

Employee Information Operations

What is Employee Information Operations in Zoho People?

Employee information in operations lets you manage employee records, departments, designations, delegations, and exit records. Employees can also add <u>HR Process</u> requests from here.

| ÷ | Emplo | oyee Information | User-specific Op | erations Insights | Employees | Depart | tments | Designations | HR Process | Groups | | | a q | \$ | 0 |
|-----|-----------|------------------|------------------|-------------------|-----------|--------|--------------|------------------|------------|----------------|------|----------------|-----------------|-------|---------|
| Emp | oloyee Vi | ew 、 | Edit | | | | | | All Data | | * | Add Department | e ⁷¹ | Ŧ | - |
| B | | Photo | EmployeeID 1 | First Name | Last Name | 11 | Email ID | | 11 | Date of joinin | a 11 | Department | 11 | Birth | Date |
| | | | Z1012 | Liam John | Liam John | | liamjohn@ | zylker.com | | | | | | | |
| | | - | Z1011 | Joe Smith | Joe Smith | | joesmith@ | zylker.com | | | | | | | |
| | | | Z1010 | Rachael | Matthew | | rachael.ma | atthew@zylker.co | om | | | | | | |
| | | X | HRM20 | Anupriya | Mohan | | anupriya.n | nohan@zylker.cc | m | 01-Nov-2023 | | | | | |
| | | N | HRM19 | Regina | Lee | | regina.leet | @zylker.com | | 02-Oct-2023 | | | | | |
| | | | HRM18 | Jen | Adams | | jen.adams | @zylker.com | | 01-Aug-2023 | | | | | |
| | | | HRM17 | Amelia | Brandon | | amelia.br@ |)zylker.com | | | | | | 23-Aj | pr-1995 |
| | | 0 | 1244 | Tina | Francis | | tina.franci | s@zylker.com | | | | | | | |
| | | | 1243 | Tayloenne | Tayloenne | | tayloenned | @gmail.com | | | | Media | | | |
| | | | 1242 | Philp | Jeff | | jeffrey.e+te | est1@zohotest.co | om | | | | | | |

What can be done under Employee Information Operations?

- Userwise operations
- Insights
- <u>Employees</u>
 <u>Public view and My views</u>
 <u>To create a new view</u>
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- Add Users From Zoho Mail
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- <u>Designations</u>
 <u>Adding a new designation</u>
- HR Process

- <u>Groups</u>
 <u>Adding a new group</u>
- <u>Delegations</u>
 <u>Adding a new delegation</u>

Userwise Operations

The **Userwise Operations** tab can be used to search and edit employee data for specific employees. Their career history, HR process, and audit history can also be viewed from here.

| | u User-specific Operations | Insights Employees | Departments | Designations | HR Process | Groups | Delegation | ۹ | ф ą |) (|
|---|---|--------------------|--|--|-------------------|---|--------------------------------------|---|---------|-------|
| HR204 - Randall Information Tech rofile Information HR Pro | Gladstone nnology cess Career History Audit Histo | ry | | | | | | | Edit Pr | ofile |
| Department Information Technol Designation HR Manager | хюду | Work F +9174 | ddress @zylker.com hone Number 568932 | | | % | Role Manager Extension 1242 | | | |
| Location London | | Seating 7CF21- | a Location California | | | | | | | |
| Summary | | | | | | | | | | |
| Location | London | | | Designation | | HR Manac | ler | | | |
| | | | | | | | | | | |
| Rewards Points | 850.00 | | | EEO Categor | y | | | | | |
| Rewards Points Employee Status | 850.00 Active | | | EEO Categor Department | y | Informatio | on Technology | | | |
| Rewards Points Employee Status Role | 850.00 Active Manager | | | EEO Categor Department Streams | Ŷ | - Informatio | on Technology | | | |
| Rewards Points Employee Status Role Work Phone Number | 850.00 Active Manager +9174568932 | | | EEO Categor Department Streams Mentor | Y. | - Informatic - Rinzee - W | on Technology Ailma | | | |
| Rewards Points Employee Status Role Work Phone Number Source of Hire | 850.00 Active Manager +9174568932 | | | EEO Categor Department Streams Mentor Seating Loca | γ tion | - Informatic - Rinzee - W 7CF21- Ca | on Technology /ilma lifornia | | | |
| Rewards Points Employee Status Role Work Phone Number Source of Hire Blood Group Custom | 850.00 Active Manager +9174568932 - | | | EEO Categor Department Streams Mentor Seating Loca Employment | y tion Type | - Informatio - Rinzee - W 7CF21- Ca | on Technology /ilma lifornia | | | |

Insights

The **Insights** tab allows you to view the dashboard, which presents employee data in a simple format with various metrics and charts for easy understanding.

The available insights include: Headcount & growth rate, Employee addition & growth rate, Employee addition & growth rate, Employee addition trend (Last Six Months), Employee attrition trend (Last Six Months), Designations (Top 30), Streams (Top 30), Department (Top 30), Location (Top 30), Age, Gender, Experience, and Experience wise exit.



Employees

The main purpose of the **Employees** tab is to list all the employees in the organization, which includes both employee profiles and users. The administrator has access to edit and view the overall list of employees.

| | Emplo | oyee Information | User-specific Op | erations Insights | Employees D | Departments Designations | HR Process | Groups ··· | | 🚯 🕸 4 |
|-----|-----------|------------------|------------------|-------------------|-------------|---------------------------|------------|-------------------|---------------------|-------------|
| Emp | oloyee Vi | ew ~ | Edit | | | | All Data | * | Add Department والم | = |
| Ð | | Photo | EmployeeID J1 | First Name J↑ | Last Name | J↑ Email ID | 11 | Date of joining ↓ | Department J | Birth Date |
| | | | Z1012 | Liam John | Liam John | liamjohn@zylker.com | | | | |
| | | - | Z1011 | Joe Smith | Joe Smith | joesmith@zylker.com | | | | |
| | | | Z1010 | Rachael | Matthew | rachael.matthew@zylker. | com | | | |
| | | | HRM20 | Anupriya | Mohan | anupriya.mohan@zylker.c | com | 01-Nov-2023 | | |
| | | NOT | HRM19 | Regina | Lee | regina.lee@zylker.com | | 02-Oct-2023 | | |
| | | | HRM18 | Jen | Adams | jen.adams@zylker.com | | 01-Aug-2023 | | |
| | | | HRM17 | Amelia | Brandon | amelia.br@zylker.com | | | | 23-Apr-1995 |
| | | Ω | 1244 | Tina | Francis | tina.francis@zylker.com | | | | |
| | | | 1243 | Tayloenne | Tayloenne | tayloenne@gmail.com | | | Media | |
| | | 2 | 1242 | Philp | Jeff | jeffrey.e+test1@zohotest. | com | | | |

Public Views and My Views

The dropdown on the left allows you to switch between different views, such as **Public views** and **My views**. Public Views include default options like Employee View, Inactive Employee View, and Master Employee Data, while My Views enables administrators to create their own custom views.

| ← Employee Information | User-specific Ope | erations Insights | Employees | Departm | ents Designations | HR Process | Groups | Delegation | | ۵ |
|-------------------------------|-------------------|-------------------|-----------|---------|------------------------|------------|-----------------|---------------|--------|-----------------|
| Employee View ~ | Edit | | | | | | A | II Data | × | Add Employee(s) |
| ٩ | EmployeeID J1 | First Name ↓↑ | Last Name | Jî Er | mail ID | 11 | Date of joining | J↑ Department | 11 | Birth Date J↑ |
| Public views Employee View | IT24_001 | Pedro | Martinez | р | edro.m@zylker.com | | 26-Sep-2014 | Information 1 | echnol | |
| Inactive Employees View | CND193 | Tom | Lee | to | om@zylker.com | | | | | |
| My views | CND192 | Bella | Stone | b | ella@zylker.com | | | | | |
| California | CND191 | Bruce | Bruce | b | ruce@zylker.com | | | | | |
| Create View | CND190 | Frank | Ocean | fr | ank@zylker.com | | | | | |
| | CND189 | Thomas | new | th | nomasshelbyk@zylker.co | m | 22-Aug-2024 | | | |

To create a new view

For the administrator to create your own view, click on **Create View**.

| ← Employee Information | User-specific Op | erations Insights | Employees | Departi | ments Designations | HR Process | Groups | Delegation | | م |
|----------------------------|------------------|-------------------|-----------|---------|-------------------------|------------|-----------------|---------------|---------|-----------------|
| Employee View ~ | Edit | | | | | | | All Data | ~ | Add Employee(s) |
| ٩ | EmployeeID ↓ | First Name | Last Name | 11 | Email ID | 11 | Date of joining | J↑ Department | 11 | Birth Date J↑ |
| Public views Employee View | IT24_001 | Pedro | Martinez | | pedro.m@zylker.com | | 26-Sep-2014 | Information | lechnol | |
| Inactive Employees View | CND193 | Tom | Lee | | tom@zylker.com | | | | | |
| Master Employee Data | CND192 | Bella | Stone | | bella@zylker.com | | | | | |
| California | CND191 | Bruce | Bruce | | bruce@zylker.com | | | | | |
| Create View | CND190 | Frank | Ocean | | frank@zylker.com | | | | | |
| | CND189 | Thomas | new | | thomasshelbyk@zylker.co | m | 22-Aug-2024 | | | |

- 1. Enter a name for the view.
- 2. Set permissions for who can access this view.

| | Specify View Name* | | |
|------------|--|----|--|
| First Name | нк Берт | | |
| Pedro | Set as default view | | |
| Jeenie | View Permission | | |
| Rabul | Allow all employees to access this custom view | | |
| | Share this view to specific users, departments, roles or locations | | |
| Rebecca | Select Columns | | |
| Rodriguez | Date of Joining | | |
| Anitha | ✓ Reporting Manager | | II First Name |
| Christine | Role | | II Employee ID |
| | ~ Location | » | II Photo |
| | ✓ Designation | > | ii Reporting Manager |
| | Address | « | |
| | | | II Location |
| | Nickname | | Department Name < Department |
| | ✓ Department | | |
| | Email address | | II Seating Location |
| | Criteria | | |
| | | | the contract of the contract o |
| | bepartment varie(Department) | 13 | * minial Resources |
| | Add new | | |

- 3. Select the fields you want to display in the view.
- 4. Define criteria to specify the exact data to be shown.
- 5. Click Save.

| ÷ | Emplo | oyee Information | User-specific Operations | Insights | Employees | Departments | Designations | HR Process | Gro | ups Delegation | | | Q | ¢ | |
|------|-------|------------------|--------------------------|----------|-----------|------------------|--------------|------------|-----|-----------------|----|----------------------------------|------|----------------|---|
| HR D | ept | ✓ Ec | lit I Delete | | | | | | | All Data | | Add Employer | e(s) | е ⁷ | Ŧ |
| | | First Name 🥼 | Employee ID 1 | Photo | | Reporting Mana | iger J∣ | Location | 11 | Department Name | 11 | Seating Location | 11 | Sender | |
| | | Pedro | 145 | | | Randall Gladsto | ne HR2O4 | California | | Human Resources | | | | | |
| | | Jeenie | Jeenie Smith | | | Rebecca Biaggi | o ZY134 | California | | Human Resources | | | | | |
| | | Rahul | ZY107 | - | | Randall Gladsto | ne HR204 | California | | Human Resources | | India | 1 | Female | |
| | | Rebecca | ZY134 | | | Christine Spaldi | ng ZY198 | California | | Human Resources | | England | , | Viale | |
| | | Rodriguez | ZY181 | 1 | | Christine Spaldi | ng ZY198 | California | | Human Resources | 1 | China | , | Female | |
| | | Anitha | ZY194 | 8 | | Christine Spaldi | ng ZY198 | California | | Human Resources | | Mexico | , | viale | |
| | | Christine | ZY198 | | | Jones Terri ZY19 | 0 | California | | Human Resources | 2 | CA-504 | , | Female | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |

- 6. This is how it will appear after creating your own view, and it will be under **My views**.
- 7. Click on **Edit** to make changes to the view, and **Delete** if you want the view to be removed.

| ÷ | Emplo | oyee Information | | User-specific | : Ope | erations | Insights | Employees | Depa | irtments | Designations | HR Proce | ss Groups | Delegation | | | | ۹ |
|----|----------|------------------|---|---------------|-------|------------|----------|-----------|------|----------|------------------|----------|---------------|--|---|----|------------|--------|
| Em | oloyee V | ew | × | Edit | | | | | | | | | | All Data | ~ | | Add Employ | vec(s) |
| B | | Photo | | EmployeeID | 11 | First Name | e 11 | Last Name | 11 | Email ID | 2 | 1 | Date of joini | All Data n | | 11 | Birth Date | 11 |
| | | | | Z1011 | | Joe Smith | | Joe Smith | | joesmitl | h@zylker.com | | | Reportees + My Data Reportees' Data | | | | |
| | | | | Z1010 | | Rachael | | Matthew | | rachael. | .matthew@zylker. | .com | | Direct Reportees' Data | | | | |
| | | X | | HRM20 | | Anupriya | | Mohan | | anupriy | a.mohan@zylker. | com | 01-Nov-202 | 3 | | | | |
| | | | | HRM19 | | Regina | | Lee | | regina.l | ee@zylker.com | | 02-Oct-202 | 3 | | | | |
| | | | | HRM18 | | Jen | | Adams | | jen.ada | ms@zylker.com | | 01-Aug-202 | 3 | | | | |
| | | | | HRM17 | | Amelia | | Brandon | | amelia.I | br@zylker.com | | | | | | 23-Apr-199 | 95 |

Use this dropdown to configure a filtered view of your data, your reportees data, and your direct reportees data.

Adding a new Employee

Watch our help video on user addition methods:



To add a new employee to your organization, click **Add Employees.**

| ÷ | Emple | oyee Information | User-specific Op | arations Insights | Employees D | epa | rtments Designations HR Pro | ocess | Groups | Delegation | | 0 | ς ¢ | ۲ | 0 |
|-----|---------|------------------|------------------|-------------------|-------------|-----|-----------------------------|-------|-----------------|----------------|----|---------------|----------------|----------|---------|
| Emp | loyee V | iew ~ | Edit | | | | | | | All Data | ~ | Add Employees | e ⁿ | ₹ | - |
| B | | Photo | EmployeeID 1 | First Name ↓↑ | Last Name | 11 | Email ID | 11 | Date of joining | Department | 11 | Birth Date ↓↑ | Design | nation | |
| | | | 1120 | John | Darron | | John@zylker.com | | 20-Jan-2020 | Administration | | | Logist | ics Exe | cutive |
| | | | 1119 | Michel | Rob | | michel@zylker.com | | 22-Aug-2020 | | | 13-May-2012 | HR Ma | nager | Recruit |
| | | | 1117 | Rita | Daniel | | rita@zylker.com | | 09-Mar-2020 | | | | Procu | ement | Executi |
| | | 9 | HRM1 | Micheller | Stanley | | micheller@zylker.com | | 09-Mar-2020 | | | | Graph | ic Desi | gner |
| | | | 4585 | Emma | Cartner | | emma.cartner@zylker.com | | 09-Mar-2020 | | | 04-Jun-2018 | Direct | or of Ci | ustomer |
| | | 2 | 4584 | Tai | Chang | | chang.tai@zylker.com | | 09-Mar-2020 | | | | | | |
| | | . , | 4583 | Quinn | Rivers | | quinn.rivers@zylker.com | | 09-Mar-2020 | | | | Financ | e Anal | yst |
| | | | 4580 | Abigail | Anderson | | abigail.anderson@zylker.com | | 09-Mar-2020 | | | 04-Jun-2018 | | | |
| | | 2 | 4579 | Raghav | Rao | | raghav.rao@zylker.com | | 09-Mar-2020 | | | 16-Aug-1990 | Financ | e Anal | yst |

Choose from where you want to add employees from.

(If you are a Zoho One user, the administrator will have additional options when adding users to the organization)

| al License: 700 | D0 Employees added: 6024 Remaining: 976 |
|--------------------------|---|
| E: Invitation | User with any email can be added. An invitation email will be sent to the user and they will become active once they accept the invite. |
| Domain Email | User with only verified domain email can be added. The user will become active instantly. |
| Coho Mail | Users from Zoho Mail can be added in Zoho People. |
| G Google Workspace | Users from Google Workspace can be added in Zoho People. |
| ٥ | Users from Microsoft 365 can be added in Zoho People. |

Inviting Users

Adding users without a verified domain requires an invitation to be sent to the users, who will then have access to their Zoho People account once they have accepted their invitation.

To invite users,

- 1. From your home page, go to **Operations > Employee Information > Employees > Add Employees.**
- 2. To invite users through email, select invitation.

| l License: 700 | D0 Employees added: 6024 Remaining: 976 |
|--------------------------|---|
| E Invitation | User with any email can be added. An invitation email will be sent to the user and they will become active once they accept the invite. |
| Domain Email | User with only verified domain email can be added. The user will become active instantly. |
| Coho Mail | Users from Zoho Mail can be added in Zoho People. |
| G Google Workspace | Users from Google Workspace can be added in Zoho People. |
| ٥ | Users from Microsoft 365 can be added in Zoho People. |

3. Create a user account by filling up the Employee ID, First Name, Last Name, and Email Address of the user.

| | Selection | Create User Account | Edit User Data | Trigger Onboarding | |
|--|-----------------------------|--------------------------------|-----------------------|--|--------------------|
| | | | | 00 | |
| Total License: 7000 E | mployees added: 6020 | Remaining: 980 | | | |
| Fill in the mandatory fields, the organization. | and click invite. User gets | email invitation sent to the e | mail id mentioned. On | ice the invitation is accepted, the us | er becomes part of |
| Employee ID * | | | | | |
| HRM_1859 | | | | | Generate |
| Last Employee ID HRM_1858 | | | | | |
| First Name * | | | | | |
| Ryan | | | | | |
| Last Name * | | | | | |
| Gosling | | | | | |
| Email address* | | | | | |
| | | | | | |

- 4. After creating a user account, you can edit or add user data like basic information, work information, hierarchy information, personal details, identity information, contact details, separation information, system fields, work experience, education details, and dependent details.
- 5. After editing, click **Update**.

| | | 1 2 Selection Create User A | 3 ccount Edit User Data Trigg | 4 ger Onboarding | | |
|-------------------|------------------|--------------------------------|----------------------------------|-------------------------|---|---|
| Basic information | | | | | | |
| Employee ID * | HRM_1859 | | Nick name | | | |
| First Name * | Ryan | | Email address * | ryangosling80@gmail.com | | |
| Middle Name | | | | | | |
| Last Name * | Gosling | | | | | |
| Work Information | | | | | | |
| Company* | Zylker | ~) | Zoho Role | Manager | ~ | |
| Business Unit | Zylker Marketing | ~ | Employment Type | | | |
| Division | • | ~ | Employee Status | Probation | * | |
| Department | Support | v | Source of Hire | Referral | ~ | + |
| | | | Date of Joining | | | |

6. To trigger onboarding for that particular record, click **Yes.**

| | | 2 | 3 | | |
|---------------------------|-----------|---------------------|----------------|--------------------|--|
| | Selection | Create User Account | Edit User Data | Trigger Onboarding | |
| | | | | | |
| | | | | | |
| gger Onboarding | | | | | |
| gger Onboarding Yes No | | | | | |

7. Click **Finish** after the onboarding process has been triggered.

Domain Email

This is a method to add users directly to your organization with verified domain email. You can give the users' user name and password and add them to the organization domain. They can change their password later. Given below are the steps to add users through Domain Email.

- 1. From your home page, go to **Operations > Employee Information > Employees > Add Employees.**
- 2. Select **Domain email** to add users.

| | Selection Sync Users from Zoho Summary |
|--------------------------|---|
| al License: 700 | 00 Employees added: 6024 Remaining: 976 |
| Invitation | User with any email can be added. An invitation email will be sent to the user and they will become active once they accept the invite. |
| Domain Email | User with only verified domain email can be added. The user will become active instantly. |
| Zoho Mail | Users from Zoho Mail can be added in Zoho People. |
| G Google Workspace | Users from Google Workspace can be added in Zoho People. |
| Microsoft 365 | Users from Microsoft 365 can be added in Zoho People. |

3. Create a user account by filling up the Employee ID, First Name, Last Name, Email Address and select the domain.

| | (1) | 2 | 3 | 4 | |
|--|---|--|---------------------|--------------------------------------|-----------------|
| | Selection | Create User Account | Edit User Data | Trigger Onboarding | |
| Total License: 7000 Er | nployees added: 6021 | Remaining: 979 | | | |
| Once your domain is verifier organization and can log in | d, you will be able to add to the account with the p | users directly. Enter the emain assword that you provide. | id and password and | click 'Add'. The user will be direct | ly added to the |
| Auto-Generated Pase This auto-generated | sword password will be send t | o your email address | | | |
| HRM_1860 | | | | | Generate |
| Last Employee ID HRM_1859 | | | | | |
| First Name* | | | | | |
| Jack | | | | | |
| Last Name * | | | | | |
| Reynolds | | | | | |
| Email address * | | | | | |
| jackreynolds76 | | | @ zylker. | com | ~ |
| | | | | | |
| | | | | | |

- 4. After creating a user account, you can edit or add user data like basic information, work information, hierarchy information, personal details, identity information, contact details, separation information, system fields, work experience, education details, and dependent details.
- 5. After editing, click **Update.**

| | | 1 Selection Creat | 2 e User Account | 3 Edit User Data Trigge | 4 er Onboarding | | |
|---|---|----------------------|---------------------|---|--------------------------------------|-------------|---|
| Basic information | | | | | | | |
| Employee ID * | HRM_1860 | | | Nick name | | | |
| irst Name * | Jack | | | Email address * | jackreynolds76@zylker.com | | |
| fiddle Name | | | | | | | |
| ast Name * | Reynolds | | | | | | |
| ork Information | | | | | | | |
| | | | | | | | |
| ompany* | Zylker | | • | Zoho Role | Team member | ~ | |
| ompany * usiness Unit | Zylker Zylker Marketing | | • | Zoho Role Employment Type | Team member | ~ | |
| ompany* usiness Unit ivision | Zylker Zylker Marketing | | • | Zoho Role Employment Type Employee Status | Team member Active | *) *) | |
| ompany* usiness Unit ivision epartment | Zyłker Zyłker Marketing - Designer | • • • • | | Zoho Role Employment Type Employee Status Source of Hire | Team member - Active Direct | * * * | + |

6. To trigger onboarding for that particular record, click Yes.

| | Selection | Create User Account | Edit User Data | Trigger Onboarding |
|------------------|-----------|---------------------|----------------|--------------------|
| | | | | |
| igger Onboarding | | | | |
| Yes 🔿 No | | | | |
| | | | | |
| | | | | |

7. Click Finish after onboarding process has been triggered.

Zoho Mail

You can add bulk users from Zoho Mail into Zoho People.

- 1. From home, go to **Operations > Employee Information > Employees > Add Employees.** (This can also be done by navigating to **Settings > Manage Accounts > Users > Add Users.**)
- 2. Click Zoho Mail to sync users.
- 3. Search users using the search box.

| | 1 2 3 | |
|---------|---|----------------|
| | Selection Sync Users from Zoho Summary | |
| otal Li | cense: 2000 Employees added: 194 Remaining: 439 | |
| Q : | Search | Total User 134 |
| | Basic Information | |
| | Fatima - fatimay@zylker.com | |
| | Russell Thomas - russellt@zylker.com | |
| | Hari Kumar - hari@zylker.com | |
| | Tamara - tamarah@zylker.com | |
| | Evan - evanr@zylker.com | |
| | Cameron - cameronp@zylker.com | |
| | Richard - richardo@zylker.com | |
| | David - davidm@zylker.com | |

4. Select the users that you would like to sync and click **Submit.**

| | 1 | 2 3 |
|---------------------|-----------|------------------------------|
| | Selection | Sync Users from Zoho Summary |
| mport Users summary | | |
| Success Records | | |
| Email ID | | Message |
| evanr@zylker.com | | Users added successfully. |
| cameronp@zylker.com | | Users added successfully. |
| | | |

This is the view after importing the selected employees from Zoho Mail.

Add Users From Google Workspace and Microsoft 365

Click the following links to learn about adding users from Google and Microsoft services:_

- Adding Users From Google Workspace
- Adding Users From Microsoft 365

| ÷ | Empl | oyee Information | User-specific Op | erations Insights | Employees D | apartment | s Designations | HR Process | Groups E | Delegation | | Q 🕹 🕸 🛞 |
|-----|---------|------------------|------------------|------------------------|-------------|-----------|---------------------|------------|-----------------|-----------------|---------|--------------------------------------|
| Emp | loyee V | ïew ~ | Edit | | | | | | A | ll Data 🗸 | Add Em | ployee(s) 🤘 😤 🚥 |
| B | | Photo | EmployeeID J | Fi gilbert@zphone.zylk | er.com lame | J↑ Email | ID | 11 | Date of joining | Department |) Birth | |
| | | R | ZY103 | Linda | Wilkins | taree | @zphone.zylker.com | | 07-Mar-2016 | Logistics | 05-A | ↑ Export re ↑ History Export |
| | | 2 | ZY104 | Alex | Calotescu | taivas | @zphone.zylker.com | | 01-Dec-2020 | Creative | 15-Ji | Bulk File Upload |
| | | | ZY105 | Espartaco | Elizabeth | espar | taco@zphone.zylker. | com | 01-Dec-2020 | Inventory | 09-1 | Show masked data |
| | | a | ZY106 | Sam | Elian | elian(| @zphone.zylker.com | | 01-Dec-2020 | Procurement | 23-N | ov-1992 Procurement Executi |
| | | - | ZY107 | Rahul | J | kallid | en@zphone.zylker.co | m | 13-May-2024 | Human Resources | 17-Ma | iy-1993 HR Manager |
| | | | ZY108 | Elston | Susan | elstor | n@zphone.zylker.com | | 22-Jan-2016 | Administration | 24-Ja | n-1991 Administrative Head |

The filter option allows for quick, targeted access to specific employee data.

The ellipsis icon helps to Import data, Export data, History Export, Bulk File Upload, E-Sign Documents, and Show masked data.

Departments

The **Departments** tab provides a view of all departments within the organization, along with details on who created each department, the creation date, who last modified it, and the time of modification.

To learn more about Public Views and My Views, click here.

Watch our help video on organization setup:



Adding a new Department

To add a new employee to your organization, click **Add Department.**

| ÷ | Emplo | oyee Information | User-specific Operations | Insights Employees | Departments Designation | s HR Process Groups | Delegation | Q 🕹 🕲 🛞 |
|-----|--------|---------------------|--------------------------|------------------------|-------------------------|------------------------------|----------------------|-------------------------------|
| Dep | rtment | View ~ E | Edit | | | | All Data v Add E | Department ⊭ ^a ₹ … |
| 6 | | Department Name J1 | Mail Alias J↑ | Added By ↓↑ | Added time 1 | Modified By | J↑ Modified time | Department Code 1 |
| | | Visual Designer | | ZY198 - Christine - S | 28-Oct-2024 00:43 AM | ZY198 - Christine - Spalding | 28-Oct-2024 00:43 AM | VD |
| | | Zylker Website Mark | | 4570 - Scott - Fisher | 08-Mar-2024 02:08 PM | 4570 - Scott - Fisher | 08-Mar-2024 02:08 PM | |
| | | Software Testing | | ZY198 - Christine - S | 11-Dec-2023 01:33 PM | ZY198 - Christine - Spalding | 11-Dec-2023 01:33 PM | |
| | | Zylker Marketing | | 1236 - Jacob - Sanders | 11-Oct-2022 10:39 AM | 1236 - Jacob - Sanders | 11-Oct-202210:39 AM | |
| | | Zylker Content Mark | | 1236 - Jacob - Sanders | 16-May-2022 04:01 PM | 1236 - Jacob - Sanders | 11-Oct-2022 10:25 AM | |
| | | Monitoring_Weekend | | ZY198 - Christine - S | 13-Apr-2020 05:06 PM | ZY198 - Christine - Spalding | 07-Oct-2022 07:31 AM | |
| | | Monitoring_APAC S | | ZY198 - Christine - S | 13-Apr-2020 05:05 PM | ZY198 - Christine - Spalding | 07-Oct-2022 07:31 AM | |
| | | Quality Assurance | | ZY198 - Christine - S | 13-Apr-2020 04:56 PM | ZY198 - Christine - Spalding | 13-Apr-2020 04:56 PM | |

- 1. Enter the department name and give a code.
- 2. Add the department lead.
- 3. Choose the parent department.

| Add Department | | | | | × |
|-----------------------|-------------------|--------------------------|------------|------------|---|
| | | | | | |
| Department Details | Department Name* | Visual Designer | | Mail Alias | |
| | Department Code | VD | | | |
| | Department Lead | Frank - Ocean | • | | |
| | Reporting Manager | Christine Spalding ZY198 | | | |
| | Photo | | | | |
| | Parent Department | Creative | v H | | |
| Submit Submit and New | Cancel | | | | |

4. Click Submit.

| Department | | | | Create channel 🖉 🛈 🚥 🗙 |
|--------------------|-------------------|------------------------------|---------------|------------------------------|
| Department Details | Department Name | Visual Designer | Mail Alias | . / |
| Related Forms | Department Code | VD | Modified By | ZY198 - Christine - Spalding |
| | Department Lead | Frank - Ocean | Modified Time | 28-Oct-2024 00:43 AM |
| | Reporting Manager | Christine Spalding ZY198 | | |
| | Photo | | | |
| | Parent Department | Creative | | |
| | Added By | ZY198 - Christine - Spalding | | |
| | Added Time | 28-Oct-2024 00:43 AM | | |

5. To update department details for a specific record, select the record and click the pencil icon to make changes.

| ÷ | Emplo | oyee Information | User-specific Operations | Insights | Employees | Departments | Designat | ions | HR Process | Groups | Delegation | | | c | ¢ | ¢ |
|-----|---------|---------------------|--------------------------|---------------|-----------|------------------|----------|------|----------------------|----------|--|---|-------|------------|----------------|---|
| Dep | artment | t View 🗸 | Edit | | | | | | | | All Data 🕓 | 2 | Add D | lepartment | e ^N | Ŧ |
| B | | Department Name 1 | Mail Alias J1 | Added By | 11 | Added time | | 11 | Modified By | | All Data | | 11 | Departmen | t Code | |
| | | Visual Designer | | ZY198 - Chris | itine - S | 28-Oct-2024 00: | 43 AM | | ZY198 - Christine - | Spalding | Reportees + My Data Reportees' Data | 1 | | VD | | |
| | | Zylker Website Mark | | 4570 - Scott | - Fisher | 08-Mar-2024 02: | 08 PM | - | 4570 - Scott - Fishe | er | Direct Reportees' Data | 1 | | | | |
| | | Software Testing | | ZY198 - Chris | tine - S | 11-Dec-2023 01:3 | 3 PM | 1 | ZY198 - Christine - | Spalding | My Data | | | | | |
| | | Zylker Marketing | | 1236 - Jacob | - Sanders | 11-Oct-2022 10:3 | 9 AM | 9 | 1236 - Jacob - Sand | iers | 11-Oct-2022 10:39 A | м | | | | |
| | | Zylker Content Mark | | 1236 - Jacob | - Sanders | 16-May-2022 04: | 01 PM | | 1236 - Jacob - Sand | iers | 11-Oct-2022 10:25 A | м | | | | |
| | | Monitoring_Weekend | | ZY198 - Chris | tine - S | 13-Apr-2020 05:0 | 06 PM | | ZY198 - Christine - | Spalding | 07-Oct-2022 07:31 A | M | | | | |
| | | Monitoring_APAC S | | ZY198 - Chris | itine - S | 13-Apr-2020 05:0 | 05 PM | 1 | ZY198 - Christine - | Spalding | 07-Oct-2022 07:31 A | м | | | | |

Use this dropdown to configure a filtered view of your data, your reportees data, and your direct reportees data.

| | Emplo | oyee Information | User-specific Operations | Insights Employees | Departments Designation | ons HR Process Groups | Delegation | Q 🕹 🕸 🛞 |
|-----|---------|---------------------|--------------------------|------------------------|-------------------------|------------------------------|----------------------|------------------|
| Dep | artment | View ~ E | dit | | | | All Data - Add | Department 🖉 😇 🚥 |
| 6 | | Department Name ↓↑ | Mail Alias J | Added By | Added time | Modified By | ↓↑ Modified time ↓↑ | Department Code |
| | | Visual Designer | | ZY198 - Christine - S | 28-Oct-2024 00:43 AM | ZY198 - Christine - Spalding | 28-Oct-2024 00:43 AM | VD |
| | | Zylker Website Mark | | 4570 - Scott - Fisher | 08-Mar-2024 02:08 PM | 4570 - Scott - Fisher | 08-Mar-2024 02:08 PM | |
| | | Software Testing | | ZY198 - Christine - S | 11-Dec-2023 01:33 PM | ZY198 - Christine - Spalding | 11-Dec-2023 01:33 PM | |
| | | Zylker Marketing | | 1236 - Jacob - Sanders | 11-Oct-2022 10:39 AM | 1236 - Jacob - Sanders | 11-Oct-2022 10:39 AM | |
| | | Zylker Content Mark | | 1236 - Jacob - Sanders | 16-May-2022 04:01 PM | 1236 - Jacob - Sanders | 11-Oct-2022 10:25 AM | |
| | | Monitoring_Weekend | | ZY198 - Christine - S | 13-Apr-2020 05:06 PM | ZY198 - Christine - Spalding | 07-Oct-2022 07:31 AM | |

The filter option allows for quick, targeted access to specific employee data.

The ellipsis icon helps to Import data, Export data, History Export, Bulk File Upload, E-Sign Documents, and Show masked data.

Designations

The **Designations** tab displays all designations within the organization, including information on who added each designation, the date of creation, the last person to modify it, and the time of modification.

To learn more about Public Views and My Views, click here.

Adding a new Designation

To add a new employee to your organization, click **Add Designation**.

| | Emplo | yee Information | | User-specific Oper | ations In: | sights | Employees | Departme | ents Designations | HR P | rocess Groups | Dele | gation | | | . Q @ | 8 🛞 |
|------|---------|-----------------|----|--------------------|------------|--------|---------------|----------|-------------------------|------|-------------------|-------|--------------------------|-----|-------------|-------------------------|---------|
| Desi | gnation | View | × | Edit | | | | | | | | All D | ata ~ | Add | Designation | <i>κ</i> ₂ ≟ | - |
| 6 | | Stream | 11 | Designation N ↓↑ | Mail Alias | 11 | Modified Time | 11 | Modified By | 11 | Added Time | 11 | Added By | 11 | Lookup1 ↓ | EEO Categ | iory][|
| | | Software | | Technical Writer | | | 28-Oct-2024 0 | 02:11 | ZY198 - Christine - Spa | I | 28-Oct-2024 02:11 | | ZY198 - Christine - Spal | | Davis | Profession | als |
| | | Software | | Graphic Designer | | | 10-Oct-2024 0 | 3:33 | ZY198 - Christine - Spa | I | 16-May-2022 04:05 | | 1236 - Jacob - Sanders | | Frank | | |
| | | | | Editorial Manager | | | 16-May-2022 0 | 14:04 | 1236 - Jacob - Sanders | | 16-May-2022 04:04 | · | 1236 - Jacob - Sanders | | Olivia | | |
| | | Software | | SEO Specialist | | | 11-Oct-202210 | 2:22 AM | 1236 - Jacob - Sanders | | 16-May-2022 04:04 | · | 1236 - Jacob - Sanders | | Jacob | | |
| | | Software | | Content Market | | | 11-Oct-202210 | 9:33 AM | 1236 - Jacob - Sanders | | 16-May-2022 04:03 | I | 1236 - Jacob - Sanders | | Mary | | |
| | | | | Content Writer | | | 16-May-2022 0 | 14:03 | 1236 - Jacob - Sanders | | 16-May-2022 04:03 | · | 1236 - Jacob - Sanders | | Eleanor | | |
| | | | | Manager-Leade | | | 09-Sep-2020 | 12:52 | ZY198 - Christine - Spa | I | 09-Sep-2020 12:52 | | ZY198 - Christine - Spal | | | | |

- 1. Enter the designation name and give a code.
- 2. Add the stream.
- 3. Fill up the other designation details.

| Add Designation | | | | × |
|---------------------|------------------|-------------|----------------------|---|
| Designation Details | | | | |
| Designation Name* | Technical Writer | Lookup 1 | Davis | ~ |
| Designation Code | Т₩ | Employee ID | Davis Rosemary ZY188 | |
| Stream | Software X | | | |
| Mail Alias | | | | |
| EEO Category | Professionals | ~ | | |
| Submit Submit and t | Vew Cancel | | | |

4. Click Submit.

| esignation | | | | 0 - 3 |
|---------------------|------------------------------|---------------|------------------------------|-------|
| Designation Details | | | | / |
| Designation Name | Technical Writer | Modified By | ZY198 - Christine - Spalding | |
| Designation Code | TW | Modified Time | 28-Oct-2024 02:11 AM | |
| Stream | Software | Lookup 1 | Davis | |
| Mail Alias | | Employee ID | Davis Rosemary ZY188 | |
| Added By | ZY198 - Christine - Spalding | | | |
| Added Time | 28-Oct-2024 02:11 AM | | | |
| EEO Category | Professionals | | | |
| Related Forms | | | | |
| E-Signature Docum | nents | | | + 🔍 |

5. To update designation details for a specific record, select the record and click the pencil icon to make changes.

| ÷ | Emple | oyee Information | ı | User-specific Ope | erations | Insights | Employees | Departm | ents Designati | ons HR P | rocess | Groups | Delegation | | с | () @ | 3 🔞 |
|------|---------|------------------|----|-------------------|------------|----------|-----------------|---------|-------------------|----------|----------|--------------|------------------------|----|---------------|------------------|---------|
| Desi | gnation | View | × | Edit | | | | | | | | [| All Data 🗸 | Ad | d Designation | κ ^R = | |
| B | | Stream | 11 | Designation N ↓↑ | Mail Alias | 11 4 | Modified Time | 11 | Modified By | 11 | Added Ti | ime | All Data | 11 | Lookup1 ↓ | EEO Categ | lori 1[|
| | | Software | | Technical Writer | | | 28-Oct-2024 02 | ::11 | ZY198 - Christine | e - Spal | 28-Oct-2 | 2024 02:11 . | Reportees' Data | | Davis | Profession | als |
| | | Software | | Graphic Designer | | | 10-Oct-2024 03 | :33 | ZY198 - Christine | e - Spal | 16-May-2 | 2022 04:05 | Direct Reportees' Data | | Frank | | |
| | | | | Editorial Manager | | | 16-May-2022 04 | 1:04 | 1236 - Jacob - Sa | nders | 16-May-2 | 2022 04:04 | My Data | | Olivia | | |
| | | Software | | SEO Specialist | | | 11-Oct-2022 10: | 22 AM | 1236 - Jacob - Sa | nders | 16-May-2 | 2022 04:04 | 1236 - Jacob - Sander | 5 | Jacob | | |
| | | Software | | Content Market | | | 11-Oct-2022 10: | 33 AM | 1236 - Jacob - Sa | nders | 16-May-2 | 2022 04:03 | 1236 - Jacob - Sander | 8 | Mary | | |
| | | | | Content Writer | | | 16-May-2022 04 | 1:03 | 1236 - Jacob - Sa | nders | 16-May-2 | 2022 04:03 | 1236 - Jacob - Sander | \$ | Eleanor | | |
| | | | | Manager-Leade | | | 09-Sep-2020 12 | :52 | ZY198 - Christine | a - Spal | 09-Sep-2 | 2020 12:52 | ZY198 - Christine - Sp | al | | | |

Use this dropdown to configure a filtered view of your data, your reportees data, and your direct reportees data.

| ÷ | Emplo | yee Information | User-specific Op | perations | Insights | Employees [| Department | s Designations | HR P | rocess Groups | Dele | egation | | Q | . 4 🛛 🔇 |
|-----|----------|-----------------|-------------------|------------|----------|------------------|------------|--------------------------|------|-------------------|-------|---------------------------|-----|-------------|----------------|
| Des | ignation | View | ✓ Edit | | | | | | | | All D | ata ~ | Add | Designation | ν ^R |
| 6 | | Stream 1 | Designation N J | Mail Alias | 11 | Modified Time | 11 1 | Modified By | 11 | Added Time | 11 | Added By | 11 | Lookup1 J↑ | EEO Calegory 1 |
| | | Software | Technical Writer | | | 28-Oct-2024 02: | 11 2 | ZY198 - Christine - Spal | | 28-Oct-2024 02:11 | | ZY198 - Christine - Spal. | | Davis | Professionals |
| | | Software | Graphic Designer | | | 10-Oct-2024 03: | 33 2 | ZY198 - Christine - Spal | | 16-May-2022 04:0 | 5 | 1236 - Jacob - Sanders | | Frank | |
| | | | Editorial Manager | | | 16-May-2022 04: | 04 1 | 1236 - Jacob - Sanders | | 16-May-2022 04:0 | 4 | 1236 - Jacob - Sanders | | Olivia | |
| | | Software | SEO Specialist | | | 11-Oct-2022 10:2 | 2 AM 1 | 1236 - Jacob - Sanders | | 16-May-2022 04:0 | 4 | 1236 - Jacob - Sanders | | Jacob | |
| | | Software | Content Market | | | 11-Oct-2022 10:3 | 3 AM 1 | 1236 - Jacob - Sanders | | 16-May-2022 04:0 | 3 | 1236 - Jacob - Sanders | | Mary | |
| | | | Content Writer | | | 16-May-2022 04: | 03 1 | 1236 - Jacob - Sanders | | 16-May-2022 04:0 | з | 1236 - Jacob - Sanders | | Eleanor | |
| | | | Manager-Leade | | | 09-Sep-202012: | 52 2 | ZY198 - Christine - Spal | | 09-Sep-2020 12:52 | 2 | ZY198 - Christine - Spal. | | | |

The filter option allows for quick, targeted access to specific employee data.

The ellipsis icon helps to Import data, Export data, History Export, Bulk File Upload, E-Sign Documents, and Show masked data.

HR Process

To learn more about HR Process, <u>click here</u>.

Groups

The **Groups** tab can be used to add and manage employee groups. Groups can contain employees from any department, designation, etc.

| ← Employee Information | User-specific Operations Insig | hts Employees | Departments | Designations | HR Process | Groups | | ۹ | ¢ | ¢ | 0 |
|------------------------|--------------------------------|---------------|---------------|------------------|-----------------|--------------|-------------------|---|-----|--------|---|
| | | | | | | | All groups | ~ | Add | d Grou | þ |
| Group name | Group email address | | Description | | | | | | | | |
| Travel | travel@zylker.com | | | | | | | | | | |
| Testathon Members | testathon@zylker.com | | This group is | or those members | who are part of | testing acro | oss all products. | | | | |
| Onboarding | onboarding@zylker.com | | | | | | | | | | |
| Recruitment | hr-recruit@zylker.com | | HR staff hand | ling recruitment | | | | | | | |
| Fun Activities | funatwork@zylker.copm | | | | | | | | | | |
| Insurance | Insurance@zylker.com | | | | | | | | | | |
| Assets | assets@zylker.com | | | | | | | | | | |
| Payroll | payroll@zylker.com | | This group is | or those members | who are part of | payroll. | | | | | |

Adding a new Group

To add a new group, click Add Group.

| ← Employee Information | User-specific Operations | Insights | Employees | Departments | Designations | HR Process | Groups | | Q | ¢ | \$ | 0 |
|------------------------|--------------------------|----------|-----------|-----------------|------------------|-----------------|-------------|-------------------|---|-----|-------|---|
| | | | | | | | | All groups | ~ | Add | Group |] |
| Group name | Group email address | | | Description | | | | | | | | |
| Travel | travel@zylker.com | | | | | | | | | | | |
| Testathon Members | testathon@zylker.com | | | This group is f | or those members | who are part of | esting acro | oss all products. | | | | |
| Onboarding | onboarding@zylker.com | n | | | | | | | | | | |
| Recruitment | hr-recruit@zylker.com | | | HR staff hand | ing recruitment | | | | | | | |
| Fun Activities | funatwork@zylker.copm | n | | | | | | | | | | |
| Insurance | Insurance@zylker.com | | | | | | | | | | | |
| Assets | assets@zylker.com | | | | | | | | | | | |
| Payroll | payroll@zylker.com | | | This group is f | or those members | who are part of | oayroll. | | | | | |

- 1. Enter the group name and description.
- 2. Enter the group email address.
- 3. Select the group administrators and group members.

| ← Employee Information Us | ser-specific Operations Insights Employee | Add Group | × |
|---------------------------|---|--|---|
| | | Group name* | |
| Group name | Group email address | Payroll | |
| Travel | travel@zylker.com | Description | |
| Testathon Members | testathon@zylker.com | This group is for those members who are part of payroll. | |
| Onboarding | onboarding@zylker.com | | |
| Recruitment | hr-recruit@zylker.com | Group email address | |
| Fun Activities | funatwork@zylker.copm | payroll@zylker.com | |
| Insurance | Insurance@zylker.com | Administrator* | |
| Assets | assets@zylker.com | | |
| | | Members Bit EU/04 Sandra Marks X | |
| | | Notify newly added employees. | |
| | | Save Cancel | |

- 4. Notifications can also be sent to newly added group members.
- 5. Click Save.

| ← Employee Information | User-specific Operations Insigh | ts Employees | Departments | Designations | HR Process | Groups | Delegation | | Q Ç | ¢ ¢ |
|------------------------|---------------------------------|--------------|-----------------|------------------|-----------------|--------------|-------------------|---|-------|-------|
| | | | | | | | All groups | ~ | Add G | Group |
| Group name | Group email address | | Description | | | | | | | |
| Travel | travel@zvlker.com | | | | | | | | | |
| | | | | | | | | | | |
| Testathon Members | testathon@zylker.com | | This group is f | or those members | who are part of | testing acro | oss all products. | | | |
| Onboarding | onboarding@zylker.com | | | | | | | | | |
| Recruitment | hr-recruit@zylker.com | | HR staff hand | ling recruitment | | | | | | |
| Fun Activities | funatwork@zylker.copm | | | | | | | | | |
| Insurance | Insurance@zylker.com | | | | | | | | | |
| Assets | assets@zylker.com | | | | | | | | | |
| Payroll | payroll@zylker.com | | This group is f | or those members | who are part of | payroll. | | | | |
| | | | | | | | | | | |

6. To edit the group details for a specific record, select the record and click the pencil icon to make changes.



| Edit Group | × |
|--|---|
| Group name * | |
| Payroll | |
| Description | |
| This group is for those members who are part of payroll. | |
| Group email address | |
| payroll@zylker.com | |
| Save Cancel | |

7. After editing, click **Save.**

Delegations

The **Delegations** tab lets you add and manage delegations. Delegations in Zoho People enable users to temporarily assign approval responsibilities from one employee to another within a specified timeframe, ensuring continuity and efficiency in workflow management.

| ← Employee Information | User-specific Operations Insights Employed | es Departments Designat | ions HR Process Groups | Delegation Q 4 | ¢ \$ |
|-------------------------|--|-------------------------|----------------------------|----------------|--------|
| | | | | Add Deleg | gation |
| Delegator | Delegatee | Туре | Date Range | Status | |
| You | 1244_deleted - Tina Francis | Temporary | 17-Nov-2023 to 17-Nov-2023 | Expired | |
| You | ZY134 - Rebecca Biaggio | Temporary | 03-Feb-2020 to 07-Feb-2020 | Expired | |
| 145 - Pedro Martinez | ZY165 - Edison Buster | Temporary | 08-Jan-2020 to 09-Jan-2020 | Expired | |
| ZY134 - Rebecca Biaggio | ZY197 - Aditi A | Temporary | 19-Sep-2018 to 28-Sep-2018 | Expired | |
| ZY179 - Lee Vanessa | ZY130 - Benito Melissa | Temporary | 10-Sep-2018 to 31-Oct-2018 | Expired | |
| ZY178 - Walker Kristen | 1119 - Michel Rob | Temporary | 24-Sep-2018 to 28-Sep-2018 | Expired | |

Adding a new Delegation

To add a new delegation, click **Add Delegation**.

| ← Employee Information | User-specific Operations Insights Employees | Departments Designat | tions HR Process Groups | Delegation Q D 🕸 |
|-------------------------|---|----------------------|----------------------------|------------------|
| | | | | Add Delegation |
| Delegator | Delegatee | Туре | Date Range | Status |
| You | 1244_deleted - Tina Francis | Temporary | 17-Nov-2023 to 17-Nov-2023 | Expired |
| You | ZY134 - Rebecca Biaggio | Temporary | 03-Feb-2020 to 07-Feb-2020 | Expired |
| 145 - Pedro Martinez | ZY165 - Edison Buster | Temporary | 08-Jan-2020 to 09-Jan-2020 | Expired |
| ZY134 - Rebecca Biaggio | ZY197 - Aditi A | Temporary | 19-Sep-2018 to 28-Sep-2018 | Expired |
| ZY179 - Lee Vanessa | ZY130 - Benito Melissa | Temporary | 10-Sep-2018 to 31-Oct-2018 | Expired |
| ZY178 - Walker Kristen | 1119 - Michel Rob | Temporary | 24-Sep-2018 to 28-Sep-2018 | Expired |

- 1. Select the delegator. (The one who will temporarily approve the requests)
- 2. Select the delegatee. (The one who will get assigned to the new approver for approval requests)
- 3. Choose the type of delegation, whether it is temporary or permanent.
- 4. Select the date range from which this should apply.

| tup Delegation | | | |
|---|---|-----------------------|-----------|
| Delegator * | | | |
| Frank Ocean | | | ~ |
| Delegatee* | | | |
| Rebecca Biaggio | | | ~ |
| Туре | | | |
| Temporary | ~ | 31-Oct-2024-06-Nov-20 | \ominus |
| Otification Delegator and Delegatee Delegatee | | | |
| | | | |
| | | | |
| | | | |
| | | | |

- 5. Select who should be notified about the change in delegator, either both Delegator and Delegatee or only Delegatee, and enable the corresponding option.
- 6. Add the description of necessary.
- 7. Click Save.

| ← Employee Information | User-specific Operations Insights Employees | Departments Desig | nations HR Process Groups | Delegation Q 🗘 🕸 |
|-------------------------|---|-------------------|----------------------------|------------------|
| | | | | Add Delegation |
| Delegator | Delegatee | Туре | Date Range | Status |
| CND190 - Frank Ocean | ZY134 - Rebecca Biaggio | Temporary | 31-Oct-2024 to 06-Nov-2024 | Upcoming |
| You | 1244_deleted - Tina Francis | Temporary | 17-Nov-2023 to 17-Nov-2023 | Expired |
| You | ZY134 - Rebecca Biaggio | Temporary | 03-Feb-2020 to 07-Feb-2020 | Expired |
| 145 - Pedro Martinez | ZY165 - Edison Buster | Temporary | 08-Jan-2020 to 09-Jan-2020 | Expired |
| ZY134 - Rebecca Biaggio | ZY197 - Aditi A | Temporary | 19-Sep-2018 to 28-Sep-2018 | Expired |
| ZY179 - Lee Vanessa | ZY130 - Benito Melissa | Temporary | 10-Sep-2018 to 31-Oct-2018 | Expired |
| ZY178 - Walker Kristen | 1119 - Michel Rob | Temporary | 24-Sep-2018 to 28-Sep-2018 | Expired |

This is how it appears after adding a new delegation.

To edit the delegation details for a specific record, select the record and click the pencil icon to make changes.

| View Delegation | Ø× |
|---------------------------|----|
| Delegator | |
| CND190 - Frank Ocean | |
| Delegatee | |
| ZY134 - Rebecca Biaggio | |
| Туре | |
| Temporary | |
| Date Range | |
| 31-Oct-2024 - 06-Nov-2024 | |
| Notification | |
| Delegator and Delegatee | |
| Description | |
| • | |

After editing, click **Save**.