



# **ZOHO PEOPLE PARTNER TRAINING: LEVEL 2 TRAINING USE CASES**



## Organization:

- ◆ Domain verification
- ◆ Invite users
- ◆ Add users
- ◆ Sync (3 types)
- ◆ Add employee profile and convert to user
- ◆ Location-based admin
- ◆ Department and Designation

## Tasks

### Use case 1

- ◆ Create a probation form.
- ◆ Use auto number and all necessary fields. Include tabular and linear sections.
- ◆ Probation completion date must be automatically calculated as six months from the joining date.
- ◆ When an employee profile is selected, their reporting manager should be listed.
- ◆ It should not be possible to use the same name or email address as another record.
- ◆ Set a permission so that team members can only add or view their records, while reporting managers can modify them.
- ◆ Add an approval setting in the form which must be approved by a reporting manager and an HR manager.
- ◆ The employee should automatically receive an email alert once their probation is confirmed.



## Use case 2

### - Form 1: Travel form

- ◆ Create a travel request form.
- ◆ Enable auto numbering.
- ◆ Add from and to date fields.
- ◆ The duration of the trip should be calculated automatically.
- ◆ Set an approval to be authorized by both the reporting manager and travel department.
- ◆ Set per diem eligibility to \$40
- ◆ The same name and travel location cannot be entered more than once.

### - Form 2: Travel Reimbursement

- ◆ Details from the travel form should only be extracted from records which are approved.
- ◆ Automatically display the total number of days and average expenses per day in the form.
- ◆ All expenses should be recorded in the tabular section.
- ◆ Set an approval to be authorized by both the manager and travel team.

[Refer to this link for more information on forms](#)

## Leave Tracker:

- ◆ During their first year, an employee should be credited with a total of 12 leave days a year (1 day a month). From their second year, they should be credited 24 leave days a year (2 days a month), accrued on monthly basis. Employees can cash out leave at 50%.
- ◆ If an employee's leave request exceeds 10 days, the weekend and holidays should be considered as leave.
- ◆ Maternity leave should only be visible for female employees. An employee can take no more than four months of maternity leave a year.
- ◆ Request compensatory time off and use it on a different date.



- ◆ Create a leave type that only becomes available to an employee 6 months after their joining date.
- ◆ For any leave type, apply leave for the first quarter of the day and OD in the last quarter of the same day.
- ◆ If a holiday is created for an employee's shift and another holiday is created for their location on the same day, which is given priority?

[Refer to this link for more information on the Leave Tracker](#)

## Attendance:

- ◆ Set up the attendance settings so that an employee can only check in up to 30 minutes late to the office 3 times a month. After this, their attendance will be marked as a half day.
- ◆ Try out these actions from an employee perspective: Add attendance entry, regularization for an absent day, import check-in/out, checking in with a mobile application.
- ◆ If a manager is located in time zone A and a team member is located in time zone B, how will the manager mark the attendance for their subordinate? How will the subordinates' entries be viewed by the manager?
- ◆ Create a weekly rotation shift where Monday–Friday shift timings are 09:00–18:00 and Saturday is 9:00–16:00
- ◆ Create three shifts: General, US shift, and AUS shift. Schedule a shift for a department which changes every month.
- ◆ Try implementing the following scenario: An employee is working the general shift and due to company policy, they need to be moved to the night shift for a particular week. They will go back to the general shift after this one week.

[Refer to this link for more information on attendance](#)

## Time Tracker:

- ◆ Create timesheets using four different billing methods and analyze the difference between them.
- ◆ Use the scheduler settings to submit time logs automatically.



- ◆ Create a timesheet and approve it partially.
- ◆ What happens if the timesheets for three projects with three different project managers for the same client are submitted simultaneously?

*[Refer to this link to learn more about the Time Tracker](#)*

## **Performance Management System:**

- ◆ Create an appraisal cycle based on the user and manager. This has to be reviewed separately.
- ◆ Create an appraisal with KRA vs goals, include multi-rater feedback for an employee and a reporting manager. Create an extended review for 2 days if a condition is not satisfied.
- ◆ Who can publish a reviewed appraisal?
- ◆ A user's salary is \$30,000 and after appraisal the salary should increase to \$35,000.
- ◆ A review period ended yesterday and there are 10 employees yet to be reviewed. How can these employees be reviewed?

*[Refer to this link to learn more about performance](#)*



[zoho.com/people](https://zoho.com/people)

Write to us at  
[partner@zohocorp.com](mailto:partner@zohocorp.com)