



Deliver the best employee experience by training in Zoho People

(Advanced)



About

Designing a simplified and automated human resources management system (HRMS) structures your organization's people operations. The advanced training is aimed at helping your organization's HR team gain a complete understanding of Zoho People, so they can streamline your organization's entire people-management processes and drive your business forward.

Who's it for?

This training is designed for the HR team of your organization to gain expertise in Zoho People and streamline the daily operations.

Learn to build a seamless onboarding process, manage your organization's employee database, track time logs/leaves, evaluate employees' performance, create a learning management module for training, handle queries efficiently, integrate with third-party applications and automate the system as a whole.



ADVANCE : 12 hrs

DAY 01: 4 hrs (including break)

Employee database

This module shows how to set up your employee details in Zoho People so you can give them access to the system.

Users addition	Create the employee IDs to access Zoho People.
Employee details import	Add the personal details of each employee.
Employee profiles import	Add the employee details who don't have access to Zoho People.
Employee form customization	Customize fields to add relevant employee details.



Leave management

This topic covers the configurations for incorporating your organization's leave policies.

Leave type configuration	Add the leave types and set the applicability.
Balance customization	Importing the leave balance for all employees.
Holidays	Set up the holiday calendar for different shifts and locations.
Leave approvals	Streamline the approval flow for leaves.
Compensatory requests	Create the compensatory time-off policies.



Attendance

This module helps you build an accurate and user-friendly attendance management system that tracks your employees' time and attendance in an efficient way.

Shift management	Create shifts for mapping employees' attendance
Biometric integration	Integrate attendance devices to sync your organization's entries.
Attendance approvals	Configure approval flows for attendance.
IP and geographic restrictions	Set up IP and location-based restrictions for attendance.



Documents management

This module will help you create a centralized repository for storing and accessing files.

Organization files	Add generic organizational files for employees to access.
Employee files	Store and share employee-specific files.
General settings	Configure permissions based on roles.



ADVANCE : 12 hrs

DAY 02: 4 hrs (including break)

Candidate onboarding

This topic covers setting up the onboarding flow for the new hires joining your organization.

Candidate form customization	Customize the fields to be filled by candidates for onboarding.
Candidate onboarding flow	Organize the candidate onboarding portal.
E-sign for documents	Integrate the e-sign application with Zoho People to sign the documents.



Employee onboarding

This topic covers setting up the onboarding flow for newly converted employees.

Employee onboarding flow	Set up the employee onboarding process.
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Time tracker

This module helps you design an efficient time management system that allows employees to record and track the time spent on various projects/jobs.

Scheduler	Create schedulers with frequencies for processing timesheets.
Billing and payroll settings	Set the cost and the billing cycle.
Timesheet approvals	Configure the approval flows for timesheets.



Automation

This topic helps you automate notifications, tasks, reminders, and updates to ensure your data is always timely and complete.

Workflows	Customize workflows for your daily HR operations.
Actions	Create alerts and custom functions for various HR use cases.



ADVANCE : 12 hrs

DAY 03: 4 hrs (including break)

Performance management

This module shows you how to set various tools to measure and evaluate employee performance.

Performance modules	Set the methods to evaluate your employees.
Appraisal process	Create the appraisal cycle period and the appraisal type.
Continuous reviews	Set the frequency and the goals for the reviews.
Feedback	Configure the feedback type and categories.



Learning management system

This topic covers the basics of setting up courses and training for upskilling employees in the organization.

Courses	Add various courses based on roles or domains.
Assessments	Create tests or assessments to evaluate the employee's understanding of a course.
Grading	Configure a grading system for the assessments.
Approvals	Design the approval flow for the graded assessments.
LMS integrations	Set up the integration with performance management and onboarding.



Cases

This module helps you build a help desk for employees to ask their questions.

Categories	Create divisions to tag and ask questions.
SLA	Define timelines and an escalation matrix for closing a case.
Feedback	Design feedback settings to collect responses from employees.

Integrations

This topic gives you insights about the integrating Zoho People with other available applications.

Zoho	Choose and connect with the Zoho applications based on your usage.
Others	Establish the connection between Zoho People and payroll/sign/conferencing platforms.

