Admin User Guide

Zoho BackToWork

Powered by

ZOHO CREATOR

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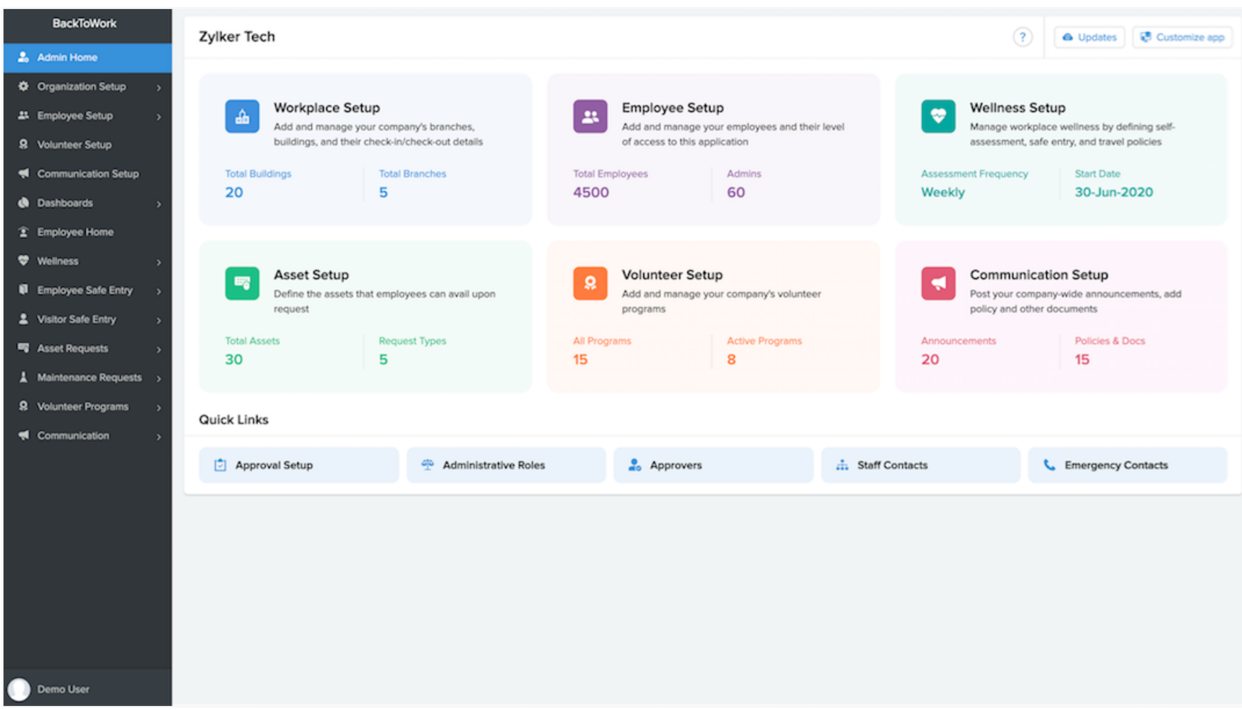
Introduction to the application

Zoho BackToWork app is built using Zoho Creator to provide you with a mechanism to make your workplace a safe environment to return to in a post pandemic condition. This app houses various modules to gather and store data about your employees, monitor the health of your employees, create a screening process for employee and visitor entry, make internal announcements, raise and track requests, and to get overall insights with the data collected.

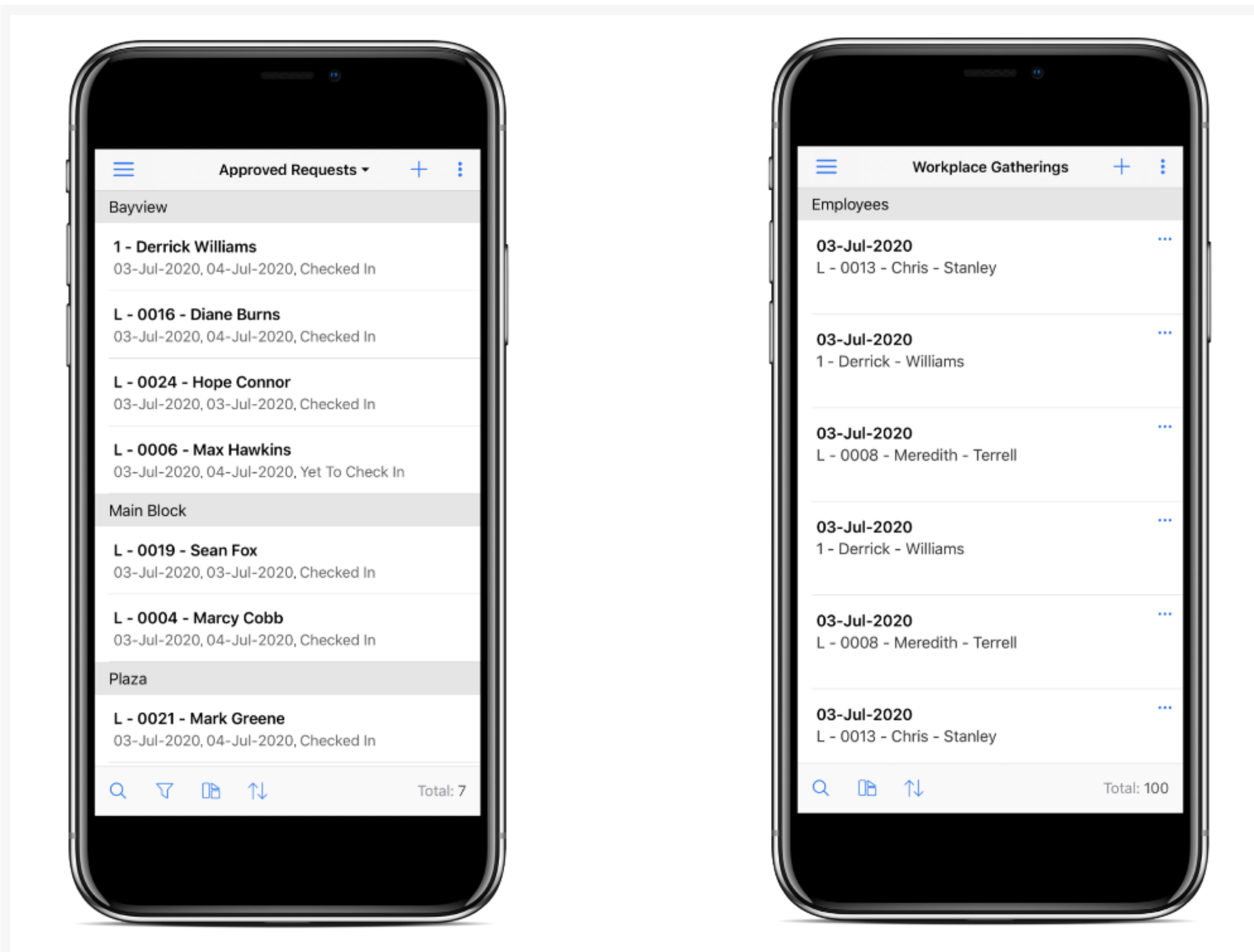


Modules in the app

- Admin Home
- Workplace Setup
- Wellness Setup
- Approval Setup
- Asset Setup

- Employee Setup
- Volunteer Setup
- Communication Setup
- Employee and Visitor Safe Entry
- Asset Request
- Maintenance Request

You and your employees can access this app from your mobile devices. The mobile version of the app is available on Playstore and Appstore for you to download and install.



Note: The Setup configuration modules will not be available in your mobile app. Those specifications can be configured only using your web app. However, you will be able to add employees, add volunteer programs, and communicate announcements, policies, etc. , using the mobile app.

Users and user roles

Each employee with access to the app is a user of the app, which includes the app owner as well. Each set of users has unique functions in the app. In order to define these functions clearly, we have categorized the actions and access to the app's components into user roles. Each user role has a specific set of actions applicable to it: these actions include a varied range of combination of actions like adding records, viewing reports, modifying records, and deleting records. For instance, a user of one profile might only have permission to view the records, while another user of a different profile might have permission to view, add, and modify the records in a particular report. In another instance, the former might have permission to view, add, and modify records, and the latter might have only view permission.

The user roles are defined taking into account the logic based on which the app's modules are constructed and which type of user needs what level of access to the components of the app.

The following are the user profiles available in this app:

Employee - The employee profile is assigned to employees who work for your organization and need to follow the protocols of the organization to make your workplace a safe environment. Employees with this profile will not have administrative functions. They will be mandated to take assessments, they will be able to raise requests and view them, and view dashboards for which they have permission.

Maintenance Staff - The maintenance staff role is assigned to employees who are responsible for building maintenance activities in the various branches of your organization. They will be assigned maintenance activities and each person will be able to view individual requests. They will be able to update the status of the activity and enable tracking of progress.

Service Agent - The service agent role is assigned to employees who perform duties associated with the asset requests that are raised by the employees of your organization. Each service agent will be assigned asset requests and will have a view of all those requests. They will be able to update the status of the request and enable tracking of progress.

Front Desk Staff - The front desk staff role is assigned to employees who handle the front desk or reception duties: this includes employee checkin and checkout and visitor checkin and checkout.

Employee Entry Approver - The employee entry approver is an employee who is provided with the permission to approve or reject safe entry requests that are submitted using the Employee Entry Request form.

Visitor Entry Approver - The visitor entry approver is an employee who is provided with the permission to approve or reject the visitor entry requests that are submitted by individuals who visit the campus.

Asset Request Approver - The asset request approver is an employee who is provided with the permission to approve or reject asset requests that are raised using the Asset Request form.

Maintenance Audit Approver - The maintenance audit approver is an employee who is provided with the permission to approve or reject maintenance audits. This person will be able to view and approve pending audits, view approved audits, and reject requests.

Branch Manager - The branch manager is of an administrative role. The organization can have multiple branches from where employees function and each branch can have one or more buildings. Each of these branches is assigned a branch manager who supervises that facility.

Super Admin - The super admin is an employee who is the owner of the app. The super admin has access to all the components of the app and provides the specifications for the workplace setup at the organizational level. The super admin can share the app to the employees, assign user roles to employees based on which actions they should be able to perform in the app, remove users from the app, and view, add, edit, and delete records.

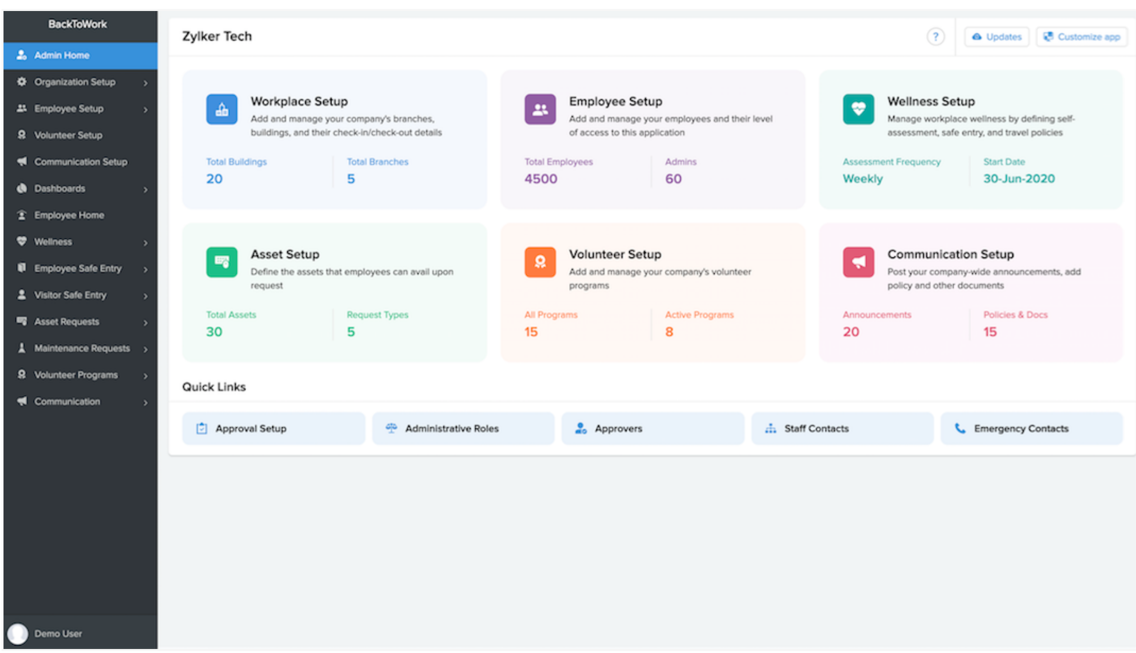
Note: You will be able to manage users in Zoho Directory. Learn more

About Admin Home

The Admin Home page is a self-service portal to the Admin that provides you with a comprehensive view of all the organization setup related details. These information are spread across reports and this dashboard collectively presents them in figures for quick reference and a high level view.

Each Setup is displayed in a card layout. Clicking on the card helps you navigate to the respective setup page. For instance, clicking on Workplace Setup card takes you to the Workplace Setup page that displays the branches and buildings at which you have offices setup.

At the bottom there are quick links to certain components of the application. You can click them to navigate to the respective page.



Update Company Name

To update company name:

1. Click **Company Name**.
2. Enter **Name**. The update will reflect.

Domain Authentication

The emails sent from BackToWork app may not reach the user's inbox or reach as a spam alert. To solve this problem, you need to get domain authentication. Contact support@zohobacktowork.com to get domain authentication.

Workplace Setup

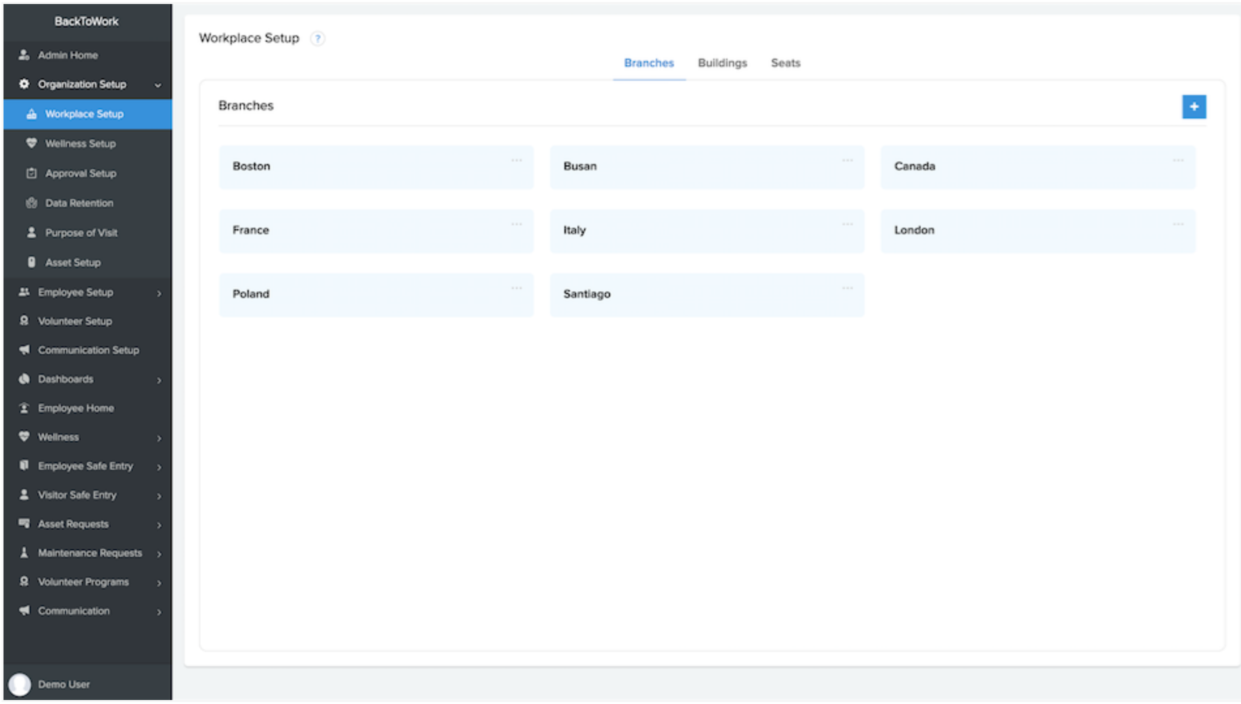
The Workplace Setup module enables you to add and manage information on your office facilities. There are three aspects to your workplace configuration: branches, buildings, and seats. These information is essential to monitor employees collectively, facilitate dissemination of information, systematise allocation of space, and maintain a uniform order across locations.

Branches and buildings

This section displays the branches at which your organization is established and the buildings in each of those branches. You can enter the information in the Workplace Setup form. Branches refer to the locations in which the organization is present. There can be multiple buildings in a branch.

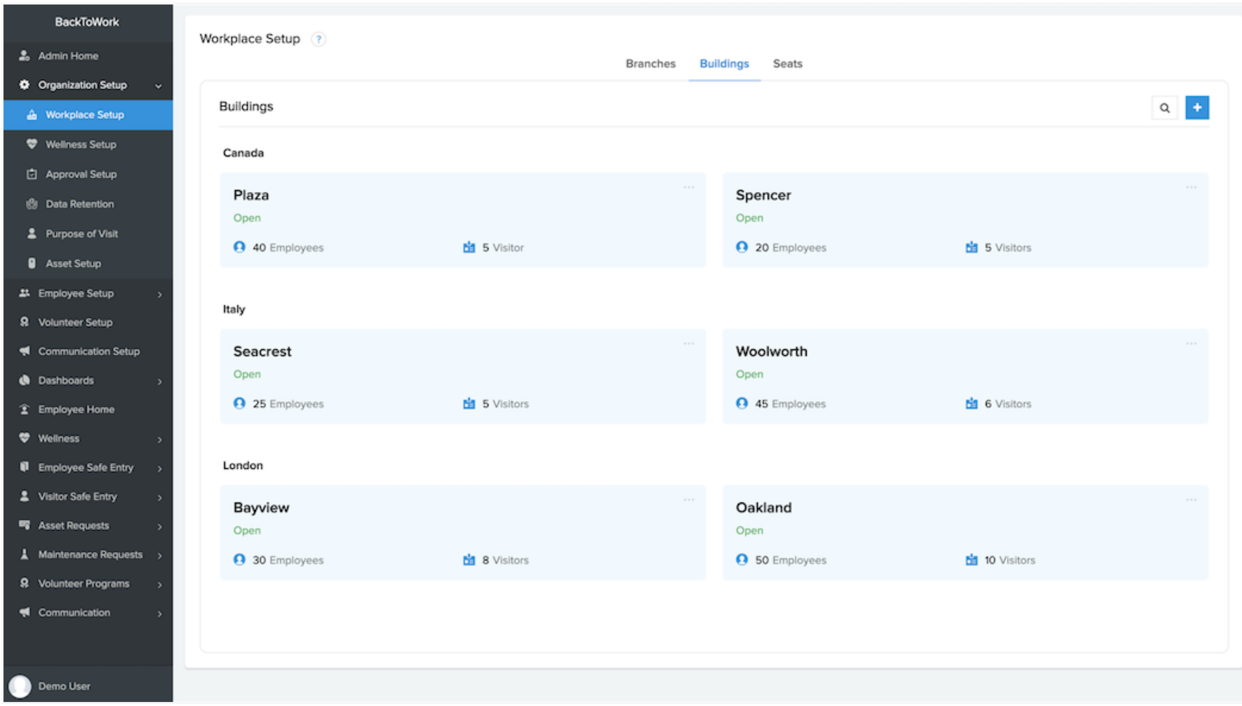
Module Configuration section in Workplace setup allows you to determine the modules that can be accessible to users of a particular branch. You can enable or disable the modules by selecting or deselecting them. The modules that are selected will be enabled for users of that branch. So users of different branches can have access to different sets of modules. This configuration is applicable to the following modules:

- Asset requests: If disabled, employees will not be able to raise asset requests.
- Maintenance Requests: If disabled, employees will not be able to raise maintenance requests.
- Travel History: If disabled, employees will not be able to added travel details.
- Workplace Gatherings: If disabled, employees will not be able to add details of workplace gatherings.



To determine building specifications you need to provide the associated branch, building name and the status (whether it is open or closed). If a building is closed, then entry requests cannot be raised for that building.

You need to specify the maximum number of employees and visitors who will be allowed to enter into a building. Safe entry requests will not be accepted beyond this stipulated number. For example, if the maximum count is 30, if we get 30 requests, we will close the form off. In that if 20 is approved, 10 is rejected, again we will open the form and accept 10 more requests.



You need to mention who is to handle Employee Safe Entry process:

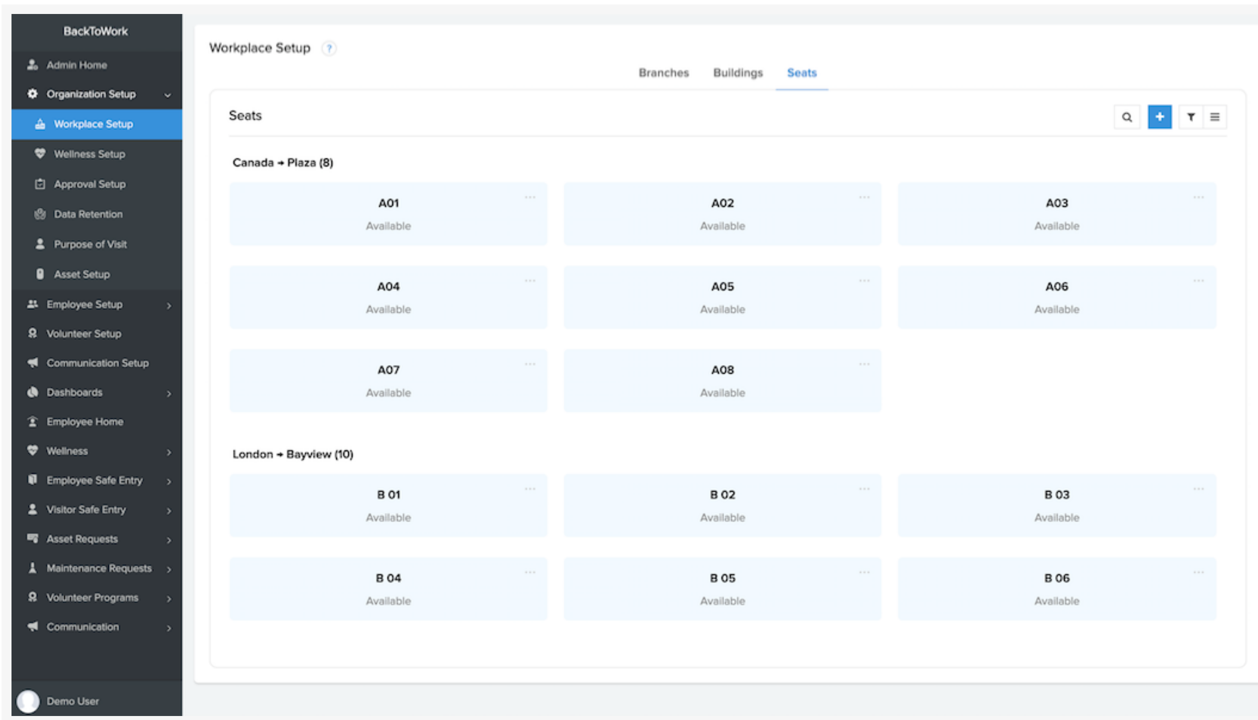
Front Desk Staff/ Branch Manager/Admin - Employees in either of these roles will be able to check-in/check-out employees/visitors.

Kiosk - A kiosk is a device like a smartphone/tablet. The BackToWork app needs to be installed on it and the kiosk email entered must be used to login to the application. This kiosk email address is provided while you are configuring the building details. After logging in, the app will open and will have a QR code scanner. When placed at the building entrance, employees and visitors will be able to self check-in/check-out by scanning the QR code at the kiosk.

Note: You can only add a new branch or building and rename an existing branch or building. You will not be able to delete records.

Seat allocation

The Seats section displays information related to the seats available in each of the buildings. You will be able to keep track of the seats that are available, based on which you can map those seats when employees raise entry requests.



You can determine whether you need to enable seat allocation for a building or not. This setting is available under the Building section. If the requirement is enabled, you need to determine whether the allocation is to be done manually or by the system. If the seating allocation is by the system, the seat is allocated automatically when the employee entry request raised by the employee is approved. The employee will be provided with the details of the seat in the entry approval email. If the seat allocation is to be handled manually, the Employee Entry Approver, Branch Manager, or the Admin will have to navigate to Employee Safe Entry, go to Seat Allocation, and under Awaiting Allocation needs to manually assign the seats to the employees. Once the seat is assigned, an email will be sent notifying the employees of the seating details.

You can set up the seat sanitization process wherein maintenance requests get raised when a seat has been vacated. The maintenance staff will attend the request to sanitize the seat.

Add seats

To enable seat allocation, you need to add the seats. You can add seats one by one by clicking the (+) icon in the Seats section or import in bulk using the template spreadsheet provided.

To import seats:

1. Go to the **Seats** tab.
2. Click More options.
3. Select Import data. The template with the format in which you need to add data will be available.
4. Add data similar to the template spreadsheet in the given format.
5. Import the data in the template. The imported data will be available in the Seats section.

Note: The Branch and building mentioned in the sheet needs to be already available in the app.

Points to note

- The Admins can mark seats as active or inactive. Only seats that are marked as active will be allocated to employees when they raise safe entry requests.

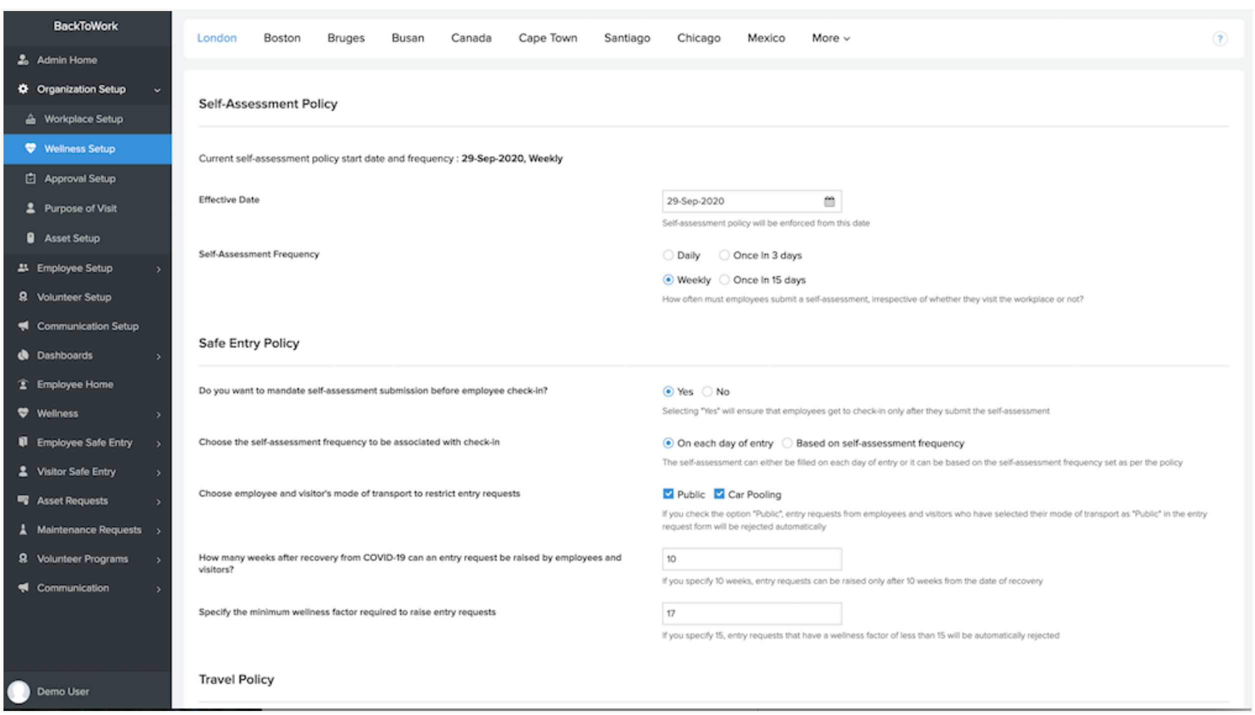
- To mark a seat as inactive: the seat should not be currently assigned to any employee and should not be assigned to an employee who has been approved for safe entry. If a seat that is assigned to an employee needs to be marked as inactive, you need to reassign another seat and them mark this seat an inactive. Similarly, a seat can be deleted only when it is not assigned to any employee.
- The number of seats needs to be greater than or equal to the maximum number of employees allowed.
- Only Admins can add and delete seats and mark them as active and inactive. Whereas, assigning and reassigning them can be done by Admins, Branch Managers, and Employee Entry Approvers.
- If the Maximum Allowed Employee Count is 50 but there are 100 seats, the app is designed in such a way that only the first 50 seats would be used.

Wellness Setup

The Wellness Setup module enables you to configure the parameters for your wellness policies. There are three sections that help you determine your employee wellness indicators: Self Assessment Policy, Safe Entry Policy, and Travel Policy. The configurations that you set can be specific to each of your branches. So, you will be able to assign various sets of regulations to different branches in your organization.

Note: When a new branch is added, the policies will be assigned default values that can be modified according to your requirement.

Self-Assessment Policy: This allows you to set the date for assessment and the periodicity for conducting the assessment.



You can request all employees to fill out a self-assessment form to monitor their health, irrespective of whether they are coming to office or are working from home.

Two specific inputs that are captured here: the effective date or the date from which the policy takes effect and the frequency at which the assessment has to be undertaken.

> Note: By default we would have set the effective date to the day the app is installed and the frequency to weekly. If suppose the effective date is changed to a future date, until the effective date the old assessment frequency will be applicable and after that, the new assessment frequency will come into play.

Safe Entry Policy: This allows you to determine the parameters for safe entry. These parameters have to be fulfilled for an employee to enter the campus.

There are aspects to safe entry policy:

- You can determine if the assessment should be taken each time an employee checks into a building. You can further specify the intervals at which the assessment needs to be taken. If you select Daily, then on each day of entry, the self-assessment form needs to be submitted to gain entry. If not check-in is not possible. Or the assessment will be based on the predefined frequency. If the assessment for that period is filled, employees can enter. This aspect is set to Yes by default and the frequency is Daily.
- You will be able to reject an entry request based on the mode of transportation. If there is a need to restrict entry requests from employees who come by public transport to work, you need to select the checkbox. The requests from employees commuting by public transport will automatically be rejected. This is applicable for both employees and visitors.
- The third aspect is to restrict entry requests from people who have recently recovered from COVID-19. You will be able to specify the number of weeks after recovery that an employee can raise an entry request. The number is set to 10

by by default. If an employee who has recovered does not satisfy this criteria raises a request, it will be rejected.

- Final aspect of providing entry is based on wellness factor. Wellness factor is a value calculated based on the responses given to the queries in the self-assessment form. The range of the score can lie between -20 to +20, with a score above 17 being eligible to raise an entry request. The super-admin/app owner can specify a threshold value below which entry requests will automatically be rejected.

Travel policy: This enables you to provide specification on entry for employees who have recent travel history.

- You will be able to restrict employees and visitors who have recently traveled from raising safe entry requests. To place this restriction, you can specify the number of weeks for which an entry request cannot be raised following travel.
- If an employee or visitor who has a travel history and does not satisfy the given specification, the entry request will automatically be rejected.
- This policy will be enabled by default with the number of weeks set to two weeks.

Wellness Factor Calculation

It is calculated based on the responses given to the self assessment form for each assessment. The result can be in the range of -20 to +20.

Part - I

- Have you ever tested positive for Covid-19 - 5 Points No (+5) Yes (-5)
- When did you test positive for the virus
- Have you recovered now (Yes/No)
- What is your recovery date

Part - II

- Do you live with children below 5 years or people aged above 60 years? - 1 point- Yes(-1) No (+1)
- Have you been in contact with anyone who has or had Covid-19 or is being investigated on suspicion of contracting the virus in the last 15 days - 4 points- Yes (-4) No (+4)
- Do you have or had any symptoms of the virus (like cold,cough, sore throat, muscle ache, runny nose, headache, diarrhoea, vomiting etc) in the last 15 days - 4 points - Yes(-4) No(+4)
- Have you visited a hospital for any health issues in the last 15 days - 3 points- Yes(-3) No (+3)
- Do you stay in a hotspot, a containment zone or a sealed off area - 3 points - Yes(-3) No (+3)

Calculation:

- PART - II - We will sum up based on response
- PART - I
- If employee answers No - We can flatly add that +5
- If employee answers Yes -
  - If employee has not recovered we calculate as -5
  - 7 days from date of recovery calculate as -4
  - 14 days from date of recovery calculate as -3
  - 21 days from date of recovery calculate as -2
  - 28 days from date of recovery calculate as -1
  - 35 days from date of recovery calculate as 0
  - 42 days from date of recovery calculate as +1
  - 49 days from date of recovery calculate as +2

    - 56 days from date of recovery calculate as +3
    - 63 days from date of recovery calculate as +3
    - 70 days from date of recovery calculate as +5
- Total Wellness factor of employee = Part I + Part II

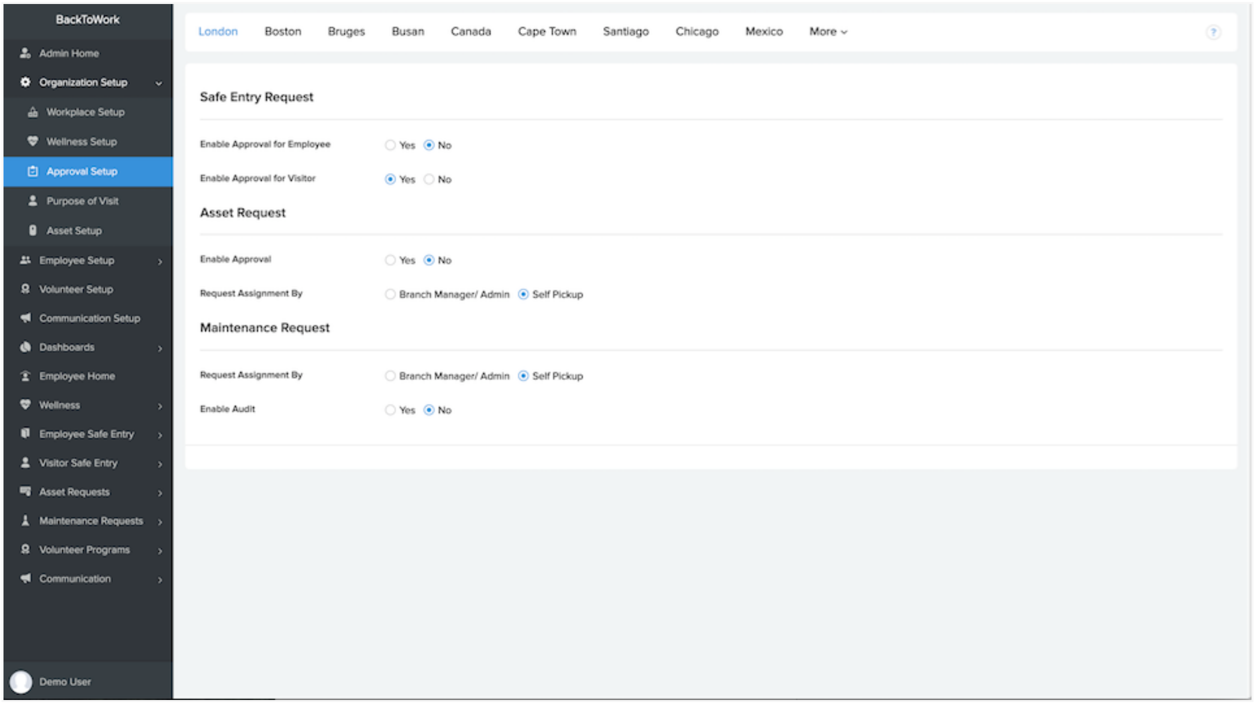
Approval Setup

The Approval Setup module enables you to configure the settings for approvals. The configurations that you set can be specific to each of your branches. So, you will be able to assign various sets of approval regulations to different branches in your organization.

Note: When a new branch is added, the approval setup will be assigned default values that can be modified according to your requirement.

There are three sections for which you can determine the approval setup:

- **Safe Entry Request**: Enable the Employee and Visitor approval process. When enabled, requests will be sent for approval and approved by the approver. Or, system will automatically approve the requests.
- **Asset Request**: Enable the approval process for asset requests and specify how the request is assigned. The request assignment can be done by the admin or branch manager, or can be picked up by the agents themselves.
- **Maintenance Request**: Specify how the request is assigned and enable audit process. The request assignment can be done by the branch manager or admin, or can be picked up by the maintenance staff themselves.


BackToWork
Admin Home
Organization Setup
Workplace Setup
Wellness Setup
Approval Setup
Purpose of Visit
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Volunteer Setup
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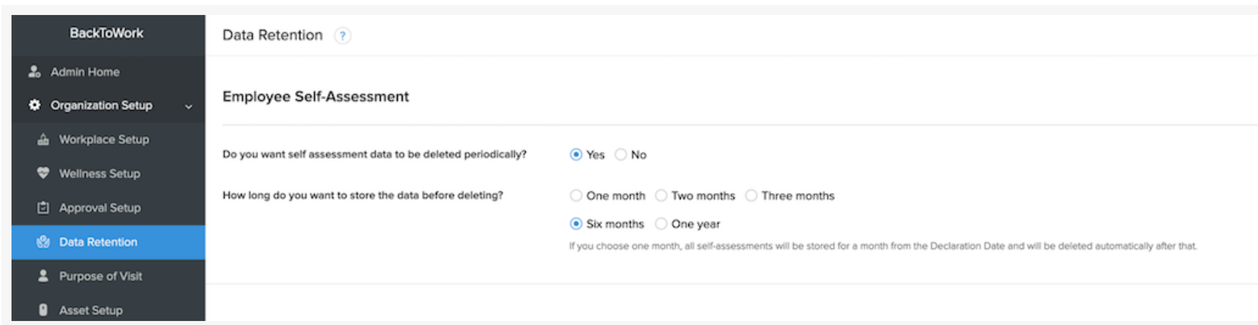
Dashboards
Employee Home
Wellness
Employee Safe Entry
Visitor Safe Entry
Asset Requests
Maintenance Requests
Volunteer Programs
Communication
Demo User
London
Boston
Bruges
Busan
Canada
Cape Town
Santiago
Chicago
Mexico
More
Safe Entry Request
Enable Approval for Employee
Yes
No
Enable Approval for Visitor
Yes
No
Asset Request
Enable Approval
Yes
No
Request Assignment By
Branch Manager/ Admin
Self Pickup
Maintenance Request
Request Assignment By
Branch Manager/ Admin
Self Pickup
Enable Audit
Yes
No

Data Retention

The Data Retention setup module enables you to specify the time period for storing and retaining self-assessment data. After the specified time period, the data is deleted. This specification is applicable to the entire organization. By setting up a time period to store data, you will be able to define a system to regularly remove unwanted data.



Firstly, you need to specify whether you want the data to be retained only for a certain duration. If you select No, all your employee self assessment data will be stored indefinitely. If you select Yes, the options for periodicity will appear. Select from the following options:

- One month
- Two months
- Three months
- Six months
- One year

The period will take effect on the date of declaration. If you select the period as One month, the data will be deleted after a month from the date of declaration. However, the last self-assessment data submitted by the employees will be retained.

Purpose of Visit

The Purpose of Visit module enables you to make a record of types of visits that a visitor can mention as purpose of visiting while raising the Visitor Entry Request. This serves as a predefined list of purposes of visit. For instance, your organization might allow a visitor who is attending an interview, meeting as a business partner, offering service as a maintenance agent, or conducting a workshop. You can capture these categories of visit purposes.

You will be able to:

- Define the various reasons for which a visitor can enter the workplace. You can add, update, or delete the purposes.

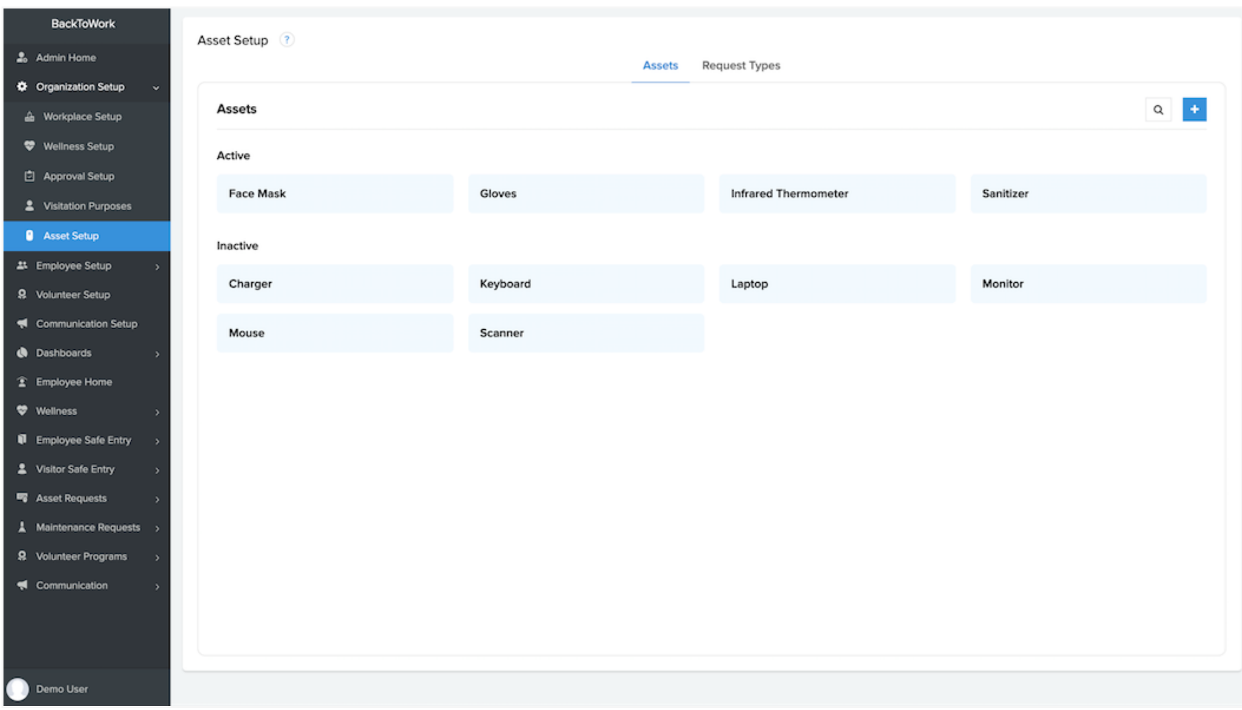
  Note: To delete a purpose, you need to ensure it is not associated with any visitor safe entry requests.
- Mark as active or inactive: If a purpose is marked as inactive, it will not be available in the listing when entry requests are raised. If marked as active, it will be available in the list of purposes dropdown, when requests are raised.

To mark as active or inactive:

1. Hover on a purpose of visit in the report. The ellipsis icon (three dots) will appear.
2. Click the ellipsis icon.
3. Select Mark as active or inactive.

Asset Setup

The Asset Setup module enables you to capture and view the assets that are made available to your employees and the types of requests. For instance, you might offer safety assets like sanitizers, masks, gadget sanitizers, and gloves for your employees. In request types, you can have new, refill, or replace. So if an employee is requesting for a new mask, they will select Asset as mask and Request Type as new.



There are two sections:

Assets

- The various assets that are available and used in the organization. For example, you could have laptop, charger, mouse, and mobile as Assets.
- You will be able to add, update, and delete assets.

- Mark as active or Mark as inactive: If an asset is marked as inactive, it will not be available in listing when asset requests are raised. If marked as active, it will be available in the assets dropdown when requests are raised.

Note: To delete an asset, you need to ensure it is not associated with any requests.

Request Types

- The different kinds of requests associated with assets. For instance, you might offer safety assets like sanitizers, masks, gadget sanitizers, and gloves for your employees. In request types, you can have new, refill, or replace. So if an employee is requesting a new mask, the Asset will be mask and the Request Type will be new.
- You will be able to add, update, or delete request types.
- Mark as active or Mark as inactive: If a request is marked as inactive, it will not be available in listing when asset requests are raised. If marked as active, it will be available in the request type dropdown when requests are raised.

To mark as active or inactive:

1. Hover on the asset or request type in the report. The ellipsis icon (three dots) will appear.
2. Click the ellipsis icon.
3. Select Mark as active or inactive.

Employee Setup

Employees are all those who are part of the organization. The Employees module enables you to enter and store employee data. This Employees report displays Employee Name, ID number, Email Address, Branch, Role, and their eligibility to raise Safe Entry request. You can add employee records individually or import the complete data

Employee Form

There are two parts to this form. The first one covers the basic details like name, email, branch, etc.

Second part is the work information. This captures whether an employee is eligible to raise safe entry requests. If an employee is marked as No, any entry requests raised will automatically be rejected.

Mark as emergency contact - should an employee be marked as emergency contact and if yes, what type of contact should the employee be marked as.

Roles - Roles are the backbone of the application and define the level of access an employee has to the application. The following are the various roles your employees will assume:

1. **Employee** - This is the fundamental level of profile. Employees in this role will only be able to raise entry requests, asset requests, add travel history, view communications, and opt for volunteer programs.
2. **Front Desk Staff** - Employees in this role are responsible for the check-in/check-out of employees and visitors at the branches to which they

belong.

3. **Service Agent** - Employees in this role work on the asset requests that are raised.
4. **Maintenance Staff** - Employees in this role work on building maintenance requests.
5. **Employee Entry Approver** - Employees in this role approve, reject, or revoke employee safe entry requests, accordingly.
6. **Visitor Entry Approver** - Employees in this role approve, reject, or revoke employee safe entry requests, accordingly.
7. **Asset Request Approver** - Employees in this role approve or reject employee asset requests, accordingly.
8. **Maintenance Audit Approver** - Employees in this role approve or reject employee maintenance audit tasks, accordingly.
9. **Branch Manger -** Employees in this role supervise the branch to which they assigned. They will be able to perform the above mentioned operations at their own branch.
10. Note: All the above roles are limited to the branch to which they belong. They will not be able to view data from other branches.
11. **Admin** - Employees in this role oversee operations at all branches. This roles enables admins to perform actions within the app work on par with the app owner. They have access to setup modules, dashboards, and other modules.
12. Note: The Admin will not be able to delete another admin in the app.

To add employees individually:

1. Navigate to the **Employees** page.
2. Click the plus icon. The form will be displayed.
3. Enter the Employee details.
4. Click **Submit**. The record is added to your Employees report in the Employee page.

To edit employee details:

1. Navigate to the Employee Setup page.
2. Click the record to open.
3. Click **Edit**. The form will appear with the current data.
4. Modify the data.
5. Click **Update**. The record is updated in the Employee Setup page.

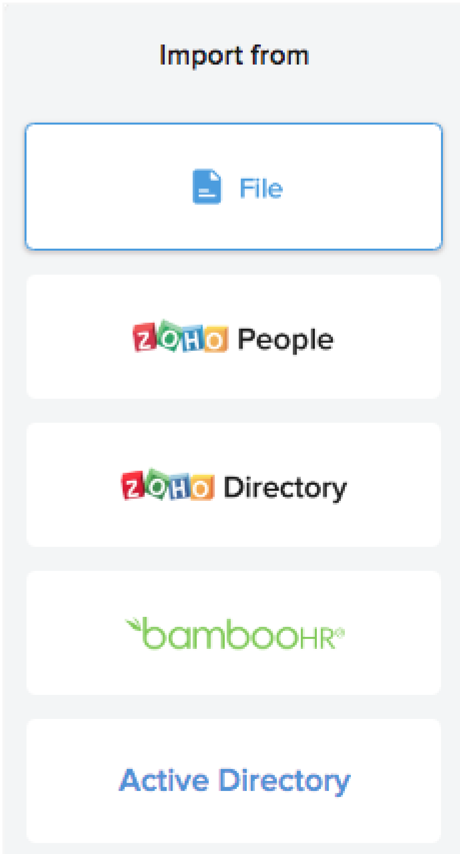
To edit multiple records, select the records that need to be edited, and select the parameter that has to be modified and update the same.

The detail view of the record allows you to view the complete details, along with additional details on the employee that are pulled from other reports.

Import employee data

You can also import all your employee details into the app from various sources. Import your data from the following locations or services:

- **From file**: Import from a File that is stored in a local drive or in a cloud service, or copy and paste the data.
- **Zoho People**: Import from your Zoho People application.
- **Zoho Directory**: Obtain users from Zoho Directory and import the file here.
- **BambooHR**: Fetch employee details from BambooHR.
- **Active Directory**: Sync with Active Directory, obtain users, and import the data here.



Import from File

To import from file:

1. Click **Import Data** in the Employees module. The Import Data window will appear.
2. Select Import from File option.
3. Select the location of the file.
4. Select the file or copy and paste data.
5. Click **Next**.
6. Specify if the first row will be the field names.
7. Assign the appropriate field type for each column. For instance, if your first field in Name field, select name. (Ignore if it is selected by default.)

8. Click **Import Data**. The data will be imported and records will be displayed.

Points to remember while importing employee data:

When you are uploading a file, the fields above must be the arranged in columns as shown below:

Employee ID	Name	Email	Branch	Role	Approver Type	Staff Type	Phone	Extn	Eligible to Raise Entry Request	Mark as Emergency Contact	Type

When adding Branch, Roles, Approver or Staff type, you need to ensure only those values that are already available in the app are added and that the spellings are also right. If not, the import will fail.

Mandatory fields like ID, Name, Email, Branch, Role, Approver Type, Staff type, and Eligible to Raise Safe Entry must have values.

Import from Zoho People

To import from Zoho People:

1. Navigate to **Zoho People**.
2. Generate the **authtoken** (the authtoken will not be stored in the app).
   Note: To perform this integration, the user needs Admin privileges with access to Settings.
3. Navigate back to your **Employee Setup** in BackToWork.
4. Click **Import Data** in the Employees module. The Import Data window will appear.
5. Select Import from Zoho People option.
6. Enter the authtoken in the field provided.
7. Click **Fetch Data** to add Active Employees in the organization from the Employee form and to share the app with them. Users will be assigned Employee Role and Branch will reflect the work location in Zoho People.
8. Reassign employee roles if needed.

Import from Zoho Directory

To import employees from Zoho Directory:

1. Navigate to **Zoho Directory**. Zoho Creator will be displayed alongside other products.
2. Select **Creator**. You or the super admin will be able to view the list of Creator apps.
3. Select **BackToWork app** from this list.
4. Select the User role and the permission set for the role. On completing this, the app will be shared with the intended users or the employees of your organization.

5. Export shared users from Zoho Directory. Refer link to learn more.
6. Note: To perform this integration, the user needs administrative privileges in ZDirectory.
7. Navigate back to your Employee Setup in BactToWork app.
8. Select Import from Zoho Directory option.
9. Note:
    - Ensure that the specifications of Roles (Admin, Approver, Branch Manager, Staff, and Employee), Approver Types (Employee Entry Approver, Visitor Entry Approver, Asset Request Approver, and Maintenance Audit Approver), and Staff types (Maintenance Staff, Service Agent, Front Desk Staff) are free of any errors.
    - Ensure that the values under Branch are values that are present in the app.
10. Upload this file to import employees.

Import from BambooHR

To import employees from BambooHR:

1. Fetch the **API Key** and **subdomain** for your **BambooHR** account. Refer link for details on how to fetch the API Key and subdomain.
2. Note:
    - To obtain the API key, the user needs Admin privileges in BambooHR.
    - The API Key and subdomain values will not be stored in the app.
3. Add the fetched values in the fields provided.
4. Click **Fetch Data** to add Active Employees from the directory and to share the app with them. Users will be assigned Employee Role and Branch will reflect the work location in BambooHR.
5. Reassign employee roles if needed.

Import from Active Directory

To import employees from Active Directory:

1. Navigate to **ZDirectory**.
2. Sync with Active Directory using the sync tool. Refer link to learn about syncing.
3. Select **Creator** from the apps listed in ZDirectory. You will be able to view the list of Creator apps.
4. Select **BackToWork app** from this list.
5. Select the User role and the permission set for the role. On completing this, the app will be shared with the intended users or the employees of your organization.
6. Export shared users from Zoho Directory. Refer link to learn more.
7. Note: To perform this integration, the user needs administrative privileges in ZDirectory.
8. Navigate back to your Employee Setup in BactToWork app.
9. Select Import from Active Directory option.
10. Note:
    - Ensure that the specifications of Roles (Admin, Approver, Branch Manager, Staff, and Employee), Approver Types (Employee Entry Approver, Visitor Entry Approver, Asset Request Approver, and Maintenance Audit Approver), and Staff types (Maintenance Staff, Service Agent, Front Desk Staff) are free of any errors.
    - Ensure that the values under Branch are values that are present in the app.
11. Click **Import Data** to to this file and import employees.

Archived Employees

The Archived Employees report houses employees who are temporarily deactivated from using the app or made dormant users of the app. The employees are moved from Employees report to this folder. To move, hover on the record, click the ellipsis, and click Remove Employee. The employee is removed and moved to the Archived Employees report. Following this the app will be unshared but the requests raised by the employee and all data of the employee will be retained.

To add that employee again, go to Archived Employee, click the ellipsis and Add Employee again. The employee will be activated, and the app will be shared.

Administrative Roles

The Administrative Roles module helps you to view employees in administrative roles and branch managers. The Admin tab displays the administrators of the various branches and the Branch Managers tab displays the managers who are in-charge of each branch.

Approvers and Staff and Emergency Contacts

Approvers

The Approvers module enables you to add employees who will perform approval actions for various requests across the organization. There are four different approver roles in the app: Entry Request Approver, Visitor Entry Approver, Asset Request Approver, and Maintenance Audit Approver. This module enables you to view these approvers in separate tabs.

Staff Contacts

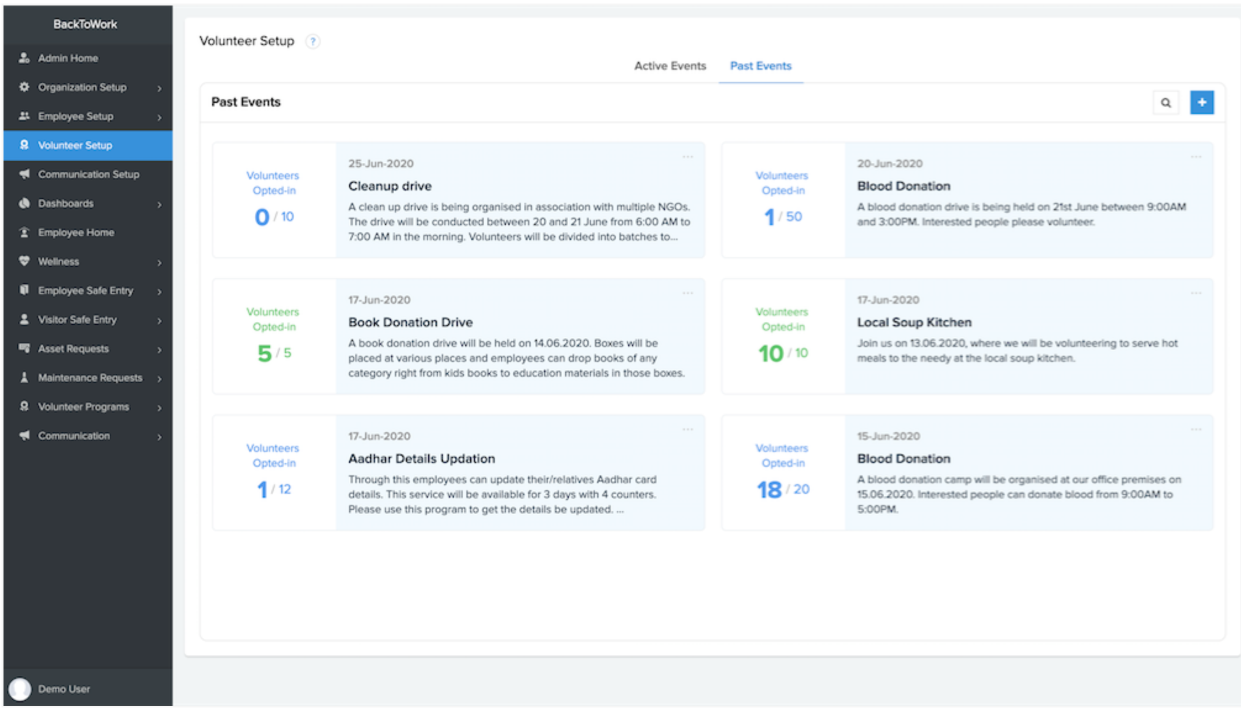
This module provides you with comprehensive info on the staff contact details from the following departments: Front Desk, Service Agents, and Maintenance Staff. These contacts of staff from these three departments are filtered and displayed as separate tabs.

Emergency Contacts

This module provides you with emergency contact details of employees in the organization.

Volunteer Setup

The Volunteer Setup module provides an opportunity for your organization to involve employees to volunteer for any program or activity.



The Volunteer Program form obtains the name of the program, the details, the number of volunteers needed, and the date by which the registration will close. Programs can be specific to one branch or can be conducted across multiple branches.

There are two tabs in this module: Active and Past events. Active events are those that are open for volunteers to opt-in. Past events are those that are closed.

Note:

- To view the employees who have opted for the program, click on the respective cards.

- You will be able to edit and delete active events, and delete past events.

Communication Setup

The Communication Setup module facilitates dissemination of information across your organization. You can post announcements, publish policies and safety documents, and maintain an FAQ section. This announcement can be specific to branches or applicable to the entire organization. The employees will receive push notifications when you add or update information here.

There are five types of information:

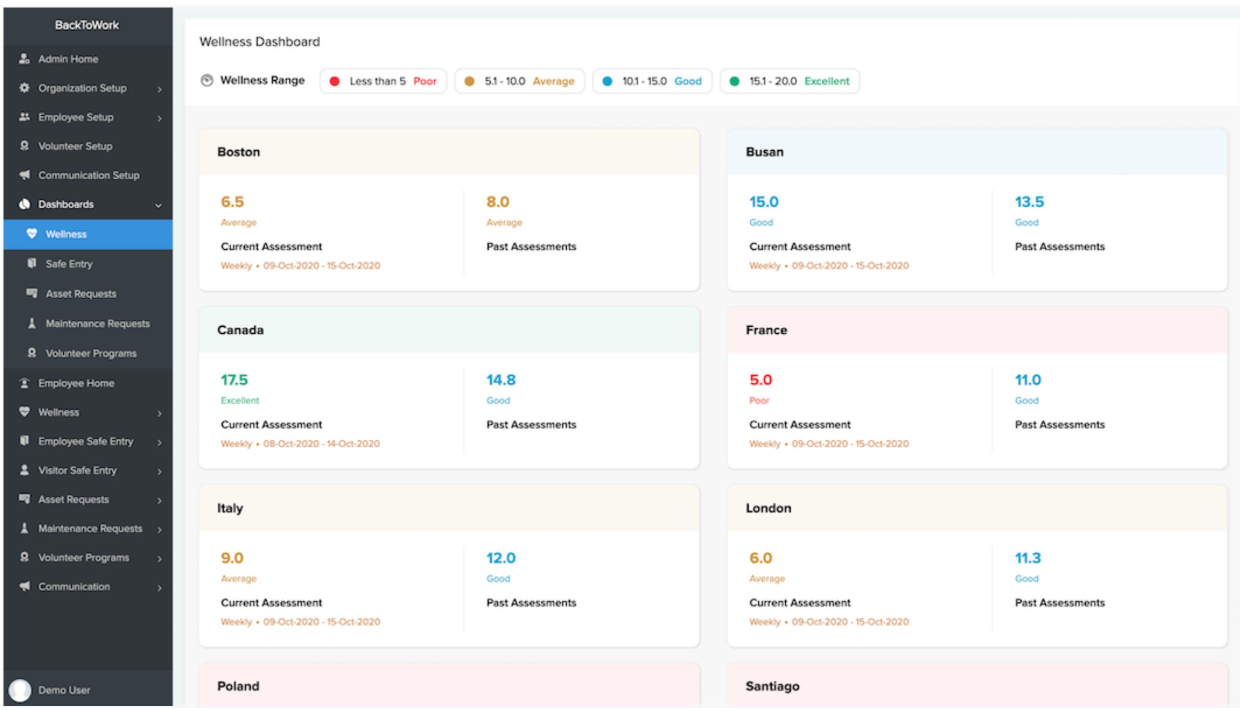
- **Announcements**: For instance, you want to inform employees of a particular maintenance activity or a fumigation routine in your building.
- **Best Practices**: For instance, you can educate your employees of all the measures that the employees need to take while in a meeting room.
- **Policies**: For instance, you could publish your Travel policy and keep your employees informed about the latest updates to the policy.
- **Safety documents**: For instance, you could make Information Safety documents available here.
- **FAQs**: For instance, you can put up questions that commonly get asked by employees and provide answers here.

Note: While uploading files that contain confidential information to share with your employees, ensure that you educate them on the confidentiality of the contents of the file. Use the notes field to enter your message.

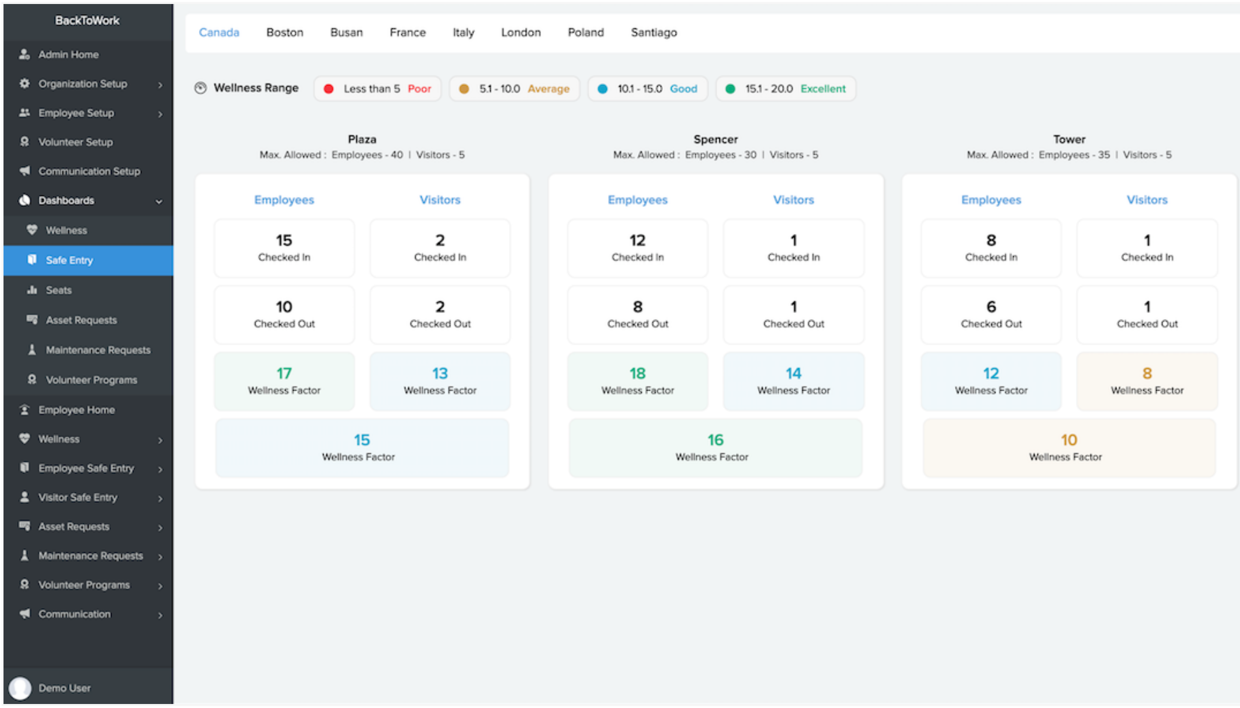
Dashboards

The purpose of a dashboard is to give a high level view of the various data that you have collected using the app. You will be able to get a comprehensive view of all requests with visual representation of the data.

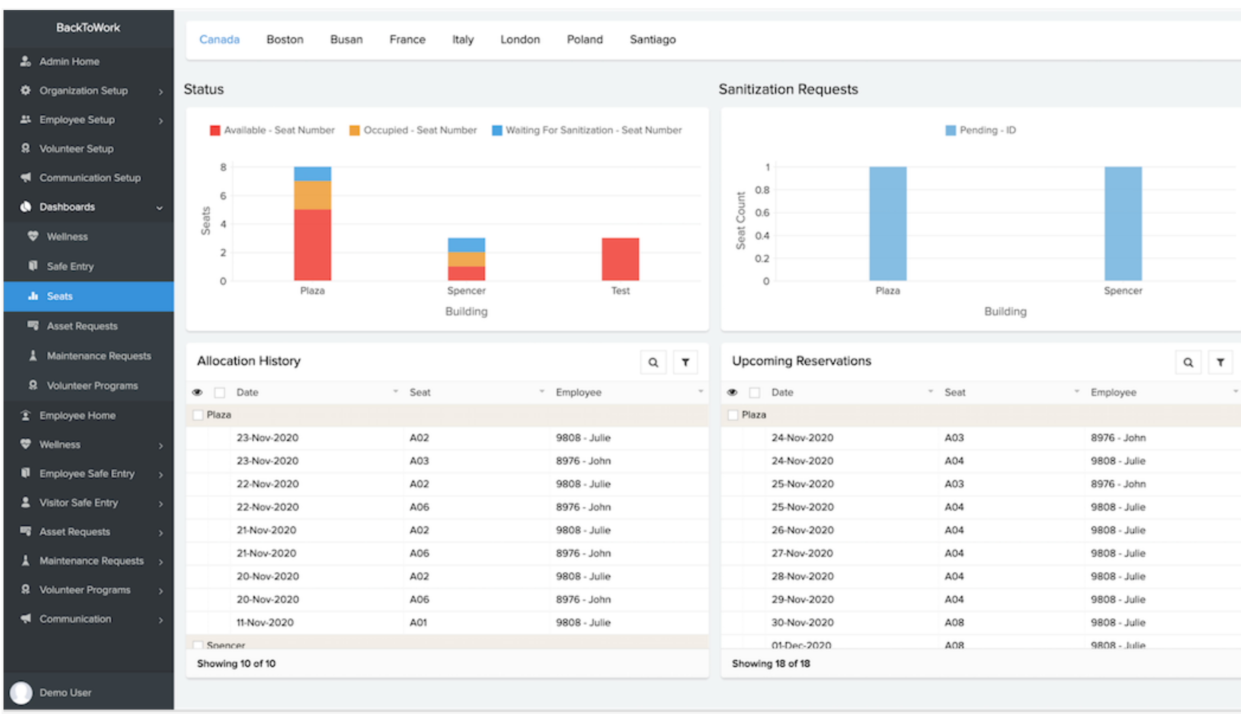
- **Wellness**: Provides the wellness factor of a branch based on the self-assessment policy.



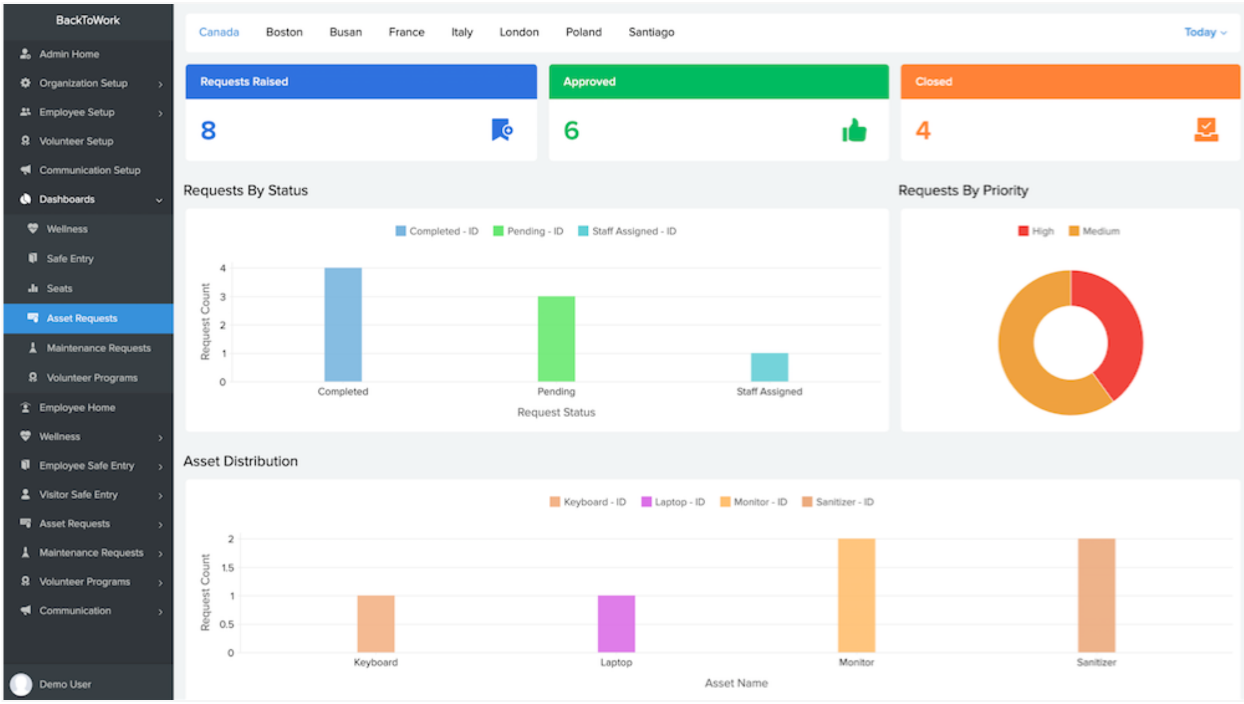
- **Safe Entry**: Provides safe entry information for each building at all branches. The information on the number of employees or visitors who have checked-in/out for the current date is provided along with the building wellness factor based on the safe entry data.



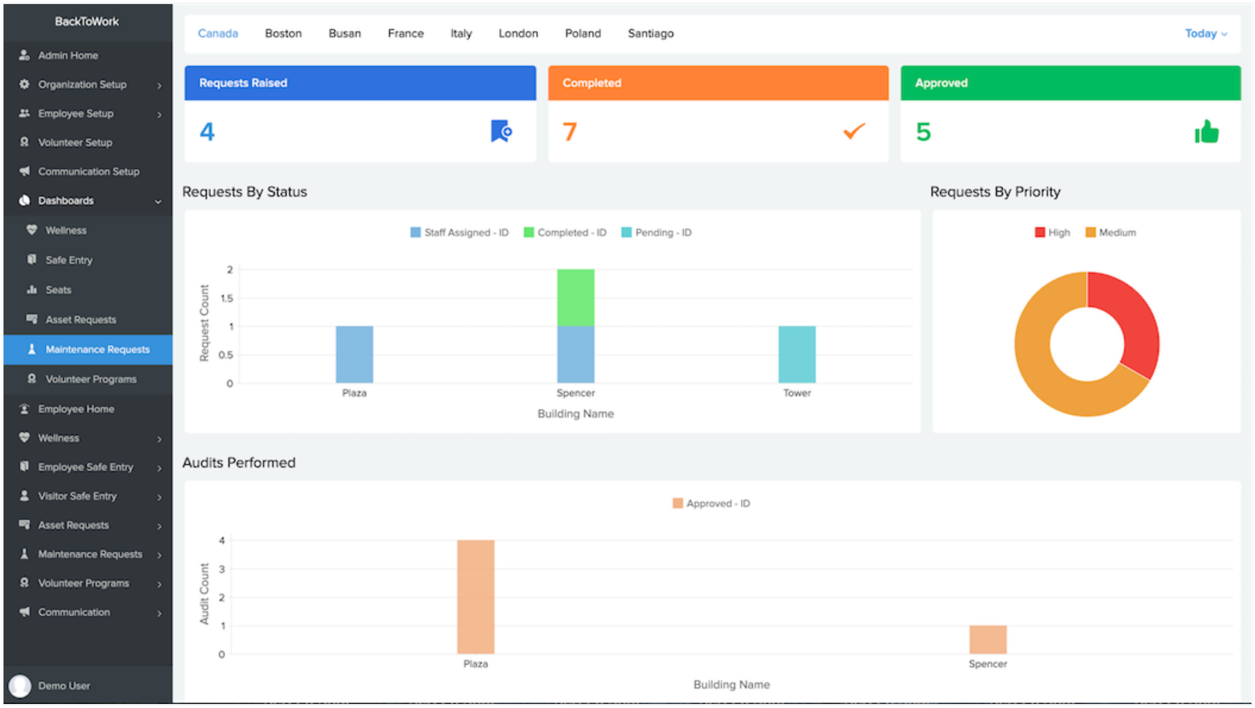
- **Seats**: Provides information on the current status of seats and details of the past and the upcoming seat allotments.



- **Asset**: Provides information on the requests raised, approved, and completed for each branch and across timelines (Today/yesterday/last 7 days and last 30 days).



- **Maintenance**: Provides information on the requests raised, completed, and approved for each branch and across timelines (Today/yesterday/last 7 days and last 30 days).



- **Volunteer**: Provides information on the volunteer programs that are available in total and active programs at branch level. Also provides information on the number of volunteers needed and those opted in.

Wellness

The Wellness module enables your employees to fill self- assessment forms, provide details on travel history, and office gatherings.

Self-Assessments: The self-assessment form will be displayed if the assessment for the current policy period is yet to be filled. If not the latest assessment that was filled will be displayed.

Past Assessments: This module will display all the past assessments that employees have filled.

My Travel History: This module will display the travels undertaken by employees. Here a record has to be created after the employee has returned after the trip. Both round trip and one way trip can be recorded.

My Gatherings: The form is used to capture information on the meetings or gatherings that happen within the campus.

When there is a meeting with visitors, the email ID of the attendees needs to be provided. When there is a meeting with employees, the employees can be selected. For example, if Bob met with Sally, Peter and Betty, this information can be recorded in the form. In the report it will be available as Bob met with Sally, Bob met with Peter, and Bob met with Betty. Three records will be entered. These records will automatically be added to Sally's, Peter's, and Betty's reports as well.

Note:

- Permission to delete records from Assessments, Travel History, and Workplace

Gatherings lies with the admin.

- The users in employee role can only view records that are in Self-assessment, Past assessments, My travel history, My gatherings reports.

Employee and Visitor Safe Entry RequestThe Employee and Visitor Safe Entry modules enable you to ensure that employees and visitors raise request to enter the campus and their requests are process based on their self-assessment.

Approvals

The Approvals module provides data on all the approved, pending, revoked, and rejected requests. This caters to users of Employee Entry Approver, Branch Manager, Visitor Entry Approver, and Admin roles.

- Pending: This tab displays all requests that are waiting for approval can be seen here. They can either be approved or rejected.
- Approved: This tab displays all requests that are approved. There are filters available to see requests that are approved by approvers and those that are auto approved by the system (if enabled). The approver can revoke the approval for a request when need arises.
- Rejected: This tab displays requests that are rejected.
- Revoked: This tab displays requests that had the approval revoked.

Seat Allocation

This module has details of requests that await seat allocation and employees who need seats to be reassigned. Admins, Branch Managers, and Employee Entry Approvers will be able to assign and reassign seats.

Note: Even if seats are system allotted, users in the above mentioned roles can manually reassign them.

Check-in/Check-out

This module concerns the Front Desk Staff, the Branch Managers, Visitor Entry Approver, and the Admins.

- **Check-in/Check-out** - The tab will contain records whose entry date is the current date. The user (one of the above mentioned roles) will be able to check-in/check-out employees. The user can also record their temperature during the process. Check-in/check-out multiple times in a day is possible, along with recording temperature multiple times.
- **Not checked out**: If an employee or visitor has forgotten/missed being checked-out at the end of the entry day, the requests will be moved to this report. The check out process can be completed here.
- **Access Revoked**: In case an employee or visitor who had initially been granted entry, entered the office and then the had the permission revoked, that employee's or visitor's records will be moved here. The admin or front desk staff can manually check out the employee from the office.

All Requests

The users of Branch Manager or Admin roles have access to this module. The entry requests raised in that particular branch is available to the branch manager, while the admin can view all requests across the organization.

Note: You will be able to edit and delete records in this report.

My Requests

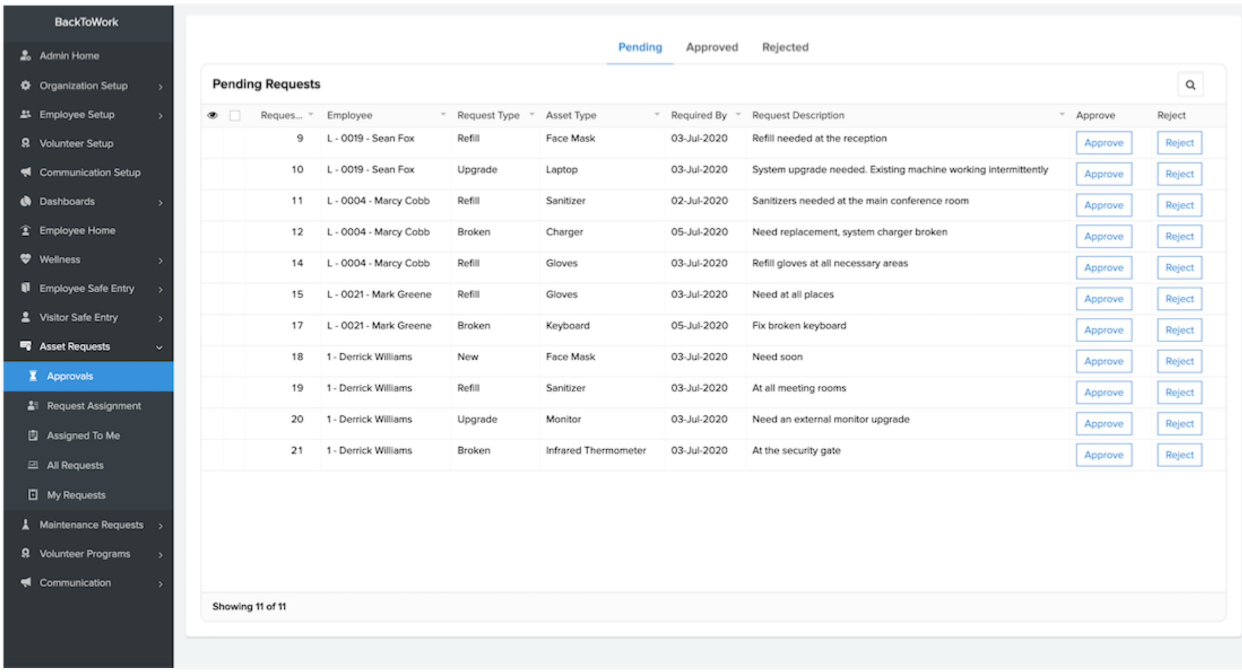
This module caters to users of Employee role. All safe entry requests raised by an employee will be displayed here. Employee will be able to raise request for multiple days of entry in a single form but duplication of requests for the same day is not permitted. If QR code is configured for entry, the QR code for that day's entry will be displayed in the report itself. Email notifications will be sent to employees when request is raised, approved, rejected, and revoked.

Request Raised for Others

This module caters to users in admin, branch manager, and front desk staff roles. These users will be able to raise visitor requests on behalf of other employees. This report displays those requests that are raised for by these users for other employees.

Asset Requests

The Asset Requests module enables you to view asset requests raised by the employees and manage the approval process.



The following are the modules under Asset Request:

Approvals - This module will be accessible to the Asset Request Approver, Branch Manager, and the Admin. There are three tabs in this module, and they display Pending (requesting awaiting approval), Approved (requests granted approval), and Rejected (requests not approved) requests, respectively.

Request Assignment - This module will be accessible to the Asset Request Approver, Branch Manager, and the Admin. The Assigned and Unassigned requests are displayed in two separate tabs.

- **Unassigned**: If the request assignment method is pickup, then this report will contain all requests with a Pickup custom action. When an unassigned request is picked up by an agent, the request is moved to the assigned tab. If the request assignment method is Staff Assigned, then this report will contain all approved requests with a custom action Staff Assign. Along with the staff the due date and priority also needs to be set.
- **Assigned**: This report displays all requests that have been assigned to a service agent but not completed yet.

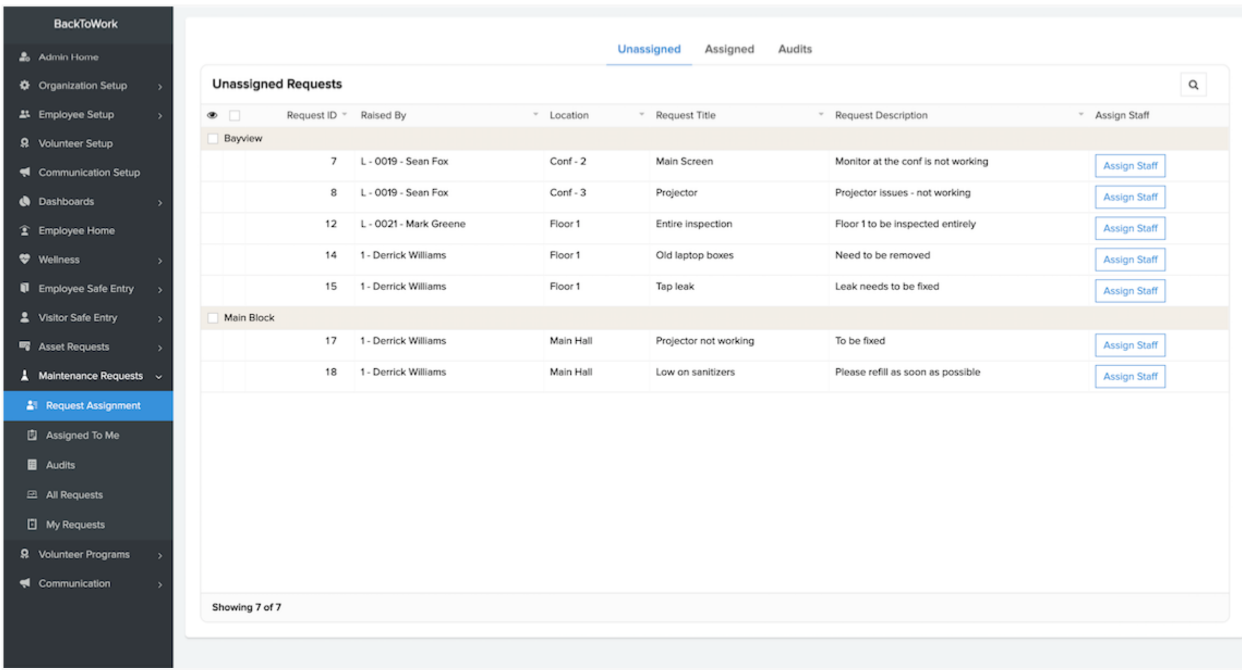
Assigned to me

This report enables individual service agents to view the requests that are assigned to them.

- **Assigned to me**: All requests assigned to a service agent will be listed. When the task is complete, the agent can click the Complete Request custom action button, add necessary images and notes, and submit it. Following this, the request would be moved to the Completed tab.
- **Completed**: All requests that have been completed by the service agent will be listed here.

Maintenance Requests

The Maintenance Requests module enables you to view the maintenance requests raised by the employees and manage the approval and audit process.



The following are the modules under Maintenance Requests:

Request Assignment

The module enables Maintenance Staff, Branch Manager, and Admin to view maintenance requests raised by the employees.

- **Unassigned**: This tab displays requests that have been raised but not assigned. If the request assignment is pickup, there will be a custom action called Pickup. Clicking this button allows the task to be assigned to the maintenance staff. If the request is assigned to the maintenance staff by branch manager or admin, due-date and priority will also be obtained.

- **Assigned**: This tab displays requests that have been assigned to maintenance staff.
- **Audits**: This tab displays completed requests that are awaiting for the audit to take place. An Audit approver will be assigned using the Assign Staff custom action.

Assigned to me

This report enables individual maintenance staff to view the requests that are assigned to them.

- **Assigned to me**: All requests assigned to a maintenance staff will be listed. When the task is complete, the agent can click the Complete Request custom action button, add necessary images and notes, and submit it. Following this, the request would be moved to the Completed tab.
- **Completed**: All requests that have been completed by the maintenance staff will be listed here.

All Requests

The module enables Branch Manager and Admin to view all maintenance requests that have been raised. The branch managers will only be able to view requests that are there from the branches that they are in charge of, while the admin can view requests from all branches.

> Note: In All Requests report, you will be able to edit or delete records.

Zoho Directory Users

Zoho Directory is a centralized user management system that enables you to maintain users in a single console, while providing them access to multiple applications. Learn more

You or the super admin in Zoho Directory will be able to view Creator alongside other products. On selecting Creator, you or the super admin will be able to view the list of Creator apps. Select BackToWork app from this list. Then, select the User role and the permission set for the role. On completing this, the app will be shared with the intended users or the employees of your organization. However, in BackToWork app, the user details (employee details) need to be entered in the Employee form. This process can be done by exporting user details from your Active Directory and importing the file into the Employee form in the app. You need to follow a specific format with regard to the employee data and their arrangement to be able to import the file in BackToWork app (click here to learn how to import employee data.) On importing, the user data is fed and stored in the employee form and the records will be displayed in the Employees report. Following this, the employees will be able to view data to which they have permission and use the app to take self-assessments and raise requests.

Localization

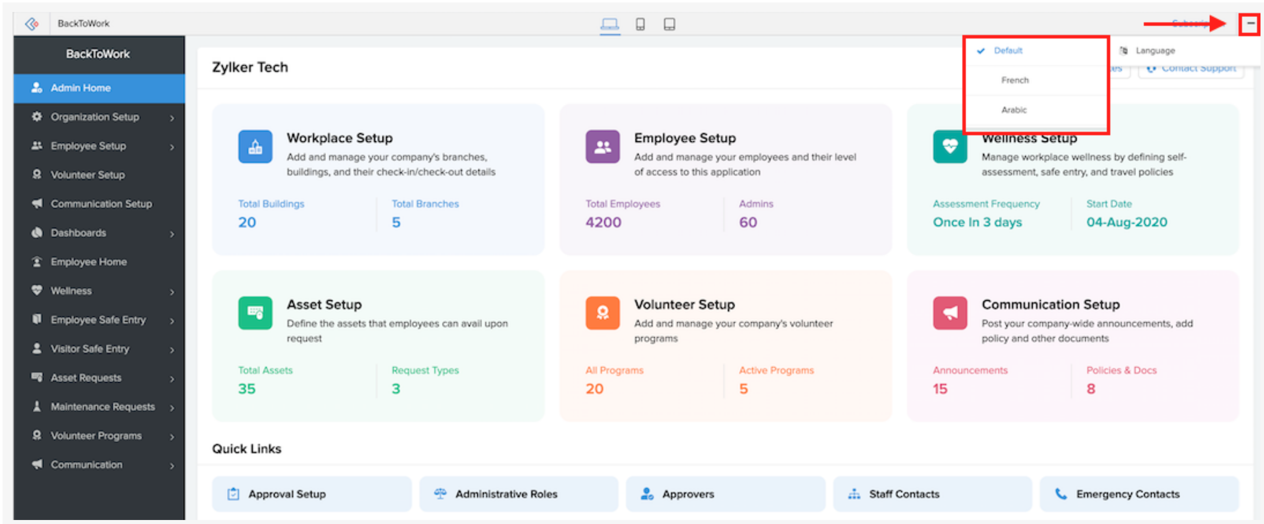
Zoho BackToWork app comes equipped with support for localization. Currently we support the following languages:

- French
- Arabic
- Chinese
- Japanese
- Spanish
- German
- Portugese

Users, both super admin and employees, will be able to select the required language and enable localization. All the field labels, the alert and info messages, and emails will be displayed in the selected language

To enable localization:

1. Click the eclipse icon at the top-right corner in the header. The language options will appear.



2. Select the required language. The change will reflect in the application.