

How to do 'New-Initiation'

You can follow the below steps for 'New-Initiation' on Zing HR :

IMP : New-Initiation process will help the admin to get all the employees in to the 'PMS' framework for Whom the PMS Policy is not applied.

1. Log in to your Zing HR account.
2. On the home screen left-hand top side click on select menu, then 'PMS ' as shown below.

ZING

Click On select menu (dots)

My Time And Attendance

● Absent ● Leave Applied ● Half Day ● Leave Approved ● Present ● Outdoor Approved ...

October 2018 [Holiday List](#)

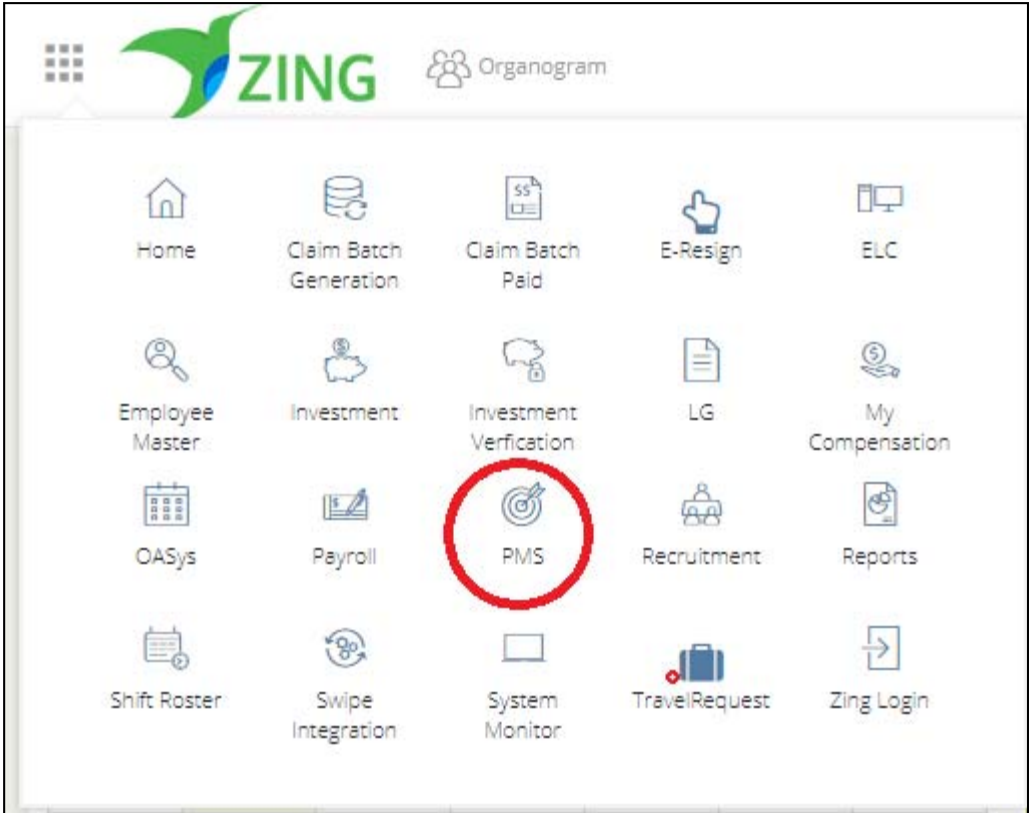
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
	●		●	●	●	●
7	8	9	10	11	12	13
	●	●				
14	15	16	17	18	19	20
					●	
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Absence in current month

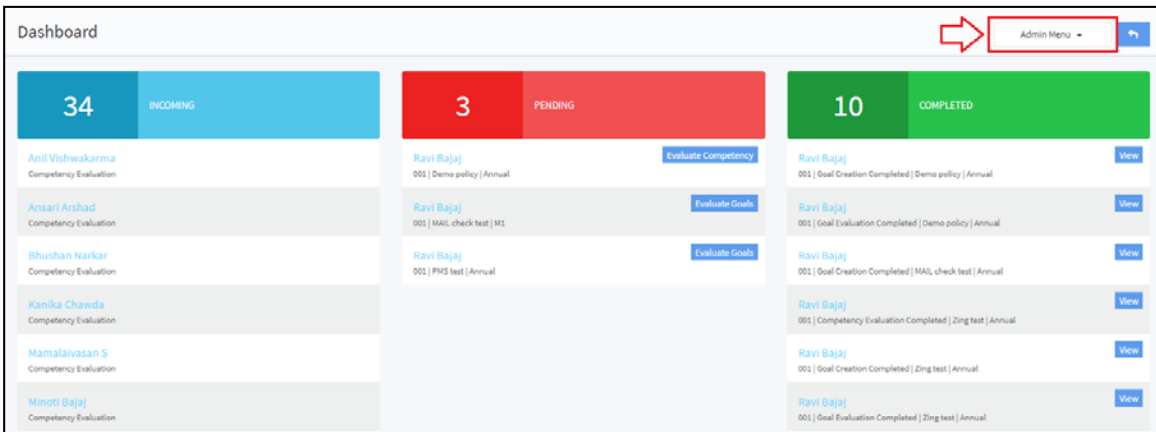
0.0

- Paternity Leaves (NA)
- Paid Leave (47.00)
- CompOff Leaves (0.00)
- BirthDay Leaves (0.00)
- Other Leaves ▾

Regularize Outdoor



On the new window please click on the 'Admin Menu' and select the 'Process Re-Initiation'



The screenshot shows an Admin Dashboard with a green header bar. On the left, a large green box contains the number '10' and the word 'COMPLETED'. To the right, a dropdown menu is open, listing 'Admin Dashboard', 'Goal Upload', and 'Process Re-Initiation'. The 'Process Re-Initiation' option is highlighted with a red box and a red arrow. Below the header, a list of items is shown, each with a 'View' button. The items are:

- Ravi Bajaj | 001 | Goal Creation Completed | Demo policy | Annual
- Ravi Bajaj | 001 | Goal Evaluation Completed | Demo policy | Annual
- Ravi Bajaj | 001 | Goal Creation Completed | MAIL check test | Annual
- Ravi Bajaj | 001 | Competency Evaluation Completed | Zing test | Annual
- Ravi Bajaj | 001 | Goal Creation Completed | Zing test | Annual
- Ravi Bajaj | 001 | Goal Evaluation Completed | Zing test | Annual
- Nitin Makharia | 2006 | Goal Evaluation Completed | PMS test | Annual

Next on the Process Re-Initiation page select the 'Policy' from the 'For Assessment Year' dropdown.

The screenshot shows the 'Process Re-Initiation' form. The 'For Assessment Year' dropdown is set to '2020 - QA training', which is highlighted with a red box and a red arrow. The 'Policy to be applied' dropdown is set to 'Common'. The 'Set cut-off date' field is empty. The search bar is set to 'Employee Code'. The form includes fields for 'Emp Code / Name', 'Date of Joining', and 'Department'. At the bottom, there are two buttons: 'Initiate Process' and 'Initiate with notification'.

Process Re-Initiation

New-Initiation Change / Hold Process Reset Delete and Sync Push Process

For Assessment Year: 2020 - QA training

Policy to be applied: **2020 - QA training**
2020 - MAIL check test
2018 - Demo policy
2018 - Zing test
2018 - PMS test

Set cut-off date:

'Policy to be Applied' is set 'Common' for all employee (If you want to change then you can change using the configuration settings).

Process Re-Initiation

New-Initiation Change / Hold Process Reset Delete and Sync Push Process

For Assessment Year: 2020 - QA training

Policy to be applied: **Common**

Set cut-off date: mm/dd/yyyy

Search by: Employee Code

Emp Code / Name	Date of Joining	Department
Select cut of date.		

Select the cut of date for 'Goals' submission, for that simply click on the calendar icon and select the 'Cut off date'.

Process Re-Initiation

For Assessment Year:

Policy to be applied:

Set cut-off date:

Emp Code / Name	2018-Dec							Date of Joining
Select cut of date.	Su	Mo	Tu	We	Th	Fr	Sa	
	25	26	27	28	29	30	1	
	2	3	4	5	6	7	8	
	9	10	11	12	13	14	15	
	16	17	18	19	20	21	22	
	23	24	25	26	27	28	29	
	30	31	1	2	3	4	5	

List of all employees will be display, Who are new in to the organization and still not yet submitted the goals.

Select the employee using the check box or enter the 'Employee Code' and search box.

For Assessment Year:

Policy applied:

Search by:

<input type="checkbox"/>	Emp Code / Name	Current Policy	Function / Perspective	Attribute based Competency	Action
<input checked="" type="checkbox"/>	001 Ravi Bajaj	Common	-	-	<input type="button" value="Initiate"/>
<input checked="" type="checkbox"/>	054 Geeta Bajaj	Common	-	-	<input type="button" value="Initiate"/>
<input checked="" type="checkbox"/>	1003 Minoti Bajaj	Common	-	-	<input type="button" value="Initiate"/>
<input type="checkbox"/>	1004 Prasad Rajappan	Common	-	-	<input type="button" value="Initiate"/>
<input type="checkbox"/>	1015 Chetna Tikoo	Common	-	-	<input type="button" value="Initiate"/>

Next click on the 'Initiate Process' and you have done it!..

Note - If you want to send a notification to employee then please select 'Initiate with Notification'

<input type="checkbox"/>	Emp Code / Name	Date of Joining	Department
<input type="checkbox"/>	N100 Anil Ajay Vishwakarma	01/06/2018	-
<input type="checkbox"/>	N101 Radhika Ajay Apte	01/06/2018	-
<input type="checkbox"/>	999 Amit Piyush Mishra	01/06/2018	-
<input type="checkbox"/>	N111 Rahul Patel	16/05/2018	-
<input type="checkbox"/>	2011 Kanika Chavda	03/04/2018	-
<input type="checkbox"/>	2012 Vinod Patil	03/04/2018	-