group**
  Select the appropriate public holiday group (for example, England & Wales).

These defaults can be overridden for any individual person at any time using Profile Planner Settings.

> ✎ **Note**
> Full default-propagation functionality is currently being finalised and will be available in an upcoming release.
> At present, these settings act as a **reference when configuring planners for new employees**, rather than automatically applying values to profiles

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5.5.3 Define full-time reference values

Full-time reference values are used for pro-rata entitlement calculations.

You can enter:

- **Full-time working hours**
  Your organisation's standard weekly hours for a full-time employee (for example, 35.00).
- **Full-time entitlement (days)**
  The annual entitlement in days for a full-time employee.
- **Full-time entitlement (hours)**
  The annual entitlement in hours for a full-time employee.

✎ **Note**
These values are reference points only. An employee's actual contracted hours come from their assigned Working hours configuration.

5.5.4 Configure an absence scheme

The Absence scheme determines how sickness is measured and whether trigger points and required actions are applied.

You can choose one of the following options:

- Our company does not use an absence scheme
- Our company uses the Bradford factor
- Our company calculates based on number of absence instances
- Our company calculates based on total number of days absent

Based on the selected scale, the system will suggest:

- Trigger values (e.g. number of days or instances)
- Corresponding actions to be taken when triggers are reached

You can:

- Edit a trigger or action by clicking the edit icon (pencil)
- Delete both a trigger and its action by clicking the delete icon (×), then confirming

✎ **Note**
If your company does not use an absence scheme, absence impact summaries will not appear on employee profile planners (`People › [select profile] › Planner`) or in reports.

✎ **Plan note**
At present, trigger-based actions that create **To Do** tasks are available on **Elite** and **Enterprise** plans only.

On **Team** and **Professional** plans, trigger conditions do not generate **To Do** tasks. Instead, their outcomes can be monitored through reporting. Administrators can review these under `Reports › Profile Information › Create`, then scroll to **Absence Impact Summary** and select the relevant fields (including **Required Action**) to identify cases that meet trigger criteria.

5.5.5 The Company calendar heatmap

The Company calendar heatmap helps visualise how busy or quiet days are across the organisation.

When enabled, you can:

- Highlight low-staff days by selecting holidays and absences
- Highlight busy days by selecting work events

Use the toggle to turn the Company calendar heatmap ON or OFF.

✎ **Note**
The **Company Calendar Heatmap** is not currently live. It will become available in a forthcoming release.

5.5.6 The personal planner / absence heatmap

The Personal planner / absence heatmap identifies patterns in an individual's planner.

When enabled, it:

- Highlights days an employee is most frequently off sick
- Uses a **rolling 12-month period by default**, with options to view **3, 6, or 9 months**.
- Supports pattern recognition during reviews or absence management

Use the toggle to turn the Personal planner heatmap ON or OFF.

When switched on, the absence heatmap can be viewed on each profile at `People › [select profile] › Planner`

5.5.7 The Dashboard Sickness widget

The Dashboard sickness widget allows employees to notify their manager that they will be absent today directly from the dashboard.

When enabled:

- Employees can report sickness quickly
- Managers and administrators gain faster visibility
- A To Do task is created for the line manager (or an administrator if no line manager is assigned) to add the event to the planner.

Use the toggle to turn the Dashboard sickness widget ON or OFF.

✎ **Note**
Ability to add own sickness to the Personal Planner is configured via Access roles. See § 6 Access Roles and Permissions

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5.6 Working Hours Configurations and Schedules

Working hours configurations define how contracted working time is structured within Sense HR. They control how planners display working and non-working days, how entitlement is calculated, and how events and (where applicable) attendance behave.

Working hours configurations are reusable. Once created, they can be assigned to multiple people and applied to future starters or existing employees through Profile Planner Settings.

Sense Workplace provides a preset selection of Working hours in accordance with the most common working hours set ups found in UK organisations. It's recommended that you use these presets wherever possible for your organisation

As a core setup step, **Working hours** configurations should be reviewed before go-live.

✎ **Note**
Working hours configurations define organisational patterns. They do not assign hours to a person on their own — this happens later at profile level.

5.6.1 Access Working Hours configurations

Navigation path:
`HR Dashboard › Settings › Calendar & Planner › Working hours`

This page lists all existing working hours configurations and shows how many people are assigned to each one.

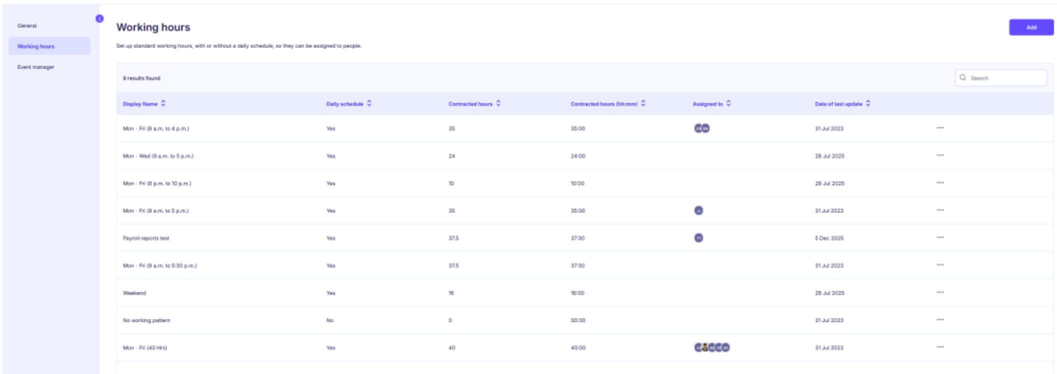

Figure: The Working hours list view showing configurations and assignment counts.

5.6.2 What a working hours configuration controls

A working hours configuration determines:

- Contracted weekly hours
- Working and non-working days
- Planner Working / Non-working status
- Holiday entitlement calculations
- Multi-week or rotating schedules

Using configurations ensures consistent behaviour across planners, reports, and entitlement calculations.

5.6.3 Preconfigured Working Hours

Sense HR includes a comprehensive set of preconfigured working hours patterns. In most cases, one of these can be selected as your organisation's default under `Settings › Calendar & Planner › General` (see §5.5 General Calendar & Planner Settings)

For employees whose schedules differ from the default, an alternative working hours configuration can be assigned at profile level via `People › [Select profile] › Planner › Settings` (see §7.7 Configuring Personal Planner Settings and Entitlement)

In the rare case that none of the preconfigured options meet your requirements, you can copy and edit an existing configuration or create a new one from scratch (see §5.6.4 Create a new working hours configuration and §5.6.5 Manage existing working hours configurations).

5.6.4 Create a new working hours configuration

Follow these steps to create a new working hours configuration.

Step 1: Start a new configuration

1 Go to **Settings** › **Calendar & Planner** › **Working hours**.
2 Select **Add.**

Step 2: Enter basic details

1 Enter a Display name that clearly describes the schedule
(for example: Compressed week – 4 days (37.5 hours))
2 (Optional) Enter a Description for internal reference.

(Optional) Step 3: Add a daily schedule

1 Toggle **Add daily schedule** ON if the role has any repeatable structure.
2 When enabled, you must select:
- A Week start day (for example Monday)

The week start day controls:
- Multi-week rotation
- Correct alignment for mid-week assignments

✎ Note
If no daily schedule is added, contracted hours must be entered manually. This is typically only suitable for genuinely ad-hoc or zero-hours roles.

(Optional) Step 4: Choose how the daily schedule is defined

Choose how working time should be captured:

Daily hours:

Use this when the role has no fixed start and end times.

Suitable for:
- office-based roles
- remote workers
- flexible schedules
- compressed working weeks

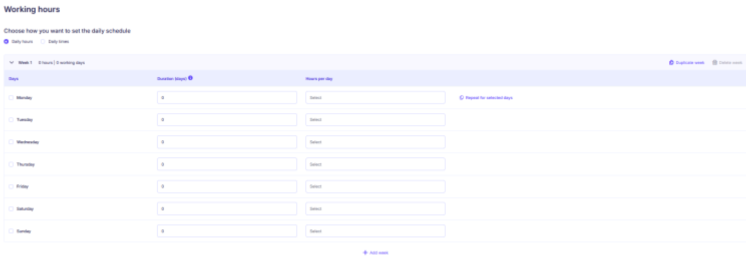

Figure: Daily hours configuration

Daily times:

Use this when the role has defined start and end times, or when employees clock in and out.

Suitable for:

- shift-based roles
- attendance tracking
- Presence-enabled environments

Figure: Daily times configuration

(Optional) Step 5: Define the Daily Schedule

✎ Key concept note — Duration (days)

Duration (days) defines how much of a working day each date represents for planner and entitlement calculations:

- 0 = non-working day
- 1 = full working day
- < 1 (e.g. 0.75) = part day
- > 1 (e.g. 1.25) = extended day

This value is separate from hours or times and is essential for supporting compressed and non-standard schedules. Ensure it accurately reflects how the day should count for entitlement and planning.
If 0.5 is entered as the duration, only 0.5 days will be deducted from holiday entitlement when leave is booked for that day.
In most cases, the duration should be set to 1 for any day that counts as a full working day for the employee, even if their working hours are shorter than the organisation's standard full day.

If using Daily hours

For each day:
- Enter Duration (days)
- Select Hours per day

Sense HR:
- Uses these values to calculate contracted weekly hours
- Uses Duration (days) to weight planners and entitlement

Example (compressed week):
- Monday–Thursday: Duration (days) = 1.25
- Friday: Duration (days) = 0

If using Daily times

For each day:
- Enter Duration (days)
- Select Start time
- Select End time
- Enter Break duration
- (Optional) Enable Subtract breaks from contracted hours

Sense HR:
- Calculates total Duration (hours) automatically
- Uses Duration (days) for entitlement and planner weighting
- Uses times and break duration for attendance and clocking behaviour

💡 **Tip — Repeat for selected days**
After completing one day, select the other matching days and choose Repeat for selected days to copy all values at once. This helps reduce errors and is especially useful for compressed, repeating, or non-standard schedules.

(Optional) Step 6: Add additional weeks

If the schedule rotates:
1. Select Add week or Duplicate week.
2. Adjust values for each week as required.

The configured week start day ensures rotations remain aligned, even when assigned mid-week.

(Optional) Step 7: Save the schedule

Once the schedule is complete, click **Back** to return to the configuration. Changes are retained and automatically update the **Contracted hours**

Step 8: Save the Working hours configuration

Click **Save**

5.6.5 Manage existing working hours configurations

Administrators can manage configurations from the list view.

Edit
To edit, click directly on the **Working hours** configuration in the list

- You can rename or update metadata at any time.
- Structural schedule changes are restricted if employees are assigned.

If structure changes are needed:

- Create a new configuration or copy an existing configuration
- Reassign employees and enter an effective date via `Profile › [Select profile] › Planner › Settings`
- Changes apply from the effective date onwards

Copy
Use **More actions (⋯)** › **Copy** to create variations.

Delete

- Configurations must have no assigned employees before deletion.
- Use **More actions (⋯)** › **Delete** to create variations.

5.7 Configuring Event Manager and Event Types

The Event Manager is where administrators configure events which can be booked in calendars and planners — such as Holiday, Sickness, Working events or other time-based records.

Each bookable event belongs to one of three system event type categories:

- Working
- Time off
- Sickness

Event types determine:

- How events appear in calendars
- Whether they affect entitlement
- Which options users see when booking events
- How and where events appear in reports

These categories define the broad behaviour of the event, while the rules applied to each bookable event determine how it behaves in practice — including approvals, entitlement deduction, accrual, and reporting.

Event Manager configuration is a core setup step and should be reviewed before go-live.

✎ **Note**

Events represent time, not just absence. Not all events affect entitlement, and different event types behave differently depending on how they are configured.

5.7.1 Access the Event Manager

Navigation path:
`HR Dashboard › Settings › Calendar & Planner › Event Manager`

This page displays a list of all available event types for your organisation.

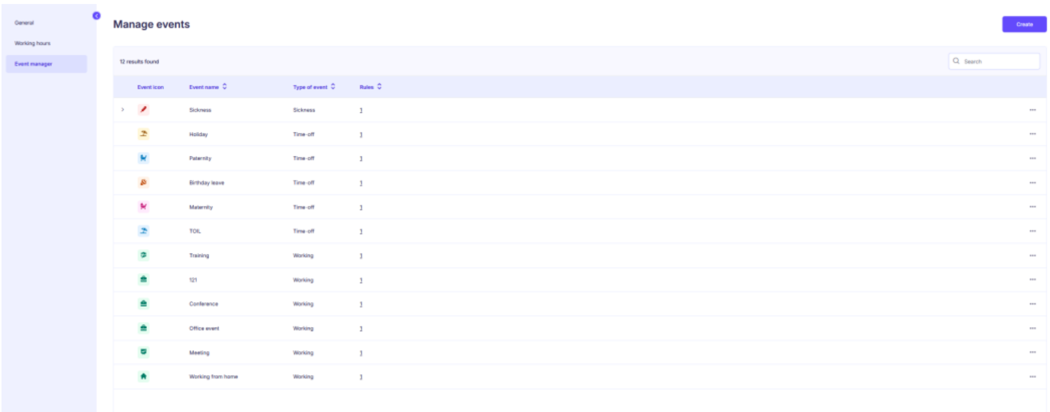

Figure: The event manager list view showing bookable event names, event types, and number of configurable rules currently applied to each bookable event.

5.7.2 What a bookable event controls

A bookable event defines:

- The name shown to employees and managers
- The event type category (Working, Time off, or Sickness)
- The icon and colour used in calendars
- Who can book an event
- Which rules apply when the event is booked
- How the event appears in planners and reports

The behaviour of a bookable event is controlled almost entirely by its rules.

5.7.3 Create or edit a bookable event

Follow these steps to create a new event or manage an existing one.

<u>Step 1: Open the event</u>

1. Go to **Settings** › **Calendar & Planner** › **Event Manager**.
2. Click the name of an existing event to edit it, or select **Create** to add a new event

Step 2: Set basic event details

In the event editor:

1 Select the Category:
- Working
- Time off
- Sickness

2 Enter or edit the **Display name**
(This is the name shown in calendars and booking flows.)

3 Select an **Icon** and **Colour** for calendar display.

3 (Sickness event type only) **Add** or **Edit** Sickness reasons

4 Select **Save** to apply these changes (adds bookable event to event manager)

5 (Optional) Click **Create rule** to begin applying rules to the event

✎ **Note**
New bookable events are created with default system rules that apply to everyone. To change these defaults or apply different rules to specific people or groups, see § 5.7.4 Editing event rules or § 5.7.5 Editing Sickness event rules

---

5.7.4 Editing event rules (Non-sickness events)

Rules define how a bookable event behaves when it is booked. Each event can have multiple rules that apply to specific people or groups.

To manage rules:
1 Click the Rules number next to the event in the Event Manager list.
2 Edit the default rule or select **Create rule** to add a new rule

3 Specify rule name, scope, and assignment

When creating or editing a rule, you can:
- Name the rule clearly to describe its purpose (e.g. Directors: HR Approval).
- Assign the rule to:
  - Everyone, or
  - Specific roles or groups (e.g. Directors, Contractors), then
  - Exclude people from the rule if required (for example, excluding an individual or department from a broader group).

4 Click **Next** to configure rule options

Common rule options

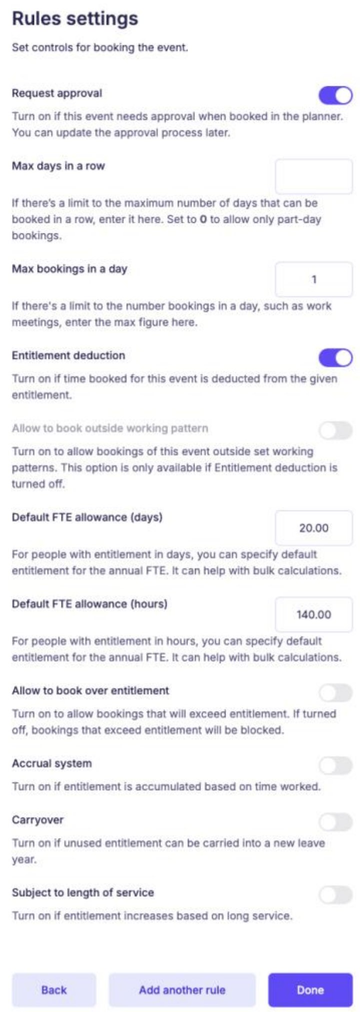

Figure: Event rule configuration showing approval, entitlement, carryover, and booking controls for a time-off event.

Depending on the event, rules may include:

- **Request approval**
  Requires manager approval via a To do task.
- **Maximum days in a row**
  Limits how long the event can be booked in a single request.
- **Maximum bookings in a day**
  Limits how many of the events can be booked in one day
- **Entitlement deduction**
  Deducts the event duration from the relevant entitlement.
- **Allow booking outside work pattern**
  Allows booking on non-working days (only available if entitlement is not deducted).
- **Default FTE allowance (days or hours)**
  Defines full-time entitlement for this event.
- **Allow booking over entitlement**
  Allows employees to exceed their remaining balance.
- **Accrual system**
  Enables entitlement to accrue weekly or monthly rather than being allocated up front.

- **Carryover rules**
  Allows unused entitlement to carry into the next holiday year, up to a defined limit.
- **Length of service (LOS) increases**
  Automatically increases entitlement after defined service milestones

5 Select **Done** to apply changes.

5.7.5 Editing Sickness event rules

Sickness events have different rule options.

To manage sickness rules:
1 Click the Rules number next to the Sickness event in the Event manager list
2 Edit the default rule or select **Create rule** to add a new rule
3 Specify rule name, scope, and assignment

When creating or editing a rule, you can:

- Name the rule clearly to describe its purpose (e.g. Directors: HR Approval).
- Assign the rule to:
  - Everyone
  - Specific roles or groups (e.g. Directors, Contractors)
  - Exclude people from the rule if required (for example, excluding an individual or department from a broader group).

4 Click **Next** to configure rule options

Sickness-specific options are set per sickness reason and include:

- **Fit note required**
  Generates a To do task for employees to provide a fit note.
- **Return to work required**
  Generates return-to-work tasks for both employee and manager.
- **Paid / unpaid**
  Controls how sickness appears in paid/unpaid reporting.
- **Include in absence scheme**
  Determines whether the sickness counts towards the configured absence scheme.

5 Select **Done** to apply changes.

5.7.6 Event manager: best practice guidance

- Keep the number of bookable events manageable
- Use clear, descriptive names that employees understand
- Use rules to tailor behaviour by individual or group rather than creating duplicate events
- Review event rules before go-live and after early usage
- Avoid editing live events with historical data — create new events if behaviour needs to change

✎ **Important note:**
The **Assign to** and **Exclude people** rules control who can book an event, not who can see the event in the calendar.

If a user has permission to view another person's planner or calendar through their **Access Role**, they may still see that person's event bookings even if they are excluded from booking that event themselves.

Event rules therefore determine **booking behaviour**, while Access Role permissions determine overall Calendar & Planner **visibility**.

5.8 ★ Time & Attendance Recording (Basic)

Professional / Elite / Enterprise only

Time & Attendance settings control whether employees can clock in and out using the Sense HR web dashboard and/or the Sense Mobile app. These settings do not configure hardware devices (such as Sense Presence clocks) and do not define working hours — they simply enable or disable clock-in access points.

This section applies whether you use:
- Web dashboard clock-in only
- Mobile app clock-in only
- Both web and mobile clock-in
- Or neither (feature disabled)

5.8.1 Access Time & Attendance Settings

Navigation path:

```
HR Dashboard › Settings › Time & Attendance
```

The Time & Attendance area contains two sub-sections:
- Dashboard Clock-In
- Mobile Clock-In

Each can be enabled or disabled independently.

5.8.2 Dashboard Clock-In

Dashboard Clock-In allows eligible users to clock in and out directly from the *Sense HR* web dashboard.

When enabled:
- A **Clock-In** widget appears on the Dashboard for eligible users
- Users can clock in and out without opening *Sense Mobile*

To enable Dashboard Clock-In:

1 Go to `Settings › Time & Attendance › Dashboard Clock-In`
2 Toggle **Enable Dashboard Clock-In ON**
3 In **Assign to**, choose who should have access (for example: Everyone, or filtered by role, department, or location)
4 (Optional) Use **Exclude people** to remove specific users
5 Select **View filtered results** to review who will be affected

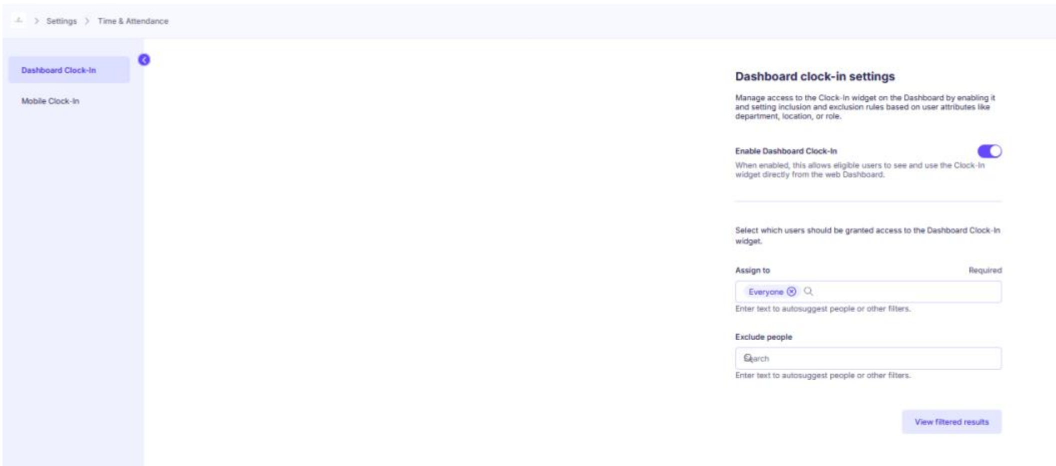

Figure: Dashboard Clock-In settings for configuring web-based time recording.

5.8.3 Mobile Clock-In

Mobile Clock-In allows eligible users to clock in and out using the **Clock-In** tile in the *Sense Mobile* app.

When enabled:

- The Clock-In tile appears in Sense Mobile for eligible users

To enable Mobile Clock-In:

1 Go to `Settings › Time & Attendance › Mobile Clock-In`
2 Toggle **Enable Mobile Clock-In ON**
3 In **Assign to**, choose who should have access
4 (Optional) Use **Exclude people** to remove specific users
5 Select **View filtered results** to confirm eligibility

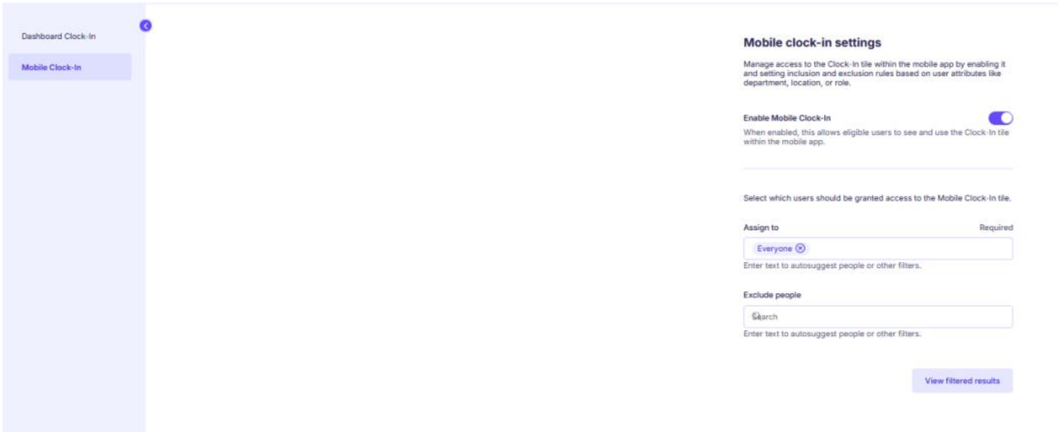

Figure: Mobile Clock-In settings for configuring mobile-based time recording.

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6 Access Roles and Permissions

Access Roles control what users can see, edit, and manage within Sense HR.

Each user is assigned one access role, which determines:

- Which profiles they can access
- What actions they can perform
- Which features and settings they can use

Access Roles allow administrators to:

- Protect sensitive data
- Delegate responsibilities safely
- Create role-appropriate experiences for employees, managers, and administrators

A full list of default access role permissions can be viewed at:
https://support.sensewp.com/en/articles/213603-default-user-permissions

✎ Important
Access Roles apply across the entire Sense HR system. Decisions made here directly affect data visibility, compliance, and user trust.

6.1 Availability and Prerequisites

Access Roles are used on all Sense HR plans.

What differs by plan is whether roles can be managed or customised.

All plans

- Use Access Roles
- Assign users to an access role
- Enforce role-based access automatically

Professional, Elite, and Enterprise plans

- Create new access roles
- Copy and customise existing roles
- Edit permissions for roles
- Create limited administrator roles

The access roles management feature is made available after administrator training. It is added to your system on request by the Sense Workplace Ops team, once training is complete.

✎ **Note**
Even on plans where access role management is not available, Access Roles are still active and must be assigned where required. The difference is whether administrators can define and modify role permissions, not whether roles exist.

6.2 Navigation

6.2.1 ★ Access Role Management (ARM)

Available on Professional, Elite and Enterprise plans

`HR Dashboard › Settings › Access Roles`

From this area, administrators can:

- View all existing roles
- Copy roles to create new ones
- Create limited administrator roles
- Edit permissions (where permitted)
- Delete custom roles

6.2.2 Assigning an access role to a user

`HR Dashboard › People › [Select profile] › More actions (⋯)menu (upper right) › Assign access role`

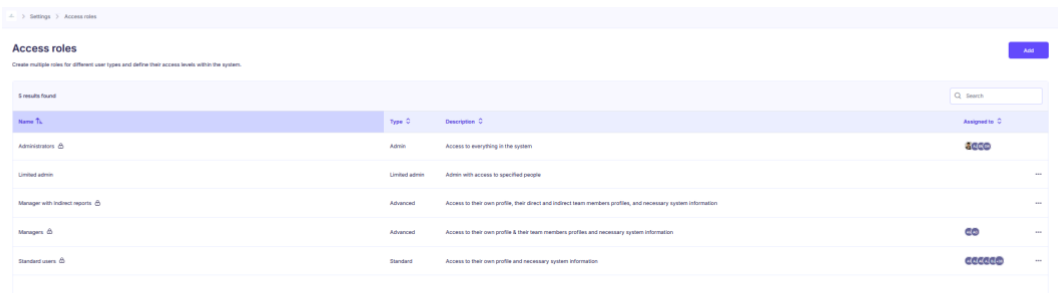

Figure: The Access Roles list with the Add role button for creating new permission sets.

6.3 Default Access Roles

Every Sense HR system includes four default roles. These provide a baseline framework and can be copied or extended (depending on plan).

Default Role	Purpose
Administrator	Full system access. Cannot be edited.
Manager	Manages direct reports' profiles, events, and documents.
Manager (with Indirect Reports)	Same as Manager, with visibility across the full reporting chain.
Standard User (Employee)	Access to own profile, tasks, documents, and calendar only.

✎ **Note**
The default role assigned to new users is Standard User.

6.4 Types of Access Roles

Understanding role types helps administrators choose the correct approach.

Standard Roles

- Access to own profile only
- Used for employees, volunteers, contractors

Manager Roles

- Access to other people's profiles
- Used for managers, team leads, specialists
- Include People groups to define who the role applies to

★ Limited Administrator Roles

- Administrator-level permissions
- Restricted to specific people or groups
- Ideal for local HR, regional admins, or functional owners

Administrator is all access.

6.5 ★ Creating or Editing Access Roles

Navigation path:
`HR Dashboard › Settings › Access Roles`

6.5.1 Create a Standard or Manager-Type Role

Use this method to create employee, manager, or specialist roles.

1 Open **Settings** › **Access Roles**
2 Locate the role closest to what you need
3 Select **More actions (···)** › **Copy**
4 Enter a Role name and Description
5 Configure permissions:
- Own profile
- People (Advanced roles only)
- Features
- Custom actions

6 Select **Done**

For full guidance on permissions settings and configuration see:
https://support.sensewp.com/en/articles/322708-access-roles-management

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6.5.2 Extend Manager Access Beyond Their Team

By default, manager-type roles have access to the employees within their reporting hierarchy:
- Manager roles can access their direct reports.
- Manager with Indirect Reports roles can access both direct and indirect reports.

However, administrators can extend a manager's visibility beyond their reporting hierarchy by creating additional access groups within the role.

This allows managers to view or interact with other employees' data where required (for example, cross-department oversight, regional supervision, or project-based responsibilities).

Navigation:
`HR Dashboard › Settings › Access roles › [Select manager-type role] › Permissions › People`

6.5.2.1 Create an additional access group

To grant a manager access to additional people:

1 Click **Add another group**.
2 Enter a **Name** for the group to describe the access it provides.
3 Choose whether to enable **Enable full document access**.
When enabled, users with this role receive administrator-level access to documents belonging to people in the group.
4 **In Search people**, select who should be included in the group. You can choose:
- Everyone
- People filtered by role, department, or location
- Specific individuals

5 (Optional) Use **Exclude people** to remove specific users from the group.
6 Click **View filtered results** to review who will be included.

✎ **Note**: Ensure that people only fall into one group per access role when configuring access to their profile and documents, to avoid conflicting permissions.

7 Click **Save**.

Once the group is created, you can configure screen and field permissions for that group. Depending on whether **Enable full document access** is enabled, users in the role may also have full administrative access to the documents of people within the group.

✎ **Note:**
Additional access groups do not affect reporting hierarchies. They only control what people and documents the role can view or manage.

6.5.2.2 Manage an existing additional access group

You can update or remove an additional access group at any time.

Navigation:
`Dashboard › Settings › Access roles › [Manager-type role] › Permissions › People`

From the More actions (…) menu next to a group, you can:

- Rename group — also allows enabling or disabling full document access
- Edit people — update the filter criteria or included individuals
- Delete group — remove the group and its associated permissions

---

6.5.3 Create a limited administrator role

Limited administrator roles allow administrative access only for specific people or groups.

1 Open `Settings › Access Roles` and select **Add**
2 Enter a role name and description
3 Choose which people or groups the role applies to
(filter by department, location, job title, contract type, or team)
4 Optionally exclude specific individuals or groups
5 Select **Save**

The limited administrator will now have admin-level access only for the defined scope.

6.5.4 Edit an existing Access role

1 Open `Settings › Access Roles`
2 Select the role you want to edit
3 (Optional) Update the role name or description
4 Adjust permissions as required
5 Select **Done**

6.6 Assigning Access Roles to Employees

Navigation path:
`HR Dashboard › People › [Select profile] › More actions (…) › Assign access role`

1. Open the employee profile
2. Click **More action (…) menu** in the upper right and Select **Assign access role**
3. Choose the appropriate role and click **Next** to confirm

✎ **Note**
Each user can have only one active access role at a time. Roles can be changed at any point.

Users may automatically change between Standard User and Manager roles when they are assigned or removed as a Line Manager in employee profiles. See §7.9.1 Automatic Access Role Adjustment for Line Managers

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6.7 Understanding Permission Scope (Overview)

Rather than documenting every individual permission, it's important to understand how permissions are grouped:

- **Own profile** – What users can view or edit about themselves (profile screens)
- **People** – Manager access to team profiles (not included for standard user-type roles)
- **Features** – Access to modules such as Documents, Planner, Reports, or Org Chart (only administrators have full reporting access)
- **Custom actions** – Actions such as sending login invites or starting processes

Permissions apply consistently across the system, including dashboards, lists, and profile screens.

✎ **Note**
If a user reports missing features or data, check both their access role and your subscription plan.

6.8 How Access Roles Affect Data Visibility

Access Roles determine what each user can see and interact with inside Sense HR. If a user cannot see a module, screen, record, or action, it is almost always because of their assigned role — not because the data does not exist.

Key principles to understand:

- **Visibility is role-based**
  Users only see the areas, screens, and actions enabled in their access role. For example, managers may see their team's planners but not company-wide settings or reports.
- **Data may exist but be hidden**

If a user cannot see a screen or planner entry, the data still exists — it is simply not visible to them based on role permissions (**note:** event rules can also impact who can access certain bookable events).

- **Screen visibility settings control where data appears**
  Access to profile data is controlled at the screen and field level via `Access roles › [select role] › Permissions › Own profile/People`. If a role does not have permission to view a screen, none of the fields on that screen will be visible, even if the data is populated. If a role does not have permission to view a field within a screen, the screen may still be visible but the field will not.
- **Planner and event visibility varies by role**
  Administrators typically have full visibility, managers see and can manage team-level data (this can be configured using access role management (ARM)), and employees see only basic team-level data
- **Documents follow their own access rules**
  Company and personal documents have explicit visibility settings that work alongside access roles.

💡 **Troubleshooting tip**
If someone says "I can't see X", check their assigned access role first, then confirm screen permissions (access role permission for own profile/people), document access, and planner visibility before assuming a system issue.

6.9 Verification & Governance Checklist

Access Roles should be reviewed periodically to ensure that the right people have the right level of access to Sense HR. This checklist focuses on governance and accountability, rather than configuration.

Use this checklist:

- After initial rollout
- Following organisational or role changes
- When new screens, features, or modules are introduced
- As part of regular security or compliance reviews

6.9.1 To Audit Access Roles

Navigation path:
`HR Dashboard › Reports › Profile Information`

1️⃣ Open **Reports** from the Sense HR dashboard.
2️⃣ Select the **Profile Information** report category.
3️⃣ Click **Create**.
4️⃣ In the **People** section, select the **Permission group** field.
5️⃣ Click **Next** to generate the report.

✅ The report displays each employee alongside their assigned access role, allowing you to review permissions across the organisation.

6.9.2 Administrator and Limited Administrator Access checklist

- Confirm that all users with Administrator access still require full system access.
- Review Limited Administrator assignments to ensure:
    - The correct people or groups are included
    - No unintended users fall within scope
- Remove administrator access promptly when it is no longer required.

✎ Important
Administrator and Limited Administrator permissions settings are fixed. Governance checks focus on who holds admin access, not changing admin permission settings.

6.9.3 Role Structure and Ownership checklist

- Confirm that each custom access role has a clear purpose.
- Ensure role names and descriptions accurately reflect how they are used.
- Remove or consolidate roles that are no longer required.

6.9.4 People Scope and Visibility checklist

- Review manager and advanced roles to ensure People group assignments are still correct.
- Confirm managers can only see employees they are responsible for.
- Check exclusions to ensure they are still valid and intentional.

6.9.5 Screen and Data Visibility checklist

- Confirm that access to profile screens aligns with data sensitivity.
- Review newly added or customised screens to ensure access has been explicitly granted where required.
- Ensure employees and managers do not have unintended visibility of restricted data.

6.9.6 Documents and Planner Visibility Checklist

- Verify that document management visibility settings align with access roles.
- Confirm calendar visibility (personal, team, or company) matches organisational expectations.

6.9.7 Ongoing Governance Checklist

- Review access roles after promotions, leavers, restructures, or role changes.
- Recheck access when enabling new features or licensed products.
- Maintain an internal record of:
    - Which custom roles exist
    - Who they apply to
    - When they were last reviewed

💡 **Best practice**

Access Roles should evolve alongside your organisation. Regular reviews help prevent inappropriate access and maintain confidence in your data governance.

6.10 Sense Portal and Cross-Product Access

Organisation-wide settings (such as branding and security) are managed in Sense Portal.

Users assigned the Administrator access role in Sense HR:

- Have administrative access across all licensed Sense Workplace products
- Can switch between products using the product switcher (Sense logo, upper left in the web app)

Other roles only have access to Sense HR, according to their role permissions.

6.11 Access Roles FAQs

Q: Can I edit the default system roles?
A: The default roles can be edited on the Professional, Elite, and Enterprise plans, with the exception of the Administrator role.

Q: Can an employee have more than one access role?
A: No employees cannot have more than one access role— each user has one active access role at a time.

Q: Why don't I see certain settings or modules?
A: If you can't see certain settings or modules, this may be due to your access role permissions or because your licensed plan does not support that feature.

Q: Where can I learn more about detailed permission settings?
A: Detailed configuration is covered in Access Roles training and support articles in the Sense Workplace Help Centre.

6.12 Section Summary

You now understand how access roles control visibility, permissions, and governance within Sense HR, and how to assign and review roles responsibly over time.
Continue to Section 7 — People Profiles to learn how employee records are structured, maintained, and managed throughout the employee lifecycle.

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7 People Profiles

Manage employee records, working arrangements, system access, and lifecycle events from one secure, central profile.

The People area in Sense HR is the system of record for all employees.

Each person has a single profile that stores their personal information, job details, documents, planner configuration, and employment status.

Employee profiles power:

- Planners and entitlement calculations
- Reporting and audit history
- Automations and workflows
- Access control and visibility

7.1 Navigation and Overview

Navigation path:
`HR Dashboard › People`

The People area displays a searchable and filterable list of:

- Active employees
- Leavers

From this list, administrators can:

- Open individual profiles
- Add new employees
- Send login invitations
- Trigger actions (where enabled)

Each row links to a full employee profile.

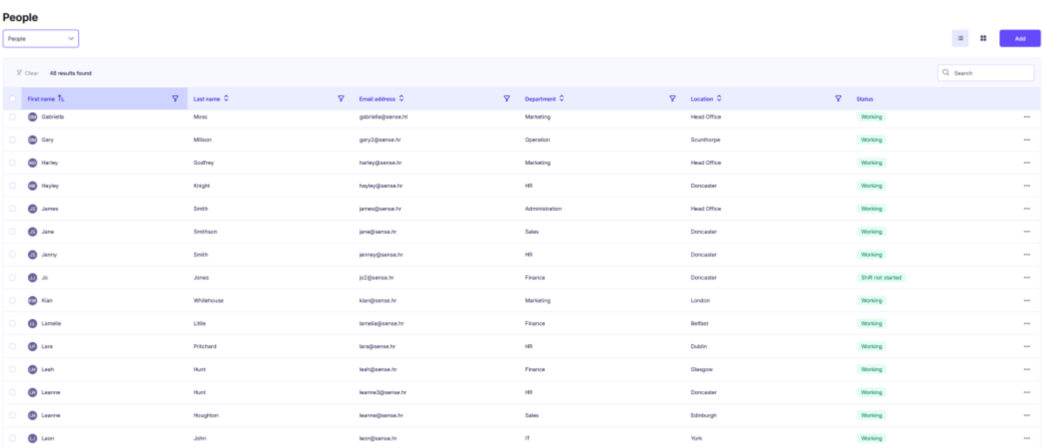

Figure: The People list view showing employee records with search and filter options.

7.1.1 List view and Tile view

The People page defaults to a list view, showing employee records in a searchable, filterable table. You can switch to a tile view by clicking the tile icon in the upper-right corner, next to the **Add** button.

Tile view displays each employee as an individual card showing key profile information at a glance. To switch back, click the list icon in the same position.

Sending an email from tile view
Each tile includes a **Send email** option. Clicking it opens your device's default email client with a new message draft, automatically filling in the employee's registered email address as the recipient.
Navigation path:
`HR Dashboard › People › Tile view (upper right) › Send email`

7.2 Understanding Employee Profiles, Screens, and Structure

Every employee profile in Sense HR is organised into screens, which appear as tabs in the profile sidebar.

Screens group related data, such as:

- Personal details
- Job details
- Documents
- Planner
- Leaver details

Important concept — Screens exist for every subscription plan

- Screens exist on all plans
- They are a core part of how profiles work
- The profile sidebar is driven by available screens

What differs by plan is who can manage them.

Plan behaviour

- **Team / Professional:**
  Screens and fields are predefined and consistent.
- **Elite / Enterprise:**
  Administrators can manage screens and fields using Screen Designer.

Screen Designer allows administrators to:

- Modify existing screens
- Add new screens and fields
- Control which screens apply to which profile templates

For details, see §16 Screen Designer.

7.3 Default Profile Screens (Before Customisation)

By default, employee profiles include system and data screens such as:

Screen	Purpose	Format / Layout

Overview	System screen showing profile insights and widgets	System screen
To Do	System screen showing tasks linked to the employee	System screen
Planner	Personal planner, events, entitlement, and balances	System screen
Documents	Company and personal documents assigned to the profile	System screen
Leaver details	Activated when the leaver process begins	System screen
Personal details	Name, email, DOB, nationality, NI number	Form
Contact details	Address and contact information	Form
Other contact details	Next of kin or emergency contacts	Table
Job details	Role, department, manager, dates	Table
Employment details	Employee ID, Contract type, employment dates	Form
Employment checks	Employment check records	Table
Pay details	Pay records and history	Table
Bank details	Bank account details	Table
Benefits	Non-salary compensation	Table
Disciplinary & Grievance	D&G records	Table
Training	Training course records	Table
Vehicle	Company vehicle records	Table
Company equipment	Assigned company equipment	Table
PPE	Assigned personal protective equipment	Table

Table-format screens can contain multiple records per profile and include an **Add record (+)** option for creating new entries.

Form-format screens contain a single set of data per profile.

✎ **Note**
System screens such as Overview, Planner, and Leaver details are always present because the system relies on the data they contain.

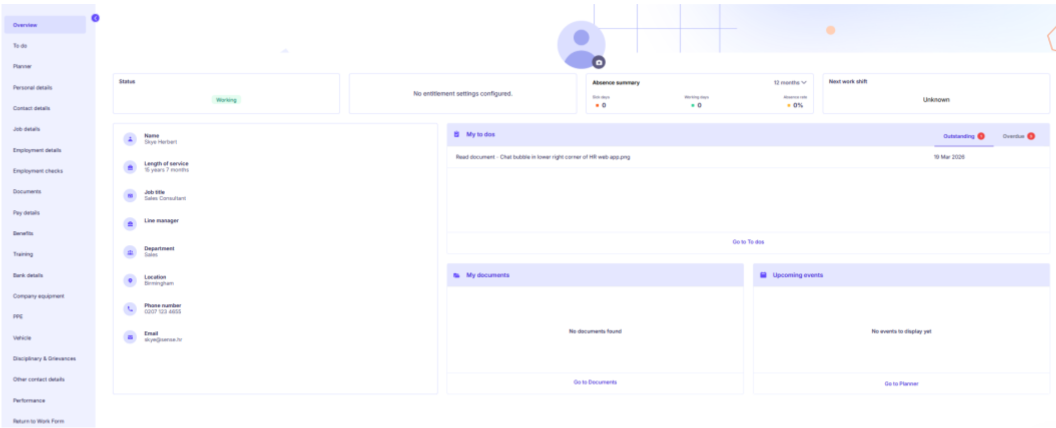

Figure: An employee profile page showing sidebar navigation tabs (based on active screens and assigned profile template).

7.4 Adding and Onboarding a New Starter (Overview)

When a new starter is added in Sense HR, the system automatically initiates onboarding behaviour.

Adding a new starter creates the employee profile and acts as the trigger point for onboarding.

Onboarding is the system response to that profile being created. Depending on your configuration, this may:

- Assign To Do tasks
- Send welcome or notification emails
- Request additional information via profile screens
- Guide administrators, managers, and employees through joining tasks

The exact onboarding experience depends on:

- Your product plan and licensing
- ★ Deployed library workflows configured via Sense Automate (Elite and Enterprise)
- ★ Custom workflows configured via Sense Automate (Elite and Enterprise)
- Access role permissions

The system standard onboarding workflow:

- Notifies all administrators by email when a new starter is added
- Assigns predefined onboarding tasks to the initiating administrator’s To Do list

✎ **Note**
All organisations have onboarding behaviour. Higher-level plans allow that behaviour to be extended, customised, and automated in more detail.

7.5 Adding a New Employee Profile

Employees can be added individually via the People area.

Navigation path:
`HR Dashboard › People › Add`

Steps

1. From the Sense HR **Dashboard**, go to **People**
2. Click **Add**
3. Select the appropriate **Profile template**
4. Enter the employee's **Personal details**
5. Enter **Job details** — to establish the correct reporting hierarchy and ensure authorisation workflows follow the preferred approval route, assign a **Line Manager** (otherwise, approvals will default to an Administrator)
6. Click **Done**

✎ **Note:** A Profile template cannot currently be changed once assigned.
Choose the most appropriate template for the employee before saving. If the existing templates don't meet your needs and you're on an Elite or Enterprise plan, you can create a new template using Screen Designer before adding the employee.

Next steps:

- Complete onboarding To Do tasks
- Assign an advanced access role if required (see §6 Access Roles and Permissions)
- Configure personal planner settings (see §7.7 Configuring Personal Planner Settings and Entitlement)

7.6 Sending Login Invitations

New profiles do not receive login access automatically, as some worker types (such as contractors or volunteers) may not require system access. This preserves the distinction between an employee profile and an active system user.

7.6.1 Send a login invite

Navigation:
`People › [Select profile] › More actions (…) › Send login invite`

Bulk login invites

From the People list:

- Select multiple users
- Click **Send login invite** in action bar

✅ Invites are sent to the email address stored on the profile.

7.7 Configuring Personal Planner Settings and Entitlement

Planner settings control how working time, holidays, and entitlement are calculated for each employee.
These settings control planner behaviour and entitlement calculations, including pro-rata and mid-week starters, and are commonly completed during onboarding. They should be reviewed whenever a person's working pattern or entitlement changes.

Use this section when:

- Setting up new starters
- Reviewing entitlement
- Changing working hours for specific profiles
- Preparing for leavers

.

✎ **Note**
Company defaults configured in `Settings › Calendar & Planner › General` currently act as a reference when configuring planner settings for new profiles.

In a forthcoming release, these defaults will automatically prefill planner settings for all newly created profiles. Default planner settings can still be overridden per employee via `People › [select profile] › Planner › Settings`.

7.7.1 What planner settings control

Planner settings determine:

- An employee's contracted working hours or days
- How holiday entitlement is calculated
- Which holiday year applies
- How public and bank holidays are treated
- How entitlement is calculated on a pro rata basis for starters and leavers

Planner settings are applied **per employee** and are stored on the employee profile.

7.7.2 Where planner settings are configured

Planner settings are configured from the employee profile.

Navigation path:
`People › [select profile] › Planner › Settings`

This area brings together:

- Working hours
- Contracted hours
- Full-time equivalent (FTE)
- Public holiday group

- Holiday year
- Entitlement behaviour

7.7.3 Working hours and schedule

Working hours define when and how much an employee is contracted to work.

Working hours may include:
- A defined schedule
- Contracted hours without a schedule
- Zero contracted hours

Working hours are used to:
- Calculate daily working time
- Convert entitlement between days and hours
- Support accurate pro-rata calculations

✎ **Note**
If working hours are not configured correctly, entitlement calculations may be incorrect.

7.7.4 Contracted hours and full-time equivalent (FTE)

Contracted hours represent the employee's agreed working time.

The system uses:
- Contracted hours
- Full-time hours
- FTE

to calculate:
- Pro-rata holiday entitlement
- Entitlement adjustments for part-time employees

These values are applied automatically once set.

7.7.5 Holiday year

The holiday year determines:
- When entitlement resets
- Which entitlement period applies
- How carryover is handled (if applicable)

Each employee profile is assigned a holiday year through planner settings.

✎ **Note**
Changing the holiday year affects entitlement calculations and should be reviewed carefully.

7.7.6 Public holiday groups

Public holiday groups define:

- Which public holidays apply to an employee
- Whether public holidays are included in entitlement
- Whether public holidays are auto-booked

Public holiday behaviour is applied through planner configuration and depends on how your organisation has configured holiday rules.

7.7.7 Entitlement behaviour

Entitlement settings determine:

- Whether entitlement is measured in days or hours
- How public holidays affect entitlement
- How entitlement is calculated for starters and leavers

These settings work together with:

- Working hours
- Holiday year
- Public holiday group

✎ **Note:**
For entitlement calculations to be accurate, both working hours and entitlement settings must be configured correctly.

7.7.8 Effective dates and changes over time

Planner settings can include effective dates.

Effective dates allow:

- Historical accuracy
- Future changes to working hours or entitlement
- Correct reporting over time

When a planner setting changes:

- Previous calculations remain intact
- New calculations apply from the effective date onward

7.7.9 Common configuration issues

Common causes of incorrect entitlement include:

- Missing or incorrect working hours
- Incorrect contracted hours or FTE
- Incorrect holiday year assignment
- Public holiday group not set
- Planner settings applied after events were booked

✎ **Note:**
If entitlement looks incorrect, review planner configuration before adjusting events manually.

7.7.10 Interaction with events and reporting

Planner settings affect:

- How holiday and absence events are calculated
- How entitlement appears in the calendar
- How entitlement is reported

Changes to planner settings may:

- Update entitlement balances
- Affect future event calculations
- Appear in entitlement-related reports

(For reporting details, see §11 Reports and Data Insights.)

7.7.11 Best practice

- Configure planner settings as part of new starter setup
- Always set working hours before reviewing entitlement
- Use effective dates for changes
- Review planner settings before processing leavers
- Avoid manual entitlement adjustments unless required

7.7.12 Steps to configure Personal planner settings and entitlements (step-by-step)

Navigation path:
`People › [select profile] › Planner › Settings (top right)`

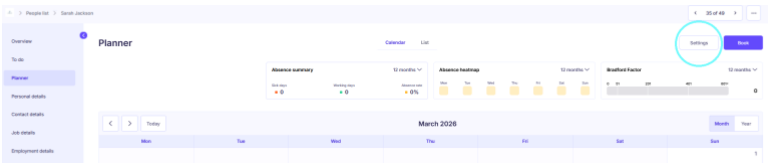

Figure: Planner Settings button

1 Open the person’s profile

1. From the Sense HR dashboard, open **People**.
2. Select the person (future starter or employee) to open their profile.

💡 **Tip:** Use search, filters, or sort in the People list to find the person quickly.

2 Open Profile Planner Settings

1. Select **Planner** (left sidebar).
2. Select **Settings** (upper right).

3 Assign working hours and confirm contracted hours

In **Working hours**:

1. Select the correct **Working hours** from the dropdown.
    - You may also see **No working pattern**.

⚠️ **Caution: "No working pattern"**
If you select **No working pattern**, the **Contracted hours** field remains editable and you can enter hours manually (including 0). But whenever possible, assign a **Working hours** configuration so planners, entitlement, and booking behaviour remain accurate and consistent across employees.

2. Review **Contracted hours**.
   - These are taken from the selected Working hours configuration and cannot be edited here (unless **No working pattern** is selected).
3. If not already populated by default Calendar & Planner settings, enter **Full time hours** (your organisation's standard FTE weekly hours), for example 37.5 or 40.
   - This is used to calculate pro-rata entitlement, not as the employee's contracted hours.

✎ **Full time hours explained**
Full time hours = your organisation's standard full-time weekly hours. Contracted hours come from the assigned Working hours configuration (unless **No working pattern** is used).

4 Set public holiday rules
1. Select the **Public holiday group** (for example England & Wales).
2. Choose whether public holidays are **included in entitlement**.

💡 **Included in entitlement?**
- **Yes:** public holidays reduce the annual entitlement balance.
- **No:** public holidays are additional days off and do not reduce the balance.

5 Select the holiday year
1. Select the **Holiday year** (for example Jan–Dec or Apr–Mar).

💡 **Tip**: The holiday year determines the date range used for pro-rata entitlement calculations.

6 Add or update event entitlements (Holiday / TOIL)
In **Event entitlements**:
1. For each entitlement (for example Holiday or TOIL), choose whether it is measured in **Days** or **Hours**.
2. Enter an **Amount**, or select **Calculate** to use the pro-rata calculator.

If using **Calculate**:
1. Confirm **Contracted hours** and **Full time hours** match the values at the top of Planner Settings.
2. Enter the **Full-time entitlement** (for example 25 days).
3. Review the pro-rata calculation. Sense uses:
   - Contracted hours (from working hours)
   - Full time hours (FTE)
   - Start date
   - Holiday year
4. Hover over the info icon to view the breakdown.
5. Select **Use new entitlement** to apply it.

✎ **Hours-based entitlement**

When entitlement is measured in hours, Sense calculates booking durations automatically based on the person's assigned working hours.

6. Select **Next** when finished.

7 Confirm the effective date and save
A confirmation window summarises your changes.

1. Choose the **Effective date**.
   - For future starters, this defaults to the person's start date.
2. (Optional) Enter a **Reason for change**.
3. Select **Save**.

✅ Sense applies working hours, public holiday rules, holiday year, and entitlements from the effective date.

💡 **Tip:**
You can return to Profile Planner Settings at any time to update working hours, public holiday rules, holiday year, or entitlement. Changes will apply from the effective date you select.

7.8 Editing Profile Information

Administrators can edit profile data directly from screens.

Navigation:
`HR Dashboard › People › [Select profile] › [Select screen]`

Changes:

- Are tracked in history
- Require a reason for audit purposes

7.8.1 Edit and Update Profile fields (step-by-step)

1 Select the employee from the **People list**.
2 Open the appropriate screen in from the sidebar (e.g., Personal, Employment).
3 Make the required updates (then click outside the field) and click **Next**
4 (Optional) Enter a **Reason for change** (for auditing purposes)
5 **Save**

7.8.2 Add Records to Table Format Screens (step-by-step)

1 Select the employee from the **People list**.
2 Open the appropriate screen from the sidebar (e.g., **Job details**).
3 Click + **Add record** and enter details for all required fields
4 Click **Add** to record entry

7.9 Assigning a Line Manager (step-by-step)

Assigning a line manager is a critical step in Sense HR configuration. In standard workflows, an employee's line manager is the default approver for requests such as events, To Dos, and other workflow-driven actions.

If a line manager is not assigned, approval-based processes redirect to Administrators.

Navigation path:
`HR Dashboard › People › [Select profile] › Job details`

Steps to assign or update a line manager

1. Open **People** and select the employee profile.
2. Select **Job details** from the profile sidebar.
3. Select **Add** (for a new job record) or **Edit** (to update an existing one).
4. In the **Line manager** field, select the appropriate manager.
5. **Save** the changes.

✎ **Note**
The selected manager must already exist as a profile in Sense HR, have login access, and be assigned an appropriate manager-type access role.

💡 **Best practice**
Always confirm line manager assignment during onboarding and after relevant organisational changes.

7.9.1 Automatic Access Role Adjustment for Line Managers

✎ **Key concept — Manager role automation**

In Sense HR, Access Roles can update automatically based on reporting relationships.

When a user is assigned as a **Line Manager** in an employee's profile (Navigation: `HR Dashboard › People › [Profile] › Job details › Line manager`), the system checks whether that user supervises other employees.

Automatic role changes

- If a user with a Standard User role is assigned as a Line Manager, their Access Role automatically updates to Manager.
- If a user no longer has any direct reports (for example, their last report is reassigned to a different manager), their role automatically reverts to Standard User.

This behaviour ensures that users responsible for employees automatically receive the permissions needed to manage approvals, documents, and reports for their team.

✎ **Note**
These automatic changes apply only to the Standard User ↔ Manager roles. Other role-types are not automatically modified including Manager with Indirect Reports.

7.9.2 Multiple line managers

An employee can have more than one line manager by having multiple job records.

This is useful when:

- An employee reports to different managers in different roles
- Responsibilities are split across departments or locations

Each job record can have its own line manager, and approval workflows will trigger To Do tasks for **all** listed managers.

7.10 ★ Advanced Profile Actions (Automate — Elite / Enterprise)

On Elite and Enterprise plans, *Sense Automate* can introduce custom actions linked to employee profiles, such as:

- Buy / Sell Holiday
- Performance cycles
- Custom HR processes

These actions may:

- Create new To Dos
- Trigger workflows
- Add dedicated screens to store data

Visibility is controlled by `Access Roles › Permissions › Custom Actions` (see § 6 Access Roles and Permissions)

For further details, see § 17 Automation and Workflows in Sense Automate

7.10.1 Triggering Custom Actions

Where enabled, actions can be triggered in three ways:

1 From an individual profile
`HR Dashboard › People › [Select profile] › More actions (…) › Select custom action`

2 From the People list (bulk)
Select multiple people, then use the action bar to select custom action

3 From the People list row menu
More actions (…) menu beside a profile, then select custom action

All methods trigger the same underlying workflow.

7.11 Processing leavers (status, access, and offboarding tasks)

Use this section when an employee is leaving and has a confirmed leaving date.

7.11.1 What marking someone as a leaver does

Marking a person as a leaver updates their profile to reflect that they are no longer employed by the organisation.

When a profile is marked as a leaver:

- The profile status changes to **Leaver** or **Future leaver**
- The Leaver details screen becomes available on the profile
- The profile remains in the system for reporting and audit purposes

✎ **Note:**
Marking someone as a leaver is not the same as deleting a profile. Leaver profiles are retained.

7.11.2 Mark as leaver (step-by-step)

Navigation path:
`HR Dashboard › People › [Select profile] › More actions (…) › Mark as leaver`

1 Go to **People** › **[select profile]**
2 Click the **More actions (…) menu** in the upper right corner
3 Select **Mark as leaver**
4 Select **Last day of employment** and **Last working date** using the calendar picker
5 Select a **Reason for leaving** or click **+Add new** to add or edit reasons

✎ **Note:** Adding or editing a reason updates the global list — it will be available for other future leavers and in reporting.

6 Would you rehire? Yes = toggle on.
7 Enter any administrator comments
8 Choose when to **Remove system access --- Last day of employment**, **Last working day**, or **Now**
9 Click **Save**

✅ The person is now marked as a leaver or future leaver depending on whether their last day of employment has passed or not.

✎ **Note:**
Leaver details can be updated after a profile is marked as a leaver if corrections are required.

7.11.3 Undo Mark as Leaver (step-by-step)

1 Go to **People** › [**select profile**]

💡**Tip:** You can filter the **People list** by **Leavers** in the dropdown box (upper left) but this will not list future leavers.

2 Click the **More actions (…)** menu in the upper right corner
3 Select **Undo leaver** and confirm.

7.11.4 Leaver workflow and offboarding checklist (To dos + notifications)

When a person is marked as a leaver, Sense HR can trigger a standard leaver workflow that supports offboarding administration, including:

- Admin email notification
- A leaver offboarding checklist created as a **To do** (with subtasks) (see §9 To Do Task Management)
- Pro-rata entitlement calculation included in the notification (dependent on correct entitlement configuration)

The notification email includes:

- The leaver's name
- Last day of employment
- Reason for leaving
- The system's calculation of the employee's pro-rata entitlement

✎ **Note:**
For entitlement calculations to be accurate, your organisation's full-time entitlement settings (in days and hours) must be correctly configured in `Calendar & Planner › General`. Likewise, the leaver's entitlement should be correctly configured in `People › [Select profile] › Planner › Settings`.

7.11.5 Managing the leaver offboarding checklist

The offboarding checklist appears in the **To Dos** area for administrators.

From the checklist, administrators can:

- Open the **To Do** to view all related subtasks
- Expand the checklist to see individual tasks
- Mark each task as **Not started**, **In progress**, or **Complete**
- Track overall progress using the checklist progress bar

Administrators can always review the status of leaver tasks from `To Dos › All To Dos` even after individual subtasks are completed (See §9 To Do Task Management)

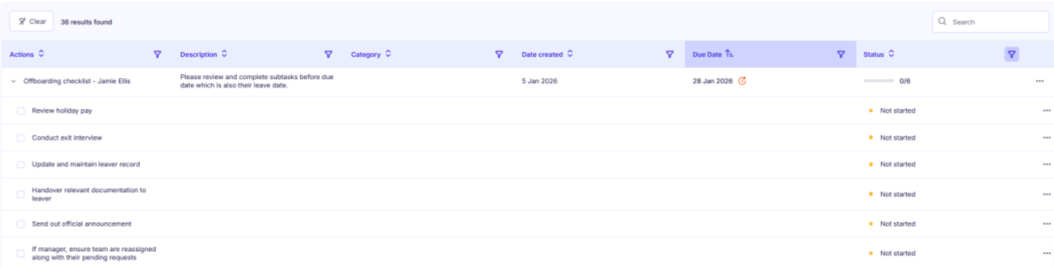

Figure: A leaver offboarding checklist shown as To Do tasks.

7.11.6 Leavers vs deleted profiles

It is important to distinguish between these actions:

Mark as leaver
- Profile is retained
- Data remains available
- Profile appears in reports

Delete profile
- Profile and all data are permanently removed
- Action cannot be undone
- Intended only for dummy or duplicate records

✎ **Note:**
Deleting a profile removes all associated history and should not be used for standard offboarding.

7.11.7 Reporting on leavers

Leavers and future leavers can be included in reports.

Common reporting use cases include:
- Listing leavers by date
- Reviewing reasons for leaving
- Auditing system access removal

Leaver information is available through the **Profile information** report category and filtering the **Status** by **Leaver** and **Future Leaver** (see [§11 Reports and Data Insights]).

7.12 Unlinking and Deleting User Profiles (step-by-step)

Unlinking a user from the system suspends their login credentials until they are re-invited.

Deleting a user from the system removes them and all their data permanently. This should only be used for dummy profiles or duplicate profiles.

Navigation:

```
HR Dashboard › People › [Select profile] › More actions (…)
menu › Unlink/ Delete
```

To remove an employee from the active list without deleting their data:

1. Open the employee record.
2. Click **More actions (…) menu** (upper right)
3. Select **Unlink** or **Delete**
4. Confirm.

To restore access after unlinking:

```
HR Dashboard › People › [Select profile] › More actions (...)
menu› Send login invite
```

7.13 Viewing History and Audit Logs

Every employee profile includes a **View history** log for internal change tracking.

Navigation:

```
HR Dashboard › People › [Select profile] › More Actions (…)
menu › View History
```

Recorded Actions Include:

- Field edits (name, manager, working pattern, etc.)
- Who made the change
- Date of change

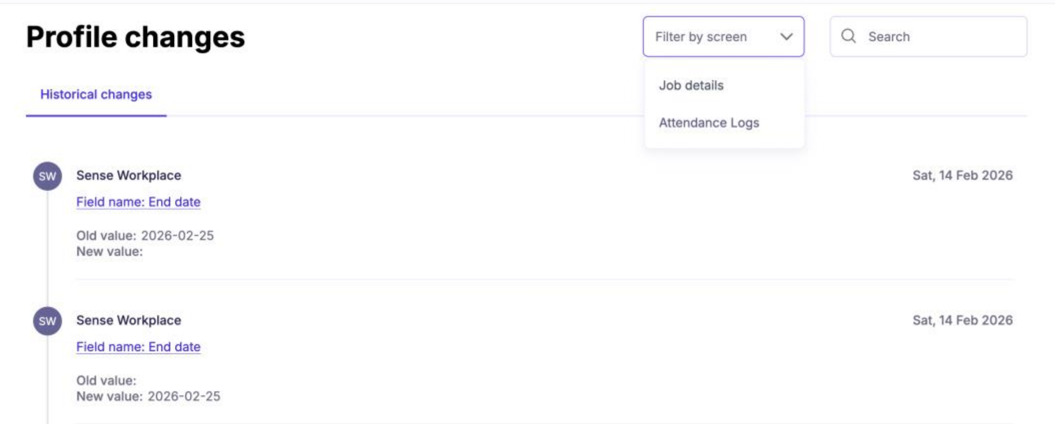

Figure: The Profile Changes history view showing recorded field edits with filter-by-screen dropdown.

Reporting Link
Data entered in profile screens feeds directly into the **Profile Information** report type (see §11 Reports and Data Insights).

Any optional or custom screens enabled in your profile templates will also appear as reportable sections.

7.14 People Profiles: FAQs

Q: Can managers edit employee information?

A: Managers can edit only the fields permitted by their access role. Administrators have full edit access.

Q: Where do I add new employees to Sense HR?
A: You can add new employees to Sense HR under **HR Dashboard › People › Add**, completing all required fields before saving.

Q: Do new employees automatically receive login invitations?
A: No, new employees do not automatically receive login invitations. Administrators must send login invitations manually, either individually from a profile or in bulk from the **People list**.

Q: What is a future leaver?
A: A future leaver is an employee with a confirmed leaving date that has not yet been reached. The profile transitions to **Leaver** on the leaving date.

Q: Can I archive a user instead of marking them as a leaver?
A: No, you cannot archive a user. To manage offboarding, you should mark the employee as a leaver, unlink the user to suspend login access, or delete the profile only if it is a dummy or duplicate record.

Q: What's the difference between unlinking a user and marking them as a leaver?
A: Unlinking a user simply suspends their login access. Marking someone as a leaver records their leaving status while retaining their profile and data for reporting and audit.

Q: Are leavers included in reports?
A: Yes. Leavers are included in reports because their profiles and leaver details are retained in the system unless the profile is deleted. Report filters can be used to exclude leavers or to focus specifically on leaver data.

Q: Do administrators receive a notification when someone is marked as a leaver?
A: Yes, when an employee is marked as a leaver, administrators receive an email notification and are automatically assigned a leaver offboarding checklist as a **To Do**. Variations to the standard offboarding workflow are available through **Sense Automate**.

Q: Where do I manage the tasks created by the leaver process?
A: You manage leaver tasks in the **To Dos** area, where the offboarding checklist and its subtasks can be viewed, updated, and completed.

Q: Does the system calculate pro-rata entitlement automatically?
A: Yes, the system calculates pro-rata entitlement during the leaver process, provided that full-time entitlement settings are correctly configured in **Settings › Calendar & Planner** and in **People › [select profile] › Planner › Settings**.

Q: Where can I see who updated an employee's record?
A: To see who updated an employee's record, open **People › [select profile] › More actions (...) › View history**, where all tracked field changes are listed. You can filter the history by **Screen** to review changes made to a specific screen. Likewise, profile changes can be audited in **Reports › User Activity**.

Q: Can I export an employee's change history?
A: Yes, you can export an employee's change history by going to **Reports › User activity › Create**, selecting the **User audit summary** and **Field update history** fields, then clicking **Next**. To focus on a single employee, apply a filter using **Equals [employee name]**, save the report, and export it (see §11 Reports and Data Insights).

Q: Are deleted employees included in the history log?
A: No, deleted employees are not included in the history log because deleted profiles are permanently removed from the system along with all associated data, including their change history.

Q: How do I find an employee record quickly?
A: You can find an employee record by typing the employee's name into the search bar at the top of the People list, then selecting them from the search results

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7.15 Section Summary

You now understand how employee profiles are structured, created, maintained, and governed throughout the employee lifecycle in Sense HR.
Continue to Part III — Everyday HR Administration, starting with Section 8 — Calendar and Planner Management, to configure company events, absences, and planner visibility.

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PART III — Everyday HR Administration

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8 Calendar and Planner Management

Manage and oversee absences, holidays, working events, and approvals while maintaining accurate entitlement and scheduling across the organisation.

8.1 Calendar & Planner Overview

The Calendar and Personal Planners are where employees book events and where administrators and managers oversee day-to-day scheduling across the organisation. From here, you can view, add, approve, and manage event booking such as holidays, sickness, and other time-based records.

These areas use event types defined in Event Manager, apply rules from Working Hours and Entitlement settings, and update automatically across planners, To Dos, and reports. This ensures that booked events remain consistent throughout the system.

8.2 Accessing the Calendar

Navigation: `HR Dashboard › Calendar`

From here you can see personal, team, or company-wide schedules.

View	Purpose
My events	Shows your own bookings and absences.
My teams events	Displays events for employees you manage.
All events	Shows every employee’s events (admin only).

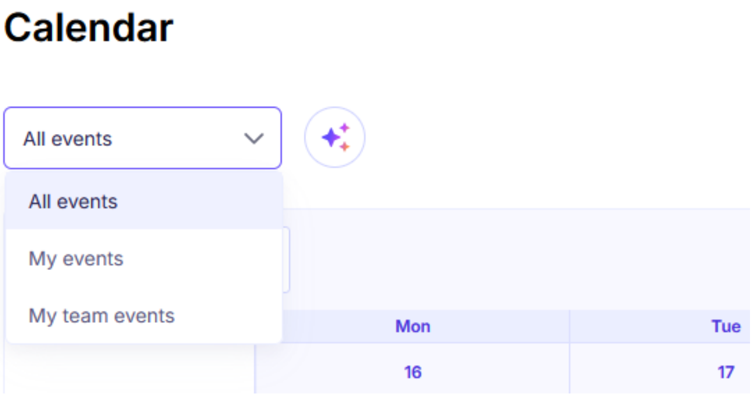

Figure: The calendar toolbar with My / Team / All Events view selector.

8.3 How the Calendar and Personal Planner Links to Event Manager

The events available to book in the Calendar and Personal Planners are defined in **Event Manager**. **Event Manager** controls which bookable events exist and the rules that govern who can book them, how they behave, and how they affect entitlement.

The Calendar does not create or configure event types — it only displays events (once booked) that have already been created and made bookable in **Event Manager**.

✎ **Important**
If an event is not available for someone to book, it is usually because the event’s rules do not include that person as an eligible participant. In this case, an administrator must review the event configuration in **Event Manager**.

For details on creating and managing events and rules, see §5.7 Configuring Event Manager and Event Types.

8.4 Adding Events to the Calendar or Personal Planner (step-by-step)

Administrators and managers can book events directly from the Calendar screen.

Navigation:
`HR Dashboard › Calendar › Add event`

To Add an Event:

1. Click **Add event.**
2. Select the **employee.**

3. Choose an **event type** (populated from Event Manager).
4. Enter **start** and **end dates.**
5. Add optional **notes or attachments.**
6. Click **Save.**

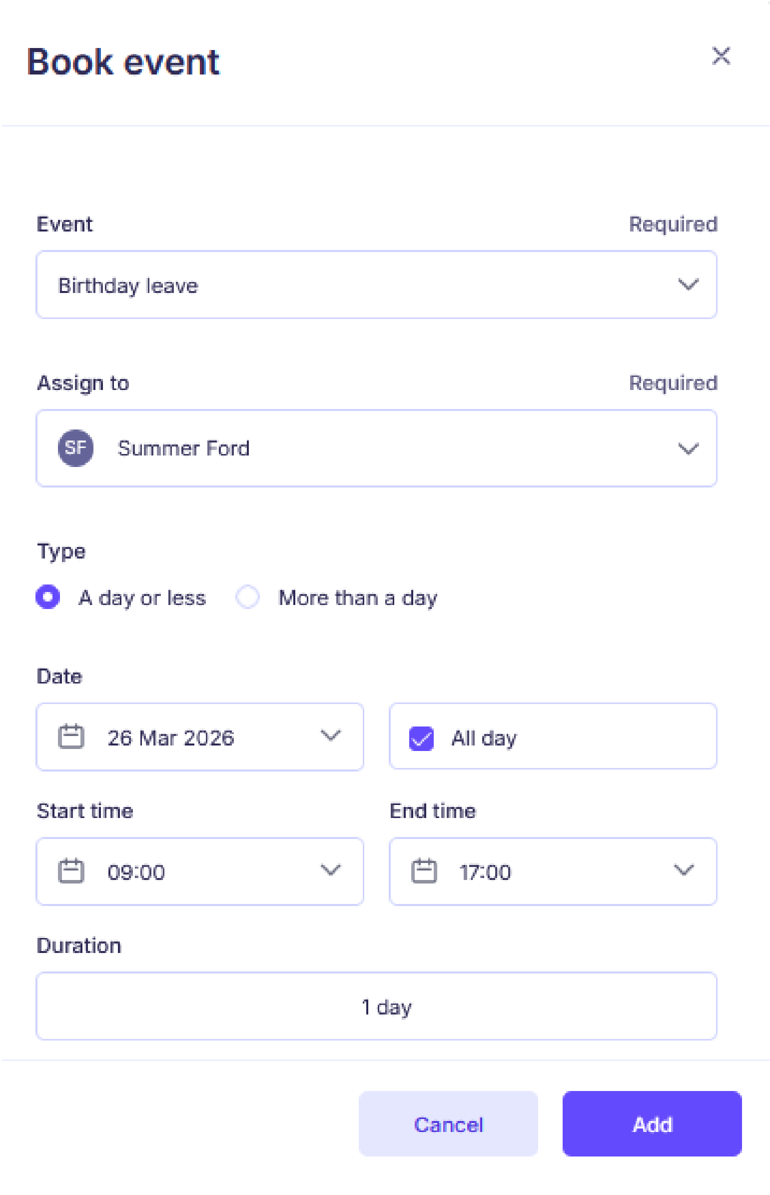

Figure: The Add event form showing event type dropdown and date pickers.

8.4.1 Locked Days

A **Locked Day** is a special bookable event available only to administrators. It blocks out one or more dates on the company calendar, preventing non-admin users from booking events on those dates.

Locked Days do not appear in the **Event Manager** — but they can be booked directly into the calendar like any other event.

How to book a Locked Day

Book a **Locked Day** the same way as any other calendar event (see §8.4). Select **Locked Day** as the event type and assign to everyone, groups of people, or individuals. A **Locked Day** can cover a full day (tick **All Day**), a partial day (set a **Start time** and **End time**), or span multiple days.

How Locked Days affect other users
When a Locked Day is in place, assigned employees cannot book events on the affected dates. If an assigned user already has an event booked on a date that an administrator subsequently locks, the existing event remains — but the user will receive an error if they try to edit it or book anything new on that date.

Administrators who attempt to book on a locked date will see a warning but can choose to proceed.

8.5 Managing Calendar & Planner Events

8.5.1 Edit an Event (step-by-step)

Managers and administrators can review and edit events directly on the Calendar.

Navigation: `HR Dashboard › Calendar › Select event`

To edit an event:

1. Click the event.
2. Review details and notes.
4. Click the **Edit** icon**,** update, and **Add.**

8.5.2 Cancel a Booked Event (step-by-step)

To cancel a booked event:

1. Click the event.
2. Click the **bin/delete** icon
3. Confirm **delete** event

✎**Note:** By default, cancelling an event does not generate a To Do task or require approval. Organisations on the Enterprise plan can create a custom approval workflow using *Sense Automate* if needed.

8.5.3 Approve, Decline, or Acknowledge an Event (step-by-step)

Managers and administrators can approve or decline event requests or acknowledge sickness events from the **To Do** module.

Navigation: `HR Dashboard › To Do`

To approve or decline an event request or acknowledge a sickness event

1 Go to **To do**

2 Click the filter icon ( ) in the **Category** column

3 Select the relevant category filter

- **Event requests**, or
- **Sickness**

4 Click the event **To do** task to open it

5 Choose the appropriate action:

- **Approve** or **Decline** for event requests
- **Add to planner** for sickness events

✓ Approved or Acknowledged events are added to the employee's planner and, in accordance with event rules and access roles, the Company calendar

8.6 Calendar and Personal Planner Views

The Calendar and Personal Planner provide multiple views to help administrators and managers understand, book, and oversee events in different ways. Each view presents the same underlying data, optimised for different tasks.

8.6.1 List view

Shows events in a chronological list grouped by date.
Best for:

- Reviewing approvals and event statuses
- Scanning upcoming absences or company events
- Filtering and searching for specific events or people

8.6.2 Calendar view

Displays events visually by date (Week, Month, or Year).
Best for:

- Understanding availability at a glance
- Identifying busy or quiet periods
- Spotting overlaps or scheduling conflicts

8.6.3 People view (Calendar only)

Shows events by person across a timeline.
Best for:

- Reviewing team availability
- Managing coverage across departments or locations
- Comparing multiple employees' schedules side by side

Note
The **People view** is available in the main company **Calendar** only. **Personal Planners** show only **List** and **Calendar views**, as they relate to a single employee.

8.6.4 Switching between different Calendar views

Use the **List**, **Calendar**, or **People** tabs at the top of the **Calendar** (or Planner) screen to switch views instantly. In the **Company Calendar**, your selected filters (such as All events, My events, My Team events) remain applied when changing views, allowing you to analyse the same data from different perspectives.

8.6.5 Calendar Smart Filters

In addition to the predefined view filters (**My events**, **My team events**, and **All events**), the Calendar includes Smart Filters that allow users to focus the calendar on specific groups of people.

Smart Filters help you quickly narrow a busy company calendar down to a relevant subset of employees, making it easier to review availability, approvals, and coverage across large organisations.

Navigation:
`HR Dashboard › Calendar › Filters`

Selecting **Filters** opens a filter panel where you can include or exclude people using organisational attributes or individual selections.

Filtering by organisational groups
Using the **Search people** field, you can filter the calendar by:

- Department
- Location
- Job title
- Contract type
- Sub-company
- Direct reports
- Indirect reports
- All managers
- Individually selected employees

These filters allow you to build a targeted view of employees who share specific organisational attributes.

For example, you might filter the calendar to show:

- All employees in the Customer Support department
- Everyone working at the Manchester office
- All managers across the organisation
- A custom group of named employees

Excluding people from results

The **Exclude people** field allows you to remove individuals or groups from the filtered results.

This uses the same filtering options as **Search people**, allowing you to exclude:

- Specific employees
- Entire departments
- Locations or contract types

For example, you could view all Customer Support employees except contractors, or all managers excluding one department.

Combining filters

Filters can be combined to create highly specific calendar views.

Example combinations include:

- Department = Engineering + Location = London
- All managers – excluding Senior Leadership Team (via job titles)
- A custom group of employees across different teams

This allows administrators and managers to quickly focus on the exact group relevant to scheduling or approvals.

Permissions and visibility

Smart Filters never expand user permissions.

They only refine the list of employees already visible to the user based on their:

- Access role (administrators always have full visibility)
- Feature permissions for the Calendar (for all other access roles)

If a user does not already have permission to view an employee's events, that employee will not appear in filter results.

When Smart Filters are most useful

Smart Filters are particularly valuable in large organisations where the company calendar contains hundreds or thousands of employees.

They allow users to move quickly from a high-level company view to a focused operational view, making it easier to:

- Review team availability
- Check departmental coverage
- Approve events for specific groups
- Investigate absence patterns within a subset of employees

Used together with List, Calendar, and People views, Smart Filters provide flexible ways to explore the same event data from different organisational perspectives.

8.7 Request and Approval Flows

Calendar and Planner bookings follow approval flows defined by event rules, access roles, and (where enabled) workflows.

Typical request flows include:

- Employee → Manager approval (e.g. holiday)
- Employee → HR / Admin approval
- Auto-approved events (no approval required)

When an employee submits a request (books an approval event):

- A **To Do** task is generated for the approver
- The event appears as pending until approved
- Email notifications are sent automatically
- Once approved or declined, the calendar updates instantly

✎ **Note**
If an employee cannot submit a request, or requests appear to "skip" approval, review:

- Event rules in Event Manager
- Access role permissions
- Any linked workflows

8.8 Event Authorisation Workflows

Some events trigger authorisation or follow-up actions, such as:

- Return-to-work acknowledgements
- Fit note requests
- Manager confirmation tasks
- HR review steps

These behaviours are controlled through:

- Event configuration (rules)
- Optional *Sense Automate* workflows (if licensed)

For example:

- A sickness event may automatically create a **Return to Work To Do**
- A specific sickness reason may require documentation

✎ **Note**
If events are generating unexpected To Dos, check:

- Event rules first
- Then any linked Automate workflows
- Then access role permissions

8.9 Holiday Entitlement and TOIL

Holiday entitlement is calculated and managed per employee within their Personal Planner settings.

Key principles:

- Entitlement is based on:
  - Working hours configurations
  - Start date
  - Holiday year
  - Full-time equivalent (FTE)
- Calculations can be in days or hours
- Public holidays may be:
  - Included or excluded from entitlement
  - Automatically deducted or left bookable

Time Off in Lieu (TOIL) or Flexi Time:

- Can be supported as additional entitlement types
- Requires setup via `Settings › Calendar & Planner › Event Manager`
- Appears as a separate balance alongside holiday

✎ **Note**
All entitlement changes — including adjustments, pro-rata updates, and TOIL — are applied from the employee's **Planner settings**, not the Calendar (see §7.7 Configuring Personal Planner Settings and Entitlements)

8.9.1 How calendar bookings affect entitlement

When a holiday event is booked (and prior to approval), Sense HR automatically deducts the booked duration from the employee's remaining entitlement. If the event is later cancelled, the entitlement is recalculated and restored. This ensures that entitlement balances always reflect bookings without requiring manual adjustment.

8.10 Managing Conflicts and Overlaps

Sense HR does not block overlapping events by default, allowing flexibility across teams and roles.

Administrators and managers can:

- View overlaps in Calendar (People view)
- Identify coverage issues visually
- Decide whether conflicts require action

Common causes and use cases:

- Multiple team members booking leave at once
- Overlapping sickness and holiday events
- Managers booking events on behalf of others

✎ **Best practice**
Use **People view** for resourcing and coverage checks before approving requests.

8.11 Integrating Outlook or Google Calendar

Sense HR can synchronise events with Outlook or Google Calendar via Service Connectors, where configured.

For Elite and Enterprise customers, configuration is managed through `Sense Automate › Service Connectors`.

Key points

- Calendar synchronisation is optional and requires explicit setup.
- Syncing is handled through Service Connectors, not automatically.
- Which events appear — and how they appear — depends on connector rules and event configuration.
- Sense HR remains the system of record for:
  - Event approval
  - Entitlement calculations
  - Reporting and audit history

What this means in practice

- Approved events can appear in external calendars once a connector is active.
- External calendars provide a read-only reflection of HR data and do not control approvals or balances.
- Only event types explicitly included in connector rules will sync; others may remain visible only in Sense HR.

External calendars are provided as a convenience view only. Entitlement accuracy, approval state, and historical records are always determined by Sense HR.

✎ **Note**
If employees report missing or differently displayed events in Outlook or Google Calendar, confirm that a Service Connector is configured and review which event types are included. Sense HR calendars remain the authoritative source for scheduling and entitlement accuracy.

8.12 Calendar Insights with AMI

Where Sense AI (AMI) is enabled, calendar and planner data can be analysed using natural language.

Examples include:

- Absence trend analysis
- Peak holiday periods
- Team availability insights
- Repeated sickness patterns

AMI draws from:

- Calendar events
- Planner data
- Work patterns and entitlement rules

For more detailed information see § 12.7 HR Calendar Agent

✎ **Admin note**
AMI provides analysis and insight, not rule enforcement. Calendar behaviour is still controlled by configuration.

8.13 Troubleshooting Missing or Duplicate Events

If events appear missing or duplicated, check the following:

Event not visible

- Event rules do not allow the user to book it
- Access role permissions restrict visibility of team or company events
- Event was declined or cancelled

Duplicate or unexpected events

- Public holidays auto generated alongside manual entries
- Work pattern changes triggering recalculations

✎ **Best practice**
When behaviour looks unexpected, review configuration first. Calendar outcomes are almost always rule-driven rather than system errors.

8.14 Calendar and Planner: FAQS

Q: Why can an employee see an event but not its details?
A: When an employee can see that an event exists but cannot view its details, it's because visibility rules restrict what information they're allowed to access. For example, employees may be able to see that a colleague is marked as sick on the Calendar, but not the sickness reason or any notes attached to the event. These restrictions are controlled by event rules and access role permissions.

Q: Why does a holiday request show "exceeds entitlement"?
A: This message appears when the employee's remaining entitlement is not sufficient to cover the requested booking. This can happen if the employee has already used their entitlement, if the entitlement has been pro-rata calculated due to start or leave dates, or if entitlement has not yet been configured for that employee. If the balance looks incorrect, an administrator should review the employee's Personal Planner settings under **People › [select profile] › Planner › Settings**.

Q: Can managers edit events after they've been approved?
A: Managers may be able to edit or cancel approved events, depending on their access role permissions and the rules settings for that event type. If editing is not available, it usually means the role or event configuration restricts changes after approval.

8.15 Section Summary

The Calendar and Personal Planner bring together events, entitlements, approvals, and visibility rules into a single operational view.

While employees use planners for booking, administrators control behaviour through Event Manager, work patterns, entitlements, and workflows — ensuring consistency across calendars, To Dos, reports, and insights.
Continue to Section 9 — To Do Task Management to understand how requests, approvals, acknowledgements, and automated tasks are created, assigned, and tracked across the system.

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9 To Do Task Management

Track, assign, and complete tasks that drive approvals, acknowledgements, and key HR processes across the system.

The To do area in Sense HR brings together all tasks and required actions — both manually created and system-generated — in one central place.

It is where administrators, managers, and employees track work, complete approvals, and ensure HR processes move forward on time.

To dos can be created manually or generated automatically by workflows (such as approvals, document sign-offs, or requests), making the module a key part of Sense HR's accountability and process control.

✎ **Note:**
Some To dos are created automatically by workflows and approvals. What actions are available (for example, approve, deny, or delete) depends on your access role and how the workflow or event has been configured.

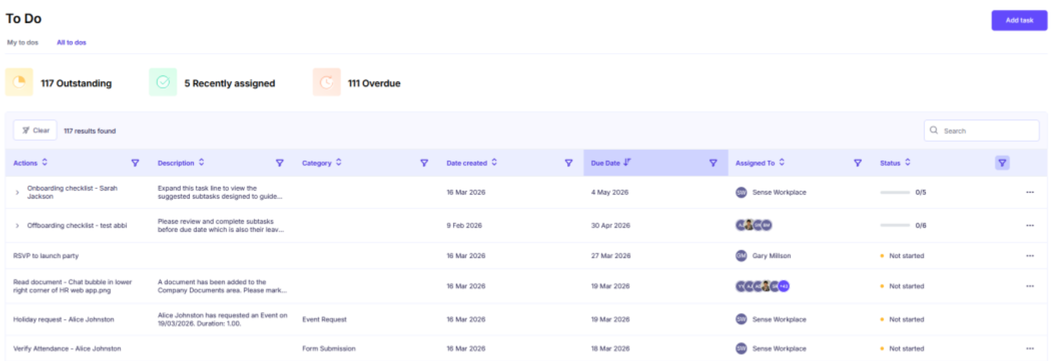

Figure: The To Do list view showing the My to dos / All to dos filter tab and filter icons for each column.

9.1 What the To do module is for

The **To do** module is Sense HR's **action and accountability layer**. It brings together:

- Manual tasks created by users or administrators
- System-generated tasks triggered by workflows (for example, approvals or sign-offs)
- Outstanding actions that require review, approval, or completion

For administrators, To dos provide a **central control point** to monitor work, ensure required actions are completed, and manage approvals across the organisation.

9.2 How To dos fit into the wider system

The To do module connects closely with other areas of **Sense Workplace**:

- **Workflows** – generate approval and action To dos automatically
- **Documents** – sign-off and acknowledgement requests appear as To dos
- **Expenses and requests** – approvals are surfaced as actionable tasks
- **Audit and accountability** – completed To dos provide a record of action

Think of To Dos as the **execution layer**:
they don't store HR data themselves, but they ensure the right people act on it at the right time.

9.3 How To Dos are Created

To dos enter the system in two ways:

1. **Manually created tasks**
   Created by users, managers, or administrators to track work or reminders.
2. **Workflow-generated To dos**
   Automatically created by Sense workflows (for example, expense approvals, document sign-offs, or authorisation steps).
   These appear automatically when a workflow reaches a task stage.

✎ **Important**
System-generated To dos reflect workflow logic. What you can approve, deny, or complete depends on:

- Your access role
- The workflow configuration
- Whether you are the final or an intermediate approver

9.4 Key To Do Concepts

- Workflow-generated To dos cannot always be deleted
- Available actions depend on **access role** and **workflow design**
- To dos do not store HR data — they prompt action on it

They act as the **execution layer** of **Sense Workplace**, connecting workflows, approvals, and accountability.

9.5 Administrator Access and Visibility

As an administrator, you can switch between:

- **My To dos** – tasks assigned directly to you
- **All To dos** – every active To do across the organisation

This allows you to:

- Monitor workload and overdue actions
- Step in where approvals are delayed
- Audit task status and completion

Navigation path:
`HR Dashboard › To do › My to dos / All to dos`

9.6 Creating and Assigning To Do Tasks

Navigation path:
`HR Dashboard › To do`

Administrators can create To dos for:

- Themselves
- Individual users
- Groups of users based on:
    - Department
    - Location
    - Job role
    - Contract type

When creating a To do, you can define:

- Task name and description
- Status (Not started, In progress, Completed)
- Category (existing or new)
- Due date
- Optional subtasks

This makes To dos suitable for:

- HR actions
- One-off operational tasks
- Team-wide reminders
- Compliance follow-ups

✎ **Best practice**
Use clear, action-based task names (for example, *Approve April expenses* rather than *Expenses*). This improves filtering and reporting later.

9.6.1 Create and Assign a To Do (step-by-step)

Purpose: Create a manual task and assign it to one or more people or groups.

Steps

1 Go to **Sense HR Dashboard › To do**
2 Click **Add task**
3 Enter a **Task name** and optional **Description**
4 In **Assign to**, select:
- Yourself
- One or more users
- Departments, locations, job roles, or contract types

5 Set **Status**, **Category**, and **Due date**
6 (Optional) Add one or more **Subtasks**
7 Click **Assign**

✅ The To do is added to all selected assignees' task lists.

9.6.2 Assign a To Do to a Group (step-by-step)

Purpose: Assign the same task to multiple users at once.

Steps

1 Go to **Sense HR HR Dashboard › To do › Add task**
2 In **Assign to**, search for a:
- Department
- Location
- Job role
- Contract type
- Multiple assignees by name

3 Select all relevant options
4 Complete the task details
5 Click **Assign**

✎ **Best practice:**
Use group assignment for policy updates, audits, or recurring HR actions.

9.6.3 View Completed or Historic To Do tasks (step-by-step)

Purpose: Review past actions for reference or audit.

Steps

1 Go to **HR Dashboard › To do**
2 Select **My to dos** or **All to dos**
3 Use filters (⛛) to show:
- **Completed** status
- Older date ranges

4 Open any To do to view details

✎ **Visibility rules apply:**
Admins see all users; managers see their teams; employees see their own.

9.7 Approvals and Requests in To Dos

Certain HR actions generate approval To dos automatically. A common example is **expense requests**.

When an employee submits a request:

- A To do is created for the relevant manager or administrator
- Supporting documents (such as receipts) may be attached
- The approver reviews and either **approves or denies** the request

Administrators can review approvals from **All To dos**, while managers see them in **My To dos**.

✎ **Note:**
What happens after approval or denial depends on your organisation's workflow:

- The request may move to another approver
- Or the employee may be notified immediately

9.7.1 Example Approval Request in To Dos — Expense Request (step-by-step)

Purpose: Review and action employee expense submissions.

Steps

1 Go to **HR Dashboard › To do**
2 Select **All to dos**

3 (Optional) Filter (⛛) by **Category › Expense request**
4 Select the expense To do
5 Review expense details and policy compliance
6 (Optional) Click **Download all** to save receipts
7 Click **Approve** or **Deny**

✎ **Outcome depends on workflow:**
The request may move to another approver or notify the employee directly.

Approval To dos will vary by category but all follow a similar basic format.

💡**Tip:** Expense reviews are even easier with *AMI (Sense AI)* — see §12.8 Using AMI for Expense Review

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9.8 Steps to Update a To Do Status

Purpose: Track progress or mark tasks as complete.

✎ **Note:** Only manually added To Do tasks and subtasks can have their status updated manually. Workflow-generated To Do tasks update automatically based on workflow progression.

Steps

1 Go to **HR Dashboard › To do**
2 Open the relevant To do task
3 Change the **Status** to:
- Not started
- In progress
- Completed

4 Close the task view

✎ **Note**
Status updates do not notify other users unless triggered by a workflow.

9.9 Deleting To Do Tasks

Administrators can delete To dos that are no longer required.

When deleting:

- A **reason is required**
- A confirmation message confirms removal

✎ **Important**
Deleting a To do removes it from active tracking but does not reverse any workflow action

that has already taken place.

9.9.1 Delete or Archive a To Do (step-by-step)

Purpose: Remove or archive obsolete or incorrect manual tasks.

Steps

1 Go to **HR Dashboard › To do**
2 Locate the To do
3 Click **More actions (⋯)** next to the task
4 Select **Delete task / Archive task**
5 Enter a **Reason** (required for auditing)
6 **Confirm**

✅ A confirmation message appears once the To do is removed.

⚠ **Important**: Deleted To Dos are permanently removed from the system and do not appear in reports or audits. Archived To Dos remain available for reporting and audit purposes.

9.10 Administrator Best Practice Checklist

✓ Use To dos for actions, not information
✓ Rely on workflows for repeatable approval processes
✓ Monitor **All To dos** regularly to avoid bottlenecks
✓ Delete redundant manual To dos to keep lists clean
✓ Use categories consistently for filtering and reporting

9.11 To Do: FAQS

Q: Who can see To Do tasks in Sense HR?
A: Who can see To Do tasks in Sense HR depends on access role and responsibility. Administrators can view My To dos and All To dos across the organisation, managers can see To dos assigned to themselves and their teams, and employees can only see To dos assigned to them personally.

Q: What's the difference between manual To dos and workflow-generated To dos?
A: The difference between manual To dos and workflow-generated To dos is how they are created and controlled. Manual To dos are created by users or administrators for reminders or tasks, while workflow-generated To dos are created automatically by system workflows and approvals and follow predefined logic that controls who can act on them and what actions are available.

Q: Can To dos be assigned to multiple people at once?

A: Yes, To dos can be assigned to multiple people at once by assigning a task to groups such as departments, locations, job roles, or contract types. When a To do is assigned this way, each matching user receives their own copy of the task.

Q: How do I audit or report on To Do tasks in Sense HR?
A: To report on To Do tasks in Sense HR, go to **Reports** › **To Do** › **Create**, where you can build reports showing task status, assignees, due dates, categories, and completion history. Reporting on To Do tasks allows administrators to monitor workload, overdue actions, and overall process performance across the organisation.

9.12 Section Summary

The To Do module is the execution and accountability layer of Sense HR, bringing together manual tasks and workflow-generated actions in one central place.
While employees and managers use To dos to complete approvals, acknowledgements, and requests, administrators control how work moves through the system by designing workflows, assigning tasks, and monitoring progress across the organisation.
Continue to Section 10 — Document Management to understand how documents are created, shared, acknowledged, and signed — and how document-related actions surface automatically as To dos within the system.

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10 Document Management

Store, share, and track important employee and company documents securely

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Documents in Sense HR are managed across several areas of the system, depending on the document type and its purpose.

Company documents
Company-wide documents are managed from the main Documents module:
Navigation path: `HR Dashboard › Documents`
These documents are typically shared with multiple employees, such as policies, handbooks, or company notices.

Personal (employee) documents
Employee-specific documents are managed from within individual profiles:
Navigation path: `People › [select profile] › Documents`
This area is used for documents that belong to a specific person, such as contracts, signed agreements, or personal records.

✎ ★ Note:
On Elite and Enterprise plans, **Screen Designer** can be used to remove the **Documents** screen from certain profile templates. This is useful for worker types that do not require personal documents (for example, contractors or volunteers). However, it should not be removed from standard employee profiles.

★ Document templates

Document templates are managed in system settings and are available on Professional, Elite, and Enterprise plans:

Navigation path: `Settings › Documents`

Templates allow administrators to standardise documents, apply e-signature fields, and use merge tags to personalise content for each employee.

What you can do with documents
Using the document features in Sense HR, administrators can:

- Upload and manage company documents
- Upload, create, or link personal employee documents
- Apply e-signature fields and merge tags for interactive documents
- Track document activity and completion status through the system

Together, these tools ensure documents are stored securely, assigned appropriately, and auditable throughout the employee lifecycle.

10.1 Accessing Document Management

Documents can be managed in two key locations:

Location	Purpose	Navigation
Employee Documents	View and manage files specific to an employee (e.g., contracts, ID, training certificates).	`HR Dashboard › People › Select Profile › Documents`
Company Documents	Upload organisation-wide files like policies, handbooks, and procedures.	`HR Dashboard › Documents`

10.2 Company Documents vs Personal Documents

The main **Documents** module allows administrators to view and manage all company documents in one place. It also includes a Personal documents tab, which provides a convenient shortcut to the administrator's own documents. This shortcut is for convenience only — the primary location for viewing and managing personal documents is always the individual's own profile.

10.2.1 Switch between Personal and Company documents view

To switch between Personal and Company, use the Personal / Company tab, but be aware that only Company documents can be added here.

10.3 Supported file types for document uploads

Sense HR supports a range of common document formats for uploading and managing company and employee documents.

Maximum file size: 10 MB per document

Supported file types:

- .docx, .doc
- .xlsx, .xls
- .ppt, .pptx
- .pdf
- .png, .jpg

✎ **Important note**
Documents must be uploaded in **PDF format** to use **e-signature, merge tag features, or the "To be read" acknowledgement function**.
PDF files can also be **viewed directly in the browser**. Other file types must be **downloaded to view.**

10.4 Adding and Managing Documents

10.4.1 Upload a Company Document (step-by-step)

Navigation path:

`HR Dashboard › Documents › Add Document`

1 Click **Add Document**
2 Select who the document will apply to and click **Next**
3 Choose **Browse Files** or drag-and-drop.
4 Select a **Category** (e.g., Contract, Policy, Certificate).
5 Optionally add **Description**
6 Click **Save**

10.4.2 Upload a Standard Personal Document (step-by-step)

`HR Dashboard › People › [Select profile] › Documents › Add document`

1 Click **Add Document.**
2 Choose **Upload Standard Document**
3 Choose **Browse files** or drag-and-drop and click **Next**
4 Set view, edit and read settings for the recipient, their manager and anyone else you choose to add
5 Click **Save.**

10.4.3 ★ Upload a Personal Document with an E-Signature (step-by-step)

This process allows administrators to upload a personal (employee-specific) document and assign one or more electronic signatures using merge tags. E-signature tasks are then generated automatically for the selected signees.

✎ **Important prerequisites**

- Documents must be saved as PDF files before upload for e-signature functionality to work
- Only supported fonts should be used in documents to ensure correct rendering (see Supported File Types and Fonts section).
- The document must be uploaded against an employee profile, not via the main Documents module.
- Available on Professional, Elite, and Enterprise

Step 1: Prepare the document with e-signature fields

1 Open the document in your preferred editor (for example, Microsoft Word).
2 Insert the required merge tags at the exact location where signatures should appear:

- Employee signature (Signee 1):
- {{Signature_1}} – physical signature
- {{Signature_1_FullName}} – signee name
- {{Signature_1_Date}} – signing date

3 For additional signees (for example, manager or HR), repeat the format using the next number:

- {{Signature_2}}
- {{Signature_2_FullName}}
- {{Signature_2_Date}}

✎ **Note:** {{Signature_2}}, {{Signature_3}} and so on represent additional signatories. If the same signatory needs to sign in multiple places, repeat {{Signature_1}} wherever their signature should appear.

💡 **Tip:** You can add as many signees as required by continuing the numbering sequence.

4 Save the document as a PDF.

Step 2: Upload the document to the employee profile

1 Go to `HR Dashboard › People › [Select profile] › Documents.`
2 Select **Add** (top right) and choose **Upload document**.
3 Drag and drop the prepared PDF file, or **browse** to select it.
4 Enter or confirm:

- Display name
- Category
- Description

5 Select **Next** to open the preview screen.

Step 3: Assign signature fields

1 In the preview screen, locate the **Signature details** panel on the right.
2 For each signature field detected:

- Type and select the name of the person who should sign.

3 (Optional) **Enable Sign** in order specified to enforce sequential signing based on signature numbering.

Step 4: Set document permissions

1 On the permissions screen, ensure:

- Each signee has **Can view** access.

2 (Optional) Use **Advanced options** to grant view access to additional people if required.
3 Do not select **To be read** when using e-signatures, as the signing task already includes a read requirement and accompanying **To do** task.

Step 5: Complete upload
1 Select **Save** to finish.

✅ The document is uploaded and e-signature tasks are automatically created and assigned to the selected signees.

✎ **Notes**

- Once signed, the completed document is stored on the employee profile with an audit trail.
- There is no functional limit to the number of signatures that can be added to a single document.
- E-signature documents are tracked through document activity and user tasks.

10.4.4 ★ Steps to add a Personal Document using a Template including E-signature (step-by-step)

Use this process to create a personal (employee-specific) document from a document template, including e-signature where signature merge tags are present.

✎ **Prerequisites**

- A document template must already exist in `Settings › Documents` (see §10.8 Document Templates and Sense AI (AMI) Link
- Your subscription plan must support Document templates (Professional, Elite, or Enterprise).

Navigation path
`HR Dashboard › People › [Select profile] › Documents › Add`

Step-by-step:

1 Open the employee's Documents screen
1. From the Sense HR dashboard, go to **People**.
2. Select the employee profile.
3. Open **Documents** from the profile sidebar.

2 Start adding a new document
1. Click **Add**.
2. Select **Use template**.

3 Select a document template
1. Choose one of your preconfigured document templates from the list.
2. The document opens in the document editor.

4 Review and edit the document
1. Review the document preview.

2. Make any required edits, including updating text or merge tags.

✎ **Note:**
Merge tags pull data from the employee profile and can be edited where required before saving.

5 Assign signatories (if applicable)
If the template includes signature merge tags:
1. The system displays one or more signatory fields.
2. Select the appropriate signatory for each signature field shown.
3. Click **Next**.

✎ **Note:**
If multiple signature tags exist, all signatory fields must be completed before continuing.

6 Confirm document details
1. Enter a **Document name**.
2. (Optional) Enter a **Description**.
3. Click **Next**

7 Set document permissions
1. Click **Next**.
2. Configure who can view and (if applicable) edit the document.

✎ **Important:**
If the document includes e-signature fields, do not enable To be read, as this would create a second To Do task alongside the signature task.

8 Save the document
1. Click **Save**.

✅ The document is added to the employee profile.

What happens next
- A To Do task is created for each assigned signatory to complete the e-signature.
- If recipients are marked as To be read (and no signature fields are present), a To Do task is created for acknowledgement.

10.4.5 Add a Personal document via a Link (step-by-step)

Use this option to attach a link to an external document (for example, a SharePoint, Google Drive, or intranet file) to an employee profile instead of uploading a file.

Navigation path:
`HR Dashboard › People › [Select profile] › Documents › Add document`

Step-by-step
1 Start adding a document

1. Click **Add** document.
2. Select **Add link**.

2 Enter document link details
1. Paste the URL of the document.
2. Enter a **Document name**.
3. Select a **Category**.
4. (Optional) Enter a **Description**.

3 Configure access and acknowledgement
1. Set **View**, **Edit**, and **To be read** permissions for:
   - The employee
   - Their manager
   - Any additional users you choose to include

4 Save the document link
1. Click **Save**.

✅ The linked document now appears in the employee's Documents list.

If To be read is enabled, a To Do task is created for the selected recipients.

10.4.6 Edit / Delete / Download a document (step-by-step)

Administrators can manage documents directly from the document list. The available actions are the same whether the document is a company document or a personal (employee) document.

Where to manage documents:

- Company documents:
  `HR Dashboard › Documents`

- Personal (employee) documents:
  `HR Dashboard › People › [Select profile] › Documents`

Steps to manage a document

1 Locate the document
1. Open the relevant Documents list (Personal or Company).
2. Find the document you want to manage (use search or filters if needed).

2 Open the document actions menu
1. Select the **More actions (⋯)** menu next to the document.

3 Choose an action
- **Edit** – Update the document permissions or settings.
- **Download** – Download a copy of the document file.
- **Delete** – Permanently remove the document from the system.
- **View history** – shows document change log, who has viewed and when, total views and download, and who has shared the document.

4 Confirm if required

- If deleting, confirm the action when prompted.

⚠ **Important**

- Deleting a document is permanent and cannot be undone.
- Any To Do tasks linked to the document (for example, signature or "to be read" requests) are cancelled when the document is deleted.

10.5 Documents and To Do Tasks

When a document is marked To be read or To be signed, Sense HR automatically creates a To Do task for each assigned recipient or signatory to track completion.

10.5.1 Read / Sign a Document (step-by-step)

To read or sign a document:

1 Open **To Do** from the Sense HR dashboard.
2 Select **My To Dos**.
3 Locate the document task.

💡 **Tip:** Use search 🔍, filters, or sort to find the task quickly.

4 Click the document To Do to open it.
5 Depending on the document type:

- **To be read** — select Mark as read.
- **To be signed** — review the document and add your signature where prompted.

✅ The **To Do** task is automatically updated once the document is read or signed.

10.6 Document Permissions, Visibility, and Access Roles

Access to documents in Sense HR is controlled at two levels:

- Access Roles and document-level permissions.

Default access by role:

By default, Sense HR applies the following document permissions through Access Roles:

Role Type	Typical Permissions
Administrator	Full access to all documents.
Manager	Access to team documents (or other groups specified in Access roles. See §6.5.2)
Employee	Access to their own documents only.

✎Note
On Professional, Elite, and Enterprise plans, these default permissions can be customised through Access Role management. On Team plans, the default role behaviour applies.

Document-level permissions (per document)
In addition to Access Roles, each document includes its own permission settings at the point it is added or edited.

When uploading or creating a document, administrators can explicitly define:

- Who can view the document
- Who can edit the document
- Who must read or sign the document

This means:

- A user may be granted access to a specific company document, even if their Access Role does not provide broad document access.
- Managers or employees can be given visibility or actions for an individual document without changing their overall role permissions.

Best practice

- Use Access Roles to define broad, role-based document visibility.
- Use document-level permissions to control access to sensitive or one-off documents.
- Review document permissions carefully when using e-signatures or To be read actions, as these create To Do tasks for recipients.

10.7 Using E-Sign

Sense HR supports secure electronic signatures (e-signatures) for personal documents, allowing organisations to send, sign, and store key HR documents digitally.

E-signatures are typically used for:

- Employment contracts and amendments
- Policy acknowledgements
- Letters of variation
- Agreements and confirmations that require proof of acceptance

When a document requires an e-signature, Sense HR creates a **To Do task** for the assigned signatory and sends an email notification. The user completes the task once the document has been signed.
This is the **default process**, but it can be customised or disabled on **Elite and Enterprise plans**.

10.7.1 E-sign validity

E-signatures created and completed in Sense HR are legally valid and binding in the UK, EU, and US, provided they are used appropriately.

Sense HR supports legal validity by providing:

- **Secure identity verification**
  Users must be logged in to Sense HR (or Sense Mobile) to sign, ensuring signatures are linked to a verified user account.
- **Clear intent to sign**
  Signatories actively confirm their signature within the document workflow.
- **Document integrity**
  Documents cannot be altered after signing.
- **Full audit trail**
  Sense HR records:
  - Who signed
  - When they signed
  - Which version of the document was signed
  - Secure, compliant storage

Signed documents are encrypted and stored securely, supporting GDPR and data-protection requirements.

✎ Important
Sense HR provides the secure technical framework for e-signatures. Your organisation remains responsible for:

- Using approved and up-to-date document templates
- Assigning the correct signatories
- Applying appropriate access permissions
- Following internal and local legal requirements

Some documents (for example, witnessed documents or specific statutory forms) may still require a physical signature, depending on company policy or jurisdiction.

10.8 ★ Document Templates and Sense AI (AMI) Link

Document templates allow administrators to standardise personal documents, automate data population, and support e-signature workflows at scale. Templates can be reused across employee profiles and combined with merge tags and *Sense AI (AMI)* to reduce manual effort and errors.

Availability: Professional, Elite, and Enterprise plans
Applies to: Company documents and personal employee documents created from templates

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10.8.1 What Document Templates Are

A document template is a reusable document design stored in Sense HR that can be applied when creating documents for employees.

Templates can include:

- Static content (text, formatting, images)
- Merge tags that automatically pull employee data
- Advanced merge tags
- One or more e-signature fields

- Optional *Sense AI (AMI)* assistance when drafting content

Templates help ensure documents are:

- Consistent
- Accurate
- Legally auditable
- Easy to reuse across many employees

✎ **Note**
Templates define structure and content. Permissions, recipients, and actions (To be read / To be signed) are applied when the document is added to a profile, not when the template is created.

10.8.2 Relationship Between Templates, Documents, and Profiles

The document lifecycle works as follows:

1. **Template**
   Created once under Settings › Documents
2. **Document instance**
   Created from a template and attached to a specific employee profile
3. **Actions**
   Reading or signing actions create To Do tasks for recipients

Changes to a template do not affect documents already created from that template.

10.8.3 Accessing Document Templates

Navigation path:
`HR Dashboard › Settings › Documents`

From here, administrators can:

- Create new templates
- Edit existing templates
- Organise templates by category
- Reuse templates when adding documents to profiles

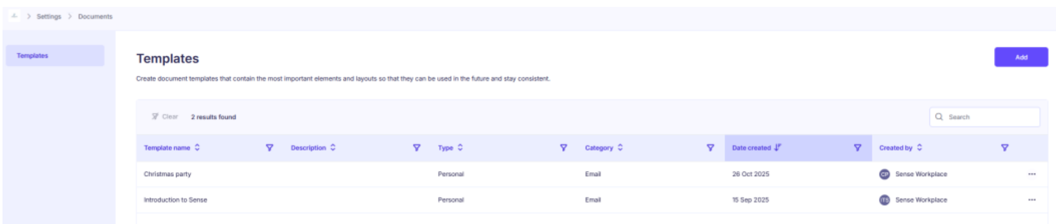

Figure: The Document templates list view for managing reusable document templates.

10.8.4 ★ Create a Document Template (step-by-step)

Use this process to create a reusable template for contracts, policies, forms, or agreements.

Navigation path:
`HR Dashboard › Settings › Documents › Add`

Steps

1️⃣ Click Add
2️⃣ Enter:
- Template name
- Category (or create a new one)
- Optional description

3️⃣ Click **Next** to open the document editor
4️⃣ Add document content using:
- Text formatting tools
- Images or links (optional)
- Merge tags (see below)
- (Optional) Document creation with *Sense AI (AMI)* — see §10.8.7 Document Templates and Sense AI (AMI)

5️⃣ (Optional) Use Preview to review layout
6️⃣ Click **Done** to save the template

✅ The template is now available for use when adding documents to employee profiles.

10.8.5 Using Merge Tags in Templates

Merge tags automatically insert employee data into documents at the point the document is created.

Examples include:
- Employee name
- Job title
- Start date
- Pay details
- Line manager
- Leaver dates

Basic Merge Tags
Basic merge tags can be inserted directly from the editor dropdown and work in both:
- Sense-created templates
- Uploaded PDFs (with limitations)

✎ **Important**
- Merge tags are case-sensitive
- In PDFs, merge tags must appear at the end of a line
- PDFs cannot dynamically reflow text

Advanced Merge Tags
Advanced merge tags allow templates to:

- Pull current or future job and pay records
- Reference specific records from table-format screens
- Extract data from custom screens

⚠ **Restriction:**
Advanced merge tags only work in Sense-created templates, not uploaded PDFs.

💡 **Best practice:**

- Use Sense templates for contracts and variable data
- Use PDFs for static documents requiring fixed formatting

For compete guidance on merge tags see:
https://support.sensewp.com/en/articles/213627-documents-adding-merge-tags-to-your-document-templates
https://support.sensewp.com/en/articles/280487-documents-advanced-merge-tags

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10.8.6 Adding E-Signature Fields to Templates

E-signature fields are added using merge tags such as:

- {{Signature_1}}
- {{Signature_1_Date}}
- {{Signature_1_FullName}}

Each signature tag creates a required signatory when the document is added to a profile.

✎ **Important**

- Each signature tag requires an assigned signatory when adding the document to a profile template
- Multiple signature tags = multiple signatories

10.8.7 Sense AI (AMI) and Document Templates

Administrators can draft content using *Sense AI (AMI)*.

AMI can help:

- Generate draft wording
- Refine tone and clarity
- Reduce time spent writing standard documents

✎ **Note**
AMI assists with content creation only. Administrators remain responsible for:

- Legal accuracy
- Correct merge tag usage
- Appropriate signatories

To use *Sense AI (AMI)* to help draft a document, you can either enter a prompt directly into the chat box at the bottom of the document editor or select **Advanced** to answer a guided set of questions that generate a more detailed prompt.

10.8.8 Best Practice for Templates

✓ Use templates for frequently issued documents
✓ Keep formatting simple and consistent
✓ Prefer Sense templates over PDFs for dynamic content
✓ Preview templates before reuse
✓ Review templates periodically for legal accuracy

10.9 Reporting on Documents (Audit Trail)

Administrators can run reports to monitor and audit document details, permissions, assignees, and signatories.

Navigation: `HR Dashboard › Reports › Documents`

10.9.1 Viewing Document History (Audit Trail)

Each document in Sense HR maintains its own audit trail.

1. Go to **Documents** in the navigation menu.
2. Locate the file and click the **More actions (…) menu.**
3. Select **View History** to see change history, views, downloads, and shares.

10.10 Troubleshooting Uploads or Access Issues

Issue	Likely cause	Resolution
Document upload fails	File too large or unsupported file type	Compress the file or upload a supported file type (see supported formats and size limits).
Document not visible	Access Role or document-level permissions do not include the user	Review both Access Role permissions and document-level permissions for the document.
Duplicate document names	Same document uploaded multiple times	Rename or delete duplicate documents to avoid confusion.

Signature option not available	No signature merge tag present in the document	Edit the document template and add a **signature merge tag** before assigning signatories. For uploaded documents, update the original file to include the merge tag and re-upload it. Merge tags in uploaded documents only work if the file is a **PDF** and the **Upload merged documents** option is selected during upload.
“To be read” and “To be signed” both triggered	Both options selected for the same document	Edit the document and remove one action — documents should be either “to be read” *or* “to be signed”, not both.
Merge tags not populating	Required profile data missing or merge tag unsupported for file type	Check the employee profile contains the required data and confirm the merge tag is supported for the document type (advanced merge tags do not work on uploaded documents). Basic merge tags in uploaded documents only work if the file is a **PDF** and the **Upload merged documents** option is selected during upload.
Document visible to wrong audience	Overly broad document permissions	Review document-level permissions and restrict access to appropriate users only.

10.11 Documents: FAQs

Q: What is the difference between company documents and personal documents in Sense HR?
A: The difference between company documents and personal documents in Sense HR is who they apply to and where they are managed. Company documents are static, shared with multiple employees, and managed from the main Documents module, while personal documents belong to a specific employee, can be dynamic, and are managed directly within that employee’s profile.

Q: What file types are supported for document uploads in Sense HR?
A: The file types supported for document uploads in Sense HR include common formats such as PDF, Word, Excel, PowerPoint, and image files. However, document uploads must be in PDF format to use e-signatures or merge tags.

Q: What happens when a document is marked “To be read” or “To be signed”?
A: When a document is marked “To be read” or “To be signed,” Sense HR automatically creates a To Do task for each assigned recipient or signatory. The To Do tracks completion and updates automatically once the document is read or signed.

Q: Are e-signatures in Sense HR legally valid?

A: E-signatures in Sense HR are legally valid in the UK, EU, and US when used appropriately. Sense HR supports legal validity by ensuring user authentication, clear intent to sign, document integrity, and a full audit trail of signing activity.

Q: Can documents be edited after they are signed?
A: Documents cannot be edited after they are signed in Sense HR. Once a document is signed, it is locked to preserve integrity, and any changes require a new document version to be created and reissued.

Q: Do changes to a document template affect existing documents?
A: Changes to a document template do not affect existing documents created from that template. Each document instance is independent once created, ensuring historical accuracy and audit integrity.

Q: How do I report on documents and signatures in Sense HR?
A: To report on documents and signatures in Sense HR, administrators can go to **Dashboard › Reports › Documents**, where reports can show document status, recipients, signatories, completion dates, and audit history.

Q: Why can a user see one document but not another?
A: Document visibility depends on two things: document assignment and Access Role permissions.

- Document-level permissions determine whether a document has been assigned to a specific user, group, or the whole organisation. If a document hasn't been assigned to someone, they won't be able to see it.
- Access Roles control whether a user can view other people's documents.

Even users with the same access role may see different documents depending on which documents have been assigned to them.

10.12 Section Summary

You've now learned how to upload, manage, and secure employee and company documents in Sense HR.
Next, continue to **Section 11 — Reports in Sense HR** to learn how to generate, filter, and export system data.

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11 Reports and Data Insights

View, analyse, and export the information your organisation needs — from workforce data to compliance tracking.

Reports in *Sense HR* allow administrators to extract structured information from across the system and convert it into operational insight, compliance records, and management reporting.

They form the backbone of auditing, compliance, and business insight and support a wide range of administrative tasks, including:

- workforce analysis
- payroll preparation
- absence monitoring
- compliance auditing
- training and certification oversight
- equipment and asset tracking
- organisational reporting

Reports can be reused, exported, visualised as charts, and analysed using *Sense AI (AMI)* to produce summaries and business-ready outputs.

★ Access Role Management (available on Professional, Elite, and Enterprise plans) allows administrators to control which report types different roles can access and whether those roles can create reports.

11.1 Accessing Reports

Navigation Path: `HR Dashboard › Reports`

From this module you can:

- create a new report,
- reopen a saved report via **All Reports** or via the relevant report type.
- edit existing reports
- export data for further analysis or audit.
- visualise reports as charts
- analyse report results using **Sense AI (AMI)**

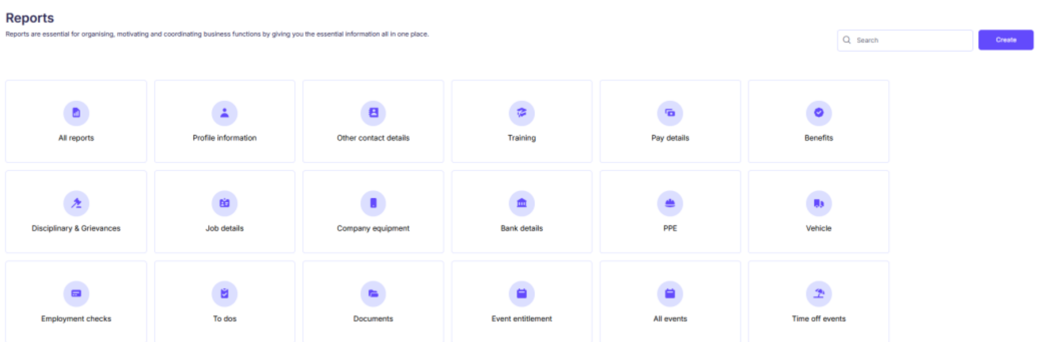

Figure: The Reports module showing available report types.

11.2 Creating, Filtering, and Customising Reports

Creating a report in Sense HR allows you to extract exactly the information you need by selecting data entities, choosing fields, and applying filters.

Reports can range from broad datasets (such as a full employee directory) to highly specific insights (for example, employees approaching absence thresholds or documents awaiting signature).

11.2.1 Create a report (step-by-step)

Navigation Path:
`HR Dashboard › Reports › Create`

1 Click **Create**.

2 Select a **Report type**.
Each report type determines which datasets (data entities) are available.

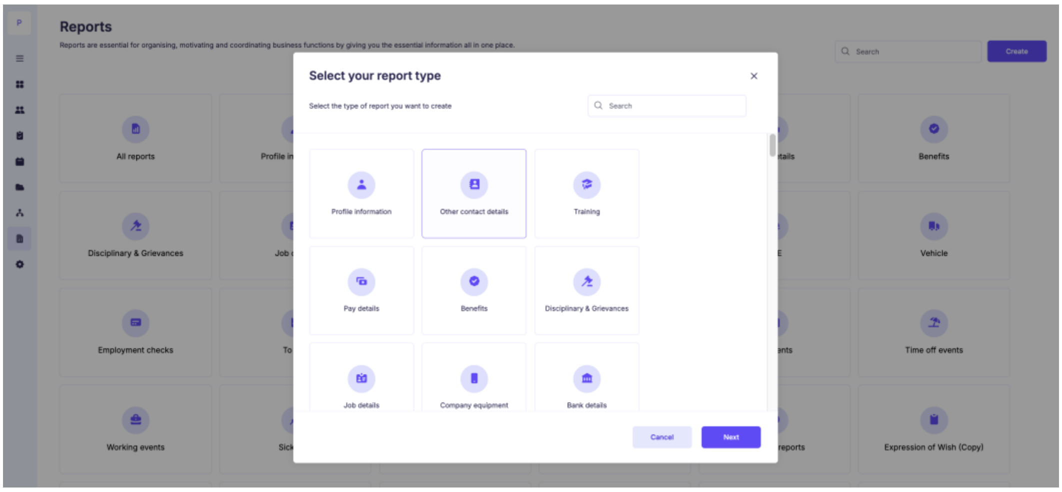

Figure: Selecting a report type. Each type determines which data entities and fields are available.

3 Select data entities and fields to include in the report.

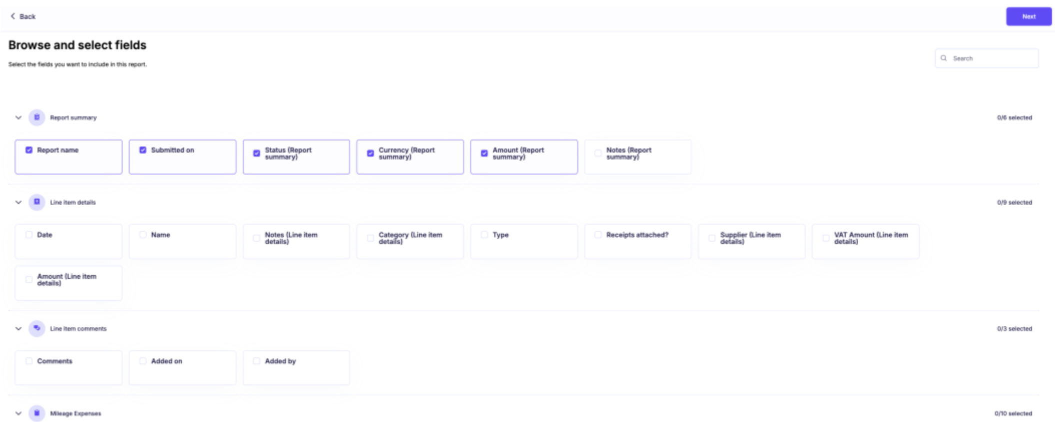

Figure: Browsing and selecting data entity fields to include in the report.

4 Click **Next** to preview the report.

5 (Optional) Apply filters ( ) to refine the dataset.

6 (Optional) Use **Add fields** to add or remove fields if adjustments are required.

7 Click **Next**.

8 Enter:
• Report name
• Optional description
• Optional Sense AI (AMI) prompt

9 Click **Save**.

The report is now available in All Reports and can be reused at any time.

11.3 Understanding the Reporting Engine

The Sense HR reporting engine is built on a structured data model designed to provide flexible, consistent access to system data.

Reports are built using **three layers**:

Report Type
↓
Data Entities
↓
Data Entity Fields

Example:
Report Type:
Payroll Extract

Data Entities:
People
Pay details
Work schedule
Time tracking details

Fields:
Employee ID
Pay rate
Hours worked
Overtime duration

This structure allows reports to combine multiple datasets while maintaining consistency across the system.

11.3.1 Types of Data Entities

Two categories of data entities exist.

Data Entity Type	Description
Screen-based entities	Generated from profile screens and contain all fields on that screen
System entities	Auto-generated datasets based on system configurations such as events, working hours, attendance records, documents, hardware, or payroll calculations

Screen-Based Entities
Examples include:

- Personal details
- Training
- Benefits
- Disciplinary & Grievances
- Company Equipment
- PPE
- Vehicle
- Bank details

All fields present on the corresponding screen automatically become available for reporting with navigation path:
`HR Dashboard › Reports › [Screen name]`

★ Screen Designer / Reporting link

When Screen Designer is used to create or customise screens and assign them to profile templates (Elite and Enterprise plans), those screens automatically appear as report types and all fields on the screen become available for reporting.
See § 16 Screen Designer for more detail.

★ Sense Automate / Reporting link
When *Sense Automate* is used to activate library or custom workflows (Elite and Enterprise plans), any workflow-generated screens also become reports types. All data captured by these workflows is available for reporting.
See § 17 Automations and Workflows in Sense Automate for more detail.

New report types will also appear in Access Role Management (ARM). By default, it is accessible only to Administrators and set to no access for other roles. Access can be enabled per role via:
Access roles › [Select role] › Permissions › Features › Reports.

11.3.1.1 Reusable Data Entities

Many entities appear across multiple report types.
Examples include:

• People
• Personal details
• Employment details
• Job details

These entities act as reusable datasets that allow reports to be constructed consistently across the system.

Key Principle
Reports do not create new data.
Reports only extract and organise information that already exists within the system.
If a field or value does not exist in the underlying screen, event, or workflow data, it will not appear in reports.
If a report appears to be missing data, check:
• whether the relevant screen or workflow captures that information
• whether the field has been populated in the system
• whether filters are restricting the results

This principle helps administrators quickly diagnose most reporting issues.

11.4 Filters and Filtering Logic

Filters allow you to refine report results to display only the data that meets specific conditions. For instance, filtering a Profile Information report by Status = Leaver instantly creates a Leaver Details view without needing a separate report type.

When building a report, filters can be applied to most fields included in the report. Filters appear as the **filter icon ( ) at the top of each column** in the report preview.

Filtering allows administrators to:

- narrow large datasets into focused insights
- create reusable reports for specific operational tasks
- isolate particular employees, events, or records
- prepare data for payroll, compliance, or management reporting

Filters can be applied individually or combined to build more complex conditions.

Best Practice:

- Start broad, then filter down (step by step rather than over-filtering initially).
- Combine filters (e.g., Status + Department + Manager) for richer analysis.
- Save filtered reports under clear names for reuse.
- Remember that filters can interact with each other — review results for accuracy.

11.4.1 How Filters Work

Each field in a report supports a filter type based on the **kind of data it stores**.
For example:

Data Type	Example Fields	Filter Type
Text	First name, Department	Text Rule Filter
Numeric	Age, Duration	Numeric Rule Filter
Date	Start date, Event date	Date Rule Filter
Selectable values	Status, Event name	Value Selection Filter

Understanding which filter type applies to each field helps administrators interpret report results correctly.

11.4.2 Filter Types

The reporting engine uses four primary filter types.

Filter Type	Description
Value Selection Filter	Select one or more values from a predefined list (for example status, category, department, or Yes/No fields).
Text Rule Filter	Apply rule-based filtering to text values such as names or descriptions.
Numeric Rule Filter	Apply rule-based filtering to numeric values such as duration, age, or totals.
Date Rule Filter	Apply rule-based filtering to date values using exact or relative date conditions.

11.4.2.1 Value Selection Filter

Value Selection Filters allow you to select one or more values from a predefined list.

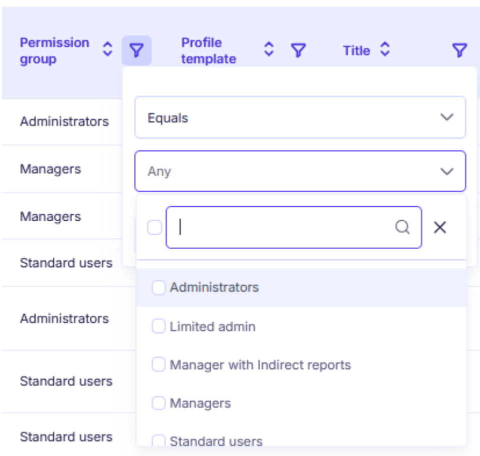

Figure: A value selection filter showing multi-select options.

These filters are used for fields such as:

- Status
- Department
- Event name
- Category
- Yes/No fields

Because these filters support multi-selection, administrators can choose one or more values simultaneously.

Available Conditions

- Equals
- Not equals
- Is empty
- Is not empty

Behaviour:
Administrators can select multiple values from the list.

Example:
Status filter:

- Active
- Future starter
- Future leaver
- Leaver

Selecting **Active** + **Future starter** will return both groups.

For Yes/No (Boolean) fields, the filter allows:

- Yes only
- No only
- Yes and No

11.4.2.2 Text Rule Filter

Text Rule Filters allow administrators to search or match text values using defined rules.

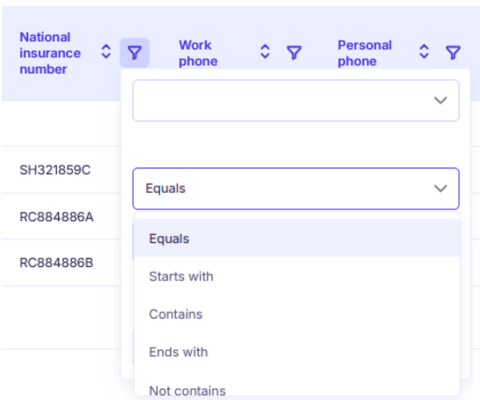

Figure: A text rule filter with condition options such as Contains, Starts with, and Equals.

These filters are typically used for:

- Names
- Descriptions
- Titles
- Free-text fields

Available conditions:

- Equals
- Starts with
- Contains
- Ends with
- Not contains
- Not equals
- Is blank
- Is not blank

Rule Combination Logic:
Administrators can apply multiple rule conditions using:

- **Match any** (OR logic)
- **Match all** (AND logic)

Additional rule conditions can be added using **+ Add rule**.

11.4.2.3 Numeric Rule Filter

Numeric Rule Filters apply comparison rules to numbers.

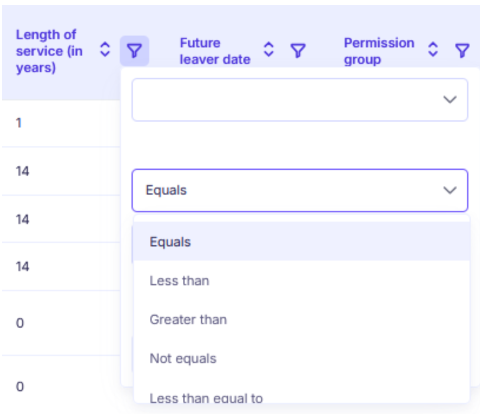

Figure: A numeric rule filter with comparison conditions such as Greater than and Less than.

These filters are used for fields such as:

- Age
- Duration
- Entitlement values
- Totals
- Calculated metrics

Available conditions:

- Equals
- Less than
- Greater than
- Not equals
- Less than or equal to
- Greater than or equal to
- Is empty
- Is not empty

Multiple numeric conditions can be combined using:

- Match any
- Match all

Additional rule conditions can be added using **+ Add rule**

11.4.2.4 Date Rule Filter

Date Rule Filters allow administrators to filter results using specific or relative date conditions.

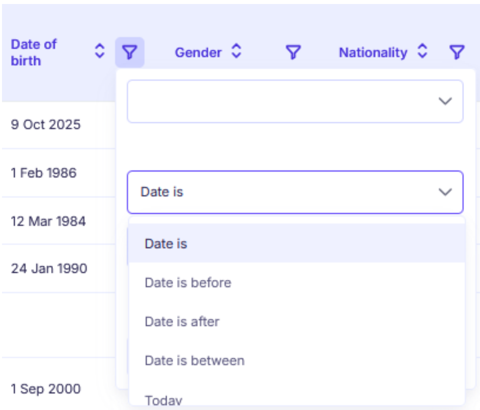

Figure: A date rule filter with conditions such as Before, After, and Between.

These filters apply to fields such as:

- Start date
- End date
- Event date
- Signature date
- Attendance date

Available conditions:

Exact comparisons:

- Date is
- Date is before
- Date is after
- Date is between

Relative dates:

- Today

- Tomorrow
- Yesterday

Time period filters:
- This week
- This month
- This year

Future periods:
- Next week
- Next month
- Next year
- Next number of days

Past periods:
- Last week
- Last month
- Last year
- Last number of days

Blank value checks:
- Date is blank
- Date is not blank

11.5 Report Types and Data Entities

Each report type provides access to a specific set of data entities.
A data entity represents a dataset within the system.

Each entity contains multiple fields that can be included in a report.

Data entities can appear across multiple report types. When this occurs, the same fields and filtering behaviour apply each time.

This ensures reporting consistency across the system.

11.6 Core system reports

This section describes core system reports.

Core system reports contain structured system data that spans multiple modules or internal datasets.

These reports often combine several data entities such as People, Job Details, Employment Details, and system activity records.

Because these reports include large numbers of fields, the detailed list of data entities, fields, and filter behaviour for each report type is provided in:

11.6.1 Profile Information Reports

Navigation Path:
`HR Dashboard › Reports › Profile Information`

Purpose
Profile Information reports provide a comprehensive export of employee profile data across all enabled screens.

These reports pull information from all profile screens assigned to employees through **Profile Templates**, including both standard system screens and any custom screens created using **Screen Designer** or workflow-generated screens created using **Sense Automate**.

Typical Uses
Profile Information reports are commonly used for:

- exporting employee directories
- workforce and headcount analysis
- HR compliance reporting
- auditing employee records
- preparing data extracts for external systems

Important Notes
The fields available in this report reflect the screens enabled in the organisation's profile templates.

If a screen is added or removed from a template, the corresponding reporting fields will automatically appear or disappear.

Data Entity Reference
See:
Appendix C.3

11.6.2 To Do Reports

Navigation Path:
`HR Dashboard › Reports › To Dos`

Purpose
The **To Do** report provides visibility into tasks created across the organisation.
Tasks may be created manually by administrators or managers, or automatically through workflows, document signature requests, onboarding processes, and other automated system activities.

Typical Uses
To Do reports are commonly used for:

- monitoring onboarding and offboarding tasks
- identifying overdue tasks

- reviewing workflow activity
- tracking document acknowledgement tasks
- auditing operational processes

✎ **Important Notes**
The **Assignee field must be included** when reporting on employment or job details related to a task owner.
If Employment Details or Job Details fields are selected without including the Assignee field, the report may fail to generate.
If this occurs, add the **Assignee field** using **“Add fields.”**
Data Entity Reference
See:
Appendix C.3

11.6.3 Documents Reports

Navigation Path:
`HR Dashboard › Reports › Documents`

Purpose
Documents reports track document records, signature status, and document access permissions across the organisation.

These reports allow administrators to monitor document distribution and confirm that employees have acknowledged or signed required documents.

Typical Uses
Documents reports are commonly used for:
- tracking document signatures and acknowledgements
- identifying employees who have not signed mandatory policies
- auditing document access permissions
- reviewing document upload activity
- preparing compliance documentation for inspections or audits

Important Notes
Signature and read acknowledgements generate **To Do tasks** for employees.

These tasks can be monitored through both **To Do reports** and the **To Do management area**.

Data Entity Reference
See:
Appendix C.3

11.6.4 Event Entitlement Reports

Navigation Path:
`HR Dashboard › Reports › Event Entitlement`

Purpose
Event Entitlement reports summarise leave allocation and leave usage for employees.

These reports provide visibility into entitlement balances, carry-over values, and remaining leave for different event types.

Typical Uses
Event Entitlement reports are commonly used for:
- auditing holiday balances
- verifying entitlement calculations
- monitoring leave carry-over
- reviewing leave allocations across departments
- supporting workforce planning

Data Entity Reference
See:
Appendix C.3

11.6.5 All Events Reports

Navigation Path:
`HR Dashboard › Reports › All Events`

Purpose
The All Events report consolidates event data across the organisation.
It combines the important data from **working events, time-off events, and sickness events** (which are also available as individual report types) into a single reporting dataset.
This allows administrators to analyse event activity across multiple event types without running separate reports.

Typical Uses
All Events reports are commonly used for:
- analysing absence patterns
- reviewing sickness records
- auditing event activity
- preparing workforce planning reports
- verifying event records for payroll or compliance purposes

Important Notes
If the **Date-wise breakup field** is included in the report, multi-day events are expanded into individual rows for each day.

This behaviour allows accurate daily analysis but may cause reports to appear to contain repeated entries.

Data Entity Reference
See:
Appendix C.3

11.6.6 Attendance Reports

Navigation Path:
`HR Dashboard › Reports › Attendance`

Purpose
Attendance reports show clock-in and clock-out activity recorded through Clock devices or other attendance tracking methods.

These reports provide visibility into employee working time, attendance patterns, and potential anomalies.

Typical Uses
Attendance reports are commonly used for:

- reviewing employee attendance patterns
- identifying missed clock-ins or clock-outs
- validating working hours before payroll processing
- investigating attendance anomalies
- supporting time and attendance audits

Data Entity Reference
See:
Appendix C.3

11.6.7 Payroll Extract Reports

Navigation Path:
`HR Dashboard › Reports › Payroll Extract`
Purpose

Payroll Extract reports provide structured payroll-ready datasets combining employee information, working time data, and pay-related records.

These reports are commonly used as the foundation for payroll calculations or payroll system integrations.

Typical Uses
Payroll Extract reports are commonly used for:

- preparing payroll input data
- validating pay-related records before payroll processing
- analysing overtime and working time data
- exporting payroll datasets to external payroll systems

✎ Important Notes
Payroll Extract reports are often combined with **Sense AI (AMI)** to produce automated payroll summaries.
Saved reports with configured AMI prompts require initial setup, but can be reused for each payroll cycle to produce consistent outputs. See §11.12 Sense AI (AMI) Reports Integration for further guidance.

Data Entity Reference
See:
Appendix C.3

11.6.8 Expense Reports

Navigation Path:
`HR Dashboard › Reports › Expense`

Purpose
Expense reports provide visibility into expense claims submitted by employees.
These reports include expense details, approval status, and associated employee information.

Typical Uses
Expense reports are commonly used for:
- auditing expense submissions
- reviewing approval status of expense claims
- analysing spending patterns
- preparing financial reconciliation reports

Data Entity Reference
See:
Appendix C.3

11.6.9 User Activity Reports

Navigation Path:
`HR Dashboard › Reports › User Activity`

Purpose
User Activity reports provide an audit trail of system activity.

They record who made changes to records, which fields were modified, and when those changes occurred.

Typical Uses
User Activity reports are commonly used for:
- auditing system activity
- investigating changes to employee records
- supporting compliance or regulatory audits
- troubleshooting unexpected data changes

Data Entity Reference
See:
Appendix C.3

11.6.10 Clock Message Inbox Reports

Navigation Path:
`HR Dashboard › Reports › Clock Message Inbox`

Purpose
Clock Message Inbox reports display messages received from attendance clock devices connected to the system.
These reports capture device messages, events, and communication records between clock hardware and the platform.

Typical Uses
Clock Message Inbox reports are commonly used for:

- troubleshooting attendance clock devices
- reviewing communication errors from devices
- monitoring device status and activity
- diagnosing device connectivity issues

Data Entity Reference
See:
Appendix C.3

11.6.11 Public Holiday Group Details Reports

Navigation Path:
`HR Dashboard › Reports › Public Holiday Group Details`

Purpose
Public Holiday Group Details reports provide information about the public holiday groups configured in the system and the holidays assigned to those groups.

Typical Uses
Public Holiday Group reports are commonly used for:

- verifying public holiday schedules
- auditing public holiday group assignments
- reviewing holiday configurations across regions or teams

Data Entity Reference
See:
Appendix C.3

11.6.12 Working Hour Details Reports

Navigation Path:
`HR Dashboard › Reports › Working Hour Details`

Purpose
Working Hour Details reports provide information about working hour schedules and patterns configured within the system.

These configurations define employees' scheduled working hours and are used to calculate attendance, leave entitlement, and schedule planning.

Typical Uses
Working Hour reports are commonly used for:

- auditing working hour configurations
- verifying shift patterns
- reviewing working schedules used in attendance calculations
- supporting payroll and workforce planning

Data Entity Reference
See:
Appendix C.3

11.7 Reports Generated from Profile Screens

In addition to the core report types described above, Sense HR can generate reports from any **profile screen** enabled in the system.

These report types correspond directly to the screens that appear within employee profiles.

Examples from standard screens include:

- Other Contact Details
- Training
- Pay Details
- Benefits
- Disciplinary & Grievances
- Job Details
- Company Equipment
- Bank Details
- PPE
- Vehicle
- Employment Checks

Each of these reports includes the fields configured on the corresponding screen.
To ensure that screen data can always be linked to an employee, these reports also include the following standard data entities:

- **People**
- **Employment details**
- **Job details**

These entities provide employee identity, employment context, and reporting structure information.

This design allows administrators to combine screen-specific data with organisational context when analysing results.

Detailed information about the data entities and fields available for each screen-based report can be found in:
Appendix C.1

11.8 Understanding date-wise breakup

When a report includes the Date-wise breakup field, Sense HR expands multi-day events into separate rows for each individual day.

For example:
- A 5-day holiday will appear as 5 separate rows, one per day.
- Each row represents a single calendar day within the event period.

This behaviour is intentional and ensures that:
- Overlapping events are reported accurately
- Daily totals (hours, duration, entitlement impact) can be analysed correctly
- Reports remain consistent with calendar and planner logic

Why this can look confusing at first
If you are not expecting date-level expansion, the report may appear to contain repeated or duplicated entries. However, each row represents a distinct day, not a duplicate record.

When to use Date-wise breakup
Use Date-wise breakup when you need:
- Day-by-day analysis of absence or attendance
- Accurate daily totals for reporting or payroll checks
- Visibility of overlapping or partial-day events

If you want a single row per event, remove the Date-wise breakup field from the report.

💡 **Tip:**
If your report shows more rows than expected, check whether Date-wise breakup is enabled before troubleshooting further.

11.9 Report Permissions and Access Roles

Report access in *Sense HR* is controlled through **Access Roles**.

Administrators can determine:
- which report types a role can access
- whether the role can **create reports** or **view reports**

Access role permissions are available on:
- Professional plans
- Elite plans
- Enterprise plans

Administrator Access
Administrators always have full reporting access.

Administrators can:

- create reports
- view all reports
- edit reports
- export report results
- analyse reports with Sense AI (AMI)

Administrators can also manage reporting permissions for other roles.

Non-Administrator Access
For non-administrator roles, reporting behaviour differs.

Non-admin users:
- can only see **reports they created**
- cannot see reports created by administrators or other users

If a non-admin role has report access enabled, the role can either:

Permission Type	Behaviour
View	Can open reports they created
Create	Can create reports and view the ones they created

This ensures that sensitive data is not unintentionally exposed across roles.

Configuring Report Permissions
Report permissions are configured in **Access Roles**.

Navigation:
`Access Roles › Select Role › Permissions › Features › Reports`

Administrators can enable or disable access to individual report types.

11.9.1 Report Types with Configurable Role Access

The following table shows which standard report types support access role configuration.

Custom screens (Screen designer) always support access role configuration.

Report Type	Limited Admin	Advanced User (Manager-type roles)	Standard User
Profile Information	Yes	Yes	Yes
Other contact details	Yes	Yes	Yes
Training	Yes	Yes	Yes
Pay details	Yes	Yes	Yes
Benefits	Yes	Yes	Yes
Disciplinary & Grievances	Yes	Yes	Yes

Job details	Yes	Yes	Yes
Company equipment	Yes	Yes	Yes
Bank details	Yes	Yes	Yes
PPE	Yes	Yes	Yes
Vehicle	Yes	Yes	Yes
Employment checks	Yes	Yes	Yes
To Dos	Yes	Yes	Yes
Documents	Yes	No	No
Event entitlement	Yes	Yes	Yes
All events	Yes	Yes	Yes
Time off events	Yes	Yes	Yes
Working events	Yes	Yes	Yes
Sickness	Yes	Yes	Yes
Attendance	Yes	Yes	Yes
Payroll extract	Yes	Yes	No
Expense reports	Yes	Yes	Yes
Additional notes	Yes	Yes	Yes
User activity	Yes	No	No
Clock message inbox	No	No	No
Public holiday group details	No	No	No
Working hour details	No	No	No

11.10 Managing and Reusing Reports

Reports can be saved and reused at any time.

This allows administrators to create reusable reporting templates for recurring processes such as:

- payroll preparation
- compliance reporting
- absence monitoring
- management reporting

Saved reports appear in **All Reports** or under the relevant report type (e.g. Profile information for Profile information reports).

Navigation path

`All reports › [Locate report in list] › More actions (…)`

or

```
[Report type] › [Locate report in list] › More actions (…)
```

Report Management Options

Action	Description	How to Access
Open	View the report results	Click report
Edit	Change fields, filters, or report name	More actions (…)
Copy	Duplicate the report for a new reporting cycle	More actions (…)
Delete	Remove the saved report	More actions (…)
Export	Download report results	More actions (…)
Create Chart	Visualise report results	More actions (…)
Analyse with AMI	Generate insights using Sense AI	More actions (…)

✎ **Note:**
By saving a report along with its configured *Sense AI (AMI)* prompt, you can easily reuse and rerun it by updating parameters such as the date range. This makes it simple to generate recurring outputs—such as weekly or monthly payroll summaries—quickly and consistently, without rebuilding the report each time. See § 12.6 Using AMI with Reports (Analyse with AMI) for more information.

11.11 Export Options for Reports

Reports can be exported for external analysis or record keeping.

Format	Purpose
CSV	Ideal for Excel or Power BI analysis.
XLSX	Readable spreadsheet layout for sharing.
PDF	Read-only snapshot for sign-off or audit.

Exports contain exactly the fields and filters currently applied to the report.

11.12 ★ Sense AI (AMI) Reports Integration

Sense AI (AMI) is directly integrated into the Reports module, allowing administrators to analyse report data using natural language prompts instead of manual interpretation.

Rather than replacing reports, *AMI* works on top of them. Reports define what data is included; *AMI* helps you interpret, summarise, and apply business rules to that data.

When you analyse a report with *AMI*, the AI receives:

- The exact fields included in the report

- The filtered results for the selected time period or people
- Any saved prompt attached to the report

AMI then produces structured outputs such as:
- Business-ready summaries
- Calculated breakdowns (for example payroll or entitlement summaries)
- Risk or compliance insights
- Clear narratives suitable for leadership, audit, or operational use

Why use AMI with reports

Using *AMI* alongside reports allows you to:
- Reduce manual analysis and spreadsheet work
- Apply consistent rules and logic every time a report is run
- Turn recurring administrative processes into repeatable workflows
- Generate clear, decision-ready outputs from complex HR data

Reusable prompts and repeatable processes

Prompts used with *AMI* can be saved directly on a report. This means:
- The same analysis can be reused every reporting cycle
- Reports can be copied and rerun for new time periods
- Business rules (such as payroll, absence thresholds, or compliance logic) remain consistent

This makes *AMI* especially valuable for recurring organisational processes such as payroll, compliance checks, audits, and management reporting.

How *AMI* fits into the reporting workflow

At a high level, the workflow is:
1. Create or open a report
2. Select and filter ( ) the required data
3. Analyse the report using *AMI*
4. Refine and save a reusable prompt
5. Reuse or copy the report for future periods

The next section walks through this process in detail using a practical payroll example.

11.12.1 Example Report with Sense AI (AMI) — Payroll extract

Payroll Extract reports can be combined with *Sense AI (AMI)* to automate complex payroll calculations and produce consistent, payroll-ready summaries each pay period.

This approach works best when treated as a two-stage setup:
1. build a reliable Payroll Extract report, then
2. refine and save an AMI prompt tailored to your company's payroll rules.

Stage 1: Prepare and save the Payroll Extract report

Create a Payroll Extract report that includes all data required to calculate pay accurately for your organisation (see §11.2.1 Create a report (step-by-step)). This typically includes:

- Pay details, ensuring the Effective date reflects the relevant pay period
- Working time and attendance data, such as worked duration, overtime, and anomalies
- Event and entitlement data, including holiday, sickness, TOIL, and other time-off types
- Employee identifiers, such as employee ID, NI number, and NI number
- Any additional pay elements, such as benefits, allowances, or premiums

Once the report accurately reflects everything payroll needs for a single pay period:

- Save the report with a clear, reusable name (for example, Weekly Payroll Extract – Core Staff).

This saved report becomes the data source for AMI analysis.

Stage 2: Analyse with AMI and build your payroll prompt
From the saved report:

1. Open the report.
2. Select **More actions (…) › Analyse with AMI**.
3. Use natural language to explain what you want AMI to produce.

You can speak to AMI conversationally. For example, you might start with:

"Can you create a clean weekly payroll summary for the employees in this report?"

AMI will generate an initial output based on the data in the report.

You can then refine the prompt step by step. For example:

- To introduce company-specific rules:
  "Can we refine this to apply our overtime rules?"
- To clarify how overtime works:
  "Overtime only applies after 15 minutes beyond shift end and is only paid at the end of a shift. Early starts do not count as overtime."
- To adjust sickness or holiday handling:
  "Sickness should be shown separately and labelled as statutory sick pay or company sick pay where available."

You can continue iterating until the output matches what your payroll team expects.

💡 **Tip:**
AMI does not invent data. If something is unclear or missing from the report, AMI will flag it rather than guess — this helps catch payroll or report settings issues early.

Stage 3: Finalise and save a reusable AMI prompt
Once you are happy with the output, ask AMI to provide the final version of the prompt:

"Can you now give me the final prompt to recreate this payroll summary exactly, so I can save it for future payroll runs?"

Or, for a code version:

“Can you give me the code for this payroll summary exactly as it is now, so I can save it and reuse it for future payroll runs?” or simply "Show me the code to run the final payroll extract"

Copy the resulting prompt.

Then:
1. Reopen the saved Payroll Extract report.
2. Click **Next** to skip field and filter selection.
3. Paste the copied prompt into the Analyse with AMI prompt field.
4. **Save** the report.

The report is now configured with a reusable payroll analysis prompt.

Ongoing use each pay period
For each new pay period:
- **Copy** the saved Payroll Extract report.
- Update the date filters or effective dates.
- Run Analyse with AMI.

The saved prompt is reused automatically, producing a consistent payroll summary without rebuilding reports or rewriting rules.

💡 **Best practice:**
The first setup may take time, especially if your payroll rules are detailed. Once saved, however, the same report and prompt can be reused every pay period — significantly reducing manual effort while improving accuracy and consistency.

11.12.2 Using Sense AI (AMI) Reports Integration for Other Organisational Processes

The same approach used to create reusable payroll summaries with *Sense AI (AMI)* can be applied to many other recurring organisational processes.

In each case, the pattern is the same:
1. Create or reuse a report that contains the relevant data
2. Analyse the report with *AMI*
3. Refine the prompt to reflect your organisation’s rules, policies, or thresholds
4. Save the final prompt with the report
5. Reuse or copy the report at regular intervals (monthly, quarterly, annually, or ad hoc)

This allows administrators to turn raw HR data into repeatable, decision-ready outputs without manual re-analysis each time.

Below are common examples where this strategy is especially effective.

11.12.2.1 Absence & Sickness Monitoring

Reporting categories:
Profile Information › Absence Impact Summary

Typical use cases:

- Identifying employees approaching absence trigger thresholds (e.g. Bradford Factor)
- Highlighting repeat short-term absence patterns
- Producing monthly or quarterly absence review summaries for managers

AMI can be prompted to:

- Flag employees who exceed defined thresholds
- Group absence by reason, department, or manager
- Produce a narrative summary highlighting risk areas and trends

This is particularly useful for manager reviews, HR compliance, and early intervention.

11.12.2.2 Training & Compliance Oversight

Reporting categories:
Training

Typical use cases:

- Tracking mandatory training completion
- Identifying expired or soon-to-expire certifications
- Preparing compliance reports for audits or inspections

AMI can:

- Highlight overdue or missing training
- Summarise compliance status by department or role
- Produce an executive-ready compliance snapshot

Saved prompts allow the same compliance report to be regenerated on demand or before audits.

11.12.2.3 Equipment, Assets, and PPE Tracking

Reporting categories:
Company Equipment, PPE

Typical use cases:

- Reviewing issued equipment by employee or location
- Identifying missing acknowledgements or overdue returns
- Preparing asset reconciliation summaries

AMI can:

- Group assets by type, location, or ownership
- Flag inconsistencies or missing records
- Generate clean handover or audit summaries

This is especially effective where Screen Designer is used to capture structured asset data.

11.12.2.4 Disciplinary, Grievance, and Case Oversight

Reporting categories:
Disciplinary & Grievances

Typical use cases:

- Reviewing open or historical cases
- Identifying repeat issues or escalation risks
- Preparing anonymised summaries for leadership or legal review

AMI can:

- Summarise case status and timelines
- Highlight patterns or repeat cases
- Produce neutral, factual summaries suitable for governance reviews

Saved prompts help ensure consistent language and analysis across reviews.

11.12.2.5 ★ Performance Reviews & Goal Tracking

Reporting categories:
Sense Automate Workflow Screens (Performance Cycles, Goals, Reviews)
Available on Elite / Enterprise

Typical use cases:

- Monitoring review completion rates
- Identifying overdue reviews
- Summarising performance themes across teams

AMI can:

- Highlight completion gaps
- Aggregate performance outcomes
- Produce leadership-level insights without exposing raw personal data

This is most relevant where *Sense Automate* workflows and **Screen Designer** are in use.

11.12.2.6 Leave & Entitlement Analysis

Reporting categories:
All events,

Typical use cases:

- Identifying low or excessive leave balances
- Forecasting end-of-year leave risk
- Supporting operational planning

AMI can:

- Flag employees at risk of unused entitlement
- Summarise leave usage trends
- Support proactive workforce planning conversations

11.12.3 Key Principle: Prompts as Operational Assets

Across all these examples, the value comes from treating AMI prompts as reusable operational assets:

- Refine them once
- Save them with the report
- Reuse them consistently
- Adjust only when business rules change

This approach reduces manual effort, improves consistency, and ensures that insights scale as your organisation grows.

11.13 Security and Data Retention

Area	Managed Where
Data retention periods	Sense Workplace Support
User data export policy	Customer maintained
Report access permissions	Access Roles (See § 6 — Access Roles and Permissions)

11.14 Troubleshooting and Best Practice for Reports

This section helps administrators resolve common reporting issues and apply best practices to ensure reports remain accurate, reliable, and easy to reuse.

Issue	Likely Cause	Recommended Action
Missing or unexpected data	Active filters or incorrect date range	Review and clear filters ( ); confirm date fields and effective dates
Duplicate-looking rows	Date-wise breakup enabled	Remove Date-wise breakup if a single row per event is required
Fields not available	Screen not enabled or workflow not active	Check profile templates, **Screen Designer**, or *Automate* configuration
Incorrect entitlement totals	Planner or working hours misconfigured	Review Working Hours, Holiday Year, and Planner Settings
Employee not appearing in report	Status filter excludes them	Check Status (Active, Future Starter, Leaver) filters

AMI analysis produces unexpected results	Prompt assumptions don't match report data	Refine the prompt to align with available fields and company rules

11.15 Best Practices for Reliable Reporting

Design reports before analysing
- Ensure the report contains all required fields before using *AMI*.
- Avoid relying on *AI* to infer data that is not present in the report.

Use clear date logic
- Always confirm which date fields are driving the report (for example: Effective date, Event start date, Employment dates).
- Be consistent when reusing reports for recurring periods (such as payroll or audits).

Save reports for reuse
- Save commonly used reports with clear names (e.g. Monthly Payroll Extract, Leaver Audit – Quarterly).
- Use the Copy function to rerun reports for new periods without rebuilding them.

Use filters incrementally
- Start broad, then narrow results using filters.
- Review results after each filter is applied to avoid unintended exclusions.

Pair reports with AMI thoughtfully
- Use AMI for interpretation, summaries, and applying business logic.
- Keep prompts explicit — especially for rules not stored in the system (e.g. overtime or sickness pay rules).

11.16 Reports: FAQS

Q: Who can access reports in Sense HR?
A: Access to reports in Sense HR is controlled through Access Roles. Administrators always have full reporting access.
By default, other roles do not have access to reports. However, if Access Role Management is enabled, administrators can grant reporting permissions to specific roles.

Q: Why don't I see all report types?
A: Report types only appear when the related data exists in your system and enabled for your role. If a screen, workflow, or feature isn't enabled — or isn't included in your subscription plan — the corresponding report type won't be available.

Q: Why does my report show more or fewer records than I expected?
A: Unexpected record counts are usually caused by filters, date ranges, or included statuses such as leavers or future starters. Reviewing active filters and selected fields is the best first step before assuming the data is incorrect.

Q: Why does my report look like it contains duplicate rows?
A: This usually happens when Date-wise breakup is included. Multi-day events are intentionally expanded into one row per calendar day, so what looks like duplication is actually a detailed daily breakdown.

Q: Can I save and reuse reports?
A: Once a report is saved, it can be reopened, copied, edited, or exported at any time from All Reports. This makes it easy to reuse reports for recurring tasks without rebuilding them.

Q: Can I reuse a report for another date range or pay period?
A: Reports can be copied and adjusted by changing filters such as dates, departments, or employee status. This is commonly used for regular processes like payroll runs or monthly reviews.

Q: Can I export data from reports?
A: Any report can be exported exactly as configured, including all selected fields and filters. This ensures exported data matches what you see on screen for audit or sharing purposes.

Q: Can Sense AI (AMI) analyse reports?
A: *Sense AI (AMI)* can analyse saved reports using a prompt that you define. This allows you to generate summaries, insights, or structured outputs such as payroll breakdowns directly from report data.

Q: Can I save an AMI prompt with a report?
A: AMI prompts can be saved with a report so the same analysis can be reused each time the report is run. This is especially useful for recurring processes that rely on consistent logic.

Q: Are deleted employees included in reports?
A: Deleted profiles are permanently removed from the system, so they no longer appear in reports. Only active, future, or leaver profiles that still exist in Sense HR can be reported on.

Q: Are leavers still included in reports?
A: Leaver and future leaver profiles remain reportable because their data is retained for audit and historical analysis, unless the profile has been deleted.

Q: Why can't I see a field I expected?
A: Fields appear in reports only if their corresponding data entity is included.
If the entity is not selected, its fields will not be available.

11.17 Section Summary

Reports in Sense HR allow administrators to extract, analyse, and reuse structured organisational data, supporting operational insight, compliance records, and strategic reporting.

You now understand how to:

- create and customise reports
- apply filters to refine results
- understand the relationship between report types, data entities, and fields

- control which roles can access reports
- reuse and export reports
- analyse reports using Sense AI (AMI)

You have also seen how the reporting engine uses reusable data entities, allowing the same datasets to be analysed across multiple report types.

This makes Sense HR reporting both flexible and consistent across the system..

Continue to Section 12 — Sense AI (AMI) to understand how AMI is integrated throughout Sense HR, and how it can also be used as a standalone product to deliver secure, data-driven insights, analysis, and general HR assistance across your organisation.

Part IV Sense AI (AMI)

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12 AI Insights (Sense AI / AMI)

Use AI-powered insights to automate tasks, save time, and enhance accuracy across HR processes.

12.1 What Is Sense AI (AMI)

Sense AI — also known as *AMI* (pronounced "AMI", as in Miami, not "Amy") — is the intelligent assistance layer within the Sense Workplace ecosystem.

AMI helps administrators analyse data, automate repetitive tasks, and generate useful outputs from existing HR information, operates within Sense Workplace's security model, and only accesses data that the user is authorised to view.

Rather than replacing system logic or HR rules, AMI works on top of existing system data, interpreting natural language instructions to produce insights, summaries, and generated outputs.

Typical benefits include:

- analysing HR reports and datasets
- identifying trends, anomalies, and risks
- drafting HR documents
- reducing manual effort in recurring tasks
- assisting with payroll and expense processing

AMI can be accessed either through the dedicated AMI workspace or through AI shortcuts embedded contextually throughout Sense HR.

12.2 Using Natural Language with Sense AI (AMI)

In most areas of Sense HR, AMI works through natural language conversation.

You can interact with AMI in the same way you would explain a task to a colleague — using clear, everyday language.

For example, you can ask AMI to:
- summarise trends in a report
- highlight unusual patterns or outliers
- reformat data into clearer tables
- draft or refine written content
- explain what data means and why it matters

You do not need to use specific keywords, syntax, or commands.

AMI interprets intent based on:
- the question you ask
- the data available in the current system context
- the AI agent selected.

Two AMI tools use slightly different interaction styles:

Feature	Interaction type
Expenses with AMI	Runs automatically against uploaded policy documents
Advanced document drafting with AMI	Uses guided questions

All other *AMI* features are conversational.

This conversational approach allows administrators to explore data, automate analysis, and complete complex tasks more quickly — without needing technical expertise.

Best practice for talking to *AMI*
- Be clear and specific about what you want.
- Include relevant context (for example time periods or teams).
- Break complex requests into smaller follow-up questions.
- Refine your request if the first response is not quite right.

💡 **Tip:**
Think of AMI as a knowledgeable assistant that understands your HR data but still relies on you to guide the task and confirm accuracy.

12.3 Using AMI Controls

AMI works through a chat-based interface.

Within the dedicated *AMI* workspace you can:

Control	Function
Agent select icon (⚙)	Select from available AMI agents
Message box	Enter instructions or questions
Send arrow (↑)	Send your message to AMI
Attachment icon (📎)	Upload files for analysis
Sidebar icon (◫)	Expand the sidebar to view chat history
+ New chat	Start a new, independent conversation

Starting a new chat is useful when switching tasks or topics.

12.4 Working with Multiple AMI Agents

In the dedicated *AMI* workspace you can select multiple agents at the same time.

Agents represent different areas of the Sense Workplace ecosystem. For example:

- Payroll
- HR Calendar
- Areas of Sense ATS (e.g. Quizzy, Interviewer)
- Areas of Sense Presence (e.g. Tech Task Tracker)

However, *AMI* does not automatically send each question to every selected agent.

Instead, each message is first received by an orchestrating AI layer, which:

- reviews the question
- checks which agents are currently selected
- selects the most appropriate agent to respond.

This means that one agent typically answers each message, based on the type of information requested.

Selecting multiple agents simply makes them available during the conversation, allowing *AMI* to route different questions to different specialists without restarting the chat.

12.4.1 Data boundaries between agents

Each *AMI* agent:

- is trained to work with a specific type of system data
- can only access the data it is authorised to use (indicated by the information in the agent selector tool)
- cannot directly access or transfer raw data from another agent.

However, the conversation context is shared.

This means outputs returned by one agent become part of the conversation history and can be referenced in later questions.

Administrators can therefore gather information from different agents step-by-step and then ask *AMI* to interpret the combined context.

12.4.2 Example workflow using multiple agents

Selected agents:
- Payroll agent
- HR Calendar agent

Step 1: Request payroll data

"Use the Payroll agent to summarise overtime payments and sickness payments for last month."

Step 2: Request calendar data

"Use the HR Calendar agent to summarise sickness events last month by department."

Step 3: Request analysis

"Using the payroll and calendar summaries above, explain whether overtime costs appear to be driven by sickness absence."

AMI can then analyse the information already returned in the conversation and generate insights.

💡 **Tip:**
You can think of AMI as a conductor coordinating specialist analysts. You choose which specialists are available (agents), gather the information you need from each one, and then ask AMI to interpret the combined results.

If you want AMI to use a specific agent, mention it directly in your message (for example: "Use the Payroll agent…").

12.5 Where AMI agent shortcuts appear in Sense HR

AMI is available in two main ways:

1. Dedicated AMI workspace

Navigation:
`Product Switcher (Sense logo, upper left) › AMI › Agent selections (⚙)`

Available agents include:
- General assistant
- Payroll agent
- HR Calendar agent

Multiple agents can be selected simultaneously.

When multiple agents are selected, AMI's orchestration layer determines which selected agent is best suited to respond to each request.

2. Contextual AMI shortcuts within Sense HR

AMI shortcuts appear directly within specific modules.

Examples include:

Feature	Navigation
Analyse with AMI (Reports)	`Dashboard › Reports › [Locate report] › More actions (…) › Analyse with AMI`
HR Calendar agent	`Dashboard › Calendar › AMI icon` ✦ `(upper left)`
Document drafting with AMI	`HR Dashboard › Settings › Documents › Add (or edit an existing template)`
Payroll agent	`HR Dashboard › Documents › AMI icon` ✦ `(upper right, next to Add)`
Expense review	`HR Dashboard › To Dos › Expense request (`⛛`) › Open To Do`

Each shortcut uses the same underlying AMI capability and applies it to different areas of the system. AI agents are specialised for specific domains and can only access the data relevant to that area.

12.6 General Assistant

Available on all plans

The **General Assistant** is a general-purpose AI tool used for research, drafting, and guidance.

Navigation path:
`Product Switcher (Sense logo, upper left) › AMI`

General assistant is the default agent selection.

Key characteristics:
- Does not access your organisation's HR data
- Can reference external web sources
- Suitable for policy guidance and best-practice advice.

Typical uses include:

- researching HR concepts
- generating policy templates
- getting guidance on compliance or engagement.

The **General Assistant** opens in the dedicated AMI workspace and can be used alongside Sense HR without interrupting other tasks.

12.7 ★ Using AMI with Reports (Analyse with AMI)

Available on Elite and Enterprise

AMI integrates directly with the reporting engine to help administrators analyse complex datasets.

Navigation path:
`Dashboard Reports › [Locate report] › More actions (…) › Analyse with AMI`

When a report is analysed:

- *AMI* generates an automatic summary of the report data
- administrators can ask follow-up questions in natural language.

AMI can generate:

- calculated summaries
- tables and structured data
- charts and visualisations
- trend analysis
- anomaly detection

Outputs can also be exported as:

- Excel files
- Images
- PDFs

Administrators can also generate and save reusable AMI prompts against reports so the same analysis runs every time the report is analysed.

Common use cases include:

- payroll summaries
- absence reviews
- compliance audits
- workforce metrics.

See §11.12 Sense AI (AMI) Reports Integration for detailed report creation and *AMI* usage examples.

12.8 ★ HR Calendar agent

Available on Elite and Enterprise plans.

The **HR Calendar agent** provides AI-assisted insight into scheduling, absence, and attendance data.

Access via Product Switcher:
`Product Switcher (Sense logo, upper left) › AMI › Agent Selection` (⚙) › `HRCalendar`

Or via the Calendar module in Sense HR:
`HR Dashboard › Calendar › AMI icon` ✨ `(upper left)`

AMI's HR Calendar agent can help administrators:

- Identify patterns in absence or sickness
- Highlight unusual booking behaviour
- Summarise calendar activity across teams or periods

Calendar AMI reads data from:

- Booked events
- Working hours and schedules
- Attendance records (where enabled)

✎ **Note:**
The **HR Calendar agent** analyses existing calendar data — it does not create or approve events.

12.9 ★ Using AMI for Expense Review (Expenses with AMI)

Available on Elite and Enterprise plans.

AMI can assist with expense claim validation when expense policies are uploaded correctly.

To enable *AMI*-powered expense review:

- Upload policy documents to Company Documents (`HR Dashboard › Documents › Add › Upload`)

Use the exact required filenames:

- Expenses policy.pdf
- Mileage expenses policy.pdf

When an expense claim is submitted via *Sense Mobile:*

- A To Do is created for approval
- *AMI* automatically scans the receipt against the policy

- Non-compliant items are flagged for the approver

This reduces manual checking while keeping final approval decisions with managers or administrators.

12.10 ★ Payroll agent

Available on Elite and Enterprise plans.

AMI's Payroll agent can bulk-process payslip PDFs and distribute them to employee profiles.

Access via the Product Switcher:
Navigation 1: `Product Switcher (Sense logo, upper left) › AMI › Agent Selection` (⚙) `› Payroll`

Or via the Documents module in Sense HR:
Navigation 2: `HR Dashboard › Documents › AMI icon` ✨ `(upper right, next to Add)`

Administrators can upload a multi-page payslip PDF and instruct AMI to:

"Process the payslip"

AMI will then:

- split the document
- identify employees
- prepare the files for upload.

Once confirmed:

- payslips are added to employee profiles
- unmatched records are flagged for manual review.

This is designed to significantly reduce payroll administration time.

12.11 ★ Using AMI for Document Drafting (Document drafting with AMI)

Available on Professional, Elite, and Enterprise plans

AMI assists administrators when creating or editing document templates.

Navigation path:
`Dashboard › Settings › Documents › Add (or edit existing template)`

Within the document template editor, *AMI* can:

- Draft full documents from a short prompt
- Rewrite or refine existing content
- Adjust tone, length, or structure
- Insert dynamic content suggestions (merge tags, signature placement)

Administrators can either:

- Enter direct instructions in the *AMI* chat box, or
- Use the **Advanced** option to answer guided questions for more precise output

AMI-generated content should always be reviewed and approved before use, particularly for contractual or policy documents.

See §10 Document Management for full guidance on document templates and e-signatures.

12.12 AI Permissions, Data Privacy, and Governance

AMI operates within Sense Workplace's security and access controls.

Key principles:

- *AMI* can only access data the user is authorised to view
- Access to *AMI* features follows **Access Role** permissions
- Data is not shared externally
- All analysis is performed within Sense Workplace infrastructure

The General Assistant differs in that:

- It does not access HR data
- It only works with general knowledge or uploaded files.

Administrators remain responsible for:

- Reviewing AI-generated outputs
- Ensuring policy and legal accuracy
- Applying appropriate access permissions

12.13 Understanding Token Usage

AMI usage is measured in tokens, which represent the amount of text processed.

- A token can be as short as one character or as long as one word.
- On average, 1 token ≈ 4 characters or ~0.75 words in English.

Tokens are counted for:

- Input tokens — what you type
- Output tokens — what *AMI* generates in response
- Your total usage is the sum of both.

You can monitor your usage via the token indicator in the top-left corner, shown as:

- Used tokens (for example: 3%) with a progress bar

Each user has 300,000 tokens per month. This allowance resets monthly.

If you reach your token limit, *AMI* will prompt you to contact Sense Workplace Support to request additional usage.

This allows Sense Workplace to monitor high-volume usage patterns and ensure system stability.

12.14 Troubleshooting AI Access or Results

Common issues include:

Issue	Possible cause
AMI option not visible	Plan or Access Role limitation
Incomplete analysis	Missing report fields
Unexpected results	Unclear prompt or missing data

Best practice:

- Start with clear, specific instructions
- Refine prompts iteratively
- Save proven prompts for reuse

12.15 AMI: FAQS

Q: What is AMI used for in Sense HR?
A: *AMI* is used to analyse data, draft documents, and automate repetitive administrative tasks using natural language instructions.

Q: Does AMI make decisions automatically?
A: No, *AMI* does not make automatic decisions. *AMI* provides analysis and recommendations, but final decisions always remain with administrators or managers.

Q: Can AMI see sensitive employee data?
A: When you use *AMI*, it can only access employee data that you already have permission to view based on your **Access Role**. *AMI* does not bypass access permissions or expose additional information from other areas of the Sense Workplace ecosystem — each agent can only access the specific data it is authorised to use.

The **General Assistant** is different: it does not have access to your organisation's HR data and can only respond using general HR knowledge or information you explicitly provide (for example, by uploading a file).

Q: Is AMI available everywhere in the system?
A: *AMI* shortcuts appear in specific, contextually appropriate areas such as Reports, Calendar, Documents, and the dedicated *AMI* product (available via the product switcher)

Q: Why can't I just use any AI (for example, a public AI tool) to process my HR data?

A: AMI operates within the secure Sense Workplace environment under controls designed specifically for sensitive employee and company data.

AMI agents respect Access Roles and only process data that the user is already authorised to view. Outputs are generated within the system and remain auditable, supporting HR governance, compliance, and organisational security.

Public AI tools are not designed for controlled HR data use. They typically lack role-based access enforcement, audit context, and organisational safeguards, which can introduce confidentiality, compliance, and data-handling risks.

Using AMI within Sense HR or the dedicated AMI workspace allows organisations to benefit from AI-assisted analysis and automation without exporting sensitive data outside the Sense Workplace environment.

12.16 Section Summary

You now understand how **Sense AI (AMI)** is integrated throughout Sense HR to support analysis, automation, and informed decision-making — from reports and documents to calendars, expenses, and general AI assistance.

Continue to **Part V Section 13 — Sense Mobile and On The Go**, to explore how employees and managers interact with Sense HR on mobile, including time, events, expenses, and on-the-go access to key information.

Part V Sense Mobile and On The Go

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13 Sense Mobile

Access, update, and manage HR information anywhere through the Sense Mobile app

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Access, update, and manage workplace information anywhere through the *Sense Mobile* app.

Sense Mobile is the on-the-go solution for the Sense Workplace ecosystem, providing secure mobile access to key tasks and data across products such as *Sense HR*, *ATS*, and *Presence*.

The mobile interface uses a tile-based layout, where each tile represents an individual app. These tiles form a library of mobile apps that can be highly customised. Organisations using *Sense Automate* can create additional mobile apps and deploy them as tiles to support specific workflows or processes.

Sense HR includes a set of standard mobile apps that mirror the core functionality of the *Sense HR* web system, allowing employees and managers to perform common HR tasks quickly from their mobile device.

13.1 Installing and Logging In

Employees and managers receive a **secure Verification Code** from their administrator.

13.1.1 Send a Verification Code for Sense Mobile Access

Navigation:

`HR Dashboard › People › [Select profile] › More actions (…) › Send verification code`

Bulk send verification code

From the **People** list:
- Select multiple users
- Click **Send verification** code in action bar

That code links their mobile session to the organisation's Sense Workplace account.

13.1.2 Sense Mobile Login Process

1 Download **Sense Mobile** from the **Apple App Store** or **Google Play Store**.
2 Enter your **Access Code** (sent via email / message).
3 Create a **PIN** or enable **Face ID / Fingerprint login** (This will be used to verify your identity each time the app is opened).
4 The app syncs with your Sense HR profile and permissions.

13.2 Caution — Logging out of Sense Mobile

Once logged in, Sense Mobile users should normally close the app when finished, rather than logging out.

Even when the app is not formally logged out, access remains protected. Each time the app is opened, users must still verify their identity using their PIN or biometric authentication, ensuring sensitive data is not accessible to unauthorised users.

Logging out is intentionally treated as a security action. When a user logs out, Sense Mobile requires full re-verification the next time it is opened. This includes sending a new verification code and restarting the registration process.

This design protects employee data on devices that are not in regular use or where access needs to be explicitly revoked. For this reason, logging out should only be used when the app will not be used for a prolonged period, or when access must be intentionally reset.

13.2.1 To logout (step-by-step)

To logout (and reset verification codes):

1. Open the Sense Mobile app
2. Click **Logout**

13.3 Supported Devices

Platform	Available From	Minimum Requirement
iOS (Apple)	App Store	iOS 14 or later
Android	Google Play Store	Android 10 or later

13.4 Default Sense Mobile Home Screen and Tiles

Every user sees five standard tiles on the home screen.

Tile / App	Purpose
My Profile	View and update personal / employment details; upload a profile photo.
To Do	Create and complete HR tasks such as approvals or acknowledgements.
Events	Book and review absences or company events.
My Documents	View and sign HR documents such as contracts and policies.
Settings	Configure login and location settings for the Sense Mobile application

13.5 ★ Optional and Configurable Tiles

For Elite and Enterprise plans, additional mobile tiles can be enabled through the *Sense Automate* **Workflow Hub**. These tiles extend the functionality of Sense Mobile and allow organisations to surface specific actions or information directly to users.

The available tiles continue to evolve. The table below shows examples of commonly used optional tiles.

Tile	Purpose / Functionality
Clock In / Out	Record start and end times for work shifts.
Sickness	Log sickness absences directly from mobile.
Hours Worked	View total hours worked each week.
People (Active Directory)	Access company directory with photos and contacts.
Attendance	Track on-site or remote attendance.
News	View company announcements.
Roll Call	Mark presence during emergency events.
Roll Call by Location	Confirm attendance from specific sites.

In addition to these library workflow options, Enterprise customers can use the Sense Automate workflow builder to design custom mobile tiles and mobile-first applications tailored to their organisation's specific processes and requirements.

13.6 Using the My Profile Tile

The **My Profile** tile shows personal and employment information and allows basic updates based on permissions.

Viewing and Editing Details

Admins / Managers / Employees can tap record sections (e.g., Personal details, Contact details, Job details, Training) to view or edit fields that their Access Role permits. Sections visible depend on the profile template assigned by administrators.

13.6.1 Updating Your Profile Photo (step-by-step)

1. Open **My Profile**.
2. Tap your photo (or the placeholder circle).
3. Choose **Take Photo** to use your camera or **Choose from Library** to select an image.
4. Tap **Confirm** to save; the image syncs across web and mobile.

13.7 Using the Documents Tile

Navigation Paths

- Personal files: `Documents › Personal Documents › [Select document to view or sign]`
- Company files: `Documents › Company Documents › [Select document to view]`

Admins / Managers can see and sign personal documents and view company documents; an upload option is planned.
Employees can view and sign personal documents and read company documents

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13.8 Using the To Do Tile

- My Outstanding To Do Tasks: `To Do › To Do`
- My Completed To Do Tasks: `To Do › Completed`

13.8.1 Add a Personal To Do Task (step-by-step)

Navigation path:
`To Do › + Add New Task`

1. Tap **To Do › + Add New Task**.
2. Enter Task Name, Description, and Due Date.
3. Tap **Save**.

13.9 Using the Events Tile

View My Entitlements: `Events › View Entitlements`
My events: `Events › My events`
Teams upcoming events: `Events › Teams upcoming events`

13.9.1 Book an Event for Yourself or Someone Else

Navigation Path:
`Events › Book Event`

1. Tap **Book Event**.
2. Choose **Me** or select another name under *Adding event for*.
3. **Page 1 – Event Details:** Choose Event Type (drop-down) and Duration (Less than a day / Whole day / More than a day) › Next.
4. **Page 2 – Dates and Times:** Enter date(s), start and end times or shift halves, add notes › Save.

13.10 Sense Mobile App Settings

Sense Mobile includes a Settings tile that allows users to manage key security and location features directly from the app.

Accessing mobile settings
Open Sense Mobile and tap the Settings tile to view available options.

13.10.1 Available settings

Biometric authentication
Users can enable biometric authentication (such as Face ID or fingerprint recognition) to secure access to the app.
When enabled, biometric verification is required each time the app is opened, adding an extra layer of protection for sensitive HR data.

Location tracking (Bluetooth Low Energy – BLE)
This setting enables proximity-based location tracking using Bluetooth Low Energy.
It is typically used in conjunction with Sense Presence hardware for on-site attendance or location-aware features.

Location tracking (GPS)
This setting enables GPS-based location tracking.
It may be required for features such as mobile clock-in/out, attendance verification, or location-dependent workflows, depending on how your organisation has configured Sense HR.

✎ **Important notes**

- Users may be prompted by their device to grant location permissions when enabling these settings.
- Disabling location tracking may limit access or function of certain features (for example, clock-in/out extended features or attendance verification).

💡 **Tip:**
Users should only enable location services required by their organisation's policies. Administrators should clearly communicate why location tracking is used during rollout to support trust and adoption.

13.11 Manager / Administrator Variations

Although the Sense Mobile app is primarily designed to support employees on the go, managers and administrators also have access to some enhanced functionality.

When signed in with the appropriate access role, managers and admins can use Sense Mobile to book, review and approve events, manage To Do tasks, and oversee team-related actions directly from their mobile device.

Function	Where	Purpose
Approve / Decline Requests	To Do › To Do	Handle requests quickly on mobile.
Team Events View	Events › Team View	View team absences and company events.
Event Booking	Event › Book event	Option to book event for others

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13.12 Push Notifications in Sense Mobile

Sense Mobile uses push notifications to keep users informed of important actions and requests without needing to open the app.

13.12.1 What push notifications are used for

When enabled, push notifications alert users to key events such as:

- New To Do tasks assigned to them
- New documents to read or sign
- Approvals required (for example, event requests or expense submissions)
- Status updates on submitted requests

For managers and administrators, notifications help ensure approvals and time-sensitive actions are not missed.

13.12.2 Enabling push notifications

Push notifications are controlled at device level.

To enable them:

1. Open your device's system settings (iOS or Android).
2. Locate Sense Mobile in the list of installed apps.
3. Enable Notifications and allow alerts, banners, and badges as preferred.

💡 **Tip:**
If notifications are disabled at device level, Sense Mobile cannot deliver alerts, even if the user has pending actions in the app.

Best practice

- Encourage users to enable notifications during rollout to improve responsiveness and adoption.
- Managers and administrators should keep notifications enabled to avoid delays in approvals or document workflows.

13.13 Security and Authentication

Sense Mobile uses encrypted tokens, PIN / biometric login, and role-based access matching Sense HR.

Admins can revoke system access via **People** › **[Select profile]** › **More actions (…) menu** › **Unlink**

13.14 Quick Troubleshooting: Sense Mobile

This section helps resolve common Sense Mobile issues quickly before escalating to support.

Issue	Likely Cause	Resolution
User can't log in	Verification code expired or already used	Ask an administrator to resend a new verification code from People › [Select profile] › More actions (…) › Send verification code
App asks for verification again	User logged out intentionally	Logging out resets mobile registration by design. Complete the verification process again using the new code
User sees fewer tiles / features	Access role or plan restrictions	Check the user's Access Role and the subscription plan. Optional tiles require *Automate* library workflows (Elite / Enterprise)

than expected		
Events not available to book	Event rules don't include the user	Check Event Manager rules to ensure the user is assigned to the relevant bookable event
Push notifications not received	Notifications disabled at device level	Enable notifications for Sense Mobile in the device's system settings
Manager cannot approve requests	Incorrect access role	Confirm the user is assigned a Manager-type access role with approval permissions
App appears slow or not updating	Poor connectivity or background sync paused	Check internet connection and reopen the app to force a refresh

💡 **Tip:**
If an issue affects multiple users, review Access Roles, Event Manager rules, or *Automate* workflows before troubleshooting individual devices.

13.15 Sense Mobile FAQS

Q: How do users log in to Sense Mobile for the first time?
A: To log in to Sense Mobile for the first time, users enter a secure verification code sent by an administrator. This links the mobile app to their Sense HR profile and permissions.

Q: Why does Sense Mobile ask for a new verification code after logging out?
A: Sense Mobile treats logging out as a security action. Logging out intentionally resets the mobile session, requiring a new verification code to protect employee data if the device is no longer in regular use.

Q: Is my data still secure if I don't log out of the app?
A: Yes — even when you don't log out, Sense Mobile requires a PIN or biometric check every time the app is opened, ensuring sensitive data remains protected.

Q: Why can't I see certain tiles or features in the app?
A: If you can't see certain tiles, it usually means your access role doesn't include them, or your organisation's plan doesn't enable those features. Optional tiles are typically added via *Sense Automate* on Elite or Enterprise plans.

Q: Why can't I book a specific event type on mobile?
A: If an event type isn't available, it usually means the event rules in Event Manager don't include you as an eligible person, or the event hasn't been made bookable for mobile use.

Q: How do approvals work on Sense Mobile?

A: Approvals on Sense Mobile are handled through the To Do tile. Managers and administrators receive To Do tasks for requests such as events, expenses, or document actions and can approve or decline them directly from the app.

Q: Do push notifications include sensitive information?
A: Push notifications only alert you that an action is required (such as a document to sign or a request to approve). Full details are shown securely inside the app after PIN or biometric verification.

Q: Can administrators revoke mobile access for a user?
A: Yes — administrators can revoke mobile (and web) access at any time by unlinking the user via People › [Select profile] › More actions (…) › Unlink.

Q: Is Sense Mobile required for all employees?
A: No — Sense Mobile is optional. Some worker types, such as contractors or volunteers, may have profiles without mobile or system access depending on organisational needs.

13.16 Section Summary

You now understand how employees, managers, and administrators use Sense Mobile to access HR information, complete tasks, and manage approvals securely on the go.

Continue to Section 14 — Manager View to explore how managers use Sense HR and Sense Mobile to oversee teams, approve requests, and stay informed about workforce activity.

PART VI — Employee and Manager Experiences

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14 Manager View

The Manager role in Sense HR is designed to support day-to-day people management, not system administration.
Managers are given visibility into their teams and the ability to act on requests, tasks, and approvals, while core system configuration remains with administrators.

This section explains:

- What managers typically see
- What they are expected to do
- How the default Manager role behaves
- Where this behaviour may differ if access roles are customised

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14.1 Manager Dashboard Overview

The Manager Dashboard is the primary workspace for managers. It is action-focused rather than informational and is designed to surface items that require attention, rather than full system navigation.

From the dashboard, managers can typically:

- View pending approvals and tasks
- See team-related alerts (for example, sickness notifications if enabled)
- Access shortcuts to their team's planners, documents, and profiles

The dashboard layout may vary depending on:

- Enabled features (for example, sickness widgets or workflows)
- Organisation configuration
- The manager's access role

✎ **Design principle:**
Managers should be able to complete most of their required actions without navigating deeply into the system.

14.2 Manager Overview

The Manager role sits between administrators and employees.

By default, managers:

- Have visibility of their direct team (and optionally indirect team)
- Can approve or action requests raised by their team
- Can view (but not configure) planners, selected documents, and selected profile data

Managers do not:

- Configure system settings
- Manage access roles
- Design workflows, screens, or events
- Edit sensitive employment or pay data (unless explicitly permitted)

✎ **Important:**
If your organisation uses Access Role Management, the exact permissions described in this section reflect the default Manager role, not a guarantee of access in every environment.

14.3 Overview of Manager Responsibilities

Under default permissions, managers are responsible for:

Day-to-day approvals

- Holiday, sickness, and other event requests
- Workflow-generated approvals (for example, expenses or reviews)

Team oversight

- Checking availability and absences
- Reviewing team planners

- Monitoring outstanding To Do tasks

Task completion

- Completing workflow tasks assigned to them
- Acknowledging documents or forms where required

Escalation and communication

- Responding to system-generated notifications
- Liaising with administrators where data or configuration changes are required

Managers are not expected to maintain system data, but to act on it.

14.4 Approving Events and Requests

Most manager actions in Sense HR are driven by To Dos.

When an employee submits:

- An event request (for example, holiday or TOIL)
- A sickness notification
- A workflow action (for example, an expense or review)

…the manager receives a To Do.

From the To Do, managers can:

- Review request details
- Check dates, notes, and supporting information
- Approve or decline the request (depending on configuration some approval workflows might require a secondary approver)

Managers can also:

- Use the Calendar to check team availability before approving
- View conflicts or overlaps in team schedules

✎ **Key concept:**
If a manager needs to take action, the system brings the task to them — they do not need to search for it.

14.5 Managing Team Documents and To-Dos

Documents

Managers typically:

- View company documents
- View or sign personal documents for themselves
- View selected team documents (depending on document-level permissions)

Managers do not manage document templates or system-wide document rules.

To Dos

Managers can:

- View outstanding and completed To Dos
- Complete tasks assigned to them
- Track progress on checklist-style tasks

To Dos may originate from:

- Events
- Documents
- Workflows
- System processes (for example, leavers)

14.6 Manager Experience on Mobile (Overview)

Managers can perform many of the same actions on Sense Mobile as on the web platform.

Common manager mobile use cases:

- Approving requests on the go
- Viewing team events and availability
- Completing To Dos
- Reviewing or signing documents

The mobile experience mirrors web permissions — managers do not gain additional access simply by using the mobile app.

Full details are covered in § 13 — Sense Mobile.

14.7 Troubleshooting Common Manager Queries

Manager cannot see their team

- Likely cause: Line manager not set correctly on employee profiles.
- Resolution: Verify line manager assignment under Job details.

Manager not receiving approval requests

- Likely cause: Workflow or event approval rules not configured, or access role restrictions.
- Resolution: Check event rules, workflow setup, and manager permissions.

Manager cannot approve or edit an item

- Likely cause: Permission not included in access role.
- Resolution: Review Manager access role configuration.

Manager sees fewer options than expected

- Likely cause: Default role limitations or customised access role.
- Resolution: Confirm whether access role management has been used.

14.8 Manager View FAQS

Q: What is the main purpose of the Manager role in Sense HR?
A: The Manager role exists to support everyday people management. Managers are expected to review and approve requests, monitor their team's availability, and complete assigned tasks, without needing access to system configuration or sensitive administrative settings.

Q: Can managers change employee details or system settings?
A: Managers generally have very limited editing rights. By default, they can view team information and act on requests, but they cannot change system settings or edit sensitive employment or pay data unless an administrator has explicitly extended their permissions.

Q: How do managers receive approval requests?
A: Approval requests are delivered to managers as To Do tasks. This ensures that actions such as holiday approvals or workflow requests are clearly surfaced and don't require managers to search elsewhere in the system.

Q: Do managers have different access when using Sense Mobile?
A: Using Sense Mobile doesn't change what a manager can see or do. The mobile app simply provides a faster, more convenient way to carry out the same approvals, reviews, and tasks they already have access to on the web.

Q: Can the Manager role be customised?
A: In organisations that have access to Access Role Management, the default Manager role can be adjusted. This allows administrators to fine-tune what managers can view or edit, while still keeping administrative controls separate.

14.9 Section Summary

You now understand the intended scope, responsibilities, and limitations of the Manager role in Sense HR, including how managers interact with dashboards, approvals, documents, calendars, and mobile access under default permissions.

Continue to Section 15 — Employee View, to understand how employees interact with Sense HR day to day.

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15 Employee View

Understand how employees interact with Sense HR, what actions they can perform, and how administrator configuration choices shape their experience.

15.1 Purpose of the Employee View

The Employee View describes how standard users (employees) experience Sense HR and Sense Mobile in day-to-day use.

From an administrator perspective, this section helps you:

- Understand what employees can and cannot do by default
- Anticipate common employee questions or confusion points
- Configure the system in a way that supports clarity, adoption, and data accuracy
- Align internal guidance and training with actual system behaviour

Employees primarily use Sense HR to:

- View and maintain their own information
- Request time off or other events
- Complete assigned tasks (To Dos)
- Access and sign documents
- Use Sense Mobile for quick actions on the go

✎ **Note:**
Employee capabilities are governed by **Access Roles**, profile templates, **Calendar & Planner** configuration, and (on Elite and Enterprise plans) **Screen Designer** and *Automate* workflows. This section describes the default intended experience, not every possible customisation.

15.2 Employee Dashboard Overview

Employees access Sense HR via the web app and, if enabled, Sense Mobile. In both cases, the dashboard is the primary entry point.

The employee dashboard typically shows:

- Outstanding To Do tasks
- Recent or upcoming Events
- Document actions (to read or sign)
- Quick access to core areas such as Profile, Calendar, and Documents
- Dashboard clock in/out if enabled

The dashboard is intentionally action-focused, surfacing what requires attention rather than exposing full system navigation.

Admin context:
If employees appear "stuck" or inactive, it is often because they have no To Dos or pending actions — not because access is broken.

15.3 Core Actions Available to Employees

By default, employees can perform the following actions, subject to access role permissions:

15.3.1 View and update their own profile

Employees can view — and sometimes edit — selected personal information such as:

- Contact details
- Emergency contacts
- Training records

- Other profile screens enabled by administrators

Editable fields depend on:

- Access Role permissions
- Screens included in the assigned profile template

✎ **Note:**
Employees cannot edit sensitive employment data (e.g. pay, contract terms) unless explicitly allowed.

15.3.2 Request and manage events

Employees can request events such as:

- Holiday
- Sickness notification (method depends on configuration e.g. Add own sickness)
- Other bookable event types defined in Event Manager

Events are requested via:

- Calendar (web)
- Events tile (mobile)

Employees can:

- View their own events
- Cancel or amend future events (subject to rules)
- See entitlement balances where applicable

✎ **Context note:**
Employees only see event types they are eligible for. If an option is missing, it is usually due to Event Manager rules for the event — not a user error.

15.3.3 Complete To Do tasks

To Dos are the primary action mechanism for employees.

Employees receive To Dos when:

- A document requires reading or signing
- An approval or acknowledgement is required
- A workflow (e.g. onboarding or offboarding step) assigns a task

Employees can:

- View outstanding and completed To Dos
- Open tasks directly from the dashboard or To Do list
- Complete tasks to trigger downstream system actions
- Create To Do tasks for themselves or others

✎ **Important concept:**
Many actions that look like “documents” or “requests” are actually handled via To Dos.

15.3.4 Access and sign documents

Employees can:

- View company documents assigned to them
- View, read, and sign personal documents
- Track document status via their profile or To Dos

Document access depends on:

- Document-level permissions
- Access role configuration
- Whether the document is personal or company-wide

✎ **Context note:**
If an employee says they "can't see a document," check document-level permissions before checking access roles or other advanced settings.

15.4 Sense Mobile — Employee Experience (High-Level)

Sense Mobile provides employees with secure, on-the-go access to the same core actions as the web app, optimised for quick interactions.

Employees commonly use mobile to:

- Complete To Dos
- Book or review events
- View documents
- Update profile details
- Clock in/out or log sickness (if enabled)

Security is enforced through:

- Verification codes during registration
- PIN or biometric authentication on every app open
- Role-based access matching the web app

✎ **Note:**
Mobile capabilities mirror web permissions. Mobile does not grant additional access beyond what the employee's role allows.

15.5 What Employees Cannot Do (By Design)

By default, employees cannot:

- Access system settings
- View other employees' data (outside limited directory features)
- Approve events or requests
- Edit employment, pay, or entitlement configuration
- Create or modify reports

These restrictions preserve data integrity and ensure that HR and managerial controls remain centralised.

15.6 How Administrator Configuration Shapes Employee Experience

An employee's experience is the result of multiple admin-controlled layers working together:

- Access Roles determine what actions are allowed
- Profile templates determine which screens and data are visible
- Calendar & Planner settings determine entitlement, booking rules, and calculations
- Event Manager determines which events can be requested
- *Automate* workflows (Elite / Enterprise) introduce additional actions, To Dos, and screens

Admin best practice:
If employees have questions or are unsure about system behaviour, review configuration and rules first. Many scenarios are driven by system settings rather than user error, and small configuration adjustments can often resolve confusion quickly.

15.7 Common Employee Misunderstandings (Admin Awareness)

Administrators should be aware of these frequent points of confusion:

- Thinking an event request is approved immediately (it may require approval)
- Expecting automatic login or mobile access after profile creation
- Assuming missing options are errors rather than permission-based
- Believing mobile and web are separate systems (they are not and share the same underlying data)

Proactively addressing these during rollout significantly reduces support requests.

15.8 Employee View: FAQS

Q: Why can't an employee see certain options or modules?
A: When an employee cannot see a feature, it usually means their access role does not permit it or the feature is not included in their profile template or the company subscription. The system hides unavailable options intentionally to reduce confusion.

Q: Why does an employee have a To Do for a document instead of only seeing the document?
A: When a document requires action — such as reading or signing — Sense HR creates a To Do so the employee cannot miss it. This ensures important actions are tracked and auditable rather than relying on passive document viewing.

Q: Why can't an employee edit some of their own details?
A: Employees can only edit fields that administrators have explicitly allowed through access roles and screen configuration. Sensitive or contractual information is intentionally restricted to protect data accuracy.

Q: Why does an event request show as pending?
A: If an event requires approval, it will remain pending until the appropriate manager reviews it. This behaviour is controlled by Event Manager rules and access roles, not by the employee.

Q: Why does the mobile app look different from the web app?
A: Sense Mobile is designed for speed and convenience, so it uses a tile-based layout. While the layout is different, permissions and available actions are the same as the web app.

Q: Why doesn't an employee automatically receive login access when added?
A: Profiles and login access are separate by design. Some worker types do not require access, so administrators must explicitly send login invitations when access is appropriate.

Q: Can an employee use Single Sign-On (SSO) to access Sense HR?
A: An employee can choose to use Single Sign-On if they have a Microsoft or Google account. SSO is a personal login choice, not an organisation-managed setting. When used, employees authenticate using their Microsoft or Google credentials instead of a separate Sense HR password. Employees who prefer not to use SSO can continue to log in with their email address and password.

Q: Can an employee use multi-factor authentication (MFA)?
A: Employee authentication depends on how security is configured. MFA usage depends on how the employee signs in. If an employee uses Microsoft or Google SSO, MFA is handled by that provider according to the employee's own security settings. When accessing the Sense HR web app, MFA may also be enforced through Sense Portal configuration. On Sense Mobile, employees always authenticate using a PIN or biometric verification, which is required each time the app is opened, even if the user has not logged out.

Q: Can an employee clock in or out using Sense HR or Sense Mobile?
A: An employee can clock in or out only if clocking features are enabled for your organisation, switched on, and permitted via clock in widget rules. Depending on configuration, employees may clock in or out via the Sense HR web dashboard, the Sense Mobile app, or through Sense Presence hardware. If an employee does not see clock-in options, the feature is either not enabled for your organisation or not available to their role.

Q: Can an employee add their own sickness to their planner?
A: In most cases, employees cannot add sickness directly to their planner without manager involvement. Sickness entries normally trigger a workflow so that a line manager or administrator can acknowledge or review the absence.
Whether an employee can add sickness themselves without triggering this acknowledgement workflow depends on how Access Roles are configured, specifically under `Permissions › Own planner`. In addition, the option for employees to notify sickness via the Dashboard sickness widget is controlled centrally by administrators under `Settings › Calendar & Planner › General.`

Q: Why do I or an employee see the message "This booking exceeds entitlement" when trying to book leave?
A: You see the "this booking exceeds entitlement" message when Sense HR detects that you don't have enough remaining entitlement to cover the holiday or other leave event you're

trying to book. This usually happens for one of two reasons: either you've already used all of your entitlement for the current holiday year, or your entitlement hasn't been set up yet.
To check this, go to your Dashboard and look at the holiday entitlement widget.

- If the Total entitlement is 0, your entitlement hasn't been configured yet.
- If the Total shows a number but Remaining is 0, you've already used your entitlement for this holiday year.

If you believe your entitlement should be available, or the balance doesn't look right, you should contact your HR team or manager so they can review your setup.

Or, as an admin, go to `HR Dashboard › People › [Select profile] › Planner › Settings`, to check figures.

15.9 Section Summary

You now understand how employees interact with Sense HR and Sense Mobile, what actions they can perform, and how administrator configuration shapes their experience throughout the employee lifecycle.

Continue to Part VII — Advanced Configuration, Integrations, and Connectivity, starting with §16 Screen Designer (Elite and Enterprise plans only), to learn how profiles, screens, and data structures can be customised.

If you are on Team or Professional plans, you can skip ahead to Part VIII — Ecosystem Awareness, starting with §19 The Sense Workplace Ecosystem, to understand how Sense HR fits within the wider platform.

PART VII — Advanced Configuration, Integrations and Connectivity

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16 ★ Screen Designer

Screen Designer is used by administrators to define **what information is captured in employee profiles** and **how that information is structured for reporting and workflows**.
In this section, you'll learn how to:

- Create and manage custom screens
- Add screens to profile templates
- Choose the correct screen layout
- Understand how screen changes affect data, reports, and workflows

This section focuses on **structure and data capture**, not permissions or workflow logic. For full Screen designer logic and guidance see the Sense Workplace Help Centre at https://support.sensewp.com/en/ and follow navigation path: `All Collections › Administrators › Settings › Screen Designer`

Screen Designer is available on Elite & Enterprise.

16.1 When to use Screen Designer

Use Screen Designer when you need to:

- Capture employee information that does not exist in the system
- Add new sections to employee profiles
- Structure data so it can be reported on according to organisational needs
- Support workflows that require custom data

Do **not** use Screen Designer to:

- Control who can see or edit data
- Control workflow approvals or tasks

✎ **Admin note**
If access or visibility is the issue, check **Access roles**, not Screen Designer.

16.2 Navigation

`HR Dashboard › Settings › Screen designer`

From here, you manage:

- **Screens** – the data structures
- **Profile templates** – which screens are active for an employee and the order they appear in a profile

16.3 Screens

Screens define the **structure of data** in Sense HR.

Each screen:

- Appears for administrators as a section in an employee profile
- Creates a reporting category
- Can be referenced by workflows

Only **custom screens** can be created or fully edited.

16.3.1 Create a custom screen

Create a custom screen when you need to store new types of employee data.

Navigation:
`HR Dashboard › Settings › Screen designer › Screens › Create`

When creating a screen, you:

1. Name the screen
2. Choose a layout
3. Add fields
4. Save the screen

16.3.2 Choose a screen layout

Choosing the correct layout is important and affects reporting.

Form layout
Use when:

- Only one record is needed per employee

Examples:

- Personal declarations
- Onboarding details

Table layout

Use when:

- Multiple records are expected over time

Examples:

- Training records
- Equipment history

✎**Note**
Table screens must contain at least one column header before they can be saved.

16.3.3 Add fields to screens

Fields are the individual data points stored on a screen.

You can:

- Add existing fields
- Create new fields

✎**Note**
Editing an existing field updates that field everywhere it is used, including other screens and reports.

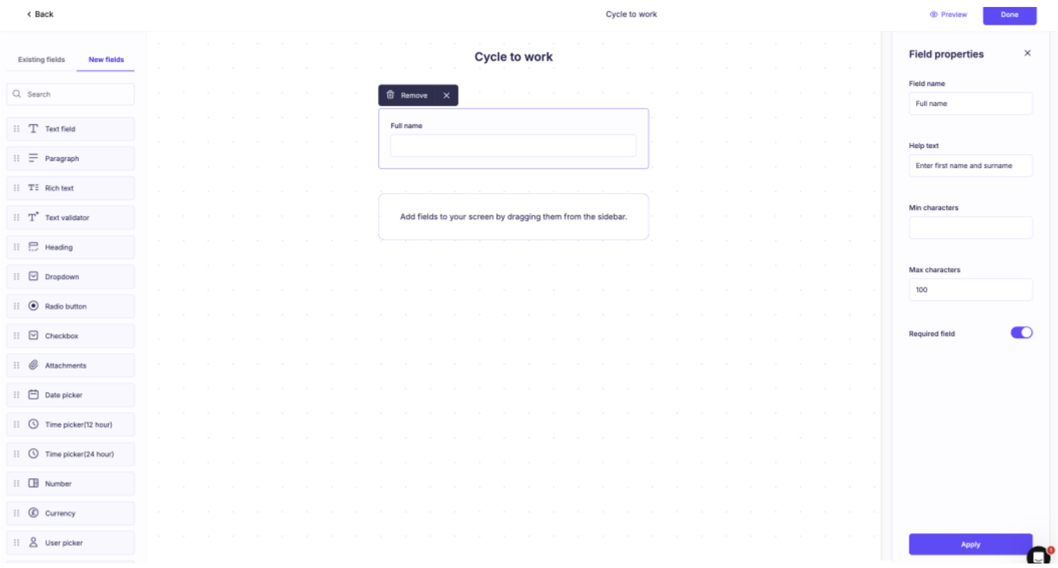

Figure: The Screen Designer canvas showing available field types (left), the screen being built (centre), and field properties (right).

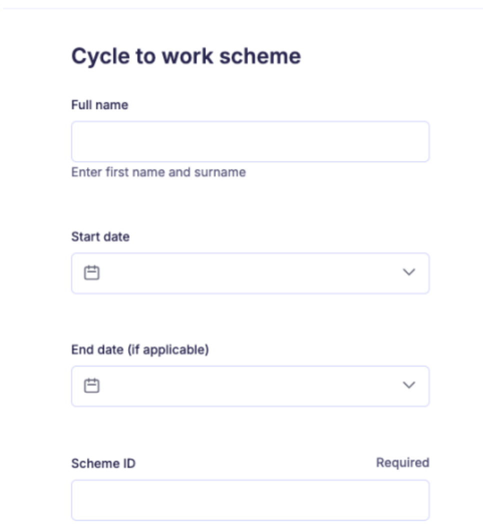

Figure: A preview of the screen being built in Screen Designer. This screen uses a form layout.

Figure: A preview of the same screen fields, but configured as a table layout. Note that both form and table screens look the same in the Screen Designer canvas — only the preview shows the resulting layout difference.

16.3.4 Edit an Existing Screen

Navigation:
`HR Dashboard › Settings › Screen designer › Screens › Select screen`

Screens are shared across the system.

Editing a screen affects:

- All profile templates using the screen
- All workflows referencing the screen
- All reports based on the screen

16.3.5 Delete a Screen

Navigation:
`HR Dashboard › Settings › Screen designer › Screens › [Locate screen] › More actions (…) menu › Delete`

- Permanently deletes all data stored on that screen
- Removes reporting categories
- Removes workflow references
- Cannot be undone
- Is not available for locked or system screens

✎ **Note**
Export any required reports to retain data before deleting a screen.

16.4 Profile templates

Profile templates control **which screens are active** for different groups of workers.

Navigation:
`HR Dashboard › Settings › Screen designer › Profile templates`

They define:

- Screen availability on profiles
- Screen order

They do **not** control:

- Visibility
- Edit permissions

✎ **Note**
Once assigned, a profile template cannot be changed.

16.5 Screen availability vs visibility

When a screen does not appear, cannot be edited, or behaves unexpectedly, the cause usually lies in one of four configuration areas. The table below shows which part of the system controls each aspect of a screen's behaviour, helping administrators quickly identify where changes need to be made.

Question	Controlled by
Does the screen exist?	Screen Designer › Screens
Is the screen available for the profile?	Screen Designer › Profile templates
Who can see or edit the screen?	Access roles
How the screen behaves in workflows	Variants

16.5.1 Best practice: Screen designer

- Create screens only when needed
- Reuse existing fields where possible
- Use table layouts only when multiple records are required
- Review screen usage before editing or deleting
- Keep screen names clear and specific

16.6 Screen designer FAQs

Q: Why can't users see the screen I created?
A: Screen visibility is controlled through Access roles, not Screen Designer. If a user can't see a screen that you created and added to their profile, check their permissions in Access roles.

Q: Why did editing a field change it elsewhere?
A: Fields are shared across screens. Editing an existing field updates it everywhere.

Q: What happens if I delete a screen?
A: If you delete and screen, all data stored in that screen is permanently deleted along with reporting and workflow references.

16.7 Section Summary

You now understand how Screen Designer defines the structure of employee data in Sense HR, including how screens and fields are created, organised, and linked to profile templates, reports, and workflows.

You've also seen how Screen Designer controls what data exists and where it appears, while access roles and workflows determine who can see or act on that data.

Continue to Section 17 — Automations and Workflows in *Sense Automate* to learn how structured employee data is used to trigger actions, approvals, and end-to-end HR processes across the employee lifecycle, and how extended authorisation, attendance tracking, reminders, events, mobile tiles, and product workflows (such as Sense Presence and ATS integrations) can be connected seamlessly into Sense HR.

17 ★ Automations and Workflows in Sense Automate

Design, extend, and monitor automated HR processes across the employee lifecycle.

Sense Automate is the workflow and automation layer within Sense Workplace. It allows organisations to extend and orchestrate HR processes beyond system default and standard settings — from approvals and reminders to cross-product integrations, mobile experiences, and operational workflows.

This section explains what *Automate* does, how it interacts with Sense HR, and what administrators should expect to manage, without going into low-level workflow construction.

For full *Sense Automate* logic and guidance see the Sense Workplace Help Centre at https://support.sensewp.com/en/ and follow navigation path: `All Collections › Sense Automate`

Sense Automate is available on Elite & Enterprise.

17.1 Sense Automate Overview

Sense Automate enables workflows that:

- Respond to events (e.g. a holiday request, new starter, expense upload)
- Trigger actions (approvals, notifications, tasks, data updates)
- Create structured data (screens, records, outputs)
- Surface actions across Sense HR, *Sense Mobile*, and connected systems

Sense Automate operates alongside Sense HR — it does not replace core HR configuration, access roles, or planners.

✎ **Important distinction**

Many automated behaviours exist even if *Sense Automate* is not licensed. *Sense Automate* allows those behaviours to be extended, customised, or replaced where supported.

17.2 Accessing Sense Automate

Navigation:

`Product switcher (Sense logo, upper left) › Sense Automate`

From here, administrators can:

- View installed workflows
- Browse the Workflow Hub
- Monitor workflow activity
- (Enterprise) Build custom workflows

✎ **Important distinction**

Many automated behaviours exist even without access to *Sense Automate*. *Sense Automate* allows you to extend or customise those behaviours where supported.

17.3 System Workflows

System Workflows are built into Sense HR and apply to all customers by default.

They operate in the background to ensure core platform behaviour remains secure, consistent, and compliant.

System Workflows:

- Run automatically
- Cannot be viewed, edited, or undeployed
- Do not appear in Sense Automate
- Support essential system functionality

Common examples include:

- Removing system access for leavers and moving profiles to the leavers list on the specified date
- Running annual entitlement refresh and carry-over processes
- Generating To Dos or email notifications when documents require signatures
- Sending login and mobile app invitations

System Workflows explain why certain actions occur automatically in Sense HR — even when no visible workflow has been configured.

✎ **Admin note**
If a behaviour occurs but you cannot locate it in *Sense Automate*, it is likely managed by a System Workflow.

No configuration or navigation is required for system-level automations.

17.4 Standard Workflows

Standard Workflows are pre-deployed workflows that ship with *Sense HR*.

Unlike System Workflows, Standard Workflows are visible in *Sense Automate* and can be managed by administrators.

Standard Workflows:

- Run automatically in new systems
- Can be viewed and monitored in *Sense Automate*
- Can be undeployed, replaced, or enhanced
- May be extended using Library or Custom Workflows (depending on plan level)

They provide structured automation for common HR processes.

Common examples include:

- Event authorisation workflows (holiday and other events)
- New starter onboarding tasks
- Leaver and offboarding processes
- Return-to-work workflows
- Core notifications and To Do creation

Standard Workflows form the baseline automation layer that organisations can later adapt, enhance, or replace using Library or Custom Workflows.

17.5 Library Workflows

(Pre-built templates in the *Automate* Workflow Hub)

For organisations with *Sense Automate* (Elite and Enterprise), the Workflow Hub provides a library of pre-built workflows.

Library workflows:

- Are designed and maintained by Sense Workplace
- Can be installed and deployed by administrators
- Extend or replace standard behaviour safely
- Do not require workflow-building knowledge

Typical use cases include:

- Enhanced onboarding or offboarding flows
- Extended approval chains
- Reminder and escalation workflows
- Mobile tiles and employee self-service actions
- Attendance, compliance, or policy-driven processes

17.5.1 Where to find Library Workflows

Navigation:
`Sense Automate › Workflow Hub`

From the Workflow Hub, administrators can:

- Browse available workflow templates
- Review what each workflow does
- Install workflows into their organisation

17.5.2 High-level steps to use a Library Workflow

1. Open `Sense Automate › Workflow Hub`
2. Select a workflow template
3. Review the description and scope

4 Install the workflow
5 Deploy and manage the workflow via `Sense Automate › Workflows` (if required)

💡 **Best practice**
Deploy one workflow at a time and observe behaviour before enabling additional workflows in the same area.

✎ **Note:**
For detailed guidance on browsing, installing, and managing Library Workflows, refer to the Managing Library Workflows in Sense Automate collection in the Sense HR Help Centre.

17.6 Standard and Library Workflow Categories

Workflows are grouped by purpose to help administrators understand impact and scope.

Common categories include:

- Onboarding & Offboarding
- Events & Absence
- Expenses
- Attendance & Presence
- Reminders & Compliance
- Mobile Experiences
- Integrations & Data Sync
- Screen enhancement (screens and/or variants added in Screen Designer)

Understanding the category helps administrators:

- Predict where a workflow will appear (profile, To Dos, mobile, reports)
- Assess whether it affects employees, managers, or admins
- Avoid deploying overlapping workflows unintentionally

17.7 Custom Workflows with the Workflow Builder

(Enterprise only)

Enterprise customers can create custom workflows using the Workflow Builder.

Custom workflows allow organisations to:

- Design bespoke processes
- Define custom logic and conditions
- Integrate with external systems
- Create organisation-specific mobile tiles or actions
- Create workflows using Sense Workplace Custom Workflow templates

✎ **Note:**
Sense Workplace publishes Custom Workflow templates for commonly requested processed on the help site at https://support.sensewp.com/en/ and follow **Sense Automate › Custom Workflow templates.**

17.7.1 Where to access the Workflow Builder

Navigation:
New workflow: `Sense Automate › Workflows › Create new`
Edit workflow: `Sense Automate › Workflows › Click custom workflow › Go to builder`

✎ **Scope note**
Custom workflow design is a specialist activity and is typically handled by:

- Trained internal administrators
- Sense Workplace Professional Services
- Approved implementation partners

This manual does not cover workflow construction in detail. Administrators should refer to the *Sense Automate* Help Centre and training resources before attempting custom builds.

17.8 Quick Troubleshooting Workflow Failures

If a workflow does not behave as expected, common causes include:

- Workflow not deployed
- Conflicting workflows responding to the same trigger
- Missing or incomplete data on profiles
- Access role restrictions
- External service connection issues

First checks for administrators

1. Confirm the workflow is deployed
2. Check recent changes to screens or access roles
3. Confirm whether behaviour is already handled by a standard workflow
4. Escalate to Support with workflow context, if required

17.9 Sense Automate and Screen Designer link (screens and variants)

(Screens, fields, and variants)

For data-gathering automations, *Sense Automate* and **Screen Designer** work closely together. Screen Designer defines the structure of the data being collected, while *Sense Automate* controls when and how that data is captured through workflows.

When workflows are deployed, they may:

- Create new screens to store workflow data
- Populate existing screens
- Use screen variants to change behaviour by role or scenario

Key relationships:

- Screen Designer defines structure (what data exists)

- *Automate* defines behaviour (when and how data is used)

✎ **Example**
A performance review workflow may:
- Create a new “Performance Cycle” screen
- Add records over time
- Trigger approvals and reminders
- Surface actions in profiles and mobile

Reporting categories update automatically to include workflow-generated screens.

17.10 Automated Service Connectors

Service Connectors enable Sense HR to securely exchange data and trigger actions with external systems such as payroll platforms, communication tools, identity providers, workforce management systems, and other third-party services.

They act as integration points between Sense HR and external platforms, helping organisations reduce duplication, improve data accuracy, and support connected HR processes across their wider technology stack.

Service Connectors are available through Sense Automate (Elite and Enterprise plans). When configured within Sense Automate, connectors allow workflows to extend beyond Sense HR, enabling conditional logic, automated triggers, and monitored data exchange between systems.

Service Connectors do not replace core Sense HR functionality — they extend it by enabling integration with external services.

17.10.1 Purpose of Service Connectors

Service Connectors are used to:
- Send notifications or approvals to external tools (e.g. Slack, Microsoft Teams)
- Sync employee or organisational data with third-party systems
- Trigger actions in external platforms as part of HR workflows
- Synchronise calendars, events, or schedules
- Export or receive documents securely
- Support payroll and workforce administration
- Reduce manual handoffs between systems
- Integrate Sense HR into an existing technology ecosystem

When used through Sense Automate, Service Connectors support structured data exchange and workflow-driven automation, allowing HR processes to interact seamlessly with other business systems.

17.10.2 How Service Connectors Work

Service Connectors operate through Sense Automate as secure integration points between Sense HR and external platforms.

Service Connectors are first added via `Automate > Service Connectors`, where authentication and connection settings are configured.

They are then used within `Automate > Workflows`, where administrators define how and when data is exchanged between systems.

At a high level:

- Sense HR exchanges defined datasets with the connected system
- Data exchange follows a structured and secure format
- Triggers can be event-based (for example, a new starter or status change)
- Workflows determine when and how data is sent or received
- The scope, conditions, and actions associated with the integration are defined within the workflow configuration

Because Service Connectors operate within workflows, how they function in your system is configurable. Organisations can define:

- Which events trigger integration activity
- What data is included
- Whether actions occur immediately or under specific conditions
- What happens before or after the connector action runs

Depending on the connector, data flow may be:

- One-way (Sense HR → external system)
- One-way (external system → Sense HR)
- Bi-directional

Service Connectors extend workflows beyond Sense HR. This enables HR processes to interact with external tools while maintaining controlled, monitored, and permission-based data exchange.

Service Connectors support structured integration — they enable workflow-driven data exchange and actions, rather than replacing core Sense HR functionality.

17.10.3 Available Service Connector Categories (Overview)

Availability depends on your subscription (Sense Automate – Elite/Enterprise) and external provider access.

New Service Connectors are introduced periodically as integrations expand. For the most up-to-date list of available connectors, supported features, and configuration guidance, refer to the Sense HR Help Centre.

Recruitment

- Hireful

Typical uses:
- Sync candidate data into Sense HR
- Trigger onboarding workflows
- Reduce duplicate recruitment data entry

Productivity & Communication
- Microsoft (Office 365 / Outlook / SharePoint / Teams)
- Google (Calendar / Workspace / Drive / SSO)
- Slack

Typical uses:
- Calendar synchronisation
- Document sharing and collaboration
- Directory alignment
- Sending HR notifications and approvals into communication tools
- Supporting lightweight interaction without logging into Sense HR

Payroll
- Xero
- Sage
- PayCaptain
- BrainPayroll

Typical uses:
- Employee data export
- Payroll preparation
- Pay-related data alignment
- Reducing duplicate HR and payroll data entry

Workforce Management & Scheduling
- Chronicle Online
- RotaCloud
- Papershift

Typical uses:
- Shift and rota synchronisation
- Attendance data sharing
- Workforce visibility and coordination

Learning & Development
- Improve LMS

Typical uses:
- Sync training records
- Maintain consistent learner data
- Track compliance and course completion

Messaging & Notifications
- Twilio

Typical uses:
- SMS notifications
- Automated reminders and alerts
- Extending workflow communications beyond email

Authentication & Identity
- TrustID

Typical uses:
- Identity verification
- Right-to-work checks
- Secure return of verification results

Compliance & HR Advisory
- Atlas (Citation Atlas)

Typical uses:
- Sharing employee or case data between systems
- Supporting HR compliance case management
- Aligning documentation and advisory workflows
- Maintaining connected HR records across platforms

17.10.4 Accessing Service Connectors

Service Connectors are authorised and managed within *Sense Automate*.

Navigation path:
`Sense Automate › Service Connectors`

From here, administrators can:
- View available connectors
- Authenticate or authorise external services
- Enable connectors for use in workflows

17.10.5 Add a Service Connector

Purpose: Add and authorise a Service Connector for use within Sense Automate workflows.

Steps

1. Go to *Automate* and select **Service Connectors** from the left-hand navigation menu.
2. Click **Add**.
3. Select the required **Service Connector** from the list of available connectors.
4. Enter a **Name** for the connector.
   You may use the third-party name, follow your internal naming conventions, or combine both (for example, Microsoft 365 – Production).
5. Enter the credentials required to authorise the connection.

Credential requirements vary by connector and are provided by the third-party system (for example, API keys, client IDs, Client secrets, or authentication tokens).

6 Click **Add** to complete the setup.

✅ Sense Automate will validate the credentials and, once correctly authorised, add the Service Connector to your available connections for use within workflows.

17.10.6 Managing and undeploying Service Connector Workflows

Once a Service Connector has been added, its behaviour is controlled through workflows in:
`Automate › Workflows`

Service Connector actions are configured within workflows and can be monitored, edited, deployed, or undeployed in the same way as other workflow types.

Current availability

- Service Connector workflows are currently configured by Sense Workplace upon request.
- Workflow creation using the Workflow Builder will be available to Enterprise customers once the feature is released from beta.
- Once released, Elite customers will have access to pre-built Service Connector workflows (Library Workflows) via the Automate Workflow Hub

Ongoing management
Once configured and deployed, Service Connector workflows can be:

- Monitored for activity and status
- Temporarily disabled or undeployed
- Reviewed for trigger conditions and actions
- Updated (where plan permissions allow)

For detailed guidance on deploying, managing, and monitoring workflows, refer to the Sense HR Help Centre article:
Workflows: Deploy, manage and monitor installed Library workflows (Admin)
https://support.sensewp.com/en/articles/466115-workflows-deploy-manage-and-monitor-installed-library-workflows-admin

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17.10.7 Troubleshooting Service Connector Issues

Service Connectors operate through Sense Automate workflows.
If data is not syncing or behaving as expected, the issue may relate to connector configuration, workflow logic, external system access, or data alignment.

Integration Not Syncing or Updating

Likely causes

- The workflow containing the connector action is undeployed
- API credentials have expired, updated, or been revoked
- External system access or permissions have changed
- The connector has been disabled or removed from the workflow

- Workflow trigger conditions are not met

What to check

- Confirm the workflow is active
- Confirm the connector is still authorised and appears in the list of service connectors in `Sense Automate › Service Connectors`
- Check whether external system credentials are still valid
- Ask your IT team or provider whether API access has changed
- Confirm the triggering event or condition has occurred
- Review workflow run log history

Next steps

- Re-authorise the connector if required
- Review workflow trigger conditions
- Contact Sense Workplace Support if the issue persists

Missing or Incomplete Data

Likely causes

- The workflow is configured to send only selected fields
- Data fields are not supported by the connector
- External system data is incomplete
- Employee identifiers do not match between systems

What to check

- Confirm which fields the connector supports
- Verify the data exists in the source system
- Check that key identifiers (email, employee ID) match
- Review workflow field mappings (if applicable)

Next steps

- Correct missing or inconsistent data
- Adjust workflow configuration if required
- Contact Support for scope clarification

Duplicate or Misaligned Records

Likely causes

- Mismatched unique identifiers
- Historical data existed before the connector was enabled
- Duplicate records already existed in one system

What to check

- Compare email addresses and employee IDs

- Review recent imports or manual edits
- Confirm which system is considered the source of truth

Next steps

- Resolve duplicates in the appropriate system
- Seek Support guidance if duplicates affect syncing

Calendar or Event Data Not Appearing

Likely causes

- Calendar permissions are not granted externally
- The workflow does not include the correct event trigger
- Event types are excluded
- Time zone or date range mismatches

What to check

- Confirm calendar sharing permissions
- Verify the workflow trigger is correctly configured
- Check event type inclusion
- Confirm timezone settings in both systems

Payroll or Finance Data Appears Incorrect

Likely causes

- Data is exported but transformed externally
- Payroll calculations occur outside Sense HR
- Effective dates or pay periods are misaligned
- Workflow conditions filter certain records

What to check

- Confirm which system performs calculations
- Verify effective dates and pay cycles
- Review exported data before processing
- Confirm workflow filters or conditions

Connector Stops Working After Previously Functioning

Likely causes

- External API changes or security updates
- Token rotation or password updates
- Provider-side outage
- Workflow accidentally undeployed

What to check

- Confirm workflow status
- Ask IT whether credentials were updated
- Check provider service status

Next steps

- Re-authorise connector credentials
- Contact Sense Workplace Support with details of when the issue began

When to Contact Sense Workplace Support

Contact Support if:

- A connector fails without configuration changes
- A workflow runs but the connector action fails
- Data inconsistencies affect payroll, compliance, or reporting
- You are unsure whether the issue originates in Sense HR, Automate, or the external system

💡 **Tip:**
Maintain a documented integration register including:

- Connected external systems
- Internal system owners
- Credential expiry dates
- Active workflows using each connector
- The defined "source of truth" system

This significantly reduces troubleshooting time.

17.10.8 Security and Governance (Service Connectors)

Service Connectors configured through *Sense Automate* follow strict security and governance principles:

- Credentials and authentication tokens are securely stored and never exposed to end users
- Access is restricted to the connector's defined permissions and approved data scope
- Data transfers use encrypted communication channels
- Connector behaviour is controlled through authorised workflow configuration

Administrators remain responsible for:

- Approving which external systems are connected
- Ensuring data exchange aligns with internal data governance policies
- Confirming compliance with legal and regulatory requirements
- Coordinating with IT, payroll providers, or third-party vendors where required
- Reviewing and monitoring active connectors and related workflows

17.11 Sense Automate FAQS

Q: What is Sense Automate actually used for in Sense HR?
Sense Automate is used to automate HR processes that would otherwise require manual coordination. It allows administrators to trigger actions, approvals, reminders, data capture, and integrations automatically based on events in Sense HR, such as a new starter, a leaver, a submitted request, or a data change on a profile.

Q: Do I need Sense Automate to use Sense HR?
Sense HR works fully without *Sense Automate*, and all core HR functionality is available without it. *Sense Automate* is optional and is designed for organisations that want to reduce manual work, standardise processes, or integrate HR activity with other systems.

Q: What automations exist if I don't configure anything myself?
A: Even without building workflows, Sense HR includes standard system automations. These include actions such as approval flows, notifications, To Do creation, and lifecycle processes like leavers. *Sense Automate* extends these defaults by allowing you to customise, replace, or add new automated behaviour.

Q: Where do I go to manage automations?
A: All automation management happens in *Sense Automate*, which is accessed via the product switcher in the upper right of the Sense HR web app. From there, administrators can view system workflows, activate library workflows, manage Service Connectors, and build or monitor custom workflows.

Q: What are library workflows, and when should I use them?
A: Library workflows are pre-built automations provided by Sense Workplace. They are designed to cover common HR scenarios such as onboarding, approvals, reminders, and data collection. Library workflows are the recommended starting point because they require minimal configuration and follow best-practice patterns.

Q: When would I need to create a custom workflow?
A: Custom workflows are useful when your organisation has processes that aren't covered by standard or library workflows. This might include bespoke approvals, data collection processes, or integrations. Custom workflows are built using the workflow builder in *Sense Automate* and should be approached with a clear understanding of the underlying process.

Q: How does Sense Automate work with Screen Designer?
A: *Sense Automate* and Screen Designer work closely together when workflows need to capture or update data. Screen Designer defines what data exists, while *Sense Automate* defines when and how that data is collected or acted upon. Workflow-generated screens are created automatically and become part of employee profiles and reporting.

Q: Do workflows control who can see or edit data?
A: Workflows do not control visibility or permissions. Access Roles determine who can view or edit data, while workflows control actions and process flow. If users can't see or edit a screen created by a workflow, the issue is usually related to Access Roles rather than *Sense Automate.*

Q: What are Service Connectors, and how are they used?

A: Service Connectors are integrations that allow *Sense Automate* workflows to interact with external systems. They are configured within *Sense Automate* and then used as actions inside workflows to send notifications, synchronise data, or trigger activity in connected services.

Q: Are Service Connectors only available through Sense Automate?
A: Yes, all Service Connectors are available and supported through *Sense Automate*. This enables conditional logic, sequencing, monitoring, and error handling.

Q: Where do I manage Service Connectors?
A: Service Connectors are added inside *Sense Automate*, via `Sense Automate › Service Connectors`. From there, administrators authorise connectors and make them available for use in workflows. How they function within workflows is managed via `Sense Automate › Workflows`.

Q: How can I tell if a workflow has failed?
Workflow activity and failures can be monitored directly in *Sense Automate*. Administrators can review execution history to see where a workflow stopped, whether a Service Connector failed, or whether user action is required to continue the process.

Q: What happens if I edit or delete a screen used by a workflow?
A: Because workflows rely on screen structure, editing or deleting a screen can impact workflow behaviour. Any changes to screens used by workflows should be reviewed carefully, as they may affect data capture, reporting, or workflow execution.

Q: Is Sense Automate suitable for sensitive HR processes?
A: *Sense Automate* is designed to work within Sense HR's permission and governance framework. Workflows only act on data that users and systems already have permission to access, and all actions are auditable. Administrators remain responsible for ensuring workflows align with company policies and compliance requirements.

Q: Do I need technical knowledge to use Sense Automate?
A: Most administrators can use *Sense Automate* effectively by starting with standard and library workflows. More advanced custom workflows do require additional training and support.

17.12 Section Summary

You now understand how *Sense Automate* extends Sense HR by enabling automated actions, approvals, data capture, and integrations across the employee lifecycle. You've also seen how *Automate* works alongside Screen Designer, Service Connectors, *Mobile*, and Reports to reduce manual effort and standardise processes.

Continue instead to Section 18 — The Wider Sense Workplace Ecosystem to see how Sense HR, *Automate*, *Mobile*, *Presence*, and *AI* work together as a unified platform.

PART VIII —Extended Ecosystem Awareness

18 The Wider Sense Workplace Ecosystem

This part provides administrators with practical awareness of adjacent Sense Workplace products that extend Sense HR functionality.
It does not reintroduce the Sense Workplace ecosystem, but instead explains what changes operationally when additional products are enabled and how data, responsibility, and configuration boundaries are managed.

18.1 Extending Sense HR Beyond Core HR

Sense HR is designed to operate effectively on its own.
However, many organisations extend their HR system over time to support recruitment, attendance tracking, automation, safety, or advanced analytics.

This section explains:

- What additional Sense Workplace products add in practical terms
- How data flows to and from Sense HR
- What administrators should expect when upgrading or expanding

18.2 Sense ATS and Sense Presence— What They Add (in Practice)

18.2.1 Sense ATS

Sense ATS extends Sense HR before employment begins.

From an administrator's perspective:

- Candidate data is captured in ATS, not HR
- When a candidate is hired, selected data flows into Sense HR to create a new employee profile
- HR onboarding, documents, planners, and workflows then continue inside Sense HR

Key admin impact

- Recruitment configuration lives in ATS
- Employee lifecycle management lives in HR
- No duplicate records are created when a candidate becomes an employee

18.2.2 Sense Presence

Sense Presence extends Sense HR into physical attendance, location, and safety.

From an administrator's perspective:

- Presence hardware captures attendance and location signals
- That data feeds into Sense HR planners, reports, and workflows
- HR remains the system of record for people, employment status, and entitlement

Key admin impact

- Attendance becomes automatic rather than self-reported
- Time, safety, and location events can trigger workflows
- Presence configuration is handled alongside HR, not instead of it

18.3 How Data Flows Without Duplication

When additional products are enabled:

- Sense HR remains the authoritative people record
- Other products read from or write back to that same record
- Data is not copied or forked between systems

Examples:

- *ATS* → HR: new hire details populate a profile
- *Presence* → HR: attendance events appear in planners and reports
- *Automate* → HR: workflows write data into screens and fields
- *AI (AMI):* analyses existing HR and workflow data, but does not create records independently

This ensures:

- Reporting remains consistent
- Auditing remains centralised
- Changes are traceable through history and reports

18.3.1 Managing Expansion and Upgrades

Sense Workplace products are designed to be activated progressively.

When upgrading or enabling a new product:

- Existing HR data remains unchanged
- New configuration options appear only where relevant
- Previously captured data becomes available to the new product immediately

From an admin perspective, expansion usually involves:

- Reviewing access roles
- Enabling or configuring new settings areas
- Communicating changes to managers and employees
- Validating reports and workflows after activation

✎ Important

Upgrading does not require re-implementation of Sense HR. It extends existing configuration.

18.4 Eco System FAQS

Q: How does Sense HR remain the system of record when other products are enabled?
A: Sense HR remains the system of record because it always holds the core employee profile. When additional products like *ATS*, *Presence*, *Automate*, or *AI* are enabled, they add related data (such as attendance records, recruitment stages, or workflow outputs) around the existing employee profile rather than replacing or duplicating it.

Q: If we enable Sense ATS or Sense Presence later, will we need to re-enter employee data?
A: No — enabling Sense ATS or Sense Presence later does not require re-entering employee data. Existing employee records remain intact in Sense HR, and newly activated products immediately use the same underlying profiles.

Q: Do administrators need to manage multiple systems separately?
A: Administrators do not need to manage separate systems with separate logins. All licensed products are accessed through the Sense Workplace web app, but each product has its own configuration area. Core people data and HR settings continue to be managed in Sense HR, while other products extend functionality where needed.

Q: Does enabling more Sense Workplace products change how employees log in?
A: No — enabling additional products does not change how employees log in. Employees continue to access Sense HR and Sense Mobile in the same way, and any new features only appear if they are relevant to the employee's role and your organisation's licensing.

Q: Can we choose not to use certain products even if they're available on our plan?
A: Yes — even if products are included in your subscription plan, you can choose not to activate or use them until your organisation is ready. Inactive products do not affect existing HR data or workflows.

18.5 Section Summary

You now understand how Sense HR can be extended through the wider Sense Workplace ecosystem, how additional products enhance HR capabilities, and how Sense HR remains the central system of record as your organisation grows.

Continue to Part IX — Support, Maintenance, and Governance, starting with Security, Data, and Compliance, to understand how your system is protected, maintained, and governed over time.

PART IX — Support, Maintenance, and Governance

19 Security, Data, and Compliance

19.1 20.1 Data Protection Standards and Access Auditing

Sense HR is designed to support organisations operating under UK GDPR and the Data Protection Act 2018.

Roles and responsibilities

- Your organisation acts as the data controller for employee data.
- Sense Workplace acts as a data processor, processing data only in line with customer instructions and contractual agreements.

Security and infrastructure (Sense Workplace responsibilities)

- Data is hosted in Microsoft Azure UK South data centres.
- All customer data is stored within the UK.
- Databases are single-tenanted, meaning your organisation's data is isolated from other customers.
- Data is encrypted at rest and in transit.
- Geo-redundant backups are maintained at a separate UK location.
- Sense Workplace operates in line with ISO 27001 security standards.

Access auditing (Administrator tools)
Administrators can audit access and activity using:

- HR Dashboard › Reports › Profile Information › People › Permission group (system-level audit)
- HR Dashboard › Reports › Profile Information › People › Registration completed (log in audit)
- HR Dashboard › Reports › User activity (profile-level changes)
- HR Dashboard › Reports › To Dos (task actions)
- HR Dashboard › Reports › Documents (document actions)

These tools help demonstrate accountability, trace changes, and support compliance reviews.

19.2 GDPR and Employee Rights

Sense HR provides tools that help administrators meet common GDPR obligations, including:

- Right of access – employee data can be exported via Reports.
- Right to rectification – profile data can be corrected with full audit trails.
- Right to erasure – profiles or specific data can be deleted where legally appropriate.
- Data portability – structured data exports are available.

✎ **Important governance note**

Legal retention requirements (for example, HMRC record-keeping for leavers) are determined by law and company policy, not enforced automatically by Sense HR. Administrators should align system use with internal retention policies and legal advice.

19.3 Role-Based Access and MFA Controls

Role-based access control (RBAC)

- All access to data and features is governed by Access Roles.
- Administrators should regularly review:
  - Who has administrator or limited administrator access (Reports › Profile Information › People › Permissions group)
  - Manager visibility scopes
  - Any custom access roles (if enabled)

Authentication and MFA

- Web app access supports:
  - Email/password login
  - Microsoft or Google SSO
  - MFA where enforced
- Sense Mobile uses:
  - Secure verification codes for registration
  - Mandatory PIN or biometric verification on every app open

Security posture depends on both system configuration and user behaviour, so periodic review is recommended.

19.4 Backup, Retention, and Deletion Policies

Backups and resilience (Sense Workplace)

- Continuous backups with geo-redundant storage
- Disaster recovery target: service restoration within 8 hours
- Target availability: 99.9% uptime

Retention and deletion (Customer choice)

- Sense HR does not enforce fixed retention periods.
- Administrators decide:
  - When to delete profiles
  - Which documents to retain
  - How long leaver data is stored
- Deleting a profile permanently removes associated data and history.

💡 **Best practice**
Before deleting records, confirm legal, payroll, and audit requirements have been met.

19.5 Security Troubleshooting Checklist

Use this checklist when investigating security or access issues:

☐ Does the user have the correct Access Role? (Perform access role audit)
☐ Is the user linked and active?

☐ Are there active filters hiding data?
☐ Is MFA or SSO blocking login?
☐ Is Sense Mobile requiring re-verification due to logout?
☐ Have permissions recently changed?
☐ Does audit history show unexpected activity?

If issues persist, raise a Support Request with clear details and timestamps.

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20 Continuous Improvement

Sense Workplace is continuously evolving. New features, enhancements, and improvements are released regularly across Sense HR and the wider Sense Workplace ecosystem.

These updates may include:

- New functionality or modules
- Improvements to existing features
- Performance, security, or usability enhancements
- Expanded integrations and ecosystem capabilities

Most updates are delivered automatically and do not require administrator action, while others may introduce optional configuration settings or new capabilities that administrators can choose to adopt when ready.

Administrators are encouraged to:

- Review release notes periodically
- Stay informed about upcoming changes
- Assess whether new features are relevant to their organisation's processes

This approach allows organisations to benefit from ongoing improvements while retaining control over when and how new functionality is adopted.

20.1.1 21.1 How to Submit Feedback

Feedback is actively encouraged and helps shape future product improvements.

Administrators can submit feedback via:

- The in-app Help Centre (Intercom / Fin)
- Support email
- Conversations with Customer Success or Support teams

Feedback may include:

- Feature requests
- Usability suggestions
- Documentation improvements
- Workflow or reporting gaps

20.2 SenseHR Updates and Release Notes

Sense Workplace communicates product updates through multiple channels:

- Help Centre → Friday release news surfaced via the Fin chat bubble
- Email newsletters
- Product announcements
- Public roadmap and timeline:
  - https://senseworkplace.com/timeline.html

Updates may include:

- New features
- Enhancements
- Bug fixes
- Security improvements

💡**Tip:**
Review release notes regularly to understand new capabilities and any changes that may affect configuration or user experience.

20.3 System summary

You now understand how Sense HR supports security, data protection, compliance, and long-term system governance, and what responsibilities remain with administrators.

You're ready to operate, maintain, and evolve your Sense HR environment with confidence, supported by secure infrastructure, clear auditability, and ongoing product improvements.

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21 Appendices & Reference Material

21.1 Appendix A. Glossary of Sense HR Terms

Access Role
A permission framework that controls what a user can see and do in Sense HR. Access Roles determine visibility of menus, screens, reports, data, and editing rights. They control visibility — not structural data configuration.

Access Role Management (ARM)
The configuration area where Access Roles are created, edited, and maintained. ARM controls user permissions, including screen visibility, field-level access, feature access, workflow interaction, and the rights to view or edit other users' profiles.

Administrator (Admin)
An Access Role type with broad system configuration permissions. Administrators can manage organisation settings, configure Calendar & Planner elements, manage Profile Templates, run reports, and (depending on plan) access Screen Designer and Workflows.

AMI Agents
Dedicated AI assistants embedded within specific modules of Sense Workplace. Each AMI Agent operates within its relevant area (e.g., Reports, Calendar, Document templates, Expense To Do tasks, Payroll/Company documents) and provides contextual analysis or drafting support based on the data available in that module.

AMI Prompt
A written instruction or question entered into Sense AI (AMI) to guide analysis or content generation. Prompts can be used to request summaries, identify trends, generate charts, or draft document content.
In **Analyse with AMI**, prompts can be saved and reused to ensure consistent analysis across similar reports.

AMI (Sense AI)
Sense HR's built-in AI assistant used to analyse report data, summarise information, and generate insights based on prompts.

Analyse with AMI (Reports AMI)
The AMI agent within the Reports module that analyses generated report data. It can summarise trends, highlight key metrics, answer structured questions, generate visual insights, and build and save reusable prompts for consistent future analysis.
Analyse with AMI works only on the currently generated report dataset and does not alter underlying system data.

Bookable Event
A reusable event configuration created in Calendar & Planner. A Bookable Event belongs to an Event Type and defines the selectable event name and booking rules used in the Calendar or Planner.

Bulk Upload

A feature used to import structured HR data at scale, using predefined Excel templates and document structures. It validates data before allowing import.

Calendar (Company)
The company-wide view that displays and allows management of all booked events visible to the user. The Calendar shows scheduled absences and working events across the organisation but does not display working or non-working days.

Calendar & Planner
The system configuration area where organisation-level scheduling settings are defined. Used to configure reusable elements such as Working Hours, Public Holiday Groups, Event Types, and entitlement rules. These settings determine how bookings behave in the Company Calendar and individual Employee Planners.

Carry Over Entitlement
Unused entitlement from a previous holiday year that is added to the current year's entitlement balance.

Clock In / Clock Out
Attendance functionality used by employees to record working time. May be connected to Sense Presence hardware.

Company Calendar Heatmap
A colour-coded visual overview of booked events across the organisation, used to quickly identify how busy or quiet specific days are. It helps highlight low-staff days or busy operational days. This feature can be enabled or disabled in Calendar & Planner › General settings.

Company Document
A static document uploaded to the system and assigned to the whole company, selected groups, or individual employees. Company Documents do not contain personalised fields and are typically used for handbooks, policies, or general reference materials.

Company Equipment
Assets issued to employees (e.g., laptops, phones, ID badges) recorded against their profile.

Contract Type
The employment classification of an employee (e.g., Permanent, Fixed Term, Casual).

Contracted Entitlement
The full annual entitlement an employee would receive for a complete holiday year before adjustments such as pro-rata or carry-over.

Contracted Hours
The employee's agreed weekly working hours. Used in entitlement calculations and planner logic.

Custom Public Holiday Group

A user-defined public holiday configuration for regions or organisations not using the standard UK public holiday groups.

Custom Screen
A screen created using Screen Designer to capture additional employee data beyond standard screens.

Custom Workflow
A fully customised workflow created within Sense Automate. Custom Workflows can be built to extend system behaviour or replace Standard or Library Workflows.

Unlike Library Workflows, Custom Workflows are fully editable. (Enterprise plan).

Dashboard
The main landing page of Sense HR, displaying widgets, To Dos, attendance information, and navigation.

Dashboard Widget
A configurable information block on the Dashboard (e.g., My To Dos, Clock In/Out).

Deploy (Workflow)
Activating a workflow so its automation logic begins running.

Document Template
A reusable document design stored in Sense HR that can be applied when creating documents for employees.
Templates can include static content, merge tags that automatically pull employee data, and one or more e-signature fields. They help ensure documents are consistent, accurate, legally auditable, and easy to reuse across multiple employee profiles.
Templates define structure and content. Permissions, recipients, and actions (such as *To be read* or *To be signed*) are applied when the document is added to a profile, not when the template is created.

Effective Date
The date from which a configuration change (e.g., Working Hours, entitlement) takes effect.

Elite Plan
An advanced subscription tier that includes all Professional features, plus access to Screen Designer, Workflow Hub (Sense Automate), performance tools, premium analytics, integrations, and expanded AI functionality.
Designed for organisations needing configurable data structures and workflow automation.

Employee
For the purposes of this manual, “Employee” is used as a catchall term for any individual recorded in Sense HR as working for the organisation. This may include permanent employees, temporary workers, contractors, volunteers, or other workforce types, unless otherwise specified.

Employee ID

A unique identifier assigned to each employee and stored in the Employment details screen. Used as the primary linking key across all Bulk Upload templates.

Employee Profile
The structured record of an individual employee, containing screens such as Personal Details, Employment, Training, and Planner.

Employment Check
A compliance record stored against an employee (e.g., Right to Work, DBS, Visa).

Employment Start Date
The official date the employee began employment. Used in entitlement and reporting logic.

Enterprise Plan
A custom-priced tier for larger or more complex organisations. Includes all Elite features, plus full workflow automation capability, advanced integrations, and enhanced operational support.
Designed for multi-site or highly customised environments requiring advanced system flexibility.

Entitlement
The amount of leave or event allowance allocated to an employee within a holiday year.

Event
An individual scheduled occurrence created when a Bookable Event is booked in the Calendar or Planner. An Event represents the actual instance recorded against an employee’s schedule. Can represent time off (e.g., Holiday), sickness, or work activity (e.g., Training).

Event Manager
The configuration area where absence and working event types are created and managed.

Event Type
The system category that defines how an event behaves. There are three Event Types in Sense HR: Working, Time-off, and Sickness. The Event Type determines entitlement impact, planner behaviour, and reporting classification.

Field-Level Visibility
A permission setting that determines whether a specific field within a screen is visible or editable.

Form-Type Screen
A screen that stores one structured record per employee.

Full-Time Equivalent (FTE)
The organisation’s standard full-time weekly hours. Used for pro-rata entitlement calculations.

Future Leaver

An employee with a confirmed leaving date set in the future. The profile remains active until the specified last working date.
The employee becomes a **Leaver** when their leaving date lapses or when system access is revoked — whichever occurs first. At that point, leaver status, reporting updates, and any configured offboarding workflows apply accordingly.

Future Starter
An individual with a confirmed employment start date set in the future. The profile can be configured in advance, but active employment status begins on the defined start date.

Go-Live
The point at which Sense Workplace becomes the active, operational HR system for the organisation. After go-live, employees and managers begin using the system for live data, bookings, workflows, and documents.

Half Day
An event measured as 0.5 days.

Holiday Year
The defined entitlement period (e.g., Jan–Dec, Apr–Mar).

In-App Document Editor
The built-in document editor used to create and edit Document Templates and personalised documents within Sense HR.
The in-app editor supports text formatting, images, merge tags (including advanced merge tags), and e-signature fields, and allows administrators to draft content directly in the system without uploading a PDF.

Install (Workflow)
Adding a Library workflow to the organisation without activating it.

Leaver
An employee whose employment has ended and whose profile has been processed through the leaver workflow.
An individual becomes a Leaver when their confirmed leaving date lapses or when system access is revoked — whichever occurs first. Leaver status records the last working date and reason for leaving and may trigger offboarding tasks, entitlement adjustments, and reporting updates.

Library Workflow
A prebuilt workflow available in the Workflow Hub that enhances, extends, or replaces a Standard Workflow. Library Workflows cannot be edited but can be installed, deployed or undeployed as needed.

Library Workflows are available on Elite and Enterprise plans.

Limited Administrator

An Access Role type with full administrative permissions, but restricted to a defined group of employees. Limited Administrators can perform the same configuration and management tasks as an Administrator, but only for the people within their assigned scope.

Location
The physical or organisational site where an employee works.

Locked Day
A non-configurable bookable event that prevents users from adding, editing, or deleting events on that date.

Login
The process of accessing Sense Workplace using a registered email address and password. Successful login grants access based on the user’s assigned Access Role and permissions.

Manager with Indirect Reports
An Access Role type that extends Manager permissions to include both a direct and indirect reporting hierarchy. Access and editing rights depend on the organisation’s Access Role configuration.

Merge Tags
Case-sensitive, dynamic placeholders used in Document Templates to automatically insert employee data when a document is created. **Basic merge tags** can be used in Sense-created templates and in uploaded PDFs (with formatting limitations). **Advanced Merge Tags** can reference specific records (such as job, pay, or table-screen data) and are only supported in Sense-created templates within the in-app document editor.

Mid-Week Alignment
Automatic system behaviour aligning working patterns correctly when an employee starts mid-week.

Multi-Week Schedule
A rotating working schedule that repeats over multiple weeks. Also known as a rotating work pattern.

No Working Pattern
An assignment option within Planner settings indicating that no working hours configuration is applied to an employee.

People (module)
A main navigation area in Sense HR that displays the employee list and provides access to individual profiles. From the People module, administrators can open employee records, access Profile Planner Settings, view personal planners, manage access roles, and send individual login or verification invitations.

Personal Document
A document assigned to an individual employee. Personal Documents may be static or dynamic and can include personalised fields such as employee name or e-signature requirements.

Bulk assignment of personalised documents at scale (using a single underlying template with dynamic fields) is planned as a future enhancement.

Personal Planner Heatmap
A colour-coded visual view within an individual employee's Planner that highlights patterns of sickness over a 12-month rolling period. This feature can be enabled or disabled in **Calendar & Planner › General** settings.

Planner
The employee-specific view of booked events. The Planner displays an individual's scheduled absences and working events and is used to request, view, or manage bookings. It does not display working or non-working days for other employees.

Product Switcher
The navigation control (accessed via the Sense logo in the top-left corner) that allows users to move between products within the Sense Workplace ecosystem, such as Sense HR and Sense Automate.

Professional Plan
A mid-tier subscription that includes all Team features, plus enhanced capabilities such as onboarding tools, e-signatures, custom Access Roles, expanded time and attendance functionality, and enhanced Sense AI features.
Designed for organisations requiring greater automation and control over HR processes.

Profile
The structured employee record within Sense HR that stores personal, employment, and organisational data. A Profile exists regardless of whether the individual has login access and data collection is defined by an assigned Profile Template.

Profile Planner Settings
The configuration area within an employee profile that assigns individual Working Hours, Public Holiday rules, Holiday Year, Event Entitlements
Underpins calendar/planner booking behaviour for that employee.

Profile Template
Defines which screens are active in an employee profile and their order.

Pro-Rata Entitlement
A proportionally calculated entitlement based on start date and contracted hours.

Public Holiday Group
A predefined set of public holidays assigned to employees.

Reports
A main navigation module in Sense HR used to generate, view, and export structured data reports. Reports are organised by Report Type and reflect the organisation's screen structure, access role permissions, workflows, Calendar & Planner settings, and recorded data.

Report Type

A predefined data view (e.g., Profile Information, Attendance, Sickness).

Return to Work
The process of recording an employee's return following a sickness absence. A Return to Work may trigger a confirmation step, prompt, or workflow and ensures the sickness event is formally closed and accurately reflected in reporting.

Role Hierarchy
The structured levels of user permissions (e.g., Administrator, Manager, Standard User).

Rollout
The structured process of introducing Sense Workplace to the organisation. Rollout may include system configuration, data upload, administrator training, communication to employees, and staged enablement of features.

Screen
A structured section within an employee's profile used to store and organise related data. Each Screen contains fields that capture specific information (for example, Personal Details, Employment, Training, or Equipment). Screens fall into three categories:

- **System Screens** – Built-in and protected. They cannot be deleted, renamed, or structurally edited.
- **Standard Screens** – Prebuilt screens that ship with the system and are available by default. They can be edited or customised (subject to data and workflow dependencies and subscription plan).
- **Custom Screens** – Screens created and managed by administrators using Screen Designer.

Some standard screens are locked to protect system-required fields. A padlock icon ( ) indicates that a screen contains protected elements. **Locked screens** cannot be fully customised, as certain fields and settings are fixed to maintain system integrity.

Screens are added to **Profile Templates**, which determine whether they are active in the employee profile.
Editing a Screen updates the master version and affects all Profile Templates that include it.

Screen Designer
The configuration tool used to create and manage standard and custom screens and profile templates.

Sense ATS
The Applicant Tracking System within the Sense Workplace ecosystem.

Sense Automate
The workflow engine within the Sense Workplace ecosystem. It allows automated actions such as creating To Dos, sending alerts, and triggering system processes. Available on higher-tier plans.

Sense HR
The core HR platform within the Sense Workplace ecosystem.

Sense Mobile
The employee-facing mobile application for accessing profiles, booking leave, and clocking in/out.

Sense Presence
The hardware and integration system used for clock-in/out, environmental monitoring, and point-in-time location functionality within the Sense Workplace ecosystem.

Sense Workplace
The integrated ecosystem that includes Sense HR, Sense Automate, Sense Mobile, Sense ATS, Sense Presence, and Sense AI (AMI). Sense Workplace connects employee data, workflows, recruitment, attendance, location, reporting, intelligent analysis, tasks, and documents within a single, flexible platform.

Service Connector
A configuration component that enables secure integration between Sense Workplace and external systems. Service Connectors allow data to flow between products (such as payroll, identity providers, or other third-party services) according to defined authentication and connection rules.

Session Name
The identifier given to a Bulk Upload process.

Sickness Event
An absence recorded under sickness categories. Must follow specific duration rules.

Standard User
The default Access Role type for employees. Standard Users can access and update their own profile (subject to permissions), book events in the Planner, complete To Dos, and view assigned documents.

Standard Workflow
A built-in workflow that ships with Sense HR and runs automatically. Standard Workflows appear in the Workflow Hub and can be undeployed or replaced by enhanced Library Workflows (Elite and Enterprise plans) or Custom Workflows (Enterprise only).

System Screen
A built-in screen that cannot be renamed or deleted.

System Workflow
A built-in background process that forms part of how Sense HR operates. System Workflows run automatically, are not visible in the Workflow Hub, and cannot be viewed, edited, replaced, or managed.

Customers typically only encounter this term if referenced by Support.

Table-Type Screen
A screen allowing multiple records per employee (e.g., Training history).

Team Plan
The entry-level subscription tier providing core HR functionality, including employee records, holiday and absence management, document storage, reporting, and employee self-service.
Designed for organisations needing essential HR administration tools.

Template Dependency Order
The required sequence for uploading Bulk Upload templates.

Time Off Event
An absence event excluding sickness.

TOIL (Time Off in Lieu)
Time off granted to an employee in exchange for additional hours worked beyond their contracted hours. TOIL can be configured as a bookable Time-off event and may be linked to entitlement rules depending on organisational policy.

To Do
A task assigned to a user, either manually or via workflow automation.

Undeploy (Workflow)
Pausing an active workflow without uninstalling it (Sense Automate)

Uninstall (Workflow)
Removing an installed workflow from the organisation (Sense Automate)

User
A person with system access credentials (login details) for Sense Workplace. A User account controls access to the platform and is distinct from the employee Profile, which stores HR data.

Verification Code
A time-sensitive security code used during Sense Mobile registration or login verification. The code confirms the user’s identity before access to the mobile app is granted.

Working Event
An event representing work activity rather than absence.

Working Hours Configuration
A reusable setup defining weekly contracted hours, schedules, and multi-week rotations. Assigned to employees via Profile Planner Settings.

Workflow
An automated sequence of system actions that controls how processes operate within Sense HR.

Workflow Hub
The interface where administrators browse and install Library workflows (Sense Automate)

21.2 Appendix B. Navigation Path Reference

The table below lists all primary navigation paths used in Sense HR, grouped by module. Each path begins from the HR Dashboard. Use this as a quick reference when following step-by-step instructions throughout this manual.

Module	Navigation Path	Purpose	Section
Overview	HR Dashboard › Overview › Activity feed	View recent system activity and changes	§4.2 & §4.5
	HR Dashboard › Overview › Insights	View live company metrics	§4.2
Settings	HR Dashboard › Settings › Access Roles	Control user permissions and visibility	§6
	HR Dashboard › Settings › Bulk upload	Bulk upload tool for system set up and adding new data at scale	§3.5
	HR Dashboard › Settings › Calendar & Planner › Event Manager	Create and manage bookable events and rules	§5.7
	HR Dashboard › Settings › Calendar & Planner › General	Set company-wide calendar defaults	§5.5
	HR Dashboard › Settings › Calendar & Planner › Working hours	Define working hour schedules and patterns	§5.6
	HR Dashboard › Settings › Documents	Manage document templates	§10.8
	HR Dashboard › Settings › Documents › Add	Create a new document template	§10.8
	HR Dashboard › Settings › Screen designer	Customise profile screens and fields	§16
	HR Dashboard › Settings › Screen designer › Profile templates	Assign screens to employee groups	§16.4
	HR Dashboard › Settings › Screen designer › Screens	Build or edit data-capture screens	§16.3
	HR Dashboard › Settings › Time & Attendance	Configure clock-in and attendance options	§5.8
People	HR Dashboard › People	View the employee list	§7.1
	HR Dashboard › People › Add	Add a new employee record	§7.5
	HR Dashboard › People › [Select profile] › Documents	View or add employee documents	§10.1
	HR Dashboard › People › [Select profile] › Job details	View or edit job and role information (including reporting hierarchy)	§7.9
	HR Dashboard › People › [Select profile] › More actions (…)	Access profile actions (invite, leaver, assign access etc.)	§7.6
	HR Dashboard › People › [Select profile] › Planner › Settings	Set personal planner and entitlement settings	§7.7
	HR Dashboard › People › [Select profile] › [Select screen]	View and edit a profile screen and fields	§7.8
	HR Dashboard › People › Tile view (upper right) › Send email	Send an email to an employee	§7.1.1
Calendar	HR Dashboard › Calendar	Open the company calendar	§8.2
	HR Dashboard › Calendar › Add event	Book a new event or absence	§8.4
	HR Dashboard › Calendar › Filters	Filter calendar by groups of people or individuals	§8.6
	HR Dashboard › Calendar › [Select event in calendar]	View or manage an existing event	§8.5
To Do	HR Dashboard › To Do	View outstanding tasks and requests	§9.1

	HR Dashboard › To Do › Add task	Create a manual to-do task	§9.6
	HR Dashboard › To Do › My to dos / All to dos	Switch between personal and all tasks	§9.5
Documents	HR Dashboard › Documents	Browse company and your own personal documents	§10.1
	HR Dashboard › Documents › Add Document	Upload a new company document	§10.4
Org chart	HR Dashboard › Org chart	View the hierarchical structure of the organisation	§4.7
Reports	HR Dashboard › Reports	Access the reports module	§11.1
	HR Dashboard › Reports › All Events	View reports for and report on all calendar events	§11.6
	HR Dashboard › Reports › All Reports	View all reports	§11.10
	HR Dashboard › Reports › Attendance	View reports for and report on attendance records	§11.6.6
	HR Dashboard › Reports › Clock Message Inbox	View reports for and report on clock-in/out messages	§11.6.10
	HR Dashboard › Reports › Create	Build a new report	§11.2
	HR Dashboard › Reports › Documents	View reports for and report on document activity	§11.6.3
	HR Dashboard › Reports › Event Entitlement	View reports for and report on leave and entitlement balances	§11.6.4
	HR Dashboard › Reports › Expense	View reports for and report on submitted expenses	§11.6.8
	HR Dashboard › Reports › Payroll Extract	View reports for and report on payroll-related data	§11.6.7
	HR Dashboard › Reports › Profile Information	View reports for and report on employee profile data	§11.6.1
	HR Dashboard › Reports › Public Holiday Group Details	View reports for and report on public holiday group assignments	§11.6.11
	HR Dashboard › Reports › To Dos	View reports for and report task activity	§11.6.2
	HR Dashboard › Reports › User Activity	View reports for and audit user actions and changes	§11.6.9
	HR Dashboard › Reports › Working Hour Details	View reports for and report on working hour configurations	§11.6.12
	HR Dashboard › Reports › [Screen name]	View reports for and report on any screen data	§11.3.1

Note: Paths shown use the › separator to indicate menu navigation. [Select profile] indicates a dynamic selection based on the employee you are viewing.

21.3 Appendix C. Report Data Entity Reference

This appendix provides a complete reference for the data entities and fields available in Sense HR reports. Screen-based data entities use the fields configured on the corresponding screen, and filters are determined by the field type (text fields use a Text Rule filter, multi-select fields use a Value Selection filter, numeric fields use a Numeric Rule filter, and date fields use a Date Rule filter). These may vary between organisations if Screen Designer has been used to customise screens and therefore related screen entities. System-based data entities are auto-generated datasets based on system configurations such as events, working hours, attendance records, documents, hardware, or payroll calculations, which are documented in full below (note: while data entities are fixed, data entity fields may vary depending on system configuration)

21.3.1 C.1 Report Types and Data Entities

The following table lists each report type and its available data entities. Data entities marked as screen-based will reflect the fields currently configured on that screen. Some data entities are shared across multiple report types.

Report Type	Data Entity	Screen Based	Notes
Profile Information	People	No	
	Personal details	Yes	
	Contact details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Pay details	Yes	
	Planner configuration	No	
	Absence Impact summary (Rolling 12 months	No	
	Other contact details	Yes	
	Training	Yes	
	Benefits	Yes	
	Disciplinary & Grievances	Yes	
	Company Equipment	Yes	
	Bank details	Yes	
	PPE	Yes	
	Vehicle	Yes	
	Employment checks	Yes	
	Leaver details	Yes (System screen)	
Other contact details	People	No	
	Personal details	Yes	
	Contact details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Other contact details	Yes	
Training	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Training	Yes	
Pay details	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Pay details	Yes	

Benefits	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Benefits	Yes	
Disciplinary & Grievances	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Disciplinary & Grievance	Yes	
Job details	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
Company equipment	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Company equipment	Yes	
Bank details	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Bank details	Yes	
PPE	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	PPE	Yes	
Vehicle	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Vehicle	Yes	
Employment checks	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Vehicle	Yes	
To dos	To do	Yes (System screen)	

	Subtasks	No	
	Assignee	No	*Assignee must be included for Employment details or Job details to be available. If omitted, an error occurs when generating the report.*
	Employment details	Yes	
	Job details	Yes	
Documents	Documents	Yes (System screen)	
	Document signatories	No	
	Other Access	No	
	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
Event entitlement	Event entitlement	No	
	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
All events	All events	No	
	Date-wise event details	No	*Enriches event data with working pattern details for anomaly checking.*
	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
Time off events	Time-off events	No	
	Date-wise event details	No	
	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
Working events	Working events	No	
	Date-wise event details	No	
	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
Sickness	Sickness events	No	
	Return to work	Yes	
	Date-wise event details	No	
	People	No	

	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
Attendance	Attendance	No	
	Clock entries	No	
	Clock in & out	No	
	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
Payroll extract	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
	Pay details	Yes	
	Benefits	Yes	
	Bank details	Yes	
	Planner configuration	No	
	Work schedule	No	
	Time tracking details	No	
	Planner event summary	No	*Summarises booked event durations by type and approval status.*
Expense reports	Report Summary	No	
	Line item details	No	
	Line item comments	No	
	Mileage expenses	No	*Must include Line item details in the report.*
	Normal expenses	No	*Must include Line item details in the report.*
	People	No	
	Personal details	Yes	
	Employment details	Yes	
	Job details	Yes	
User activity	User audit summary	No	
	Field update history	No	
	Screen data snapshot	No	
	Employment details	Yes	*Links data to the impacted profile record.*
	Job details	Yes	*Links data to the impacted profile record.*
Clock message inbox	Clock messages	No	
	Employment details	Yes	
	Job details	Yes	

Public holiday group details	Public holiday group	No	
	Public holiday group details	No	
	Currently assigned to	No	
	Employment details	Yes	*Must include Currently assigned to in the report.*
	Job details	Yes	*Must include Currently assigned to in the report.*
Working hour details	Working hour	No	
	Working hour details	No	
	Currently assigned to	No	
	Employment details	Yes	*Must include Currently assigned to in the report.*
	Job details	Yes	*Must include Currently assigned to in the report.*

21.3.2 C.2 Filter Types

System-based data entity fields use one of the following filter types. Each filter type determines how data can be narrowed when building a report.

Filter Type	Description and Options
Value Selection Filter	Conditions: Equals / Not equals / Is blank / Is not blank Select one or more values from a predefined list
Text Rule Filter	Match mode: Match any / Match all Conditions: Equals / Starts with / Contains / Ends with / Not contains / Not equals / Is blank / Is not blank Enter a text value to match Additional rule conditions can be added
Numeric Rule Filter	Match mode: Match any / Match all Conditions: Equals / Less than / Greater than / Not equals / Less than or equal to / Greater than or equal to / Is empty / Is not empty Enter a numeric value for comparison filters Additional rule conditions can be added
Date Rule Filter	Match mode: Match any / Match all Conditions: Date is / Date is before / Date is after / Date is between Relative dates: Today / Tomorrow / Yesterday / This week / This month / This year / Next week / Next month / Next year / Next number of days / Last week / Last month / Last year / Last number of days / Date is blank / Date is not blank Select dates using the date picker or enter a number of days for relative filters Additional rule conditions can be added

21.3.3 C.3 System Data Entity Fields

The following tables list every field available for each system-based data entity, along with its filter type and available filter options. Each entity is presented as a separate table for clarity.

21.3.3.1 People (full - when under Profile information report type)

Field	Filter Type	Filter Options / Notes
Full name	Value Selection	Select from profile full name
Status	Value Selection	Active / Future leaver / Future starter / Leaver
Registration completed?	Value Selection	Yes / No Completed first time login on Sense HR.

Profile picture uploaded?	Value Selection	Yes / No
Age (in months)	Numeric Rule	
Age (in years)	Numeric Rule	
Length of service (in months)	Numeric Rule	
Length of service (in years)	Numeric Rule	
Profile template	Value Selection	Select from profile templates e.g. Employee, Contractor, etc.
Permission group	Value Selection	Administrators / Limited admin / Manager with indirect reports / Managers / Standard users System wording is inconsistent — also labelled as Access role.
Future leaver date	Date Rule	

21.3.3.2 People (abridged - when under any other report type)

Field	Filter Type	Filter Options / Notes
Full name (People)	Value Selection	Select from profile full name
Status (People)	Value Selection	Active / Future leaver / Future starter / Leaver
Start date of employment	No filter	
Last date of employment	No filter	

21.3.3.3 Planner configuration

Field	Filter Type	Filter Options / Notes
Working hours	Value Selection	Working hours configuration list
Working hours effective date	Date Rule	
Contracted hours	Numeric Rule	
Full time hours	Numeric Rule	
FTE	Numeric Rule	
Current week	Numeric Rule	
Working hours has pattern ?	Value Selection	Yes / No
No. of weeks in pattern	Numeric Rule	
Public holiday group	Value Selection	Select from list of Public holiday groups
Public holiday group effective date	Date Rule	
Entitlement includes public holidays ?	Value Selection	Yes / No
Auto book public holidays ?	Value Selection	Yes / No
Holiday year (Planner configuration)	Value Selection	Select from list of possible holiday years in system e.g. Jan–Dec, Apr–Mar.
Holiday year effective date	Date Rule	

21.3.3.4 Absence Impact summary (Rolling 12 months)

Field	Filter Type	Filter Options / Notes
Rolling period start date	Date Rule	
Rolling period end date	Date Rule	
Number of sickness spells	Numeric Rule	
Total spell duration	Numeric Rule	
Total spell duration (h:mm)	No filter	
Bradford factor score	Numeric Rule	Only applicable if Bradford Factor is the configured absence scheme.
Required action	Value Selection	Select from list of possible actions set in Absence scheme Configured in Settings > Calendar & Planner > General.

21.3.3.5 Leaver details

Field	Filter Type	Filter Options / Notes
Last day of employment	Date Rule	
Last working date	Date Rule	
Reason for leaving	Value Selection	Select from available reasons for leaving
Would you rehire?	Value Selection	Yes / No
Comments (Leaver details)	Text Rule Filter	
Remove system access	Value Selection	Last working date / last day of employment / Now

21.3.3.6 To do

Field	Filter Type	Filter Options / Notes
Title (To do)	Text Rule Filter	
Description	Text Rule Filter	
Category	Value Selection	Select from list of possible To Do task categories in system e.g. Expense request, Event request, New hire, Read document, Sickness, Review return to work form
System generated?	Value Selection	Yes / No
Participation type	Value Selection	Individual / Collaborative
Completion rule	Value Selection	Any one can complete / All must complete Applies to collaborative To Do tasks.
Status (To do)	Value Selection	Not started / In progress / Completed / Waiting / Archived
Archive notes	Text Rule Filter	
Date created	Date Rule	
Due on	Date Rule	
Actioned by (To do)	Value Selection	Select from list of available users
Actioned on (To do)	Date Rule	

21.3.3.7 Subtasks

Field	Filter Type	Filter Options / Notes
Title (Sub-tasks)	Text Rule Filter	
Status (Sub-tasks)	Value Selection	Not started / In progress / Completed / Waiting / Archived
Actioned by (Sub-tasks)	Value Selection	Select from list of available users
Actioned on (Sub-tasks)	Date Rule	

21.3.3.8 Assignee

Field	Filter Type	Filter Options / Notes
Assignee	Value Selection	Select from list of available profiles
Status (Assignee)	Value Selection	Not started / In progress / Completed / Waiting / Archived Reflects the To Do task status for this individual assignee.
Actioned by (Assignee)	Value Selection	Select from list of available users
Actioned on (Assignee)	Date Rule	

21.3.3.9 Documents

Field	Filter Type	Filter Options / Notes
Document name	Text Rule Filter	
Description	Text Rule Filter	
Category	Value Selection	Select from list of possible Document categories stored in system
Type	Value Selection	Personal / Company
Uploaded on	Date Rule	
Updated on	Date Rule	
Status (Documents)	Value Selection	Unread / Read pending / Read / Signature pending / Signed
Can view (Documents)	Value Selection	Yes / No
Can edit (Documents)	Value Selection	Yes / No
Requires signatures?	Value Selection	Yes / No
Multiple signatures required?	Value Selection	Yes / No Only recorded if Requires signatures is Yes.
Signature must be completed in order?	Value Selection	Yes / No Only recorded if Requires signatures is Yes.
Signature status	Value Selection	Not started / In progress / Completed Only recorded if Requires signatures is Yes.
Storage type	Value Selection	File / Link
Extension	Text Rule Filter	

21.3.3.10 Document signatories

Field	Filter Type	Filter Options / Notes
Signature order	No filter	Number indicating place in order that this signatory would sign (1 = 1st, 2 = 2nd, etc) Only recorded if Requires signatures is Yes.
Signatory name	Value Selection	Select from list of available users (populated from people who have been assigned as signatories) Only recorded if Requires signatures is Yes.
Signed status	Value Selection	Signature flow not started / Pending to be signed / Signed
Signed on	Date Rule	

21.3.3.11 Other Access

Field	Filter Type	Filter Options / Notes
User type	Value Selection	Line Manager / Specific people
Full name (Others access)	Value Selection	Select from list of users Only populated for users listed as specific people (Line Manager is listed by role only, unless also assigned by name).
Can view (Others access)	Value Selection	Yes / No
Can edit (Others access)	Value Selection	Yes / No

21.3.3.12 Event entitlement

Field	Filter Type	Filter Options / Notes
Event name	Value Selection	Select from list of event names available in system (bookable events)
Entitlement period	Text Rule Filter	
Entitlement start date	Date Rule	
Entitlement end date	Date Rule	
Is Current Year?	Value Selection	Yes / No
Is Next Year?	Value Selection	Yes / No
Recorded in	Value Selection	Days / Hours
Total entitlement duration	Numeric Rule	
Total booked duration	Numeric Rule	
Remaining entitlement duration	Numeric Rule	
Remaining entitlement (%)	Numeric Rule	
Entitlement duration	Numeric Rule	
Carryover duration	Numeric Rule	
LOS duration	Numeric Rule	
Booked duration	Numeric Rule	
Lost duration	Numeric Rule	
Automatically booked public holidays duration	Numeric Rule	
Notes (Event entitlement)	Text Rule Filter	

21.3.3.13 All events

Field	Filter Type	Filter Options / Notes
Event name	Value Selection	Select from list of event names available in system (bookable events)
Start date (All events)	Date Rule	
End date (All events)	Date Rule	
Status (All events)	Value Selection	Flow not started/ Pending / Approved / Declined / Auto-approved
Recorded in	Value Selection	Days / Hours
Duration	Numeric Rule	
Type	Value Selection	A day or less / More than a day
Booking breakdown	Value Selection	Full day / More than a day / Partial day (hours) / Partial day (shift)
Start day shift portion	Value Selection	First half of shift / Second half of shift Only applicable for partial day (shift) bookings.
End day shift portion	Value Selection	First half of shift / Second half of shift Only applicable for partial day (shift) bookings.
Start time	No filter	Only present for partial day (hours) bookings.
End time	No filter	Only present for partial day (hours) bookings.
Comments	Text Rule Filter	

21.3.3.14 Date-wise event details

Field	Filter Type	Filter Options / Notes
Date-wise breakup	Date Rule	
Date-wise duration	Numeric Rule	Duration per date of the event.
Is working day?	Value Selection	Yes / No
Is public holiday?	Value Selection	Yes / No
Schedule start time	No filter	
Schedule end time	No filter	
Schedule break duration (in mins)	Numeric Rule	
Schedule duration (days)	Numeric Rule	
Schedule duration	Numeric Rule	
Schedule duration (h:mm)	No filter	
Schedule duration (in mins)	Numeric Rule	

21.3.3.15 Time-off events

Field	Filter Type	Filter Options / Notes

Event name	Value Selection	Select from list of event names available in system (bookable time-off events)
Start date (Time-off events)	Date Rule	
End date (Time-off events)	Date Rule	
Status (Time-off events)	Value Selection	Flow not started/ Pending / Approved / Declined / Auto-approved
Recorded in	Value Selection	Days / Hours
Duration	Numeric Rule	
Type	Value Selection	A day or less / More than a day
Booking breakdown	Value Selection	Full day / More than a day / Partial day (hours) / Partial day (shift)
Start day shift portion	Value Selection	First half of shift / Second half of shift
End day shift portion	Value Selection	First half of shift / Second half of shift
Start time	No filter	
End time	No filter	
Comments	Text Rule Filter	

21.3.3.16 Working events

Field	Filter Type	Filter Options / Notes
Event name	Value Selection	Select from list of event names available in system (bookable working events)
Start date (Time-off events)	Date Rule	
End date (Time-off events)	Date Rule	
Status (Time-off events)	Value Selection	Flow not started/ Pending / Approved / Declined / Auto-approved
Recorded in	Value Selection	Days / Hours
Duration	Numeric Rule	
Type	Value Selection	A day or less / More than a day
Booking breakdown	Value Selection	Full day / More than a day / Partial day (hours) / Partial day (shift)
Start day shift portion	Value Selection	First half of shift / Second half of shift
End day shift portion	Value Selection	First half of shift / Second half of shift
Start time	No filter	
End time	No filter	
Comments	Text Rule Filter	

21.3.3.17 Sickness events

Field	Filter Type	Filter Options / Notes
Event name	Value Selection	Select from list of event names available in system (bookable sickness events)
Reason	Value Selection	Select from list sickness reasons available in system

Start date (Sickness events)	Date Rule	
End date (Sickness events)	Date Rule	
Status (Sickness events)	Value Selection	Flow not started/ Pending / Approved / Declined / Auto-approved
Recorded in	Value Selection	Days / Hours
Duration	Numeric Rule	
Type	Value Selection	A day or less / More than a day
Booking breakdown	Value Selection	Full day / More than a day / Partial day (hours) / Partial day (shift)
Start time	No filter	
End time	No filter	
Comments (Sickness events)	No filter	

21.3.3.18 Attendance

Field	Filter Type	Filter Options / Notes
Attendance date	Date Rule	
Earliest in	No filter	
Latest out	No filter	
Duration	Numeric Rule	
Duration (h:mm)	No filter	
Duration (in mins)	Numeric Rule	
Break time (in mins)	Numeric Rule	
Is working day?	Value Selection	Yes / No
Is public holiday?	Value Selection	Yes / No
Schedule start time	No filter	
Schedule end time	No filter	
Schedule break time (in mins)	Numeric Rule	
Schedule duration (days)	Numeric Rule	
Schedule duration	Numeric Rule	
Schedule duration (h:mm)	No filter	
Schedule duration (in mins)	Numeric Rule	
All clock entries	No filter	
Remarks	Text Rule Filter	
Anomalies	Text Rule Filter	
Is attendance verified?	Value Selection	Yes / No
Verifier remarks	Text Rule Filter	
Is seen by gateway?	Value Selection	Yes / No
First seen	No filter	Only populated if seen by a Sense Presence gateway.
Last seen	No filter	Only populated if seen by a Sense Presence gateway.
Gateway Id	Text Rule Filter	Only populated if seen by a Sense Presence gateway.

21.3.3.19 Clock entries

Field	Filter Type	Filter Options / Notes
Clock type	Value Selection	In / Out
Clock time	No filters	
Is overnight entry?	Value Selection	Yes / No
Days from attendance date?	Numeric Rule	
Clock serial number	No filter	Only populated if applicable.
Latitude	No filter	
Longitude	No filter	
Source	Text rule filter	Indicates the clock method used (e.g. Web, Mobile, Clock).

21.3.3.20 Clock in & out

Field	Filter Type	Filter Options / Notes
Clock entry number	No filter	
Clock in time	No filter	
Clock out time	No filter	
Clock duration	Numeric Rule	
Clock duration (h:mm)	No filter	
Clock duration (in mins)	Numeric Rule	

21.3.3.21 Work schedule

Field	Filter Type	Filter Options / Notes
Date	Date Rule	
Is working day?	Value Selection	Yes / No
Is public holiday?	Value Selection	Yes / No
Schedule start time	No filters	
Schedule end time	No filters	
Schedule break time (in mins)	Numeric Rule	
Schedule duration (days)	Numeric Rule	
Schedule duration	Numeric Rule	
Schedule duration (h:mm)	No filters	
Schedule duration (in mins)	Numeric Rule	

21.3.3.22 Time tracking details

Fields in this entity are auto-calculated against real clock in/out events and calendar bookings, for comparison and validation against their non-time-tracking counterparts.

Field	Filter Type	Filter Options / Notes
Is attendance recorded?	Boolean Filter	
Earliest in	No filters	
Latest out	No filter	
All clock entries	No filters	
Attendance remarks	Text Rule Filter	
Anomalies(notes: e.g. Missing clock out to calculate duration)	Text Rule Filter	
Is attendance verified?	Boolean Filter	
Verifier remarks	Text Rule Filter	
Gross worked duration	Numeric Rule	
Gross worked duration (h:mm)	No filter	
Gross worked duration (in mins)	Numeric Rule	
Net worked duration	Numeric Rule	
Net worked duration (h:mm)	No filter	
Net worked duration (in mins)	Numeric Rule	
Duration	Numeric Rule	
Duration (h:mm)	No filter	
Duration (in mins)	Numeric Rule	
Break time (in mins)	Numeric Rule	
Gross overtime duration	Numeric Rule	
Gross overtime duration (h:mm)	No filter	
Gross overtime duration (in mins)	Numeric Rule	
Net overtime duration	Numeric Rule	
Net overtime duration (h:mm)	No filter	
Net overtime duration (in mins)	Numeric Rule	
Overtime duration (Time tracking details)	Numeric Rule	
Overtime duration (h:mm) (Time tracking details)	No filter	
Overtime duration (in mins) (Time tracking details)	Numeric Rule	
Holiday duration (in days) (Time tracking details)	Numeric Rule	
Holiday duration - pending (in days)	Numeric Rule	
Holiday duration - approved (in days)	Numeric Rule	
Holiday duration (in hrs)	Numeric Rule	
Holiday duration - pending (in hrs)	Numeric Rule	
Holiday duration - approved (in hrs)	Numeric Rule	

Mat/Pat duration (in days)	Numeric Rule	
Mat/Pat duration - pending (in days)	Numeric Rule	
Mat/Pat duration - approved (in days)	Numeric Rule	
Mat/Pat duration (in hrs)	Numeric Rule	
Mat/Pat duration - pending (in hrs)	Numeric Rule	
Mat/Pat duration - approved (in hrs)	Numeric Rule	
Other leave types	Numeric Rule	
Other leave duration (in days)	Numeric Rule	
Other leave duration - pending (in days)	Numeric Rule	
Other leave duration - approved (in days)	Numeric Rule	
Other leave duration (in hrs)	Numeric Rule	
Other leave duration - pending (in hrs)	Numeric Rule	
Other leave duration - approved (in hrs)	Numeric Rule	
Sickness reason	Numeric Rule	
Sick duration (in days)	Numeric Rule	
Sick duration - pending (in days)	Numeric Rule	
Sick duration - approved (in days)	Numeric Rule	
Sick duration (in hrs)	Numeric Rule	
Sick duration - pending (in hrs)	Numeric Rule	
Sick duration - approved (in hrs)	Numeric Rule	
Is seen by gateway?	Boolean Filter	
First seen	No filters	
Last seen	No filters	
Gateway Id (notes: Only useful if Sense Presence Gateways are active)	Text Rule Filter	

21.3.3.23 Planner event summary

Pending status means the event has been booked but not yet approved. Duration fields labelled '(in days)' calculate duration relative to the person's configured working hours.

Field	Filter Type	Filter Options / Notes
Payroll Status	Value Selection	Pending, Approved
[Event] duration (in days)	Numeric Rule	Each event configured in the system generates its own column, displaying duration in days
[Event] duration	Numeric Rule	Each event configured in the system generates its own column, displaying duration

[Event] duration (h:mm)	No filter	Each event configured in the system generates its own column, displaying duration in h:mm

21.3.3.24 Report Summary

Field	Filter Type	Filter Options / Notes
Report name	Text Rule Filter	
Submitted on	Date Rule	
Status (Report summary)	Value Selection	Pending / Approved / Declined / Auto-approved / Requires resubmission
Currency (Report summary)	Select from list of available currency codes	
Amount (Report summary)	Numeric Rule	
Notes (Report summary)	Text Rule Filter	

21.3.3.25 Line item details

Field	Filter Type	Filter Options / Notes
Date	Date Rule	
Name	Text Rule Filter	
Notes (Line item details)	Text Rule Filter	
Category (Line item details)	Value Selection	Select from list of expense categories
Type	Value Selection	Mileage expenses / Normal expenses
Receipts attached?	Boolean Filter	
Supplier (Line item details)	Text Rule Filter	
VAT Amount (Line item details)	Numeric Rule	
Amount (Line item details)	Numeric Rule	

21.3.3.26 Line item comments

Field	Filter Type	Filter Options / Notes
Comments	Text Rule Filter	
Added on	Date Rule	
Added by	Value Selection	Select from available users

21.3.3.27 Mileage expenses

Field	Filter Type	Filter Options / Notes
Expense name (Mileage Expenses)	Text Rule Filter	

Expense date (Mileage Expenses)	Date Rule	
Mileage	Numeric Rule	
Rate	Value Selection	Select from list of rates (e.g. 0.25, 0.45, 0.5, 0.75, 1)
Total Amount (Currency) (Mileage Expenses)	Value Selection	Select from list of currency codes
Total Amount (Mileage Expenses)	Numeric Rule	
VAT Amount (Currency) (Mileage Expenses)	Value Selection	Select from list of currency codes
VAT Amount (Mileage Expenses)	Numeric Rule	
Category (Mileage Expenses)	Value Selection	Select from list of expense categories
Notes (Mileage Expenses)	Text Rule Filter	

21.3.3.28 Normal expenses

Field	Filter Type	Filter Options / Notes
Expense name (Normal Expenses)	Text Rule Filter	
Expense date (Normal Expenses)	Date Rule	
Total Amount (Currency) (Normal Expenses)	Value Selection	Select from list of currency codes
Total Amount (Normal Expenses)	Numeric Rule	
VAT Amount (Currency) (Normal Expenses)	Value Selection	Select from list of currency codes
VAT Amount (Normal Expenses)	Numeric Rule	
Supplier (Normal Expenses)	Text Rule Filter	
Category (Normal Expenses)	Equals / Not equals / Is empty / Is not empty	Select from list of categories
Notes (Normal Expenses)	Text Rule Filter	

21.3.3.29 User audit summary

Field	Filter Type	Filter Options / Notes
Audit #	System generated (no filter)	
Actioned on	Date Rule	
Actioned by	Value Selection	Select from available user names
User action	Value Selection	Select from: Leaver status undone / Personal document added / Personal document signed / Profile entitlement summary updated / Profile picture updated / Profile planner configuration updated / Profile template migrated / Profile updated (via profile) / User added / User deleted / User marked as Leaver

Type of action	Value Selection	Select from: Added / Updated / Deleted / Reassigned / Renamed / Approved / Submitted / Resubmitted / Signed
Profile	Value Selection	Select from list of profiles
Screen	Value Selection	Select from list of Screens
Screen record #	Value Selection	Select from list of Screen record numbers (system generated)
Fields changed	Text rule filters	For screens, list of fields that we re modified
What changed?	Text rule filters	Text summary with actual data updates e.g. Automatically book public holidays: → false Contracted hours: → 40.00 Full time hours: → 35.00 Holiday year: → Jan - Dec Included in their given entilement: → false Public holiday group: → England & Wales Public holiday group effective date: → 2025-11-17 Starting week: → 1 Working hours: → Mon - Fri (40 Hrs) Working hours effective date: → 2025-11-17
User comments	Text rule filters	

21.3.3.30 Field update history

Field	Filter Type	Filter Options / Notes
Field name (Field update history)	Text rule filters	
Old value	Text rule filters	
Field value (Field update history)	Text rule filters	

21.3.3.31 Screen data snapshot

Field	Filter Type	Filter Options / Notes
Field name (Screen data snapshot)	Text rule filters	
Field value (Screen data snapshot)	Text rule filters	

21.3.3.32 Clock messages

Field	Filter Type	Filter Options / Notes
Received at	Date Rule	
Status	Value Selection	Received / Processed / Rejected / Discarded / Failed
NFC card ID	Text rule filters	
Details	Text rule filters	
Profile	Value Selection	Select from list of profiles
Clock serial number	Text rule filters	
Clock timestamp	Date Rule	
Processed at	Date Rule	

21.3.3.33 Public holiday group

Field	Filter Type	Filter Options / Notes
Holiday group	Value Selection	Select from list of public holiday groups
Holidays (this year)	Numeric Rule	Count of public holidays defined in template definition
Holidays (next year)	Numeric Rule	Identified if in future, based on report run date
Holidays (year after next)	Numeric Rule	
Created by	Text rule filters	e.g. System
Created on	Date Rule	
Updated by	Text rule filters	e.g. System
Updated on	Date Rule	

21.3.3.34 Public holiday group details

Field	Filter Type	Filter Options / Notes
Holiday name	Text rule filters	
Holiday date	Date Rule	
Day of week	Value Selection	Select from days of the week
Is weekend?	Boolean Filter	Public holiday is on Sat/Sun
Is upcoming?	Boolean Filter	

21.3.3.35 Currently assigned to

Field	Filter Type	Filter Options / Notes
People	Value Selection	Select from list of profiles
Effective from	Date Rule	

21.3.3.36 Working hour

Field	Filter Type	Filter Options / Notes
Working hour name	Value Selection	Select from working hours configurations list
Description	Text rule filters	
Contracted hours	No filters	
Has pattern?	Boolean Filter	
Pattern defined as	No filter	Daily hours / Daily times
Deduct breaks?	Boolean Filter	
Is it multi-week pattern?	Boolean Filter	
Pattern start day	Value Selection	Select from days of the week

Created by	Text rule filters	e.g. System
Created on	Date Rule	
Updated by	Text rule filters	e.g. System
Updated on	Date Rule	

21.3.3.37 Working hour details

Field	Filter Type	Filter Options / Notes
Week number	Numeric Rule	
Day of week	Value Selection	Select from days of the week
Is working day?	Boolean Filter	
Duration (in days)	No filter	
Start time	No filter	
End time	No filter	
Break time	No filter	
Duration	No filter	
Duration (h:mm)	No filter	
Duration (in mins)	No filter	

21.4 Appendix D. Icon Reference

This appendix provides a visual reference for the icons used throughout Sense HR and AMI. Icons are grouped by purpose: navigation and module icons, action icons, status indicators, text formatting controls, Screen Designer field types, and AMI-specific icons. Where an icon serves multiple purposes depending on context, this is noted in the description.

21.4.1 Navigation & Modules

Icons representing the main modules and sections in the left-hand navigation bar.

Icon	Name	Where You See It	What It Does
	**Dashboard**	Left hand navigation	Represents dashboard on collapsed left-hand navigation bar. Click to return to dashboard
	**Documents**	Documents module Documents widgets	Represents the Documents module in the collapsed left-hand navigation bar
	**Orgchart**	Org Chart	Represents the Org chart in the collapsed left-hand menu
	**People**	People module	Represents the People module in the collapsed left-hand navigation menu Also used to represent groups of people in some areas (i.e. org chart department)
	**Tasks**	To Do	Represents To Do in the collapsed left hand navigation menu
	**Timesheets**	Time and Attendance settings	

21.4.2 Action Icons

Icons that trigger an action when clicked. These appear throughout the system.

Icon	Name	Where You See It	What It Does
	Category	Tile view for People list	Click to view People in tile view
	Chart Pie	Reports	Click to open charts
	Chevron Down	Dropdown menus	Click to open dropdown
	Chevron Left	Inside a profile (upper right) Inside Calendar module and Profile Planner	In a profile, click to scroll to previous profile entry (alphabetical or reverse alphabetical depending on how list is sorted) In Calendar and Profile Planner, click to scroll to previous day, week, or year depending on view.
	Chevron Right	Inside a profile (upper right) Inside Calendar module and Profile Planner In lists the right chevron indicates further options In breadcrumbs or navigation paths denotes next page or step	In a profile, click to scroll to next profile (alphabetical or reverse alphabetical depending on how list is sorted) In Calendar and Profile Planner, click to scroll to next day week, or year depending on view In lists, click to expand further options
	Chevron Up	Dropdown menus	Click to close dropdown
	Close	Appears for close or remove	Closes UI containers (modals, dialogs, panels) or removes items such as filters, tags, or selections
	Dots Horizontal	The last column in lists/tables. Upper right inside any profile for more profile actions.	More actions menu. Click to expand options
	Download	Appears anywhere in the system where a download option is available	Click to download
	Edit	Anywhere that an item can be directly edited	Click to edit
	Filter	To Do list columns Profile table screen columns Document list columns Report list columns	
	Help	Appears anywhere that help option are available	Hover over or click for help text
	List	People list view option. List style for in-app document editor.	Click for list view in People. Click to activate list style when using in-app document editor
	Logout	Sense Mobile	Click to logout
	Open	Open or open in a new window (for example, inside a document)	
	Out	Throughout the system to exit a process	Click to exit
	Pencil	Bulk upload	Click to edit a record during data validation in the bulk upload tool
	Permanently Delete	Used throughout the system to define a permanent deletion	Click to permanently delete an item
	Plus	Throughout the system to add a new option	Click to add

	Search	Search boxes wherever they appear in the system	Click inside box to begin typing a search term Press return to search
	Sort	To Do list columns Profile table screen columns Document list columns Report list columns	
	Sort Down	To Do list columns Profile table screen columns Document list columns Report list columns	Click to sort alphabetically from A-Z or numerically from low to high
	Sort Up	To Do list columns Profile table screen columns Document list columns Report list columns	Click to sort alphabetically from Z-A or numerically from high to low
	Trash	Used throughout the system to delete or remove items	Click to delete or remove (permanent deletion is accompanied by a confirmation modal)
	Unfilter	To do list (upper left) Profile table screens Document list (upper left) Report list and individual reports	
	Upload/ Export	Appears anywhere in the system where upload or export options are available	Click to export or upload
	Zoom In	Throughout system	Click to zoom in
	Zoom Out	Throughout system	Click to zoom out

21.4.3 Status & Indicators

Icons that convey status, state, or contextual information. These are typically not clickable.

Icon	Name	Where You See It	What It Does
	Bell		Indicates notifications
	Completed	Used in completion notification popups and to indicate success status in processes such as bulk upload	Indicates completion or success
	Exclamation	Warnings Toast notifications Errors	Click or hover over to see more information and resolve
	Goals	Calendar – bank holidays Planner – bank holidays	
	Group	Access roles. Dashboard widgets that represent groups or teams. Department.	Denotes a group of people
	Information	Throughout the system where there is additional information about an item	Hover over to read additional information
	Location	Profile overview for a person's location Org chart for a person's primary location	Represents location items

	Lock	Used in Screen designer and Calendar (lock days) and anywhere options are locked or limited within the system	Denotes limited editing or customisation options
	Newspaper	Activity feed (dashboard overview)	
	RSS	ATS	Used to denote an RSS feed or link
	RTW	Return to work	
	Timer	To do list Calendar and Profile Planner	Highlights overdue tasks in the To Do list (red) Shows attendance logs in the Calendar (lilac)

21.4.4 Text Formatting

Icons found in rich text editors and the in-app document editor.

Icon	Name	Where You See It	What It Does
	Background colour	Option is rich text editors (including in-app document editor)	Click to choose text background colour
	Bold	Option is rich text editors (including in-app document editor)	Click to activate Bold text
	Bulleted List	Option is rich text editors (including in-app document editor)	Click to format as bulleted list
	Code	Option is rich text editors (including in-app document editor)	Click to format text as a codeblock
	Editor Drop	Control in rich text editors (including in-app document editor)	Click open dropdown options
	Italic	Option is rich text editors (including in-app document editor)	Click to activate Italicise text
	Mark Header	Screen designer field Screen designer Mark as column header	Represents a static header field or, Click to mark any field as a column header (makes the field a column header in table-type screens)
	Numbered List	Option is rich text editors (including in-app document editor)	Format as numbered list
	Paragraph Editor	Option is rich text editors (including in-app document editor)	Click to open alignment options
	Paragraph Justify	Option is rich text editors (including in-app document editor)	Click to justify text
	Paragraph Left	Option is rich text editors (including in-app document editor)	Click to left align text
	Paragraph Right	Option is rich text editors (including in-app document editor)	Click to right align text
	Picture	Option is rich text editors (including in-app document editor)	Click to insert an image
	Remove Header	Screen designer remove field as column header field setting	Removes the field as a headed column in a table screen.
	Text X	Option is rich text editors (including in-app document editor)	Click to clear all text formatting and return to plain text
	Underline	Option is rich text editors (including in-app document editor)	Click to activate underline text

	Underline Colour	Option is rich text editors (including in-app document editor)	Click to choose an underline colour for text

21.4.5 Screen Designer Fields

Icons representing field types and settings in the Screen Designer feature.

Icon	Name	Where You See It	What It Does
	Attachment	Anywhere you can add an attachment (i.e. in AMI chat to attach a doc or file) Also as a Screen Designer field	Click to add an attachment In screen designer use to add your own attachment field to a customised standard screen or customised screen.
	Calendar	Calendar module Calendar widgets Also in screen designer fields	Represents the main Calendar module or a calendar or date. In screen designer use to add a date picker field to you customised standard screen or custom screen
	Clock	Screen designer field	Use to add a time picker field to your customised standard screen or custom screen
	Dropdown	Screen designer field	Represents a dropdown options field and a checkbox options field which can be added to the screen
	GBP	Anywhere in the system for GBP specific or general currency items Screen designer field	In Screen designer use to add a currency field to your screen.
	Link	URL link references Screen designer field Option is rich text editors (including in-app document editor)	Denotes a URL link anywhere it's used in the system Use in Screen designer to add a link field to a screen In rich text editors click to insert a link
	Mail	Send an email in tile view of People list Profile overview for a person's email address Screen designer field	In the People list – tile view, click to open you're preferred email service and send an email to the registered email address of the person listed. Denotes email address in other areas of the system. Use In screen designer to add an email field to your screen
	Number	Screen designer field	Use to add a number field to your custom or customised screen
	Paragraph	Screen Designer field	Represents text box (multi-line input)
	Phone	Profile overview for a person's phone number Screen designer field	Denotes telephone number in various areas of the system. Use In screen designer to add an telephone number field to your screen
	Profile Templates	Screen settings for screen designer feature	Denotes Profile template settings – click to open
	Radio	Screen designer field	Represents a radio type options field that can be added to a screen
	Regex	Screen designer field (Text validator)	Represents a text field that validates against defined regex field properties
	Screen Designer	Screen designer feature	Denotes the screen designer feature – click to open
	Screens	Screen settings for screen designer feature	Click to enter screen settings area

	Text	Screen Designer field	Represents text fields (single line input)
	Toggle	Item that can be switched on or off Screen designer field	Grey = switched off/ Coloured = switched on Use in screen designer to add an ON/OFF toggle to your screen
	User	Anywhere in the system that relates to as specific user Screen designer field	In screen designer use to add a user picker to your screen. Will populate with all current system users.

21.4.6 AMI

Icons specific to AMI, the AI assistant integrated into Sense Workplace.

Icon	Name	Where You See It	What It Does
	Agent select	AMI agent select icon	In AMI, click to select from available agents
	Arrow Up	AMI Bulk upload	Send message to AMI in a chat Indicates uploading in bulk upload tool
	Bolt	AMI	Indicates token usage statistics
	Copy	AMI	Click icon on at the lower-felt of any message from AMI to copy the text to clipboard
	Form	AMI	Click to summarise chat with AMI
	Picture (2)	AMI	Click to create an image with AMI
	Save	AMI	Click to save agent selection
	Sparkles	Generic icon symbolizing AI throughout Sense Workplace products.	Signifies AI powered features, options, and tools