Employee User Guide

Zoho BackToWork

Powered by

ZOHO CREATOR

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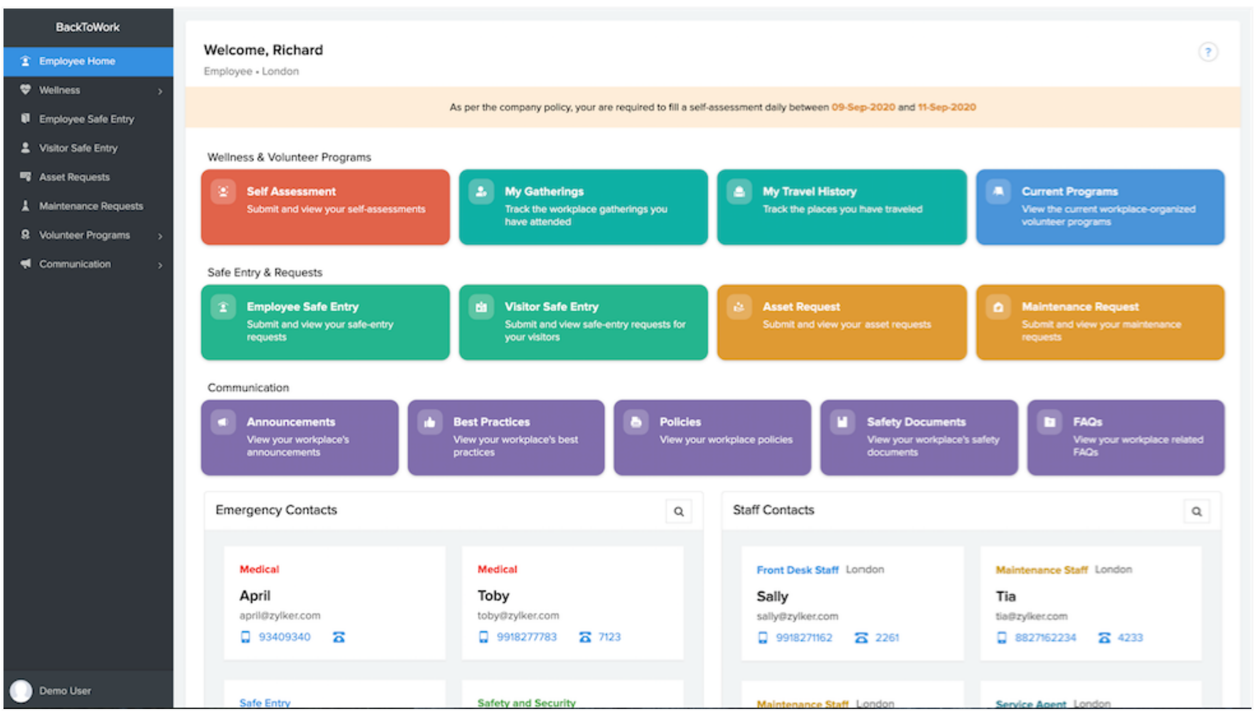
Introduction to the application

Zoho BackToWork app is here to offer 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 our employees, monitor status of your health, create a screening process while you or your visitors enter the campus, make internal announcements to keep you posted, enable you to raise and track requests, provide you with the tools to communicate your requirements, take into account your health assessment, track your travel history, and get insights with the data collected to ensure you and our workplace remain safe, while we try to keep our business running.



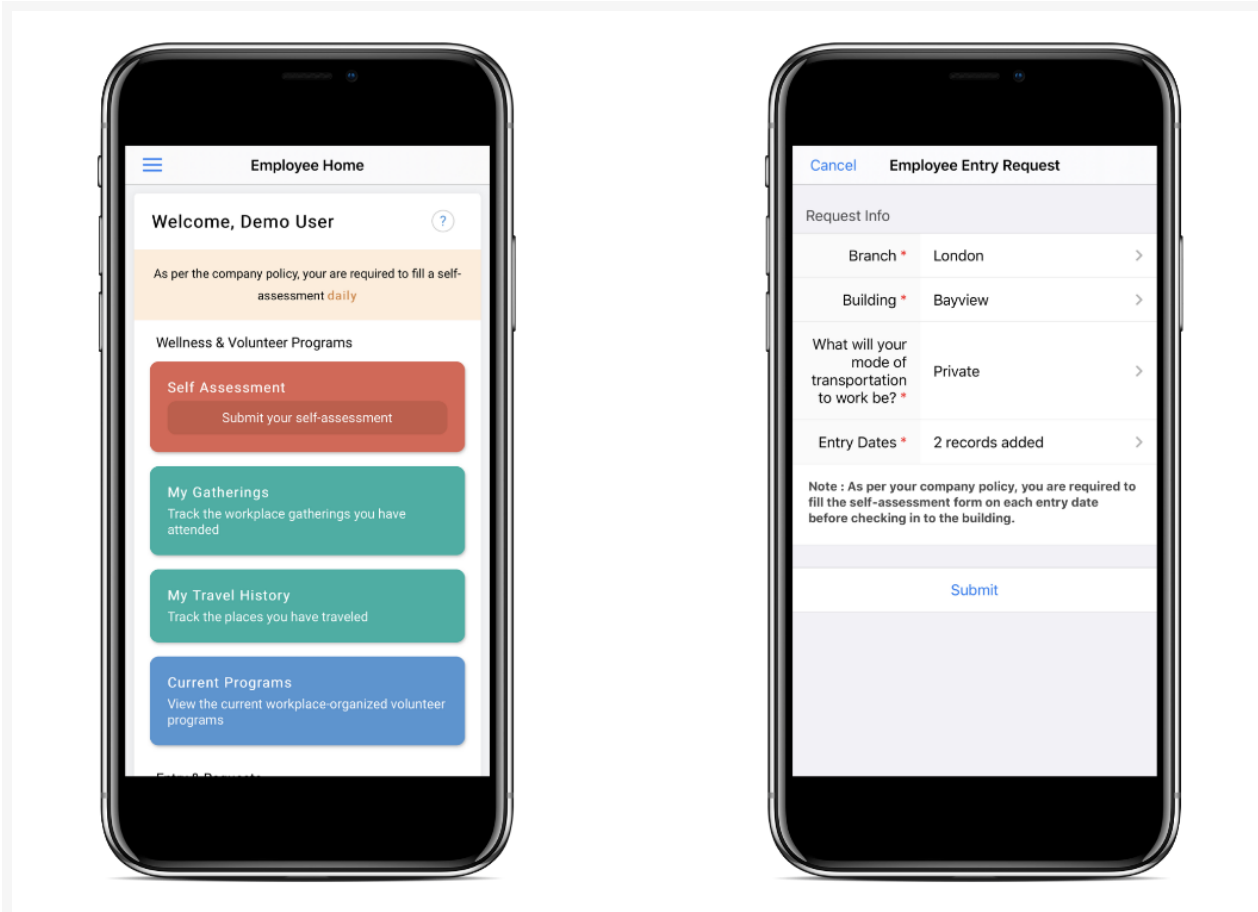
Modules in the app

- Employee Home
- Wellness

- Employee Safe Entry
- Visitor Safe Entry
- Asset Requests
- Maintenance Requests
- Volunteer Programs
- Communication

You 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.

The mobile app will enable you to fill in your self-assessment and verify your wellness score based on the organization's wellness policy, raise safe entry requests, and raise asset and maintenance requests. You will be able to view your requests and track their status. The organization volunteer programs and communications (announcements, safety documents, FAQs, and policies) will also be available on your mobile app.



Users and user roles

Each employee with access to the app is a user of the app, which includes the admin of the app 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 roles available in this app:

Admin - The admin is an employee who is the owner of the app. The admin has access to all the components of the app and provides the specifications for the workplace setup at the organizational level. The 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.

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.

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.

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.

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.**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.

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.

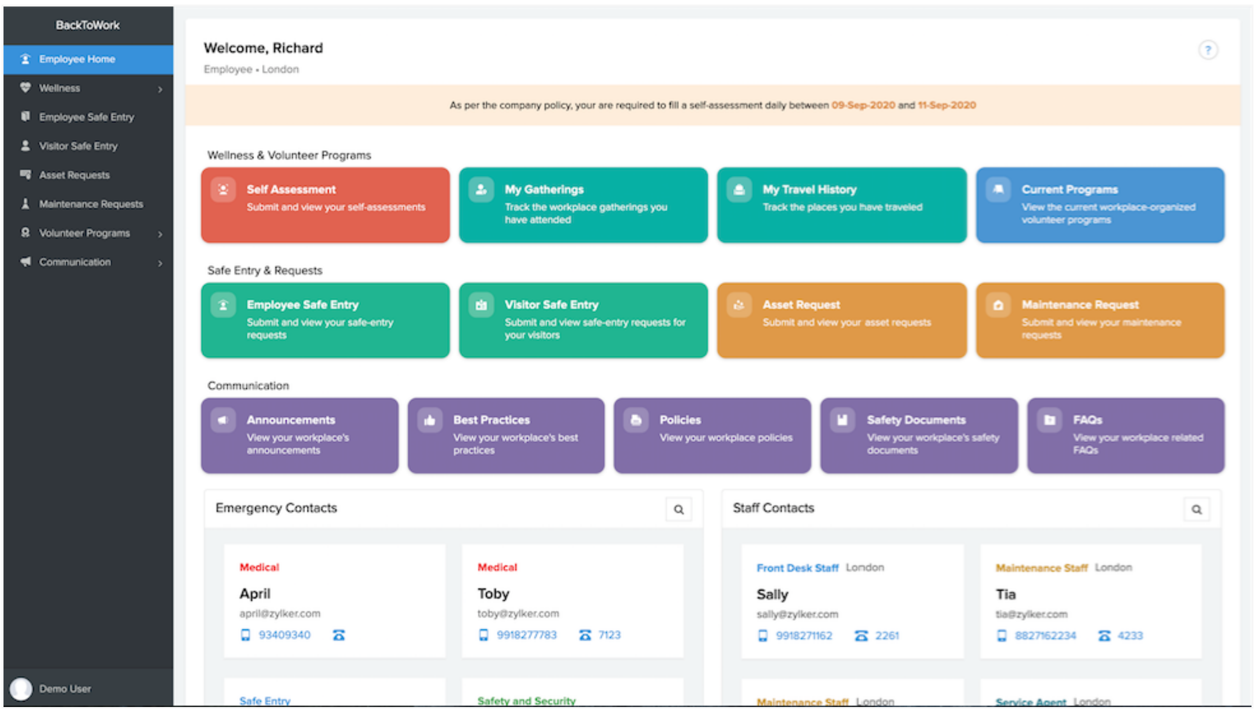
Visitor Entry Approver - The visitor entry approver is an employee who is provided with the permission to approve or reject the visitor entry requests that are submitted by individuals who visit the campus.

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.

Employee HomeThe Employee home is the self-service portal for employees. The page provides a comprehensive view of all the data that is relevant to the employee. This portal has quick links using which you will be able to navigate quickly to all modules of the application. The reports of the Staff and Emergency contacts who are there in that employee's branch will also be listed.

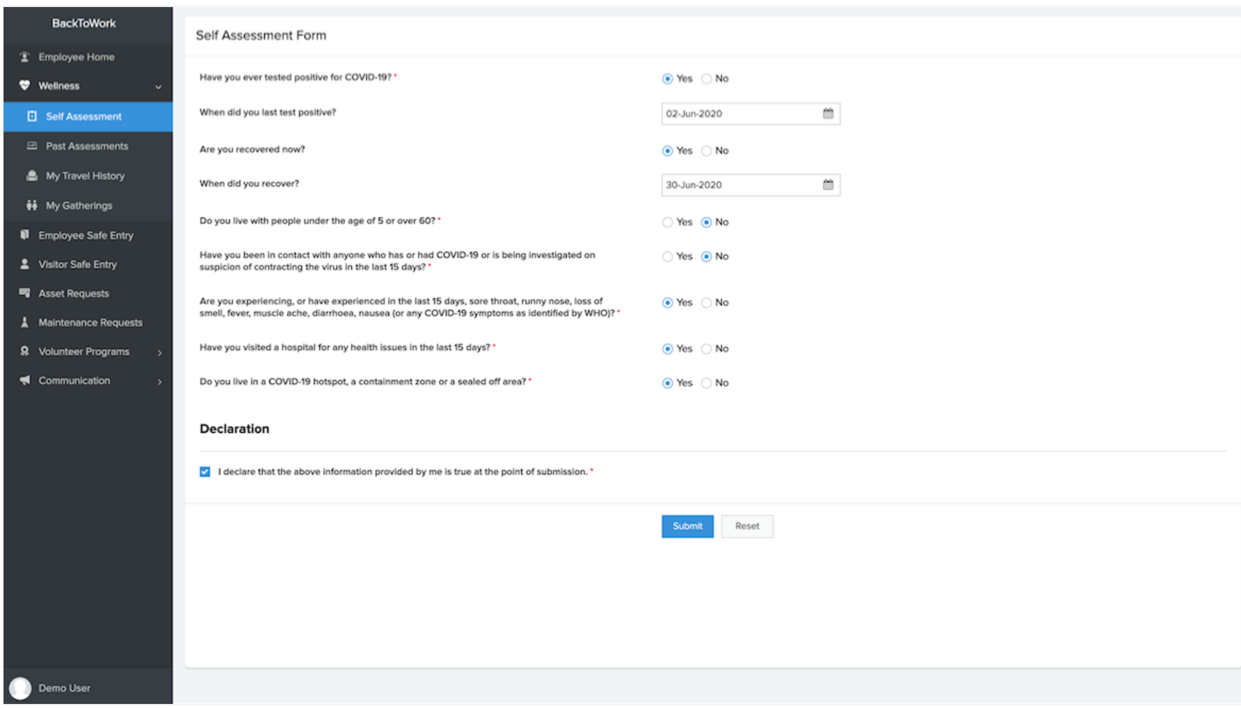


Note: Employees will be able to update name, phone number, or extension number details. To edit, user needs to click on the name.

Wellness

The Wellness module enables 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 an employee has filled.

My Travel History: Employee will be able to view the travels undertaken. 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.

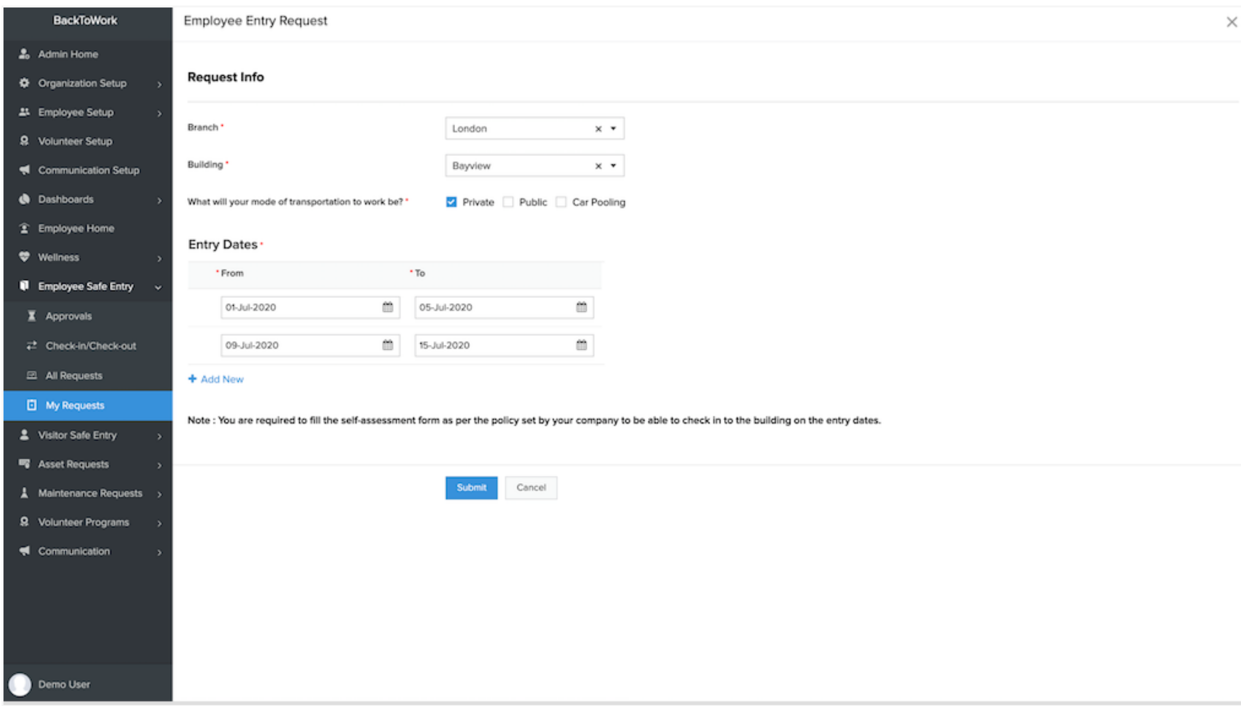
When there is a meeting with visitors, the email ID of the attendees needs to be provided. When there is a meeting with employees, the employees can be selected. For example, if Bob met with Sally, Peter and Betty, this information can be recorded in the form. In the report it will be available as Bob 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, and My gatherings reports.

Employee Safe Entry

The Employee Safe Entry is meant for employees to apply for entry into their respective branches and buildings. The Safe Entry Request form enables employees to raise a request to gain access to their office facilities. The prerequisite to raising a request is that the employees must take the self-assessment to undergo a screening process with regard to their health status. based on their wellness score they will be permitted to raise request for safe entry. This request can again be further scrutinized for approval.



Check-in/Check-out

The Front Desk Staff, the Branch Managers, or the Admins will enable employees to check-in and check-out of the building. The employees could have their temperatures gauged for safety. Check-in/check-out multiple times in a day is possible, along with recording temperature multiple times.

An employee who had initially been granted approval for entry can have the approval revoked later.

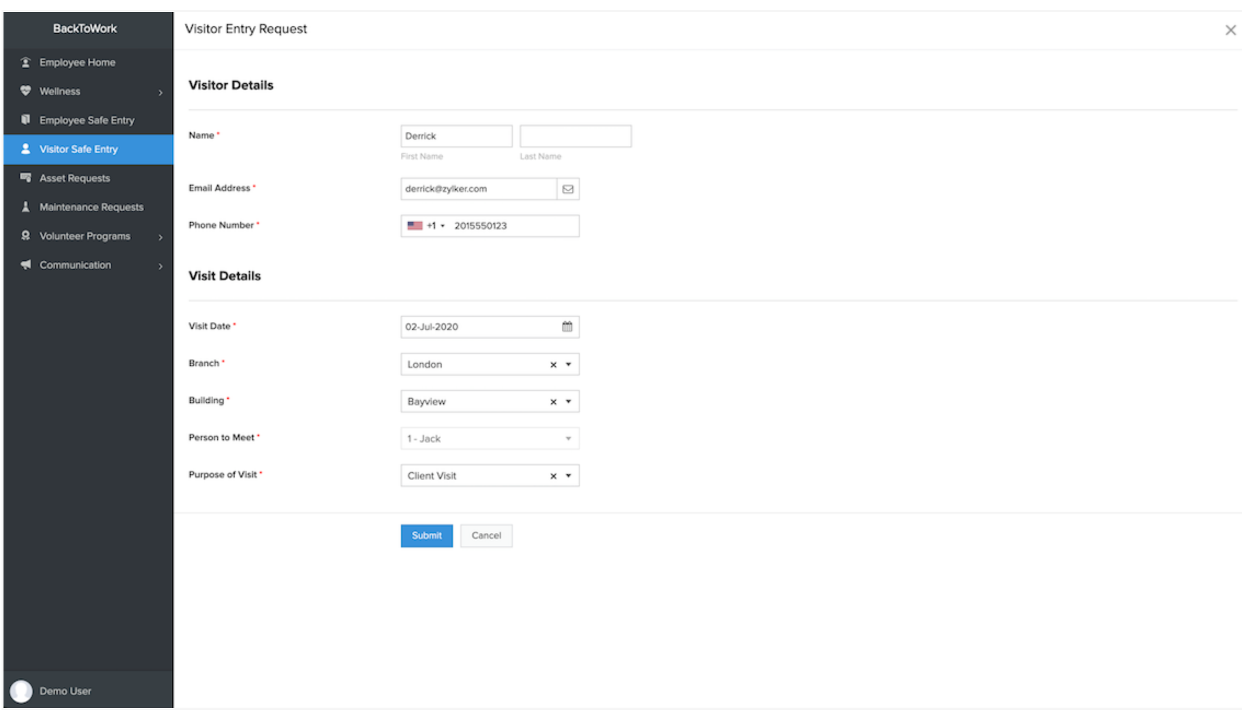
My Requests

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.

Visitor Safe Entry

Just as an Employee Safe Entry request, a visitor has to raise a safe entry request to gain access to the building. But the user requesting for entry will be the employee who is receiving that visitor. This employee has to furnish the details on the visitor and the details of the visit. On submitting the request, an email will be sent to the visitor along with a declaration form. The visitor has to fill this declaration form. The form consists of the self-assessment form and obtains information on visitor's travel history in the last 60 days, photograph, and signature field. Once these details are filled, the request will be sent for approval. When the approval is granted, rejected, or revoked, an email will be sent to both the visitor and the employee who raised the request.

The front desk staff will be able to raise entry requests on behalf of other employees also.



Check-in/Check-out

The Front Desk Staff, the Branch Managers, or the Admins will enable visitors to check-in and check-out of the building. The visitors could have their temperatures gauged for safety. Check-in/check-out multiple times in a day is possible, along with recording temperature multiple times.

A visitor who had initially been granted approval for entry can have the approval revoked later.

My Requests

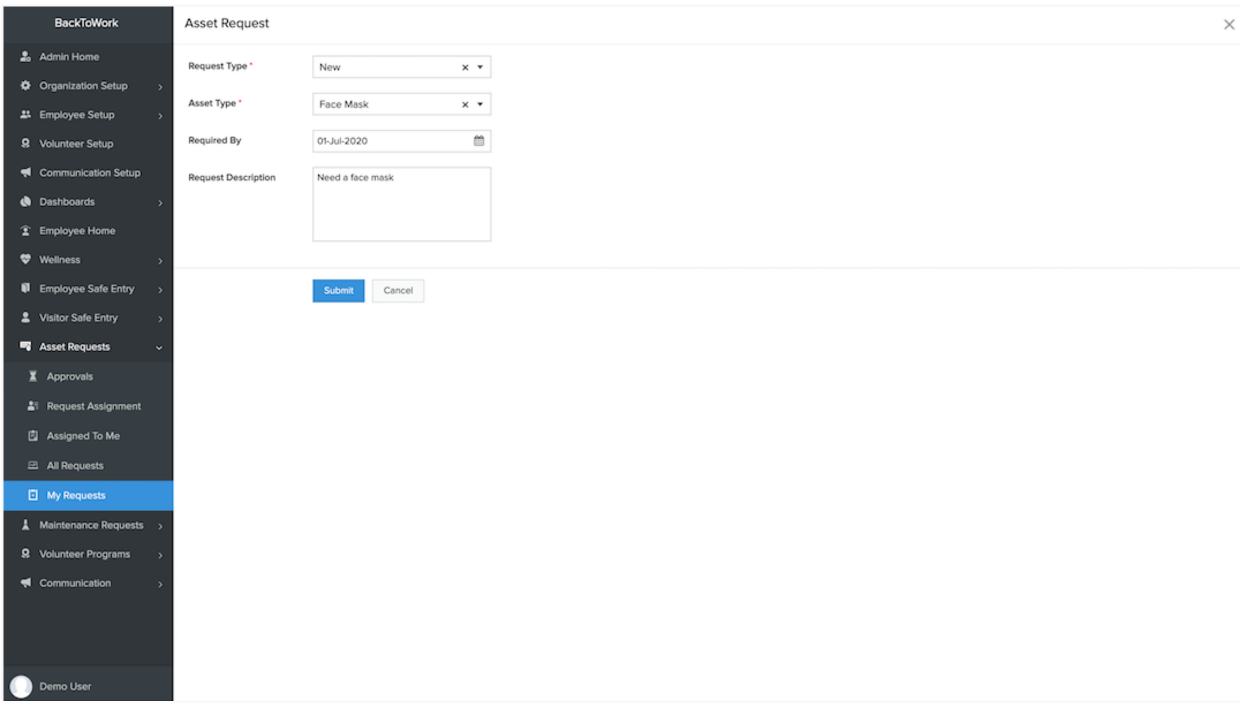
All visitor safe entry requests raised by an employee will be displayed here. Employee will be able to raise request for multiple days of entry in a single form but duplication of requests for the same day is not permitted. If QR code is configured for entry, the QR code for that day's entry will be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

Requests Raised for Others

The admins, branch manager, and front desk staff 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 when they are receiving visitors.

Asset Requests

The Asset Requests module enables employees to raise request for assets and view the requests raised by them. For instance, employees might need safety assets like sanitizers, masks, gadget sanitizers, and gloves for your employees. They can make their requests here. This request will undergo an approval process in which employees request might be approved or rejected.



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.

My Requests

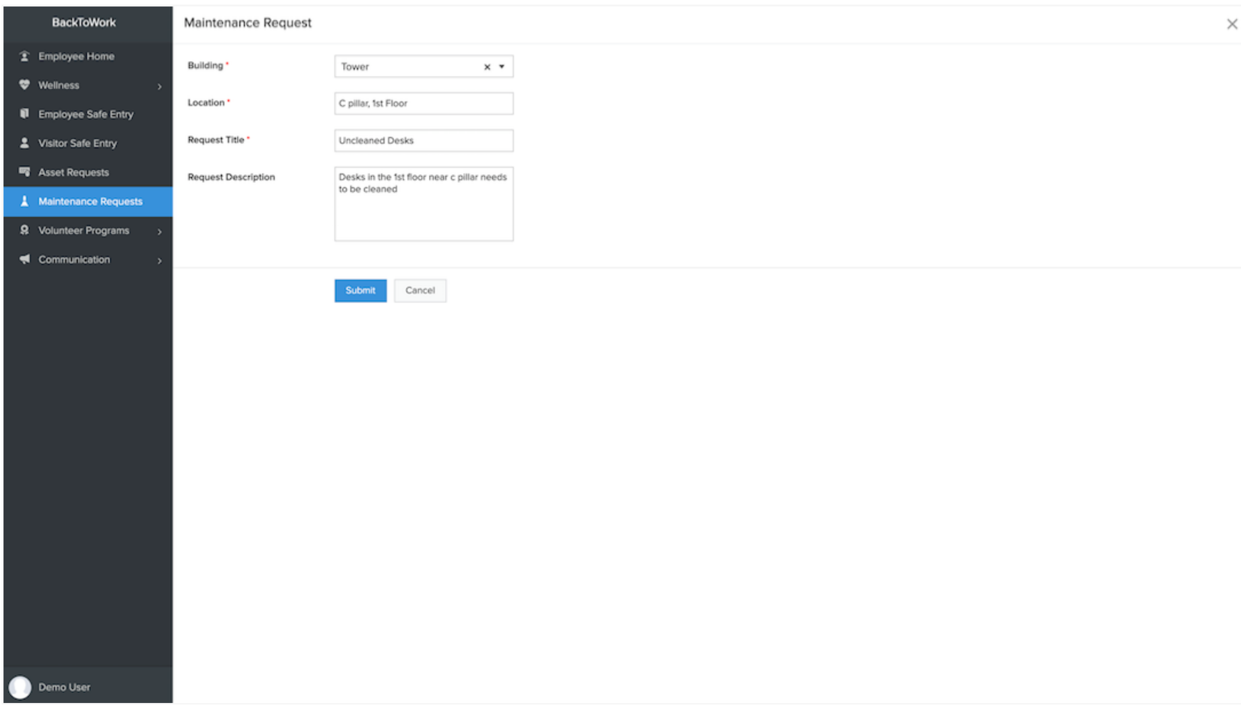
This module enables an employee to view all asset requests that have been raised.

Life cycle of an asset request

- Asset requests are subject to an optional approval process. If this approval is enabled, a request can either be approved or rejected by an asset request approver. If not the request will automatically be approved by the system.
- After the approval, it needs to be assigned to a service agent who will take up the request and complete it. This request can either be assigned by branch manager or admin, or the service agent can pickup requests themselves. Once the request is completed by the service agent, it is closed.
- When the request is assigned to a service agent, the due-date time and priority needs to be set. If it is assigned by self pick-up, the system sets the priority to medium and the due date and time to the required by date.
- When an employee raises an request, the type of request, asset, required by date, and the request description are obtained as inputs.
- Email notifications will be sent to employee when asset request is raised, approved, rejected, or completed. Emails will also be sent to service agents when request is assigned.

Maintenance Requests

The Maintenance Requests module enables employees to raise request for maintenance activities and view the requests raised by them. For instance, a employees might need a broken chair to be replaced. This request will undergo an approval process in which employees request might be approved or rejected based on the configurations in the app.



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.

My Requests

This module enables an employee to view all maintenance requests that have been raised.

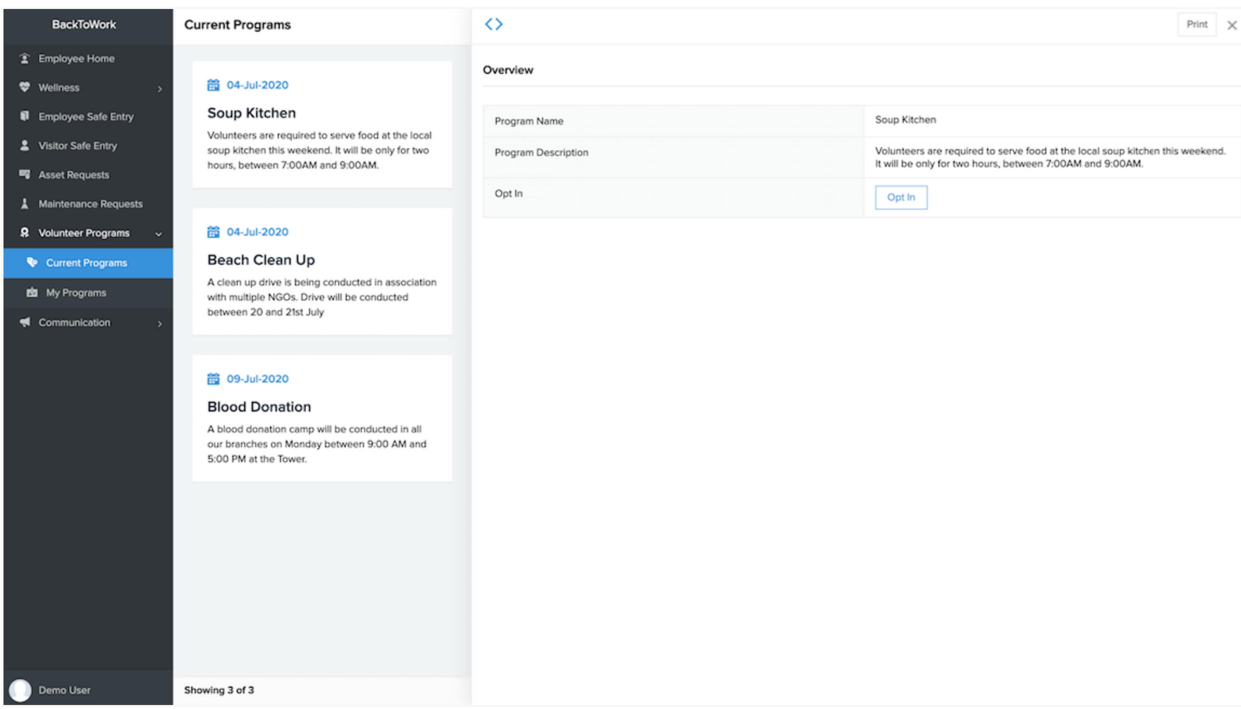
Life cycle of a maintenance request

- When a maintenance request is raised, the request will first be assigned to a maintenance staff. The request can either be picked up by the maintenance staff or can be assigned by the branch manager or admin.
- On completion, the task will be marked as completed and sent for audit, if the audit process is enabled. The branch manager or the admin will assign audit staff to approve or reject the request. They will review the request and approve it or reject it.
- If the task is rejected, then the request will be reassigned to the maintenance staff for rework and on completion will face the audit process again.
- Email notifications will be sent to employees when request is raised and completed. Emails will be sent to maintenance staff when request is assigned to them and to audit staff when task is ready for audit.

Volunteer Programs

The Volunteer Programs module enables Employees to get information on the various activities and initiatives taken by the organization.

Current Programs: This tab displays all programs that are currently active and are accepting volunteers. The Opt-in custom action button enables employees to volunteer for the program that interests them. Push notification is sent to employees when a program is first added.



My Programs: This tab provides a list of all the programs that the employee has volunteered for.

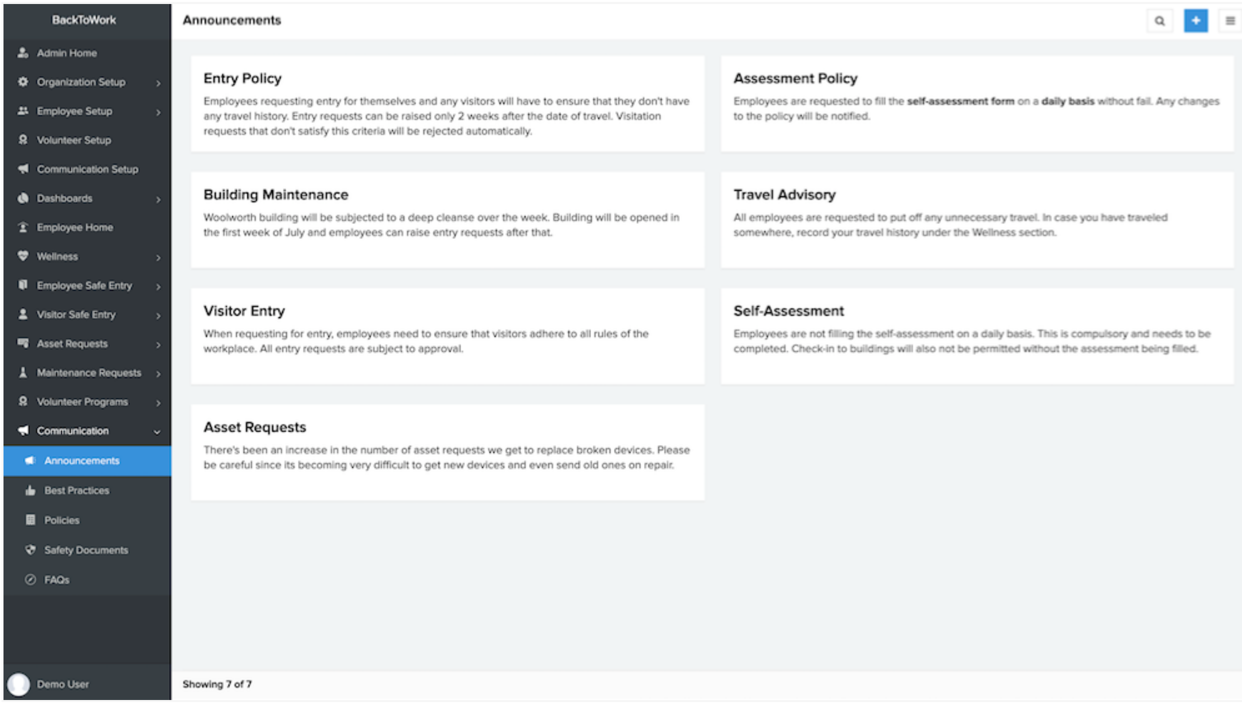
> Note: Employees can only opt-in for programs.

Communication

The Communication module enables Employees to get information on the important updates, activities, policy change, and safety initiatives from the organization. The following aspects are part of communication:

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

These information are added by the admin or super admin and can be viewed by the employees. An employee can view an announcement that is made for all branches or for the particular branch to which the employee belongs. Push notifications will be sent to employees whenever a communication is added or updated.



Note: Employees can only view records, and not edit or delete records.

Localization

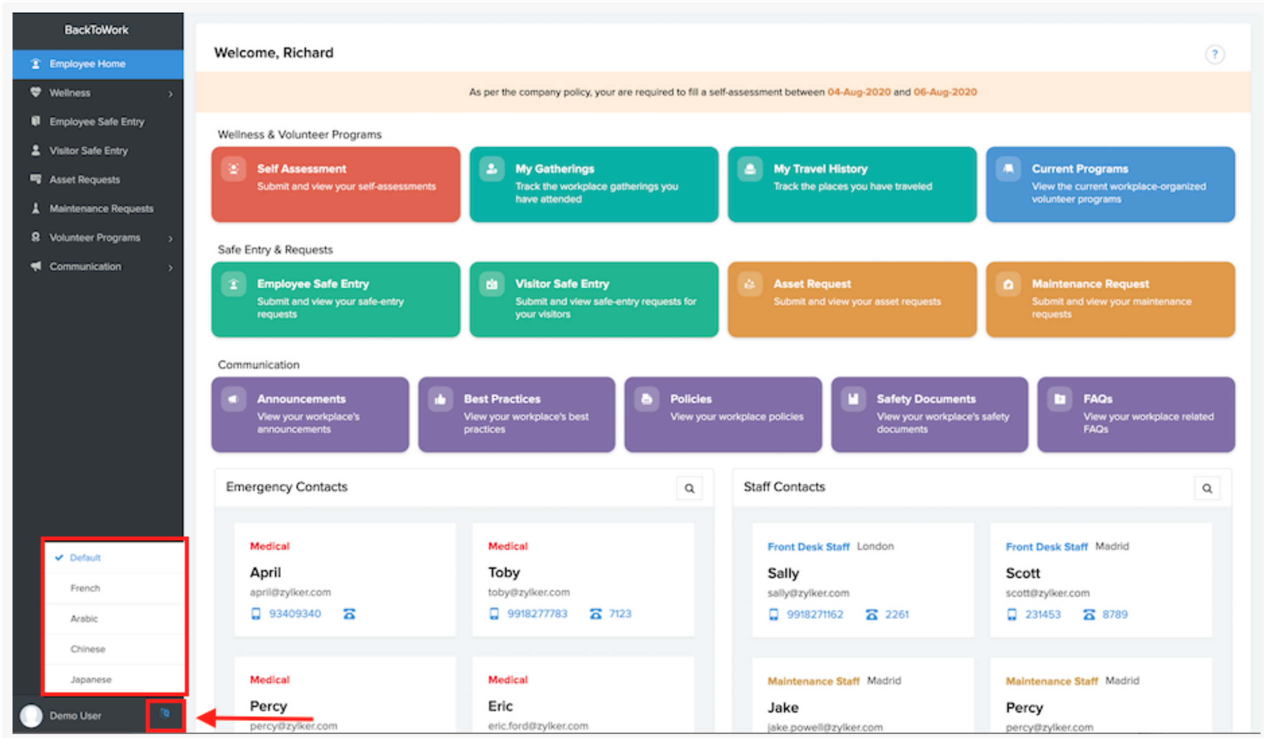
Zoho BackToWork app comes equipped with support for localization. Currently we support the following languages:

- French
- Arabic
- Chinese
- Japanese
- Spanish
- German
- Portuguese

Users 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 language icon at the bottom in the footer. The language options will appear.



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