

How to do 'Change and Hold' process in PMS.

You can follow the below steps for 'Change and Hold' process on Zing HR :

IMP : Change and Hold process will helps to 'Manager / Admin' to 'Hold or Resume' employees PMS process.

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](#)

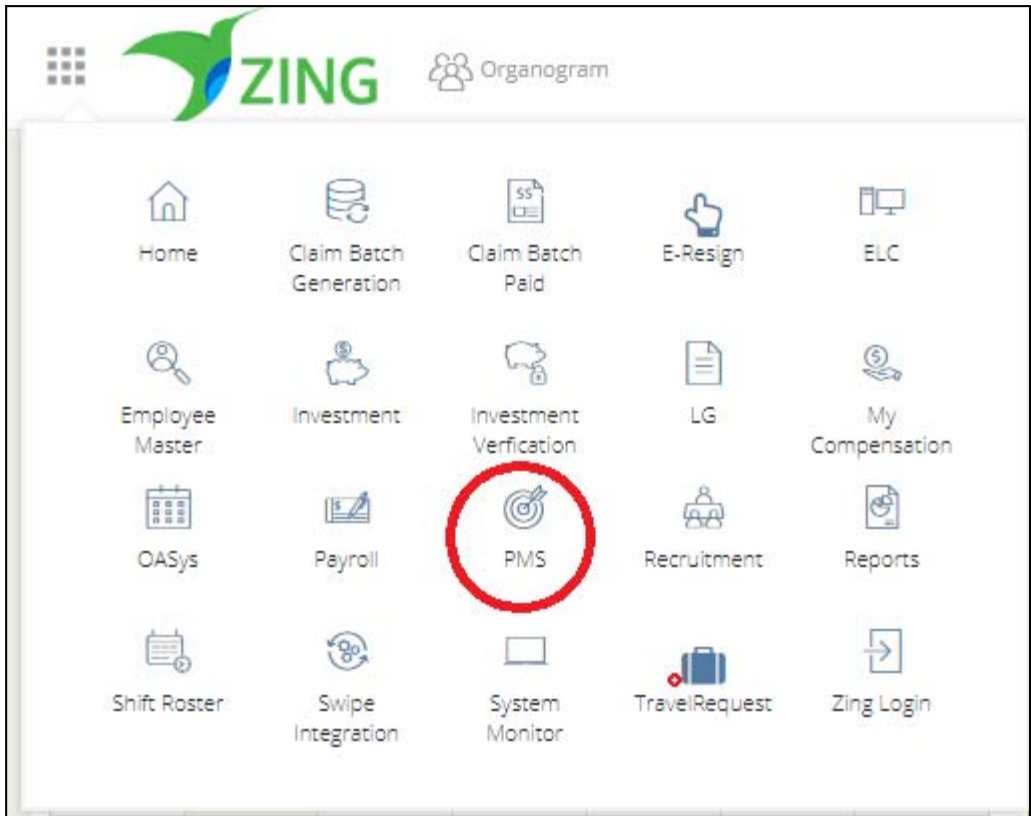
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
	●		●	●	●	●
7	8	9	10	11	12	13
	●	●				
14	15	16	17	18	19	20
					●	
21	22	23	24	25	26	27
28	29	30	31	1	2	3

[Regularize](#) [Outdoor](#)

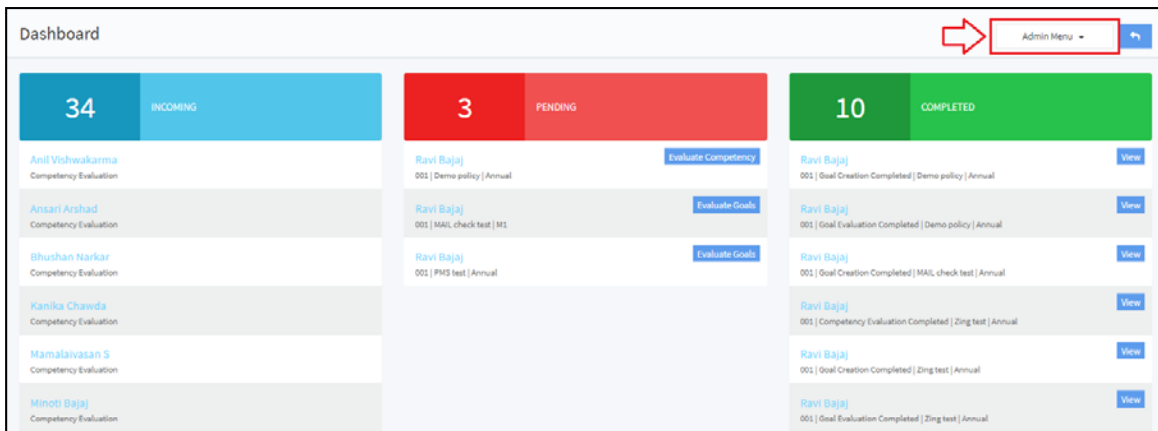
Absence in current month

0.0

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



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



The screenshot displays an admin dashboard interface. At the top right, there is an 'Admin Menu' dropdown menu with a blue refresh button. The dropdown menu contains the following items: 'Admin Dashboard', 'Goal Upload', and 'Process Re-Initiation'. The 'Process Re-Initiation' item is highlighted with a red rectangular box, and a red arrow points from the 'COMPLETED' status bar to it. The status bar itself is green and features a large white number '10' on the left and the word 'COMPLETED' in white capital letters on the right. Below the status bar, there is a list of goal entries, each with a 'View' button. The entries are as follows:

Name	Goal ID	Status	Policy	Frequency	Action
Ravi Bajaj	001	Goal Creation Completed	Demo policy	Annual	View
Ravi Bajaj	001	Goal Evaluation Completed	Demo policy	Annual	View
Ravi Bajaj	001	Goal Creation Completed	MAIL check test	Annual	View
Ravi Bajaj	001	Competency Evaluation Completed	Zing test	Annual	View
Ravi Bajaj	001	Goal Creation Completed	Zing test	Annual	View
Ravi Bajaj	001	Goal Evaluation Completed	Zing test	Annual	View
Nitin Makharia	2006	Goal Evaluation Completed	PMS test	Annual	View

Next on the Process Re-Initiation page select the 'Change / Hold Process' tab.

Process Re-Initiation

For Assessment Year:

Policy to be applied:

Set cut-off date:

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

Select 'For Assessment Year'(Policy) from 'for assessment year' dropdown.

Process Re-Initiation

For Assessment Year:

Policy applied:

<input type="checkbox"/>	Emp Code / Name	Current Policy	Function / Prespective
<input type="checkbox"/>	001 Ravi Bajaj	Common	-

Select 'Policy Applied' from policy applied dropdown.

Process Re-Initiation

For Assessment Year:

Policy applied:

<input type="checkbox"/>	Emp Code / Name	Current Policy	Function / Prespective
<input type="checkbox"/>	001 Ravi Bajaj	Common	-
<input type="checkbox"/>	054 Geeta Bajaj	Common	-

List of all employees will be display, select the employees using the check box or enter the 'Employee Code' in search box .

The screenshot shows a web interface with a top navigation bar containing tabs: 'New Initiation', 'Change / Hold Process', 'Reset', 'Delete and Sync', and 'Push Process'. Below the navigation bar, there are two dropdown menus: 'For Assessment Year' set to '2020 - MAIL check test' and 'Policy applied' set to 'Common'. To the right, there is a search bar with the text 'Employee Code' and a search icon, and a 'Reset' button. Below these elements is a table with the following columns: 'Emp Code / Name', 'Current Policy', 'Function / Perspective', 'Attribute based Competency', and 'Action'. The table contains six rows of employee data. The first three rows have their checkboxes selected (checked), and these checkboxes are highlighted with red boxes. The 'Action' column for each row contains a blue icon with a right-pointing arrow.

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

Next click on the 'Hold' process.

This screenshot is similar to the previous one, but the first checkbox in the table is now checked. Below the table, there are two buttons: 'Hold' and 'Resume'. The 'Hold' button is highlighted with a red box, and a red arrow points down to it from the table area.

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





Click 'OK' for the confirmation and done it!



The screenshot shows a confirmation dialog box with a blue header containing the word 'Confirmation' and a close button (X). The main text of the dialog asks 'Do you want to proceed?'. At the bottom, there are two buttons: 'Ok' and 'Cancel'. The 'Ok' button is highlighted with a red box.

Action status will be change as 'HOLD'.

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

For resuming the please select the user name and click on 'Resume' button.

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

Click 'OK' for the confirmation and done it!

Confirmation ✕

Do you want to proceed?

Ok
Cancel

Action status will be change as 'RESUME'.

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