



Deliver the best employee experience by training in Zoho People

(Intermediate)



About

Designing a simplified and automated human resources management system (HRMS) structures your organization's people operations. The intermediate training will give you deeper insights on Zoho People's features so you can manage your employees' onboarding, leaves, and attendance efficiently.

Who's it for?

This course is developed for the HR team of your organization to gather extensive insights about the features of Zoho People. Along with managing your company's employee database, leaves and attendance, you can structure a seamless onboarding process for your employees, track time logs, build your exit policies, and automate the system completely.



INTERMEDIATE : 8 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.



INTERMEDIATE : 8 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.
---------------------------------	---

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.

