ZOHO PEOPLE PARTNER TRAINING:

LEVEL 2 TRAINING USE CASES

Organization:

- Domain verification
- Invite users
- Add users
- Sync (3 types)
- Add employee profile and convert to user
- Location-based admin
- Department and Designation

Tasks

Use case 1

- Create a probation form.

- Use auto number and all necessary fields. Include tabular and linear sections.

- Probation completion date must be automatically calculated as six months from the joining date.

- When an employee profile is selected, their reporting manager should be listed.

- It should not be possible to use the same name or email address as another record.

- Set a permission so that team members can only add or view their records, while reporting managers can modify them.

- Add an approval setting in the form which must be approved by a reporting manager and an HR manager.

- The employee should automatically receive an email alert once their probation is confirmed.

Use case 2

- Form 1: **Travel form**

- Create a travel request form.

- Enable auto numbering.

- Add from and to date fields.

- The duration of the trip should be calculated automatically.

- Set an approval to be authorized by both the reporting manager and travel department.

- Set per diem eligibility to $40

- The same name and travel location cannot be entered more than once.

- Form 2: **Travel Reimbursement**

- Details from the travel form should only be extracted from records which are approved.

- Automatically display the total number of days and average expenses per day in the form.

- All expenses should be recorded in the tabular section.

- Set an approval to be authorized by both the manager and travel team.

Refer to this link for more information on forms

Leave Tracker:

- During their first year, an employee should be credited with a total of 12 leave days a year (1 day a month).From their second year, they should be credited 24 leave days a year (2 days a month), accrued on monthly basis. Employees can cash out leave at 50%.

- If an employee's leave request exceeds 10 days, the weekend and holidays should be considered as leave.

- Maternity leave should only be visible for female employees. An employee can take no more than four months of maternity leave a year.

- Request compensatory time off and use it on a different date.

- Create a leave type that only becomes available to an employee 6 months after their joining date.

- For any leave type, apply leave for the first quarter of the day and OD in the last quarter of the same day.

- If a holiday is created for an employee's shift and another holiday is created for their location on the same day, which is given priority?

Refer to this link for more information on the Leave Tracker

Attendance:

- Set up the attendance settings so that an employee can only check in up to 30 minutes late to the office 3 times a month. After this, their attendance will be marked as a half day.

- Try out these actions from an employee perspective: Add attendance entry, regularization for an absent day, import check-in/out, checking in with a mobile application.

- If a manager is located in time zone A and a team member is located in time zone B, how will the manager mark the attendance for their subordinate? How will the subordinates' entries be viewed by the manager?

- Create a weekly rotation shift where Monday–Friday shift timings are 09:00–18:00 and Saturday is 9:00–16:00

- Create three shifts: General, US shift, and AUS shift. Schedule a shift for a department which changes every month.

- Try implementing the following scenario: An employee is working the general shift and due to company policy, they need to be moved to the night shift for a particular week. They will go back to the general shift after this one week.

Refer to this link for more information on attendance

Time Tracker:

- Create timesheets using four different billing methods and analyze the difference between them.

- Use the scheduler settings to submit time logs automatically.

- Create a timesheet and approve it partially.

- What happens if the timesheets for three projects with three different project managers for the same client are submitted simultaneously?

Refer to this link to learn more about the Time Tracker

Performance Management System:

- Create an appraisal cycle based on the user and manager. This has to be reviewed separately.

- Create an appraisal with KRA vs goals, include multi-rater feedback for an employee and a reporting manager. Create an extended review for 2 days if a condition is not satisfied.

- Who can publish a reviewed appraisal?

- A user's salary is $30,000 and after appraisal the salary should increase to $35,000.

- A review period ended yesterday and there are 10 employees yet to be reviewed. How can these employees be reviewed?

Refer to this link to learn more about performance

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