



Administrators

Complete Course Plan



About

This course takes you through the basics of setting up your organization account in Zoho People and will take you through the steps required for automating your daily HR processes like email alerts, tasks, approvals and schedulers, to building just about any function your organization needs and implementing integrations with other tools. You will also gain an in-depth knowledge of the various deployment methods and the customization techniques available in Zoho People.

Who it is for:

HR Administrators and Super Administrators who are responsible for the setup, configuration, and maintenance of their organization's Zoho People account.



Day One (4 hours)

Module 1: Introduction and Employee Database

- Welcome to Zoho People
- Benefits of an HRMS system
- Adding users
- User access control, roles, and permissions

Module 2: Onboarding Employees

- Candidate onboarding
- Employee onboarding



Module 3:

Time-off and Attendance Management

- Time-off configuration and settings
- Data operations and automation
- Reports
- Attendance configuration and settings
- Shift management
- Reports

Module 4: Timesheet Management

- Settings and automation
- Integrations
- Reports

Module 5: Custom Services

- Introduction
- Exit management use case



Day Two (4 hours)

Module 6: Performance Management

- Performance modules
- Appraisal cycles
- Continuous review
- Reports

Module 7: Training and Development

- Self-paced courses
- Blended courses
- Teams

Module 8: Document Case Management

- Organization and employee files
- E-signature and personal files
- Query categorization
- Query tracking with SLA
- Feedback and reports



Module 9: Integrations

- Integration with Zoho applications
- Integration with third-party applications

Summary

What's new?

Best practices for administrators

What's next?

Frequently asked questions

