

About Zeta Softwares Company

Zeta Softwares: Empowering businesses with smart ERP & HRMS software, with 25 Years of Domain Expertise, and Trusted by 20+ Countries, used by 200 Thousand Users Globally.

What products or services does Zeta company provide?

Zeta Software is a software product company specialized in development of cutting-edge ERP and HRMS software globally since 1998. Zeta Software also provides custom software solutions for businesses on web and mobile platforms using their exclusive technology development partner – BETA Technologies. The latest addition to BETA technology services are AI integration and development for products and solutions. Zeta Softwares have garnered the trust and goodwill of over 2000 customers spanning across 20 countries. Our impact is felt by over 10,000 core users and an impressive network of over 2,00,000 ESS users worldwide. If you would like to know more, please feel free to reach out to our sales team at sales@zetasoftware.com

ZetaHRMS – System Guide, Help Document and FAQs

What is ZetaHRMS?

ZetaHRMS is one of the most popular product launched by Zeta Softwares. It is a centralized software system for HR Admin users managing an organization's fundamental HR tasks, acting as a single source for employee data, payroll, time tracking, leave management, onboarding, and compliance, replacing manual processes like spreadsheets to streamline daily operations, improve accuracy, and provide data insights for better decision-making. The ZetaHRMS application forms the backbone of HR functions, ensuring efficient, compliant management of the entire employee lifecycle. ZetaHRMS has a separate Employee Self Service Portal that is served through a web application named ZetaHRMS ESS Application. ZetaHRMS also serves a separate mobile app for both Apple and Android Devices named as ZETAHRMS in the AppStore and PlayStore respectively.

Note: This document acts as a system guide for ZetaHRMS Core Application which is used by HR Administrators. This document does not include functionality or related system information of ESS Application and ZetaHRMS mobile apps.

Key Functions & Features

- **Employee Data Management:** Centralized, secure storage of all employee information including documents (digital records).
- **Payroll & Benefits:** Automated processing and administration of salaries, taxes, and benefits.
- **Attendance Management:** Create Attendance Rules, Tracking work hours, managing time-off requests, and shift management.
- **Leave Management:** Create and defined leave types, leave rules and managing leave related configurations.
- **Recruitment & Onboarding:** Streamlining the new hire process from recruitment until onboarding employees
- **Employee Docs:** Organizing HR documents and employee files.
- **Compliance:** Ensuring adherence to labor laws and internal regulations.
- **Employee Self-Service (ESS):** Portal management for employees to access their data and perform HR tasks.
- **Reporting & Analytics:** Generating insights from HR data to support strategic goals.

Why It's Important? Advantages of ZetaHRMS

- **Efficiency:** Automates repetitive tasks, saving time and reducing errors.
- **Accuracy:** Creates a reliable, single source of truth for employee data.

- **Compliance:** Helps meet legal requirements and reduces risk.
- **Strategic Focus:** Frees HR professionals from admin to focus on strategic initiatives.
- **Employee Experience:** Provides better access to information and streamlined processes for employees.

Basic Navigation Guide – Primary Modules / Second Level Sub-Menu Items / Third Level Items

ZetaHRMS follows a **standard menu structure** for all its modules as follows - **Primary Modules / Second Level Menu Items / Third Level Menu Items**. The parent module or parent menu refers to the primary modules which exists in ZetaHRMS.

A) The primary modules are the first level parent menus in the application sidebar on the left side of the application screen. Following are the list of all primary modules of the ZetaHRMS.

1. Core HR
2. Attendance Management
3. Compensation Management
4. Leave Management
5. Payroll
6. Recruitment
7. ESS Management
8. Performance Management
9. Project Costing
10. Loan Management
11. Learning and Development
12. Employee Docs
13. Asset Management
14. Analytics & Reporting
15. System Manager

The Parent menus are displayed in the application are subject to the registration and licensing of the primary module. If a customer has not purchased a particular module, then users will not be able to view that particular modules' parent menu in their application sidebar. If any user is not able to view a parent menu item of a primary module which is already purchased, then contact Zeta Support for the module access update.

Dashboard is the only page that exists as a parent menu without any child menus in ZetaHRMS. The default page that loads after the user login the ZetaHRMS Dashboard screen.

B) Second Level Menu Items:

All the parent menu items, meaning the primary modules which exist in ZetaHRMS has 4 second level sub-menus that exist as standard structure which is common for all modules. However, the Analytics & Reporting module and the System Manager module from above list follow different second level menus. This second level menu mainly consists of the following items which are Settings, Activities, Enquiry and Reports.

For example:

- Core HR -> Settings
- Core HR -> Activities
- Core HR -> Enquiry
- Core HR -> Reports

Similarly, for the other primary modules, the same 4 sub-menus are present. Each of this sub-menu further expands to show the various pages under them by clicking the + sign next to the menu name.

However, for the System Manager Module and the Analytics & Reporting Module, the above sub-menus are different and it does not follow the same 4 sub-menus in the second level hierarchy of menu items in the sidebar.

The System Manager Module has the following 3 items as second level menus which are as follows: -

- System Setup
- Administrative Services
- Common Services.

The Analytics & Reporting Module has 2 second level menu items under them which are as follows: -

- MIS
- Dashboards.

Settings Sub-Menu Description:

The Settings menu relates to the various settings or configurations pertaining to a primary module. Under the Settings menu, all the pages related to various settings of the module can be accessed by further expanding the menu (clicking the + sign) next to the menu name.

Activities Sub-Menu Description:

The Activities menu relates to all the transactions that can be performed under a primary module. All the activities or transactional pages pertaining to a module are placed under the Activities menu. The pages under the activities menu can be accessed by further expanding the menu (clicking the + sign) next to the menu name.

Enquiry Sub-Menu Description:

The Enquiry menu relates to querying, searching and display of data pertaining to features of the primary module. Enquiry menu can be expanded further (clicking the + sign) next to the menu name to view all pages from which the enquiries can be performed against datasets of a primary module.

Reports Sub-Menu Description:

The Reports menu relates to the various reports available under the primary modules. The reports menu can be expanded further (clicking the + sign) next to the menu name to view all reports present under the primary module.

C) Third Level Menu Items – Description

The third level menu items represent all Pages of ZetaHRMS Core Application under each module. It includes all the pages under the second level sub-menus as described earlier.

Following is the list of all navigations for the ZetaHRMS application for all its pages. It is specified in the following format: Primary Module / Second Level Sub Menu / Third Level Menu Item

1. Core HR / Settings / Division
2. Core HR / Settings / Department
3. Core HR / Settings / Designation

4. Core HR / Settings / Employee Category
5. Core HR / Settings / Employee Group
6. Core HR / Settings / Employee Status
7. Core HR / Settings / Employment Type
8. Core HR / Settings / Bank
9. Core HR / Settings / Grade Master
10. Core HR / Settings / Schooling Benefits
11. Core HR / Settings / Visa Designation
12. Core HR / Settings / Visa Sponsor
13. Core HR / Settings / Employment Sponsor
14. Core HR / Settings / Line Manager
15. Core HR / Settings / Approval Group Master
16. Core HR / Settings / Approval Rules
17. Core HR / Settings / Education
18. Core HR / Settings / Skills
19. Core HR / Settings / Religion
20. Core HR / Settings / Training
21. Core HR / Settings / Insurance
22. Core HR / Settings / Life Category
23. Core HR / Settings / Travel Sector
24. Core HR / Settings / GL Code Master
25. Core HR / Settings / Test Request
26. Core HR / Settings / Register
27. Core HR / Settings / Mandatory Settings
28. Core HR / Settings / Custom Report Settings
29. Core HR / Settings / Location Master
30. Core HR / Settings / Division - Department Mapping
31. Core HR / Settings / On-Board/Off-Board Category
32. Core HR / Settings / On-Board/Off-Board Tasks
33. Core HR / Settings / On Board Template
34. Core HR / Settings / Off Board Template
35. Core HR / Settings / Segment Settings
36. Core HR / Settings / Configuration
37. Core HR / Activities / Employee Master
38. Core HR / Activities / Employee Probation
39. Core HR / Activities / Division Transfer
40. Core HR / Activities / Deputation
41. Core HR / Activities / Dependents
42. Core HR / Activities / Regional Employee Master
43. Core HR / Activities / Visa Allocation
44. Core HR / Activities / Segment Allocation
45. Core HR / Activities / Fixed-term Contracts and Probations
46. Core HR / Enquiry / ID Card Expiry
47. Core HR / Enquiry / Driving License Expiry
48. Core HR / Enquiry / Insurance Expiry
49. Core HR / Enquiry / Health Card Expiry
50. Core HR / Reports / Employee Profile
51. Core HR / Reports / Employee Detailed List
52. Core HR / Reports / Employee Contact Details
53. Core HR / Reports / Profile with Salary
54. Core HR / Reports / Employee Salary Details
55. Core HR / Reports / Bank Account Details

56. Core HR / Reports / Employee WPS List
57. Core HR / Reports / Custom Field Details
58. Core HR / Reports / Dependent Details
59. Core HR / Reports / Agewise Dependent Details
60. Core HR / Reports / Passport Details
61. Core HR / Reports / Labour Card Details
62. Core HR / Reports / Employee Visa Details
63. Core HR / Reports / Employee ID Card Details
64. Core HR / Reports / Driving License Details
65. Core HR / Reports / Insurance Details
66. Core HR / Reports / Health Card Details
67. Core HR / Reports / Nationality & Gender wise List
68. Core HR / Reports / Joiners List
69. Core HR / Reports / Service Record
70. Core HR / Reports / Service Period as on Date
71. Core HR / Reports / Profile Audit Log
72. Core HR / Reports / Custom Report
73. Core HR / Reports / Visa Utilization Details
74. Core HR / Reports / Visa Allocation Details
75. Core HR / Reports / Division Transfer Details
76. Core HR / Reports / Employee Confirmation Details
77. Compensation Management / Settings / Salary Component
78. Compensation Management / Settings / Allowance
79. Compensation Management / Settings / Deduction
80. Compensation Management / Settings / Pay Category Rule
81. Compensation Management / Settings / Add on Benefits
82. Compensation Management / Settings / Statutory Deduction Rule
83. Compensation Management / Settings / Pension
84. Compensation Management / Settings / TDS Configuration
85. Compensation Management / Settings / Professional Tax
86. Compensation Management / Settings / Bonus
87. Compensation Management / Settings / Other Benefit
88. Compensation Management / Settings / Activity Type
89. Compensation Management / Settings / Incentive Master
90. Compensation Management / Settings / Incentive Rule
91. Compensation Management / Settings / Offline Rule
92. Compensation Management / Settings / Non Payroll Component
93. Compensation Management / Settings / End of Service Rule
94. Compensation Management / Settings / Reason Type
95. Compensation Management / Settings / Appraisal Settings
96. Compensation Management / Settings / Configuration
97. Compensation Management / Activities / Deduction Allocation
98. Compensation Management / Activities / Temporary Allowance
99. Compensation Management / Activities / Temporary Deduction
100. Compensation Management / Activities / Leave Settlement
101. Compensation Management / Activities / Leave Salary Encashment
102. Compensation Management / Activities / Ticket Allocation
103. Compensation Management / Activities / Ticket Issue
104. Compensation Management / Activities / Add on Benefit Allocation
105. Compensation Management / Activities / Add on Benefit Entry
106. Compensation Management / Activities / Pension Entry
107. Compensation Management / Activities / Income Tax Opening

108. Compensation Management / Activities / TDS Declaration
109. Compensation Management / Activities / Income Tax Adjustment
110. Compensation Management / Activities / Incentive Allocation
111. Compensation Management / Activities / Incentive Processing
112. Compensation Management / Activities / Offline Incentive Allocation
113. Compensation Management / Activities / Offline Incentive Processing
114. Compensation Management / Activities / End of Service Booking
115. Compensation Management / Activities / End of Service Process
116. Compensation Management / Activities / Bonus Allocation
117. Compensation Management / Activities / Bonus Processing
118. Compensation Management / Activities / Service Charge Allocation
119. Compensation Management / Activities / Service Charge Processing
120. Compensation Management / Activities / Other Payments
121. Compensation Management / Activities / Schedule Increment
122. Compensation Management / Activities / Approve Increment
123. Compensation Management / Activities / Import Increment
124. Compensation Management / Enquiry / Temporary Allowance
125. Compensation Management / Enquiry / Temporary Deduction
126. Compensation Management / Enquiry / Ticket Allocation Details
127. Compensation Management / Enquiry / Ticket Issue Details
128. Compensation Management / Enquiry / Increment Details
129. Compensation Management / Reports / Temporary Allowance
130. Compensation Management / Reports / Temporary Deduction
131. Compensation Management / Reports / Leave Salary Encashments
132. Compensation Management / Reports / Leave Encashed History
133. Compensation Management / Reports / Division wise Leave Provision
134. Compensation Management / Reports / Ticket Allocation Details
135. Compensation Management / Reports / Ticket Issue Details
136. Compensation Management / Reports / Ticket Details
137. Compensation Management / Reports / Period wise Ticket Details
138. Compensation Management / Reports / Period wise Ticket Summary
139. Compensation Management / Reports / Ticket Provisional Details
140. Compensation Management / Reports / Division wise Ticket Provision
141. Compensation Management / Reports / Ticket Details Based on Date of join
142. Compensation Management / Reports / Leave Provisional Details
143. Compensation Management / Reports / Gratuity Provisional Details
144. Compensation Management / Reports / Division wise Gratuity Provision
145. Compensation Management / Reports / Gratuity Actual Report
146. Compensation Management / Reports / Pension Details
147. Compensation Management / Reports / Division wise Insurance Provision
148. Compensation Management / Reports / Monthly Pension Details
149. Compensation Management / Reports / Activity Details
150. Compensation Management / Reports / Non Payroll Component Details
151. Compensation Management / Reports / End of Service Booked
152. Compensation Management / Reports / End of Service Details
153. Compensation Management / Reports / Leavers Report
154. Compensation Management / Reports / Longevity Report
155. Compensation Management / Reports / Division wise Worksmen Provision
156. Compensation Management / Reports / Form 24Q(Annexure I)
157. Compensation Management / Reports / Form 16
158. Compensation Management / Reports / Form 24Q
159. Compensation Management / Reports / Form 10E

160. Compensation Management / Reports / Increment Details
161. Compensation Management / Reports / Increment History
162. Leave Management / Settings / Leave Type
163. Leave Management / Settings / Leave Policy
164. Leave Management / Settings / Leave Rule
165. Leave Management / Settings / Configuration
166. Leave Management / Activities / Annual Leave Entry
167. Leave Management / Activities / Other Leave Entry
168. Leave Management / Activities / Approve / Reject Leave
169. Leave Management / Activities / Leave Alteration
170. Leave Management / Activities / Cancel Leave
171. Leave Management / Activities / Leave Resumption
172. Leave Management / Activities / Leave Accrual Adjustment
173. Leave Management / Activities / Bulk Leave Entry
174. Leave Management / Activities / Lieu Days Entry
175. Leave Management / Enquiry / Annual Leave Details
176. Leave Management / Enquiry / Other Leave Details
177. Leave Management / Enquiry / Annual Leave Accrual Details
178. Leave Management / Enquiry / Employee Leave Status
179. Leave Management / Enquiry / Approved and Applied Leave Status
180. Leave Management / Enquiry / Cancelled Leave Details
181. Leave Management / Reports / Leave History
182. Leave Management / Reports / Annual Leave Details
183. Leave Management / Reports / Annual Leave Accrual Details
184. Leave Management / Reports / Annual Leave Accrual as on Date
185. Leave Management / Reports / Annual Leave Accrual as on Month
186. Leave Management / Reports / Annual Leave Accrued Summary
187. Leave Management / Reports / Other Leave Details
188. Leave Management / Reports / Other Leave Accrual Summary
189. Leave Management / Reports / Other Leave Accrual As on Month
190. Leave Management / Reports / Employee Leave Statement
191. Leave Management / Reports / Lieu Day Details
192. Leave Management / Reports / Leave Request History
193. Leave Management / Reports / Approved and Applied Leave Status
194. Leave Management / Reports / Leave Accrual Adjustment Details
195. Leave Management / Reports / Leave Summary Report
196. Compensation Management / Activities / Import Other Benefit
197. Loan Management / Settings / Loan Type
198. Loan Management / Settings / Configuration
199. Loan Management / Activities / Employee Loan Entry
200. Loan Management / Activities / Import Employee Loan
201. Loan Management / Activities / Loan Payment
202. Loan Management / Enquiry / Employee Loan Details
203. Loan Management / Reports / Employee Loan Status
204. Loan Management / Enquiry / Employee Loan Status
205. Loan Management / Reports / Loan WPS Report
206. Attendance Management / Settings / Calendar Category
207. Attendance Management / Settings / Holiday Settings
208. Attendance Management / Settings / Annual Holiday Calendar
209. Attendance Management / Settings / Daily Attendance Settings
210. Attendance Management / Settings / Sync Attendance Settings
211. Attendance Management / Settings / Work Plan Rule

- 212. Attendance Management / Settings / Attendance Rule
- 213. Attendance Management / Settings / Grid Timesheet Masters
- 214. Attendance Management / Settings / Configuration
- 215. Attendance Management / Activities / Daily Attendance Creation
- 216. Attendance Management / Activities / Monthly Attendance
- 217. Attendance Management / Activities / Grid TimeSheet
- 218. Attendance Management / Activities / Approve Grid Timesheet
- 219. Attendance Management / Activities / Cancel Approved Grid TimeSheet
- 220. Attendance Management / Activities / Approve Cancel Grid Timesheet
- 221. Attendance Management / Activities / Timesheet
- 222. Attendance Management / Activities / Approve Timesheet - Attendance
- 223. Attendance Management / Activities / Cancel Approved TimeSheet
- 224. Attendance Management / Activities / Approve Cancel Timesheet
- 225. Attendance Management / Activities / Import Daily Attendance
- 226. Attendance Management / Activities / Approve Daily Attendance
- 227. Attendance Management / Activities / Daily OverTime Entry
- 228. Attendance Management / Activities / Import Monthly Overtime
- 229. Attendance Management / Activities / Attendance Regularization
- 230. Attendance Management / Activities / Sync Punch Data
- 231. Attendance Management / Activities / Import Punch Data
- 232. Attendance Management / Activities / Punch View
- 233. Attendance Management / Activities / Monthly Unpaid Hours
- 234. Attendance Management / Activities / Off Planner
- 235. Attendance Management / Activities / OT Details
- 236. Attendance Management / Activities / Shift Allocation
- 237. Attendance Management / Activities / DTS Integration
- 238. Attendance Management / Activities / Approve DTS Integration
- 239. Attendance Management / Activities / Import Worked Hours
- 240. Attendance Management / Activities / Import Shift Allocation
- 241. Attendance Management / Enquiry / Daily Attendance Summary
- 242. Attendance Management / Reports / Daily Attendance Summary
- 243. Attendance Management / Reports / Monthly Attendance
- 244. Attendance Management / Reports / Employee Weekly Off
- 245. Attendance Management / Reports / Punch Time Sheet
- 246. Attendance Management / Reports / Month wise Attendance Register
- 247. Attendance Management / Reports / Evacuation Report
- 248. Attendance Management / Reports / Pending TimeSheet Report
- 249. Attendance Management / Reports / Date wise Attendance Register
- 250. Attendance Management / Reports / Attendance Details
- 251. Attendance Management / Reports / Pending Grid TimeSheet
- 252. Attendance Management / Reports / Monthly Unpaid Hours
- 253. Attendance Management / Reports / MusterRoll Report
- 254. Attendance Management / Reports / Shift Details
- 255. Attendance Management / Reports / Holiday Register
- 256. Attendance Management / Reports / Cumulative Report
- 257. Attendance Management / Reports / Duty Roaster Report
- 258. Project Management / Settings / Client
- 259. Project Management / Settings / Service
- 260. Project Management / Settings / Category
- 261. Project Management / Settings / Mandatory Settings
- 262. Project Management / Settings / Status
- 263. Project Management / Settings / Resource Cost

- 264. Project Management / Settings / Project Managers
- 265. Project Management / Settings / Project Invoice Settings
- 266. Project Management / Settings / Invoicing Rate Rule
- 267. Project Management / Settings / Location
- 268. Project Management / Settings / Project Timesheet Settings
- 269. Project Management / Settings / Dynamic Report Settings
- 270. Project Management / Settings / PMS Login
- 271. Project Management / Settings / Activity Master
- 272. Project Management / Settings / Configuration
- 273. Project Management / Activities / Project Creation
- 274. Project Management / Activities / Project Allocation
- 275. Project Management / Activities / Daily Project Entry
- 276. Project Management / Activities / Project Invoicing
- 277. Project Management / Activities / Import
- 278. Project Management / Activities / Time Sheet Approval
- 279. Project Management / Activities / Import Monthly Overtime
- 280. Project Management / Enquiry / Project Allocation
- 281. Project Management / Enquiry / Project Entry Details
- 282. Project Management / Enquiry / Projectwise Cost
- 283. Project Management / Enquiry / Employee Invoice Details
- 284. Project Management / Reports / Project Allocation
- 285. Project Management / Reports / Project Allocation Details
- 286. Project Management / Reports / Timesheet Details
- 287. Project Management / Reports / Project Entry Details
- 288. Project Management / Reports / Projectwise Cost Detail
- 289. Project Management / Reports / Employee & Project wise Cost
- 290. Project Management / Reports / Projectwise CTC Report
- 291. Project Management / Reports / Project Costing Summary
- 292. Project Management / Reports / Project Invoice Details
- 293. Project Management / Reports / Employee Invoice Details
- 294. Project Management / Reports / Project Invoice
- 295. Project Management / Reports / Project Timesheet Summary
- 296. Project Management / Reports / Project Timesheet Detailed
- 297. Project Management / Reports / Project Timesheet Summary (Quantity)
- 298. Project Management / Reports / Project Timesheet Detailed (Quantity)
- 299. Project Management / Reports / Man Power Cost Report
- 300. Project Management / Reports / Dynamic Reports
- 301. Project Management / Reports / Timesheet
- 302. Payroll / Settings / Cost Centre
- 303. Payroll / Settings / Bank Electronic Report Settings
- 304. Payroll / Settings / Dynamic Payroll Settings
- 305. Payroll / Settings / Configuration
- 306. Payroll / Activities / Cost Centre Allocation
- 307. Payroll / Activities / Run Trial Payroll
- 308. Payroll / Activities / Run Trial Payroll - B
- 309. Payroll / Activities / Verify Payroll
- 310. Payroll / Activities / Cancel Trial Payroll
- 311. Payroll / Activities / Issue Payslip
- 312. Payroll / Activities / Email Payslip
- 313. Payroll / Activities / Bank Transfer Letter
- 314. Payroll / Activities / WPS Generation
- 315. Payroll / Activities / BNP Generation

- 316. Payroll / Activities / Bank Electronic Report
- 317. Payroll / Activities / Run Final Payroll
- 318. Payroll / Activities / Month end Process
- 319. Payroll / Activities / Account Posting
- 320. Payroll / Activities / Payroll Hold
- 321. Payroll / Enquiry / Trial Payroll List
- 322. Payroll / Enquiry / Payroll Detailed
- 323. Payroll / Enquiry / Final Payroll List
- 324. Payroll / Enquiry / Payroll Status
- 325. Payroll / Reports / Payroll Summary
- 326. Payroll / Reports / Payroll Detailed
- 327. Payroll / Reports / Payroll Summary (Without OT)
- 328. Payroll / Reports / Payroll Detailed (Without OT)
- 329. Payroll / Reports / Allowance Report
- 330. Payroll / Reports / Deduction Report
- 331. Payroll / Reports / Overtime Report
- 332. Payroll / Reports / Employee wise YTD Salary
- 333. Payroll / Reports / YTD Salary Report
- 334. Payroll / Reports / Cash/Cheque Report
- 335. Payroll / Reports / Cost Centre Report
- 336. Payroll / Reports / Employee wise Cost Centre
- 337. Payroll / Reports / Cost Centre wise Employee
- 338. Payroll / Reports / Payroll Register
- 339. Payroll / Reports / Payroll Report
- 340. Payroll / Reports / Payroll Summary Report
- 341. Payroll / Reports / Reconciliation Report
- 342. Payroll / Reports / Pay Mode Summary Report
- 343. Payroll / Reports / Payroll Attrition Report
- 344. Payroll / Reports / Accounts Report
- 345. Payroll / Reports / Customized Report
- 346. Payroll / Reports / Dynamic Payroll Report
- 347. Payroll / Reports / Offline HT Statement
- 348. Payroll / Reports / MOH Payroll Summary
- 349. Payroll / Reports / Employee Segment Details
- 350. Payroll / Reports / CTC Report
- 351. Payroll / Reports / HRA Exemption Details
- 352. Payroll / Reports / Monthly TDS Register
- 353. Project Management / Settings / Component Master
- 354. Employee Docs / Settings / Document Template
- 355. Employee Docs / Activities / Create Document
- 356. Employee Docs / Activities / Attach Employee Documents
- 357. Employee Docs / Activities / Attach Company Documents
- 358. ESS Management / Settings / ESS Group
- 359. ESS Management / Settings / ESS User
- 360. ESS Management / Settings / Mandatory Settings
- 361. ESS Management / Settings / Manage Downloads
- 362. ESS Management / Settings / Manage Announcements
- 363. ESS Management / Settings / Other Request Master
- 364. ESS Management / Settings / Field Settings
- 365. ESS Management / Settings / Question Template
- 366. ESS Management / Settings / Section Master
- 367. ESS Management / Settings / Group Master

- 368. ESS Management / Settings / Question Master
- 369. ESS Management / Settings / Request Form Template
- 370. ESS Management / Settings / Advance/Expense Category
- 371. ESS Management / Settings / Password Settings
- 372. ESS Management / Settings / Configuration
- 373. ESS Management / Activities / Import ESS User
- 374. ESS Management / Activities / Blocked Users
- 375. ESS Management / Activities / Approve Expense Claim Request
- 376. ESS Management / Activities / Approve Salary Advance Request
- 377. ESS Management / Activities / Approve Salary Certificate Request
- 378. ESS Management / Activities / Approve Lieu Days Request
- 379. ESS Management / Activities / Approve Schooling Allowance Requests
- 380. ESS Management / Activities / Approve Passport Request
- 381. ESS Management / Activities / Approve Attendance Regularization
- 382. ESS Management / Activities / Approve Other Request
- 383. ESS Management / Activities / Approve Allowance Request
- 384. ESS Management / Activities / Approve Deduction Request
- 385. ESS Management / Activities / Approve PMS Add on Benefits
- 386. ESS Management / Activities / Approve Add on Benefit Request
- 387. ESS Management / Activities / Approve Advance Payment Request
- 388. ESS Management / Activities / Approve OT Request
- 389. ESS Management / Activities / Resource Allocation Request List
- 390. ESS Management / Activities / Approve Expense Claim Form
- 391. ESS Management / Activities / Approve Cancel Advance Payment Request
- 392. ESS Management / Activities / Approve Resumption Request
- 393. ESS Management / Activities / Approve Cancel Expense Claim Form
- 394. ESS Management / Activities / Approve Division Transfer Request
- 395. ESS Management / Activities / Approve Deputation Transfer Request
- 396. ESS Management / Activities / Approve Asset Transfer Request
- 397. ESS Management / Activities / Approve Daily Overtime Request
- 398. ESS Management / Activities / Approve Off Planner Request
- 399. ESS Management / Reports / Expense Claim Requests
- 400. ESS Management / Reports / Salary Advance Requests
- 401. ESS Management / Reports / Salary Certificate Requests
- 402. ESS Management / Reports / Loan Requests
- 403. ESS Management / Reports / Passport Requests
- 404. ESS Management / Reports / Travel Request
- 405. ESS Management / Reports / Other Requests
- 406. ESS Management / Reports / Allowance Requests
- 407. ESS Management / Reports / Deduction Requests
- 408. ESS Management / Reports / Add on Benefit Details(PMS)
- 409. ESS Management / Reports / Overtime Requests
- 410. ESS Management / Reports / OT PreApproval Report
- 411. ESS Management / Reports / Resumption Request
- 412. ESS Management / Reports / Add on Benefit Request
- 413. ESS Management / Reports / ESS Log
- 414. ESS Management / Reports / ESS USER
- 415. ESS Management / Reports / Leave Planner Report
- 416. ESS Management / Reports / Advance Payment Request
- 417. ESS Management / Reports / Expense Claim Form
- 418. Payroll / Reports / Employee Standard Rate
- 419. Payroll / Reports / Bonus Report

- 420. Payroll / Reports / P9 Report
- 421. Asset Management / Settings / Asset Type
- 422. Asset Management / Settings / Asset Master
- 423. Asset Management / Settings / Expense Type
- 424. Asset Management / Settings / Configuration
- 425. Asset Management / Activities / Asset Issue
- 426. Asset Management / Activities / Asset Return
- 427. Asset Management / Activities / Expense Entry
- 428. Asset Management / Activities / Asset Transfer
- 429. Asset Management / Enquiry / Asset Issued Details
- 430. Asset Management / Enquiry / Asset Returned Details
- 431. Asset Management / Enquiry / Employee wise Asset
- 432. Asset Management / Enquiry / Asset wise Employee Details
- 433. Asset Management / Reports / Asset Issued Details
- 434. Asset Management / Reports / Asset Returned Details
- 435. Asset Management / Reports / Employee wise Asset
- 436. Asset Management / Reports / Asset wise Employee Details
- 437. Asset Management / Reports / Expense Report
- 438. Performance Management / Settings / Key Performance Indicators
- 439. Performance Management / Settings / Review Questions
- 440. Performance Management / Settings / Rating
- 441. Performance Management / Settings / Key Result Area
- 442. Performance Management / Reports / Evaluation Summary Report
- 443. Performance Management / Reports / Evaluation Detailed Report
- 444. Performance Management / Reports / Employee Productivity Details
- 445. Learning and Development / Settings / Training Master
- 446. Learning and Development / Settings / Rating Master
- 447. Learning and Development / Settings / Evaluators
- 448. Learning and Development / Settings / Question Template
- 449. Learning and Development / Settings / Section
- 450. Learning and Development / Settings / Group Master
- 451. Learning and Development / Settings / Question Master
- 452. Learning and Development / Settings / Evaluation Template
- 453. Learning and Development / Settings / Configuration
- 454. Learning and Development / Activities / Schedule Training
- 455. Learning and Development / Activities / Evaluation Details
- 456. Learning and Development / Activities / Import Training
- 457. Learning and Development / Reports / Employee wise Report
- 458. Learning and Development / Reports / Training wise Employee Report
- 459. Learning and Development / Reports / Trainer wise Report
- 460. Learning and Development / Reports / Employee Evaluation Sheet
- 461. Learning and Development / Reports / Training Status Report
- 462. Recruitment / Settings / Company
- 463. Recruitment / Settings / Country
- 464. Recruitment / Settings / City
- 465. Recruitment / Activities / Job Requisition
- 466. Recruitment / Settings / Job Template
- 467. Recruitment / Activities / Job Opening
- 468. Recruitment / Settings / Pay Grade
- 469. Recruitment / Settings / Language Master
- 470. Recruitment / Settings / Employment Type
- 471. Recruitment / Settings / Group Master

- 472. Recruitment / Settings / Education Master
- 473. Recruitment / Settings / Rating Master
- 474. Recruitment / Settings / Job Category
- 475. Recruitment / Settings / Killer Question
- 476. Recruitment / Settings / Questionnaire Master
- 477. Recruitment / Settings / Document Title Master
- 478. Recruitment / Settings / Interview Level Settings
- 479. Recruitment / Settings / Hired Status
- 480. Recruitment / Activities / Prospects
- 481. Recruitment / Activities / Job Applicants
- 482. Recruitment / Activities / Shortlisted Applicants
- 483. Recruitment / Activities / Scheduled Applicants
- 484. Recruitment / Activities / Hired Applicants
- 485. Recruitment / Enquiry / Applicants Status
- 486. Recruitment / Enquiry / Registered Applicants
- 487. Recruitment / Reports / Applicants Status
- 488. Recruitment / Reports / Registered Applicants
- 489. Recruitment / Reports / Job Detailed Report
- 490. Recruitment / Reports / Applicant Details
- 491. Recruitment / Reports / Jobwise Grouped Report
- 492. System Manager / System Setup / Currency
- 493. System Manager / System Setup / Configuration
- 494. System Manager / System Setup / Employee ERP Integration
- 495. System Manager / System Setup / Global Settings
- 496. System Manager / System Setup / SMS Format Settings
- 497. System Manager / System Setup / System Settings
- 498. System Manager / Administrative Services / Access Level Settings
- 499. System Manager / Administrative Services / User Group Management
- 500. System Manager / Administrative Services / User Management
- 501. System Manager / Administrative Services / Dashboard Settings
- 502. System Manager / Administrative Services / Import
- 503. System Manager / Administrative Services / Registration
- 504. System Manager / Administrative Services / Database Backup
- 505. System Manager / Administrative Services / Database Restore
- 506. System Manager / Administrative Services / Admin Approval Group
- 507. System Manager / Administrative Services / Admin Approval Rules
- 508. System Manager / Common Services / Company
- 509. System Manager / Common Services / Create Company
- 510. System Manager / Common Services / Country
- 511. System Manager / Common Services / Reminder
- 512. System Manager / Common Services / Change Password
- 513. Analytics and Reporting / MIS / Payroll Summary
- 514. Analytics and Reporting / MIS / End of Service Details
- 515. Analytics and Reporting / MIS / Monthly Attendance
- 516. Analytics and Reporting / Dashboards / HR
- 517. Analytics and Reporting / MIS / Leave Salary Encashments
- 518. Analytics and Reporting / MIS / Leave History
- 519. Analytics and Reporting / MIS / Annual Leave Accrued Summary
- 520. Analytics and Reporting / MIS / Passport Expiry
- 521. Analytics and Reporting / MIS / Labour Card Expiry
- 522. Analytics and Reporting / MIS / Visa Expiry

Below are the all the actions that can be performed in the Settings related pages of ZetaHRMS modules.

I. Core HR – Settings

1. Users can view, add, edit or delete Division from the following screen: Core HR / Settings / Division
 - For Adding new division, Click New button on the division page to create a new division in your company.
 - For Editing new division, Click Edit button on the division page after selecting the record first. The edit page opens and then update the required values on the Edit Screen and click Save in order to update the division.
2. Users can view, add, edit or delete Department from the following screen: Core HR / Settings / Department
3. Users can view, add, edit or delete Designation from the following screen: Core HR / Settings / Designation
4. Users can view, add, edit or delete Employee Category from the following screen: Core HR / Settings / Employee Category
5. Users can view, add, edit or delete Employee Group from the following screen: Core HR / Settings / Employee Group
6. Users can view, add, edit or delete Employee Status from the following screen: Core HR / Settings / Employee Status
7. Users can view, add, edit or delete Employment Type from the following screen: Core HR / Settings / Employment Type
8. Users can view, add, edit or delete Bank from the following screen: Core HR / Settings / Bank
9. Users can view, add, edit or delete Grade Master from the following screen: Core HR / Settings / Grade Master
10. Users can view, add, edit or delete Schooling Benefits from the following screen: Core HR / Settings / Schooling Benefits
11. Users can view, add, edit or delete Visa Designation from the following screen: Core HR / Settings / Visa Designation
12. Users can view, add, edit or delete Visa Sponsor from the following screen: Core HR / Settings / Visa Sponsor
13. Users can view, add, edit or delete Employment Sponsor from the following screen: Core HR / Settings / Employment Sponsor
14. Users can view, add, edit or delete Line Manager from the following screen: Core HR / Settings / Line Manager
15. Users can view, add, edit or delete Approval Group Master from the following screen: Core HR / Settings / Approval Group Master
16. Users can view, add, edit or delete Approval Rules from the following screen: Core HR / Settings / Approval Rules
17. Users can view, add, edit or delete Education from the following screen: Core HR / Settings / Education
18. Users can view, add, edit or delete Skills from the following screen: Core HR / Settings / Skills
19. Users can view, add, edit or delete Religion from the following screen: Core HR / Settings / Religion
20. Users can view, add, edit or delete Training from the following screen: Core HR / Settings / Training
21. Users can view, add, edit or delete Insurance from the following screen: Core HR / Settings / Insurance

22. Users can view, add, edit or delete Life Category from the following screen: Core HR / Settings / Life Category
23. Users can view, add, edit or delete Travel Sector from the following screen: Core HR / Settings / Travel Sector
24. Users can view, add, edit or delete GL Code Master from the following screen: Core HR / Settings / GL Code Master
25. Users can view, add, edit or delete Test Request from the following screen: Core HR / Settings / Test Request
26. Users can view, add, edit or delete Register from the following screen: Core HR / Settings / Register
27. Users can view, add, edit or delete Mandatory Settings from the following screen: Core HR / Settings / Mandatory Settings
28. Users can view, add, edit or delete Custom Report Settings from the following screen: Core HR / Settings / Custom Report Settings
29. Users can view, add, edit or delete Location Master from the following screen: Core HR / Settings / Location Master
30. Users can view, add, edit or delete Division - Department Mapping from the following screen: Core HR / Settings / Division - Department Mapping
31. Users can view, add, edit or delete On-Board & Off-Board Category from the following screen: Core HR / Settings / On-Board/Off-Board Category
32. Users can view, add, edit or delete On-Board & Off-Board Tasks from the following screen: Core HR / Settings / On-Board/Off-Board Tasks
33. Users can view, add, edit or delete On Board Template from the following screen: Core HR / Settings / On Board Template
34. Users can view, add, edit or delete Off Board Template from the following screen: Core HR / Settings / Off Board Template
35. Users can view, add, edit or delete Segment Settings from the following screen: Core HR / Settings / Segment Settings
36. Users can view, add, edit or delete Configuration from the following screen: Core HR / Settings / Configuration

II. Compensation Management – Settings

1. Users can view, add, edit or delete Salary Component from the following screen: Compensation Management / Settings / Salary Component
2. Users can view, add, edit or delete Allowance from the following screen: Compensation Management / Settings / Allowance
3. Users can view, add, edit or delete Deduction from the following screen: Compensation Management / Settings / Deduction
4. Users can view, add, edit or delete Pay Category Rule from the following screen: Compensation Management / Settings / Pay Category Rule
5. Users can view, add, edit or delete Add on Benefits from the following screen: Compensation Management / Settings / Add on Benefits
6. Users can view, add, edit or delete Statutory Deduction Rule from the following screen: Compensation Management / Settings / Statutory Deduction Rule
7. Users can view, add, edit or delete Pension from the following screen: Compensation Management / Settings / Pension
8. Users can view, add, edit or delete TDS Configuration from the following screen: Compensation Management / Settings / TDS Configuration

9. Users can view, add, edit or delete Professional Tax from the following screen: Compensation Management / Settings / Professional Tax
10. Users can view, add, edit or delete Bonus from the following screen: Compensation Management / Settings / Bonus
11. Users can view, add, edit or delete Other Benefit from the following screen: Compensation Management / Settings / Other Benefit
12. Users can view, add, edit or delete Activity Type from the following screen: Compensation Management / Settings / Activity Type
13. Users can view, add, edit or delete Incentive Master from the following screen: Compensation Management / Settings / Incentive Master
14. Users can view, add, edit or delete Incentive Rule from the following screen: Compensation Management / Settings / Incentive Rule
15. Users can view, add, edit or delete Offline Rule from the following screen: Compensation Management / Settings / Offline Rule
16. Users can view, add, edit or delete Non Payroll Component from the following screen: Compensation Management / Settings / Non Payroll Component
17. Users can view, add, edit or delete End of Service Rule from the following screen: Compensation Management / Settings / End of Service Rule
18. Users can view, add, edit or delete Reason Type from the following screen: Compensation Management / Settings / Reason Type
19. Users can view, add, edit or delete Appraisal Settings from the following screen: Compensation Management / Settings / Appraisal Settings
20. Users can view, add, edit or delete Configuration from the following screen: Compensation Management / Settings / Configuration

III. Leave Management – Settings

1. Users can view, add, edit or delete Leave Type from the following screen: Leave Management / Settings / Leave Type
2. Users can view, add, edit or delete Leave Policy from the following screen: Leave Management / Settings / Leave Policy
3. Users can view, add, edit or delete Leave Rule from the following screen: Leave Management / Settings / Leave Rule
4. Users can view, add, edit or delete Configuration from the following screen: Leave Management / Settings / Configuration

IV. Loan Management – Settings

1. Users can view, add, edit or delete Loan Type from the following screen: Loan Management / Settings / Loan Type
2. Users can view, add, edit or delete Configuration from the following screen: Loan Management / Settings / Configuration

V. Attendance Management – Settings

1. Users can view, add, edit or delete Calendar Category from the following screen: Attendance Management / Settings / Calendar Category
2. Users can view, add, edit or delete Holiday Settings from the following screen: Attendance Management / Settings / Holiday Settings

3. Users can view, add, edit or delete Annual Holiday Calendar from the following screen: Attendance Management / Settings / Annual Holiday Calendar
4. Users can view, add, edit or delete Daily Attendance Settings from the following screen: Attendance Management / Settings / Daily Attendance Settings
5. Users can view, add, edit or delete Sync Attendance Settings from the following screen: Attendance Management / Settings / Sync Attendance Settings
6. Users can view, add, edit or delete Work Plan Rule from the following screen: Attendance Management / Settings / Work Plan Rule
7. Users can view, add, edit or delete Attendance Rule from the following screen: Attendance Management / Settings / Attendance Rule
8. Users can view, add, edit or delete Grid Timesheet Masters from the following screen: Attendance Management / Settings / Grid Timesheet Masters
9. Users can view, add, edit or delete Configuration from the following screen: Attendance Management / Settings / Configuration

VI. Project Management – Settings

1. Users can view, add, edit or delete Client from the following screen: Project Management / Settings / Client
2. Users can view, add, edit or delete Service from the following screen: Project Management / Settings / Service
3. Users can view, add, edit or delete Category from the following screen: Project Management / Settings / Category
4. Users can view, add, edit or delete Mandatory Settings from the following screen: Project Management / Settings / Mandatory Settings
5. Users can view, add, edit or delete Status from the following screen: Project Management / Settings / Status
6. Users can view, add, edit or delete Resource Cost from the following screen: Project Management / Settings / Resource Cost
7. Users can view, add, edit or delete Project Managers from the following screen: Project Management / Settings / Project Managers
8. Users can view, add, edit or delete Project Invoice Settings from the following screen: Project Management / Settings / Project Invoice Settings
9. Users can view, add, edit or delete Invoicing Rate Rule from the following screen: Project Management / Settings / Invoicing Rate Rule
10. Users can view, add, edit or delete Location from the following screen: Project Management / Settings / Location
11. Users can view, add, edit or delete Project Timesheet Settings from the following screen: Project Management / Settings / Project Timesheet Settings
12. Users can view, add, edit or delete Dynamic Report Settings from the following screen: Project Management / Settings / Dynamic Report Settings
13. Users can view, add, edit or delete PMS Login from the following screen: Project Management / Settings / PMS Login
14. Users can view, add, edit or delete Activity Master from the following screen: Project Management / Settings / Activity Master
15. Users can view, add, edit or delete Configuration from the following screen: Project Management / Settings / Configuration

16. Users can view, add, edit or delete Component Master from the following screen: Project Management / Settings / Component Master

VII. Payroll – Settings

1. Users can view, add, edit or delete Cost Centre from the following screen: Payroll / Settings / Cost Centre
2. Users can view, add, edit or delete Bank Electronic Report Settings from the following screen: Payroll / Settings / Bank Electronic Report Settings
3. Users can view, add, edit or delete Dynamic Payroll Settings from the following screen: Payroll / Settings / Dynamic Payroll Settings
4. Users can view, add, edit or delete Configuration from the following screen: Payroll / Settings / Configuration

VIII. Employee Docs – Settings

1. Users can view, add, edit or delete Document Template from the following screen: Employee Docs / Settings / Document Template

IX. ESS Management – Settings

1. Users can view, add, edit or delete ESS Group from the following screen: ESS Management / Settings / ESS Group
2. Users can view, add, edit or delete ESS User from the following screen: ESS Management / Settings / ESS User
3. Users can view, add, edit or delete Mandatory Settings from the following screen: ESS Management / Settings / Mandatory Settings
4. Users can view, add, edit or delete Manage Downloads from the following screen: ESS Management / Settings / Manage Downloads
5. Users can view, add, edit or delete Manage Announcements from the following screen: ESS Management / Settings / Manage Announcements
6. Users can view, add, edit or delete Other Request Master from the following screen: ESS Management / Settings / Other Request Master
7. Users can view, add, edit or delete Field Settings from the following screen: ESS Management / Settings / Field Settings
8. Users can view, add, edit or delete Question Template from the following screen: ESS Management / Settings / Question Template
9. Users can view, add, edit or delete Section Master from the following screen: ESS Management / Settings / Section Master
10. Users can view, add, edit or delete Group Master from the following screen: ESS Management / Settings / Group Master
11. Users can view, add, edit or delete Question Master from the following screen: ESS Management / Settings / Question Master
12. Users can view, add, edit or delete Request Form Template from the following screen: ESS Management / Settings / Request Form Template
13. Users can view, add, edit or delete Advance-Expense Category from the following screen: ESS Management / Settings / Advance/Expense Category

14. Users can view, add, edit or delete Password Settings from the following screen: ESS Management / Settings / Password Settings
15. Users can view, add, edit or delete Configuration from the following screen: ESS Management / Settings / Configuration

X. Asset Management – Settings

1. Users can view, add, edit or delete Asset Type from the following screen: Asset Management / Settings / Asset Type
2. Users can view, add, edit or delete Asset Master from the following screen: Asset Management / Settings / Asset Master
3. Users can view, add, edit or delete Expense Type from the following screen: Asset Management / Settings / Expense Type
4. Users can view, add, edit or delete Configuration from the following screen: Asset Management / Settings / Configuration

XI. Performance Management – Settings

1. Users can view, add, edit or delete Key Performance Indicators from the following screen: Performance Management / Settings / Key Performance Indicators
2. Users can view, add, edit or delete Review Questions from the following screen: Performance Management / Settings / Review Questions
3. Users can view, add, edit or delete Rating from the following screen: Performance Management / Settings / Rating
4. Users can view, add, edit or delete Key Result Area from the following screen: Performance Management / Settings / Key Result Area

XII. Learning and Development – Settings

1. Users can view, add, edit or delete Training Master from the following screen: Learning and Development / Settings / Training Master
2. Users can view, add, edit or delete Rating Master from the following screen: Learning and Development / Settings / Rating Master
3. Users can view, add, edit or delete Evaluators from the following screen: Learning and Development / Settings / Evaluators
4. Users can view, add, edit or delete Question Template from the following screen: Learning and Development / Settings / Question Template
5. Users can view, add, edit or delete Section from the following screen: Learning and Development / Settings / Section
6. Users can view, add, edit or delete Group Master from the following screen: Learning and Development / Settings / Group Master
7. Users can view, add, edit or delete Question Master from the following screen: Learning and Development / Settings / Question Master
8. Users can view, add, edit or delete Evaluation Template from the following screen: Learning and Development / Settings / Evaluation Template
9. Users can view, add, edit or delete Configuration from the following screen: Learning and Development / Settings / Configuration

XIII. Recruitment– Settings

- 1.** Users can view, add, edit or delete Company from the following screen: Recruitment / Settings / Company
- 2.** Users can view, add, edit or delete Country from the following screen: Recruitment / Settings / Country
- 3.** Users can view, add, edit or delete City from the following screen: Recruitment / Settings / City
- 4.** Users can view, add, edit or delete Job Template from the following screen: Recruitment / Settings / Job Template
- 5.** Users can view, add, edit or delete Pay Grade from the following screen: Recruitment / Settings / Pay Grade
- 6.** Users can view, add, edit or delete Language Master from the following screen: Recruitment / Settings / Language Master
- 7.** Users can view, add, edit or delete Employment Type from the following screen: Recruitment / Settings / Employment Type
- 8.** Users can view, add, edit or delete Group Master from the following screen: Recruitment / Settings / Group Master
- 9.** Users can view, add, edit or delete Education Master from the following screen: Recruitment / Settings / Education Master
- 10.** Users can view, add, edit or delete Rating Master from the following screen: Recruitment / Settings / Rating Master
- 11.** Users can view, add, edit or delete Job Category from the following screen: Recruitment / Settings / Job Category
- 12.** Users can view, add, edit or delete Killer Question from the following screen: Recruitment / Settings / Killer Question
- 13.** Users can view, add, edit or delete Questionnaire Master from the following screen: Recruitment / Settings / Questionnaire Master
- 14.** Users can view, add, edit or delete Document Title Master from the following screen: Recruitment / Settings / Document Title Master
- 15.** Users can view, add, edit or delete Interview Level Settings from the following screen: Recruitment / Settings / Interview Level Settings
- 16.** Users can view, add, edit or delete Hired Status from the following screen: Recruitment / Settings / Hired Status

Enquiry Pages of ZetaHRMS

Below are the all the actions that can be performed by users in Enquiry related pages of ZetaHRMS modules. All these pages can be accessed under the Enquiry Menu for each module in ZetaHRMS.

HR users can perform enquiry to get details on ID Card Expiry by navigating to the following path: Core HR / Enquiry / ID Card Expiry

HR users can perform enquiry to get details on Driving License Expiry by navigating to the following path: Core HR / Enquiry / Driving License Expiry

HR users can perform enquiry to get details on Insurance Expiry by navigating to the following path: Core HR / Enquiry / Insurance Expiry

HR users can perform enquiry to get details on Health Card Expiry by navigating to the following path: Core HR / Enquiry / Health Card Expiry

HR users can perform enquiry to get details on Temporary Allowance by navigating to the following path: Compensation Management / Enquiry / Temporary Allowance

HR users can perform enquiry to get details on Temporary Deduction by navigating to the following path: Compensation Management / Enquiry / Temporary Deduction

HR users can perform enquiry to get details on Ticket Allocation Details by navigating to the following path: Compensation Management / Enquiry / Ticket Allocation Details

HR users can perform enquiry to get details on Ticket Issue Details by navigating to the following path: Compensation Management / Enquiry / Ticket Issue Details

HR users can perform enquiry to get details on Increment Details by navigating to the following path: Compensation Management / Enquiry / Increment Details

HR users can perform enquiry to get details on Annual Leave Details by navigating to the following path: Leave Management / Enquiry / Annual Leave Details

HR users can perform enquiry to get details on Other Leave Details by navigating to the following path: Leave Management / Enquiry / Other Leave Details

HR users can perform enquiry to get details on Annual Leave Accrual Details by navigating to the following path: Leave Management / Enquiry / Annual Leave Accrual Details

HR users can perform enquiry to get details on Employee Leave Status by navigating to the following path: Leave Management / Enquiry / Employee Leave Status

HR users can perform enquiry to get details on Approved and Applied Leave Status by navigating to the following path: Leave Management / Enquiry / Approved and Applied Leave Status

HR users can perform enquiry to get details on Cancelled Leave Details by navigating to the following path: Leave Management / Enquiry / Cancelled Leave Details

HR users can perform enquiry to get details on Employee Loan Details by navigating to the following path: Loan Management / Enquiry / Employee Loan Details

HR users can perform enquiry to get details on Employee Loan Status by navigating to the following path:
Loan Management / Enquiry / Employee Loan Status

HR users can perform enquiry to get details on Daily Attendance Summary by navigating to the following path: Attendance Management / Enquiry / Daily Attendance Summary

HR users can perform enquiry to get details on Project Allocation by navigating to the following path:
Project Management / Enquiry / Project Allocation

HR users can perform enquiry to get details on Project Entry Details by navigating to the following path:
Project Management / Enquiry / Project Entry Details

HR users can perform enquiry to get details on Projectwise Cost by navigating to the following path:
Project Management / Enquiry / Projectwise Cost

HR users can perform enquiry to get details on Employee Invoice Details by navigating to the following path: Project Management / Enquiry / Employee Invoice Details

HR users can perform enquiry to get details on Trial Payroll List by navigating to the following path:
Payroll / Enquiry / Trial Payroll List

HR users can perform enquiry to get details on Payroll Detailed by navigating to the following path: Payroll / Enquiry / Payroll Detailed

HR users can perform enquiry to get details on Final Payroll List by navigating to the following path:
Payroll / Enquiry / Final Payroll List

HR users can perform enquiry to get details on Payroll Status by navigating to the following path: Payroll / Enquiry / Payroll Status

HR users can perform enquiry to get details on Asset Issued Details by navigating to the following path:
Asset Management / Enquiry / Asset Issued Details

HR users can perform enquiry to get details on Asset Returned Details by navigating to the following path:
Asset Management / Enquiry / Asset Returned Details

HR users can perform enquiry to get details on Employee wise Asset by navigating to the following path:
Asset Management / Enquiry / Employee wise Asset

HR users can perform enquiry to get details on Asset wise Employee Details by navigating to the following path: Asset Management / Enquiry / Asset wise Employee Details

HR users can perform enquiry to get details on Applicants Status by navigating to the following path:
Recruitment / Enquiry / Applicants Status

HR users can perform enquiry to get details on Registered Applicants by navigating to the following path:
Recruitment / Enquiry / Registered Applicants

Below are the all the standard reports that are present in the Report related pages of ZetaHRMS modules. All these pages can be accessed under the Reports Menu of each module in ZetaHRMS.

HR users can access reports related to Employee Profile from the following screen: Core HR / Reports / Employee Profile

HR users can access reports related to Employee Detailed List from the following screen: Core HR / Reports / Employee Detailed List

HR users can access reports related to Employee Contact Details from the following screen: Core HR / Reports / Employee Contact Details

HR users can access reports related to Profile with Salary from the following screen: Core HR / Reports / Profile with Salary

HR users can access reports related to Employee Salary Details from the following screen: Core HR / Reports / Employee Salary Details

HR users can access reports related to Bank Account Details from the following screen: Core HR / Reports / Bank Account Details

HR users can access reports related to Employee WPS List from the following screen: Core HR / Reports / Employee WPS List

HR users can access reports related to Custom Field Details from the following screen: Core HR / Reports / Custom Field Details

HR users can access reports related to Dependent Details from the following screen: Core HR / Reports / Dependent Details

HR users can access reports related to Agewise Dependent Details from the following screen: Core HR / Reports / Agewise Dependent Details

HR users can access reports related to Passport Details from the following screen: Core HR / Reports / Passport Details

HR users can access reports related to Labour Card Details from the following screen: Core HR / Reports / Labour Card Details

HR users can access reports related to Employee Visa Details from the following screen: Core HR / Reports / Employee Visa Details

HR users can access reports related to Employee ID Card Details from the following screen: Core HR / Reports / Employee ID Card Details

HR users can access reports related to Driving License Details from the following screen: Core HR / Reports / Driving License Details

HR users can access reports related to Insurance Details from the following screen: Core HR / Reports / Insurance Details

HR users can access reports related to Health Card Details from the following screen: Core HR / Reports / Health Card Details

HR users can access reports related to Nationality & Gender wise List from the following screen: Core HR / Reports / Nationality & Gender wise List

HR users can access reports related to Joiners List from the following screen: Core HR / Reports / Joiners List

HR users can access reports related to Service Record from the following screen: Core HR / Reports / Service Record

HR users can access reports related to Service Period as on Date from the following screen: Core HR / Reports / Service Period as on Date

HR users can access reports related to Profile Audit Log from the following screen: Core HR / Reports / Profile Audit Log

HR users can access reports related to Custom Report from the following screen: Core HR / Reports / Custom Report

HR users can access reports related to Visa Utilization Details from the following screen: Core HR / Reports / Visa Utilization Details

HR users can access reports related to Visa Allocation Details from the following screen: Core HR / Reports / Visa Allocation Details

HR users can access reports related to Division Transfer Details from the following screen: Core HR / Reports / Division Transfer Details

HR users can access reports related to Employee Confirmation Details from the following screen: Core HR / Reports / Employee Confirmation Details

HR users can access reports related to Temporary Allowance from the following screen: Compensation Management / Reports / Temporary Allowance

HR users can access reports related to Temporary Deduction from the following screen: Compensation Management / Reports / Temporary Deduction

HR users can access reports related to Leave Salary Encashments from the following screen: Compensation Management / Reports / Leave Salary Encashments

HR users can access reports related to Leave Encashed History from the following screen: Compensation Management / Reports / Leave Encashed History

HR users can access reports related to Division wise Leave Provision from the following screen: Compensation Management / Reports / Division wise Leave Provision

HR users can access reports related to Ticket Allocation Details from the following screen: Compensation Management / Reports / Ticket Allocation Details

HR users can access reports related to Ticket Issue Details from the following screen: Compensation Management / Reports / Ticket Issue Details

HR users can access reports related to Ticket Details from the following screen: Compensation Management / Reports / Ticket Details

HR users can access reports related to Period wise Ticket Details from the following screen: Compensation Management / Reports / Period wise Ticket Details

HR users can access reports related to Period wise Ticket Summary from the following screen: Compensation Management / Reports / Period wise Ticket Summary

HR users can access reports related to Ticket Provisional Details from the following screen: Compensation Management / Reports / Ticket Provisional Details

HR users can access reports related to Division wise Ticket Provision from the following screen: Compensation Management / Reports / Division wise Ticket Provision

HR users can access reports related to Ticket Details Based on Date of join from the following screen: Compensation Management / Reports / Ticket Details Based on Date of join

HR users can access reports related to Leave Provisional Details from the following screen: Compensation Management / Reports / Leave Provisional Details

HR users can access reports related to Gratuity Provisional Details from the following screen: Compensation Management / Reports / Gratuity Provisional Details

HR users can access reports related to Division wise Gratuity Provision from the following screen: Compensation Management / Reports / Division wise Gratuity Provision

HR users can access reports related to Gratuity Actual Report from the following screen: Compensation Management / Reports / Gratuity Actual Report

HR users can access reports related to Pension Details from the following screen: Compensation Management / Reports / Pension Details

HR users can access reports related to Division wise Insurance Provision from the following screen: Compensation Management / Reports / Division wise Insurance Provision

HR users can access reports related to Monthly Pension Details from the following screen: Compensation Management / Reports / Monthly Pension Details

HR users can access reports related to Activity Details from the following screen: Compensation Management / Reports / Activity Details

HR users can access reports related to Non Payroll Component Details from the following screen: Compensation Management / Reports / Non Payroll Component Details

HR users can access reports related to End of Service Booked from the following screen: Compensation Management / Reports / End of Service Booked

HR users can access reports related to End of Service Details from the following screen: Compensation Management / Reports / End of Service Details

HR users can access reports related to Leavers Report from the following screen: Compensation Management / Reports / Leavers Report

HR users can access reports related to Longevity Report from the following screen: Compensation Management / Reports / Longevity Report

HR users can access reports related to Division wise Worksmen Provision from the following screen:
Compensation Management / Reports / Division wise Worksmen Provision

HR users can access reports related to Form 24Q(Annexure I) from the following screen: Compensation Management / Reports / Form 24Q(Annexure I)

HR users can access reports related to Form 16 from the following screen: Compensation Management / Reports / Form 16

HR users can access reports related to Form 24Q from the following screen: Compensation Management / Reports / Form 24Q

HR users can access reports related to Form 10E from the following screen: Compensation Management / Reports / Form 10E

HR users can access reports related to Increment Details from the following screen: Compensation Management / Reports / Increment Details

HR users can access reports related to Increment History from the following screen: Compensation Management / Reports / Increment History

HR users can access reports related to Leave History from the following screen: Leave Management / Reports / Leave History

HR users can access reports related to Annual Leave Details from the following screen: Leave Management / Reports / Annual Leave Details

HR users can access reports related to Annual Leave Accrual Details from the following screen: Leave Management / Reports / Annual Leave Accrual Details

HR users can access reports related to Annual Leave Accrual as on Date from the following screen: Leave Management / Reports / Annual Leave Accrual as on Date

HR users can access reports related to Annual Leave Accrual as on Month from the following screen: Leave Management / Reports / Annual Leave Accrual as on Month

HR users can access reports related to Annual Leave Accrued Summary from the following screen: Leave Management / Reports / Annual Leave Accrued Summary

HR users can access reports related to Other Leave Details from the following screen: Leave Management / Reports / Other Leave Details

HR users can access reports related to Other Leave Accrual Summary from the following screen: Leave Management / Reports / Other Leave Accrual Summary

HR users can access reports related to Other Leave Accrual As on Month from the following screen: Leave Management / Reports / Other Leave Accrual As on Month

HR users can access reports related to Employee Leave Statement from the following screen: Leave Management / Reports / Employee Leave Statement

HR users can access reports related to Lieu Day Details from the following screen: Leave Management / Reports / Lieu Day Details

HR users can access reports related to Leave Request History from the following screen: Leave Management / Reports / Leave Request History

HR users can access reports related to Approved and Applied Leave Status from the following screen: Leave Management / Reports / Approved and Applied Leave Status

HR users can access reports related to Leave Accrual Adjustment Details from the following screen: Leave Management / Reports / Leave Accrual Adjustment Details

HR users can access reports related to Leave Summary Report from the following screen: Leave Management / Reports / Leave Summary Report

HR users can access reports related to Employee Loan Status from the following screen: Loan Management / Reports / Employee Loan Status

HR users can access reports related to Loan WPS Report from the following screen: Loan Management / Reports / Loan WPS Report

HR users can access reports related to Daily Attendance Summary from the following screen: Attendance Management / Reports / Daily Attendance Summary

HR users can access reports related to Monthly Attendance from the following screen: Attendance Management / Reports / Monthly Attendance

HR users can access reports related to Employee Weekly Off from the following screen: Attendance Management / Reports / Employee Weekly Off

HR users can access reports related to Punch Time Sheet from the following screen: Attendance Management / Reports / Punch Time Sheet

HR users can access reports related to Month wise Attendance Register from the following screen: Attendance Management / Reports / Month wise Attendance Register

HR users can access reports related to Evacuation Report from the following screen: Attendance Management / Reports / Evacuation Report

HR users can access reports related to Pending TimeSheet Report from the following screen: Attendance Management / Reports / Pending TimeSheet Report

HR users can access reports related to Date wise Attendance Register from the following screen: Attendance Management / Reports / Date wise Attendance Register

HR users can access reports related to Attendance Details from the following screen: Attendance Management / Reports / Attendance Details

HR users can access reports related to Pending Grid TimeSheet from the following screen: Attendance Management / Reports / Pending Grid TimeSheet

HR users can access reports related to Monthly Unpaid Hours from the following screen: Attendance Management / Reports / Monthly Unpaid Hours

HR users can access reports related to MusterRoll Report from the following screen: Attendance Management / Reports / MusterRoll Report

HR users can access reports related to Shift Details from the following screen: Attendance Management / Reports / Shift Details

HR users can access reports related to Holiday Register from the following screen: Attendance Management / Reports / Holiday Register

HR users can access reports related to Cumulative Report from the following screen: Attendance Management / Reports / Cumulative Report

HR users can access reports related to Duty Roaster Report from the following screen: Attendance Management / Reports / Duty Roaster Report

HR users can access reports related to Project Allocation from the following screen: Project Management / Reports / Project Allocation

HR users can access reports related to Project Allocation Details from the following screen: Project Management / Reports / Project Allocation Details

HR users can access reports related to Timesheet Details from the following screen: Project Management / Reports / Timesheet Details

HR users can access reports related to Project Entry Details from the following screen: Project Management / Reports / Project Entry Details

HR users can access reports related to Projectwise Cost Detail from the following screen: Project Management / Reports / Projectwise Cost Detail

HR users can access reports related to Employee & Project wise Cost from the following screen: Project Management / Reports / Employee & Project wise Cost

HR users can access reports related to Projectwise CTC Report from the following screen: Project Management / Reports / Projectwise CTC Report

HR users can access reports related to Project Costing Summary from the following screen: Project Management / Reports / Project Costing Summary

HR users can access reports related to Project Invoice Details from the following screen: Project Management / Reports / Project Invoice Details

HR users can access reports related to Employee Invoice Details from the following screen: Project Management / Reports / Employee Invoice Details

HR users can access reports related to Project Invoice from the following screen: Project Management / Reports / Project Invoice

HR users can access reports related to Project Timesheet Summary from the following screen: Project Management / Reports / Project Timesheet Summary

HR users can access reports related to Project Timesheet Detailed from the following screen: Project Management / Reports / Project Timesheet Detailed

HR users can access reports related to Project Timesheet Summary (Quantity) from the following screen: Project Management / Reports / Project Timesheet Summary (Quantity)

HR users can access reports related to Project Timesheet Detailed (Quantity) from the following screen: Project Management / Reports / Project Timesheet Detailed (Quantity)

HR users can access reports related to Man Power Cost Report from the following screen: Project Management / Reports / Man Power Cost Report

HR users can access reports related to Dynamic Reports from the following screen: Project Management / Reports / Dynamic Reports

HR users can access reports related to Timesheet from the following screen: Project Management / Reports / Timesheet

HR users can access reports related to Payroll Summary from the following screen: Payroll / Reports / Payroll Summary

HR users can access reports related to Payroll Detailed from the following screen: Payroll / Reports / Payroll Detailed

HR users can access reports related to Payroll Summary (Without OT) from the following screen: Payroll / Reports / Payroll Summary (Without OT)

HR users can access reports related to Payroll Detailed (Without OT) from the following screen: Payroll / Reports / Payroll Detailed (Without OT)

HR users can access reports related to Allowance Report from the following screen: Payroll / Reports / Allowance Report

HR users can access reports related to Deduction Report from the following screen: Payroll / Reports / Deduction Report

HR users can access reports related to Overtime Report from the following screen: Payroll / Reports / Overtime Report

HR users can access reports related to Employee wise YTD Salary from the following screen: Payroll / Reports / Employee wise YTD Salary

HR users can access reports related to YTD Salary Report from the following screen: Payroll / Reports / YTD Salary Report

HR users can access reports related to Cash-Cheque Report from the following screen: Payroll / Reports / Cash/Cheque Report

HR users can access reports related to Cost Centre Report from the following screen: Payroll / Reports / Cost Centre Report

HR users can access reports related to Employee wise Cost Centre from the following screen: Payroll / Reports / Employee wise Cost Centre

HR users can access reports related to Cost Centre wise Employee from the following screen: Payroll / Reports / Cost Centre wise Employee

HR users can access reports related to Payroll Register from the following screen: Payroll / Reports / Payroll Register

HR users can access reports related to Payroll Report from the following screen: Payroll / Reports / Payroll Report

HR users can access reports related to Payroll Summary Report from the following screen: Payroll / Reports / Payroll Summary Report

HR users can access reports related to Reconciliation Report from the following screen: Payroll / Reports / Reconciliation Report

HR users can access reports related to Pay Mode Summary Report from the following screen: Payroll / Reports / Pay Mode Summary Report

HR users can access reports related to Payroll Attrition Report from the following screen: Payroll / Reports / Payroll Attrition Report

HR users can access reports related to Accounts Report from the following screen: Payroll / Reports / Accounts Report

HR users can access reports related to Customized Report from the following screen: Payroll / Reports / Customized Report

HR users can access reports related to Dynamic Payroll Report from the following screen: Payroll / Reports / Dynamic Payroll Report

HR users can access reports related to Offline HT Statement from the following screen: Payroll / Reports / Offline HT Statement

HR users can access reports related to MOH Payroll Summary from the following screen: Payroll / Reports / MOH Payroll Summary

HR users can access reports related to Employee Segment Details from the following screen: Payroll / Reports / Employee Segment Details

HR users can access reports related to CTC Report from the following screen: Payroll / Reports / CTC Report

HR users can access reports related to HRA Exemption Details from the following screen: Payroll / Reports / HRA Exemption Details

HR users can access reports related to Monthly TDS Register from the following screen: Payroll / Reports / Monthly TDS Register

HR users can access reports related to Expense Claim Requests from the following screen: ESS Management / Reports / Expense Claim Requests

HR users can access reports related to Salary Advance Requests from the following screen: ESS Management / Reports / Salary Advance Requests

HR users can access reports related to Salary Certificate Requests from the following screen: ESS Management / Reports / Salary Certificate Requests

HR users can access reports related to Loan Requests from the following screen: ESS Management / Reports / Loan Requests

HR users can access reports related to Passport Requests from the following screen: ESS Management / Reports / Passport Requests

HR users can access reports related to Travel Request from the following screen: ESS Management / Reports / Travel Request

HR users can access reports related to Other Requests from the following screen: ESS Management / Reports / Other Requests

HR users can access reports related to Allowance Requests from the following screen: ESS Management / Reports / Allowance Requests

HR users can access reports related to Deduction Requests from the following screen: ESS Management / Reports / Deduction Requests

HR users can access reports related to Add on Benefit Details(PMS) from the following screen: ESS Management / Reports / Add on Benefit Details(PMS)

HR users can access reports related to Overtime Requests from the following screen: ESS Management / Reports / Overtime Requests

HR users can access reports related to OT PreApproval Report from the following screen: ESS Management / Reports / OT PreApproval Report

HR users can access reports related to Resumption Request from the following screen: ESS Management / Reports / Resumption Request

HR users can access reports related to Add on Benefit Request from the following screen: ESS Management / Reports / Add on Benefit Request

HR users can access reports related to ESS Log from the following screen: ESS Management / Reports / ESS Log

HR users can access reports related to ESS USER from the following screen: ESS Management / Reports / ESS USER

HR users can access reports related to Leave Planner Report from the following screen: ESS Management / Reports / Leave Planner Report

HR users can access reports related to Advance Payment Request from the following screen: ESS Management / Reports / Advance Payment Request

HR users can access reports related to Expense Claim Form from the following screen: ESS Management / Reports / Expense Claim Form

HR users can access reports related to Employee Standard Rate from the following screen: Payroll / Reports / Employee Standard Rate

HR users can access reports related to Bonus Report from the following screen: Payroll / Reports / Bonus Report

HR users can access reports related to P9 Report from the following screen: Payroll / Reports / P9 Report

HR users can access reports related to Asset Issued Details from the following screen: Asset Management / Reports / Asset Issued Details

HR users can access reports related to Asset Returned Details from the following screen: Asset Management / Reports / Asset Returned Details

HR users can access reports related to Employee wise Asset from the following screen: Asset Management / Reports / Employee wise Asset

HR users can access reports related to Asset wise Employee Details from the following screen: Asset Management / Reports / Asset wise Employee Details

HR users can access reports related to Expense Report from the following screen: Asset Management / Reports / Expense Report

HR users can access reports related to Evaluation Summary Report from the following screen: Performance Management / Reports / Evaluation Summary Report

HR users can access reports related to Evaluation Detailed Report from the following screen: Performance Management / Reports / Evaluation Detailed Report

HR users can access reports related to Employee Productivity Details from the following screen: Performance Management / Reports / Employee Productivity Details

HR users can access reports related to Employee wise Report from the following screen: Learning and Development / Reports / Employee wise Report

HR users can access reports related to Training wise Employee Report from the following screen: Learning and Development / Reports / Training wise Employee Report

HR users can access reports related to Trainer wise Report from the following screen: Learning and Development / Reports / Trainer wise Report

HR users can access reports related to Employee Evaluation Sheet from the following screen: Learning and Development / Reports / Employee Evaluation Sheet

HR users can access reports related to Training Status Report from the following screen: Learning and Development / Reports / Training Status Report

HR users can access reports related to Applicants Status from the following screen: Recruitment / Reports / Applicants Status

HR users can access reports related to Registered Applicants from the following screen: Recruitment / Reports / Registered Applicants

HR users can access reports related to Job Detailed Report from the following screen: Recruitment / Reports / Job Detailed Report

HR users can access reports related to Applicant Details from the following screen: Recruitment / Reports / Applicant Details

HR users can access reports related to Jobwise Grouped Report from the following screen: Recruitment / Reports / Jobwise Grouped Report

ZetaHRMS FAQ Document

Question 1. How to change LOP (unpaid Leave) to Annual leave (Paid Leave) after payroll.

Answer:

Once payroll is processed, then leave alterations are not possible. Salary amendments need to be manually adjusted in the next month's payroll through allowances or deductions as required. Leave balance adjustments can be handled through the following screen: Leave Management>Activities>Leave Adjustments

Question 2. How to cancel a leave?

Answer:

You can cancel a leave by navigating to **Compensation Management > Activities> Cancel Leave**.

Select the leave you wish to cancel and click the **Edit** button. A popup will display the leave details — then click **Cancel** to proceed.

Please note:

- If payroll has already been processed or the leave has been resumed, the leave will not be visible here. Such cases need to be manually adjusted through leave adjustment screen.

Question 3. How can I alter a leave or change the leave type after it has been approved?

Answer:

You can alter a leave by going to **Compensation Management > Activities> Leave Alteration**.

1. Select the leave you want to modify and click **Edit**.
2. Make the necessary changes and click **Save**.

The leave will now be **pending approval by Admin in Leave Management**. Please approve it from **Compensation Management > Activities> Approve/Reject Leave Screen**.

Question 4: Why are some employees missing or not visible in the Run Trial Payroll screen?

Answer:

Employees will not be visible in the Run Trial Payroll screen in the following cases:

1. If the employee attendance is not saved for the given month Or
2. if the employee payroll is on hold.

Please note: once payroll is processed, those employees will no longer be visible on this screen.

Question 5: How can I update an employee's joining date (DOJ)?

Answer:

You can update the DOJ directly from the employee's master screen. However, if you encounter an error, it means there are transactions linked to the employee, and the DOJ cannot be updated from the master screen. In that case, you can update it via import by following these steps:

Path:

System Manager > Administrative Services > Import

Steps:

1. Select General Format from the dropdown list.

2. Download the sample format.
3. Fill in the Employee ID and DOJ, and remove any unnecessary columns. Save the Excel sheet in TEXT format.
4. Choose the prepared file and click Import.
5. Click Save.

Note: The DOJ must follow the format shown in the below

29 Sep 2025
25/Sep/2025
29-Sep-2025
29 September 2025
25/September/2025
29-September-2025

Kindly note that change in Date of Joining will result in changes to leave accruals and gratuity provisions.

Question 6: How to add appraisal in the Zeta software?

Answer:

Please find the below mentioned path and follow the steps for Employees appraisal.

Compensation Management >> Transactions >> Import Increment (For bulk update)

- Select Appraisal type as 'Component wise'
- Download Sample Format
- Enter the Employee ID and Salary hikes difference in required columns (enter only the difference amount. For eg; current Basic sal : 15000, new Basic sal : 20000. so enter 5000 as Basic in excel).
- Unused columns are should not be removed, make it blank
- Make it Excel 'Text' Format & save
- Select 'Month' & 'Reflect Month' on Zeta
- Choose the Saved file.
- Import
- Check the values are correct or not in listing screen
- Save

Compensation Management >> Transactions >> Approve Increment

- Click on 'Add'
- Click on 'Search & Filter' and select the employees.
- Select 'Month & Year'
- Select The employees
- Save.

You can Edit / Cancel the Increment after approving it. For that,

Compensation Management >> Transactions >> Approve Increment

- Select Month & Year

- Select Employee and Click on 'View' Button
- Click on 'Cancel' Button for cancelling Appraisal
- Go to '**Schedule Increment**' Screen for edit employee's Increment
- Select Employee and Edit (for editing the details) OR Delete (for deleting the data)
- Make the Changes and Save.

Then,

- Go to '**Approve Increment**' Screen for approving the edited scheduled increment.

Question 7: How can we create new Allowances in Zeta?

Answer:

We have two types of Allowances.

1. Temporary Allowances
2. Regular Allowances.

You can create the Temporary allowance and regular allowances from the Compensation Management>> Settings>> Allowances.

- Click New.
- Enter the Allowance Name.
- Enter the Short Name.
- Select the type as 'Temporary' from the dropdown.
- Click save

Compensation Management>> Settings>> Allowances.

- Click New.
- Enter the Allowance Name.
- Enter the Short Name.
- Select the type as 'Regular' from the dropdown.
- Click save

Question 8: How can we create new Deductions in Zeta?

Answer:

CM - Settings

Question 9: How can we enter an allowance in Zeta?

Answer:

CM - Activities

Question 10: How can we enter a deduction in Zeta?

Answer:

CM - Activities

Question 11: How to make an employee inactive or exit from the application.

Answer:

Employee Master

Compensation Management Activities End of Service Booking and Process

Question 12: Why the mobile punch option is missing from the mobile app

Answer: ESS Management, ESS group Menu Access

Question 13: How to hold an employee salary

Answer: Payroll Activities Payroll Hold

Question 14: What is the difference between Run Trial Payroll and Run Final Payroll?

Answer: Trial payroll can be cancelled and re-run. Once final payroll is run, then no more modifications are allowed in the payroll.

Question 15: why the employees or dates missing in the Approve Daily Attendance Screen?

Answer:

Leave code mismatch or the employee is not eligible for the leave as per import done

Additional FAQs shared by Avinash - 26 December 2025

- 1) How to Bulk On-board Employees?
- 2) How to Bulk Update Employees' Information?
- 3) Can we configure Approval rules for Employee Updating? How to configure the same?
- 4) Can employees update their information through ESS/Mobile App?
- 5) How to update employees' probation information?
- 6) Is there any reminder or report for Probation employees?
- 7) How to handle employee increments and Promotion?
- 8) Can approval hierarchy be configured for Increments and Promotion?
- 9) How to allocate air ticket benefits for the employees?
- 10) How to capture dependent information in the software?
- 11) When a line manager/Approval manager resigns, how to assign a new manager?
- 12) How to update approval rules for employees?
- 13) How to generate Advance Leave salary for the employees?
- 14) Employee details are not visible in the payroll screen?
- 15) Employees punching timings are mismatched and allocated to different dates?
- 16) Employees have applied for leave but the status is showing Absent in Sync Punch?
- 17) How to update overtime details for the employees?

S.	Question	Answer
1	How to Bulk On-board employees?	System Manager Administrative Services Import
2	How to Bulk Update employees information?	System Manager Administrative Services Import
3	can we configure Approval rules for employee Updation? How to configure the same?	System Manager Administrative Services Admin Approval Group

		System Manager Administrative Services Admin Approval Rules
4	Can employees update their information through ESS/Mobile App?	Yes, through change request in ESS
5	How to update employees probation Information?	Core HR Activities Employee Probation
6	Is there any reminder or report for Probation employees?	Dashboard > Probation Tab
7	How to handle employees increments and Promotion?	Compensation Management Activities Schedule Increment
		Compensation Management Activities Approve Increment
		Compensation Management Activities Import Increment
8	Can approval hierarchy be configured for Increments and Promotion?	Using Approve Increment - Menu access
9	How to allocate air ticket benefits for the employees?	Core HR Activities Employee Master
		Compensation Management Activities Ticket Allocation
10	How to capture dependents information in the software?	Core HR Activities Dependents

11	When a line manager/Approval managers resign, how to assign new manager?	Core HR Activities Employee Master
		Core HR Settings Approval Rules
12	How to update approval rules for employees?	Core HR Activities Employee Master >> Edit >> Rules Tab
13	How to generate Advance Leave salary for the employees?	Compensation Management Activities Leave Settlement
14	Employee details are not visible in payroll screen?	1. If the employee attendance is not saved for the given month Or 2. If the employee payroll is on hold.
15	Employees punching timings are mismatched and allocated to different date?	This can occur due to following reasons:- 1. If the correct shift is not allocated for the affected employees 2. If the Margin In hours are not updated in the Shift Master screen
16	Employees has applied for leave but the status is showing Absent in Sync Punch?	1. Click recalculate on the synch punch screen
17	How to update overtime details for the employees?	Attendance Management Activities Monthly Attendance

If this document does not provide contain any information or response to user-related queries, then the user can contact the Zeta support team by raising a ticket in the Zeta Support Portal or email support@zetasoftware.com