



Zoho People 5.0 Implementation Guide





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Introduction

Welcome aboard!

We are glad you have chosen Zoho People for your organization. This guide helps you set up your Zoho People account as an Administrator, aimed at simplifying the various stages of the setup process. From setting up users to configuring services, we will walk you through the entire process.

The purpose of this guide is to ensure your onboarding experience is structured, smooth, and easy to follow. Use it as your starting point to set up your Zoho People account and run your organization efficiently.

Getting Started

After you sign up and create an administrator account, you will be greeted with a pop-up screen as shown below.

Company Information

Help us setup your account

Company name *
Awfis Corporation

Portal Name *
awfiscorporation

Industry *
Information Technology

Save

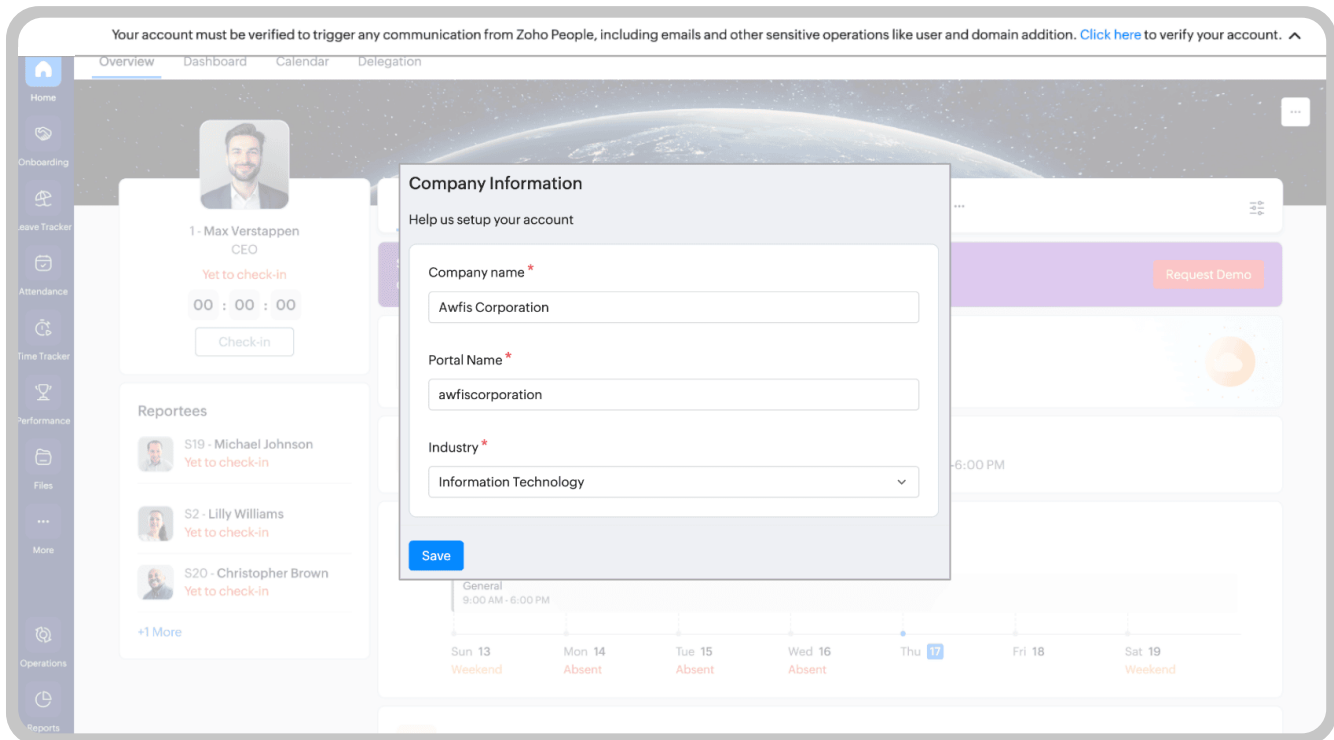


NOTE:

The portal name you enter will be part of the Zoho People access portal URL. For example, if you enter “portal name”, the URL will be **people.zoho.com/portalname/**

The portal name is the unique URL of your account.

Once you have updated your company information, you need to verify your account.



Click on the banner on top to verify your account. If it is not verified, you will not be able to add users, and several features will be restricted.

NOTE:

Account verification will be skipped if you have already verified your account in **Zoho People Account**.




Sample Data for Setup

In Zoho People, new sign-ups can choose to load sample data. This allows administrators to explore and practice with content that resembles real data, providing a safe, hands-on test experience. You can delete the sample data at any time.

After signing up and accessing Zoho People for the first time, you'll be guided to set up your organization details. Once completed, a prompt will appear asking if you'd like to load sample data into your account.

Click **Yes, Generate Data**. (to add sample data)

Click **No, I will fill my own data**. (if you prefer to start with your own information)



Would you like us to load sample data into your Zoho People account?

Load sample data to your Zoho People account to help you settle in comfortably as you familiarize yourself with the various features.

Note: You can delete sample data at any point in time.

Yes, Generate Data **No, I will fill my own data**



NOTE:

Sample data cannot be generated once the sample data screen is closed.

Supported Display Languages

Zoho People is available in 24 supported languages:

 Arabic	 French	 Polish
 Bulgarian	 Georgian	 Portuguese
 Chinese	 German	 Russian
 Croatian	 Hebrew	 Serbian
 Danish	 Hindi	 Spanish
 Dutch	 Italian	 Swedish
 English (UK)	 Japanese	 Turkish
 English (US)	 Korean	 Vietnamese

NOTE:

Only the tabs/sub-tabs/fields that are non-editable by the user will be changed to the respective language. The fields that are editable will remain the same.



The localization feature lets you customize both system and custom terms by adding a language and updating the terminology to match user needs. [Learn more about localization.](#)

How to change the display language in Zoho People?

1. In your browser, navigate to [Zoho People Account](#).
2. Enter your password to re-identify yourself.
3. Click **Edit** in your profile card. (Navigate to **Profile** > **Personal Information** > **Edit**)

The screenshot shows the Zoho People 'Accounts' interface. On the left is a dark sidebar with navigation options: Profile, Personal Information, Email Address, Mobile Numbers, Security, Multi-Factor Authentication, Settings, Sessions, Groups, Privacy, Compliance, and Organization. The main content area is titled 'Profile' and shows a user card for 'Christine Spalding' with email 'c.spalding@zylker.com'. Below the card are several form fields: 'First Name *' (Christine), 'Last Name' (Spalding), 'Display Name' (Christie), 'Gender' (Female), 'Country/Region' (France), 'Language' (français (French)), and 'Time zone' (IST). At the bottom are 'Save' and 'Cancel' buttons.

4. Select the desired language and select the corresponding country/region using the provided drop-downs.
5. Click **Save**.



Organization Setup

Organization Details

1. From home, go to **Settings** (gear icon) > **Manage Accounts** > **Organization Setup** > **Organization Details**.
2. By default, the Zoho People logo will appear. Click the Edit option to replace the Zoho People logo with your own custom logo.
3. Click **Upload File**.
4. Enter your Organization's contact information, such as name, address, contact number, and email address.

IDEA:

*Your company logo will appear at the top of your Zoho People account, and make sure it is in the 80 * 55 size for the best resolution.*

The screenshot displays the Zoho People interface for setting up an organization. The top navigation bar includes 'Manage Accounts', 'Users', 'Organization Setup' (highlighted with a red box), 'User Access Control', 'Manage Service', 'Automation', and 'Approvals'. The left sidebar lists various settings, with 'Organization Details' (also highlighted with a red box) selected. The main content area is titled 'Basic Details' and contains a 'Save' button and a 'Reset' button. The form fields are as follows:

Field	Value
Logo	[Image placeholder with 'Edit' button]
Name *	Awfis Corporation
Website	Company Website
Type of organization	Information Technology
Contact person	Contact person
Contact number	
Contact email *	awfiscorporation@gmail.com
Primary address	Address Line 1



Organization Policy

This space contains crucial settings that impact your entire organization's accounts. These include settings on alerts, chats, employee information preferences, search preferences, profile picture preferences, and finally locale and display format preferences.

To do this, navigate to **Settings** (gear icon) > **Manage Accounts** > **Organization Setup** > **Organization Policy**.

The screenshot shows the 'Organization Policy' settings page. The top navigation bar includes 'Manage Accounts', 'Users', 'Organization Setup' (highlighted with a red box), 'User Access Control', 'Manage Service', 'Automation', 'Approvals', and 'Subscription'. The left sidebar lists various settings categories, with 'Organization Policy' highlighted by a red box. The main content area is divided into several sections:

- Alert & Chat**: Contains three toggle switches: 'Notifications' (checked), 'Chat' (checked), and 'Bot' (unchecked). Each toggle has a descriptive text below it.
- Employee personal information**: Contains three toggle switches: 'Birthday' (checked), 'Work Anniversary' (checked), and 'Mobile number' (checked). Each toggle has a descriptive text below it.
- Employee search**: Contains one toggle switch: 'Allow employee information to be searched using mobile number' (checked).
- Profile picture update**: Contains a dropdown menu for 'Profile picture can be updated by' (set to 'Employee') and a toggle switch for 'Mandate approval for profile picture changes' (unchecked).
- Locale & Display format**: Contains a dropdown menu for 'Country/Region'.



Alert & Chat

Notifications: If you wish to disable all email alerts and notifications sent from Zoho People, disable notifications.

Chat: Zoho People has a built-in chat bar, which can be used to send messages, attachments, calls, etc. to other employees.

Bot: Zia Bot helps employees quickly check in, apply for leave, and view pending tasks. It also searches the company's FAQs and lets users raise a query if no match is found.

Alert & Chat

Notifications
Disabling notifications will stop all email communications

Chat
Specify if you want the chat bar or not

Bot
Specify if you want the Zia bot or not

Employee Personal Information

Using these options, the administrator can choose to give employees the choice to display or hide sensitive information such as their birthday, work anniversary date, wedding anniversary date, and mobile number. Based on the preferences configured here, employees will have access to permissions on the Personal Preferences page in the home tab. [Learn more about personal preferences.](#)



Employee personal information

Define permissions to give employees the option to share or hide certain personal information in the dashboard with others in the organization.

- Birthday**
Enable to give employees the choice to share or hide their birth day.
- Work Anniversary**
Enable to give employees the choice to share or hide their work anniversary day.
- Mobile number**
Give employee the choice to share or hide their mobile number

Employee Search:

By enabling this, employee information can be searched using the employee's mobile number.

Profile Picture Update

Specify who can update the profile picture in Zoho People by using the provided drop-down.

Employee search

- Allow employee information to be searched using mobile number

Profile picture update

Define who can add or update an employee's profile picture.

Profile picture can be updated by

Employee

- Mandate approval for profile picture changes ⓘ



Locale & Display format

Specify the organization's primary country/region and time zone here.

NOTE:

You can also add multiple locations and specify their time zones from the [Locations page](#). ([Settings](#) > [Manage Accounts](#) > [Locations](#)). Each employee can be associated with a region, and this information can be edited through the [Employee Information page](#) in [Operations](#) (**Operations** > **Employee Information** > **Employees page**) or through the [HR Process](#) feature.

Locale & Display format

Country/Region

Select the country from which your organization primarily operates

India ▼

Time zone

Choose the time zone to be applied for your organization

India Standard Time (Asia/Kolkata) ▼

Time

Define if time must be shown in the 12 or 24 hour format in the account

12 - Hour(s) 24 - Hour(s)

Name

Select how an employee's name must be shown in the account

First name Last name ▼

Date

Pick how dates must be displayed in the account

dd-MMM-yyyy ▼



Time: Specify if the organization uses a 12-hour or 24-hour time format. This setting impacts all users.

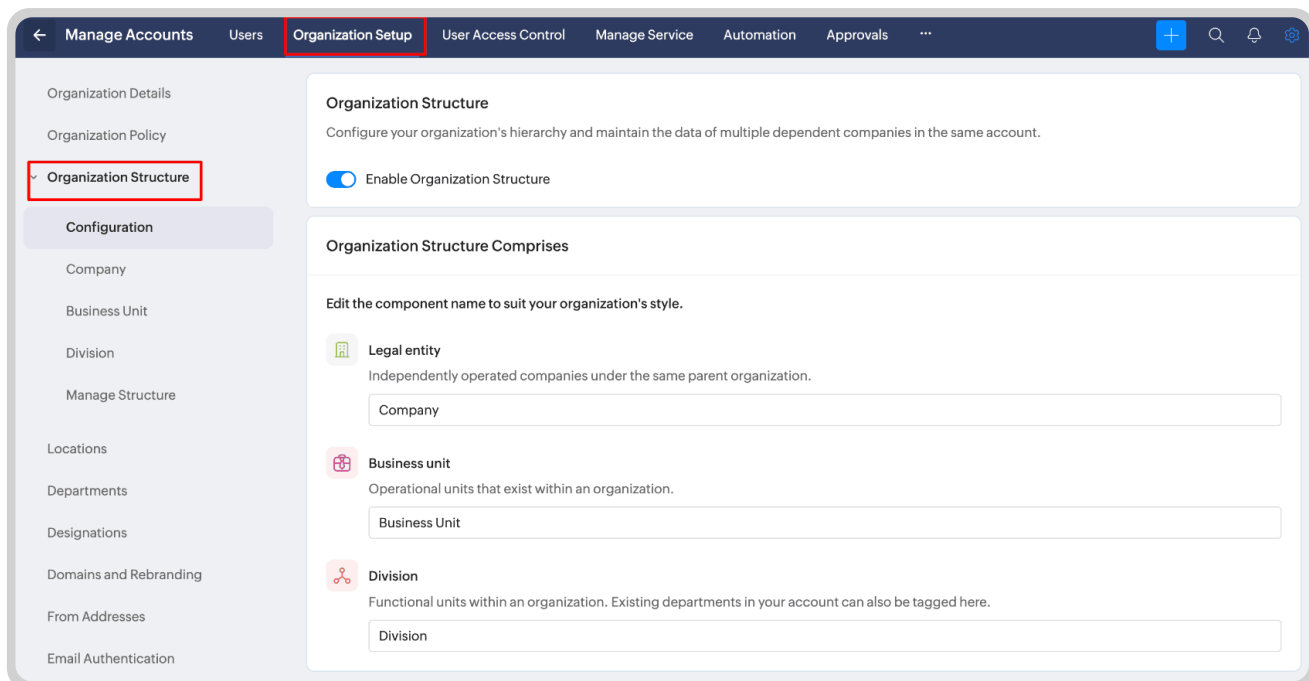
Name: Specify the name display format; for example, if you would like to display the first name following the last name or vice versa across the organization, that can be adjusted here. This setting impacts all users.

Date: Specify the preferred date format choice using the provided drop-down. This setting impacts all users.

Organization Setup

The organization structure feature in Zoho People lets you set up and manage your company hierarchy, making it easy to handle multiple companies or legal entities from a single account.

[Learn more about how to set up Organization Structure.](#)





IDEA:

Enabling organization structure will work well for your organization, if your organization:

- *Has multiple entities within an organization that need to be classified.*
- *Has multiple entities within an organization that are dependent.*
- *Has cross-reporting structures between entities.*
- *Has multiple entities only for payroll processing.*

Organizational Layers and Structure in Zoho People

The organization structure in Zoho People includes the following:

Legal entity:

A legal entity is an independently operated company with its own legal responsibilities, and you can manage multiple legal entities under a single Zoho People account, where each legal entity sits at the top of the organization hierarchy.

Business units:

Various operational units that exist within an organization. You can create multiple business units that operate within a legal entity. The business entity is the second highest in the organization's hierarchy.

Divisions:

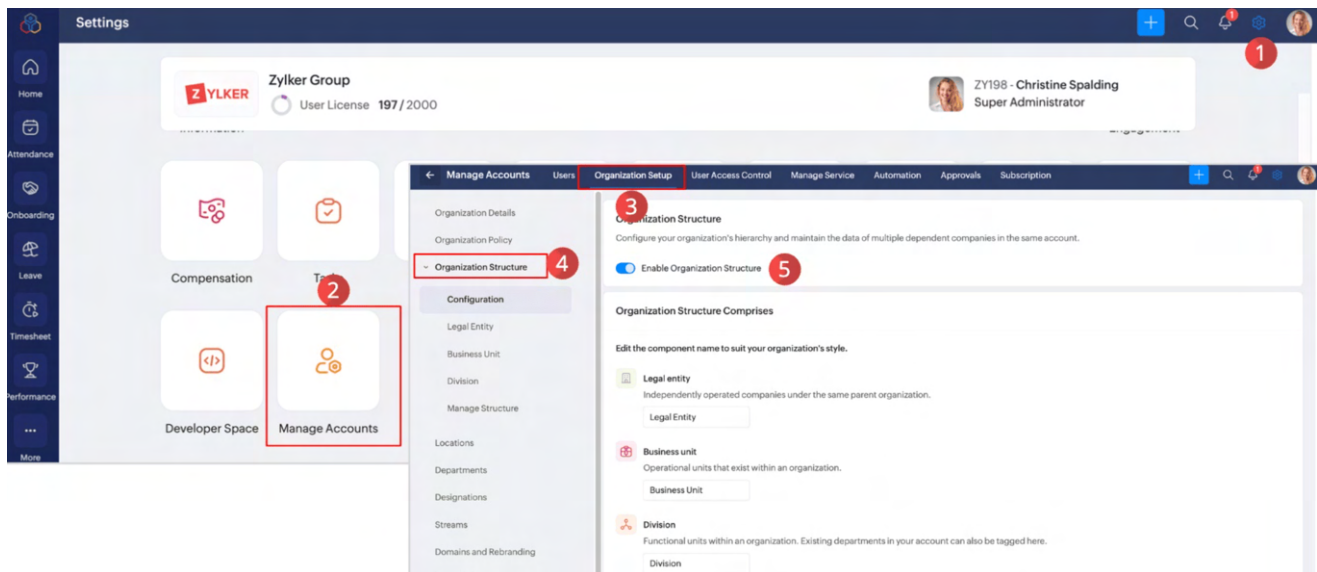
Parts of a business unit that are commonly based on location or products. You can create multiple divisions within a business unit. Division is the next level in the organization hierarchy, after business unit.



Enable and Set Up Organizational Structure

To enable organization structure:

1. Navigate to **Settings > Manage Accounts > Organization Setup > Organization Structure > Configuration**.

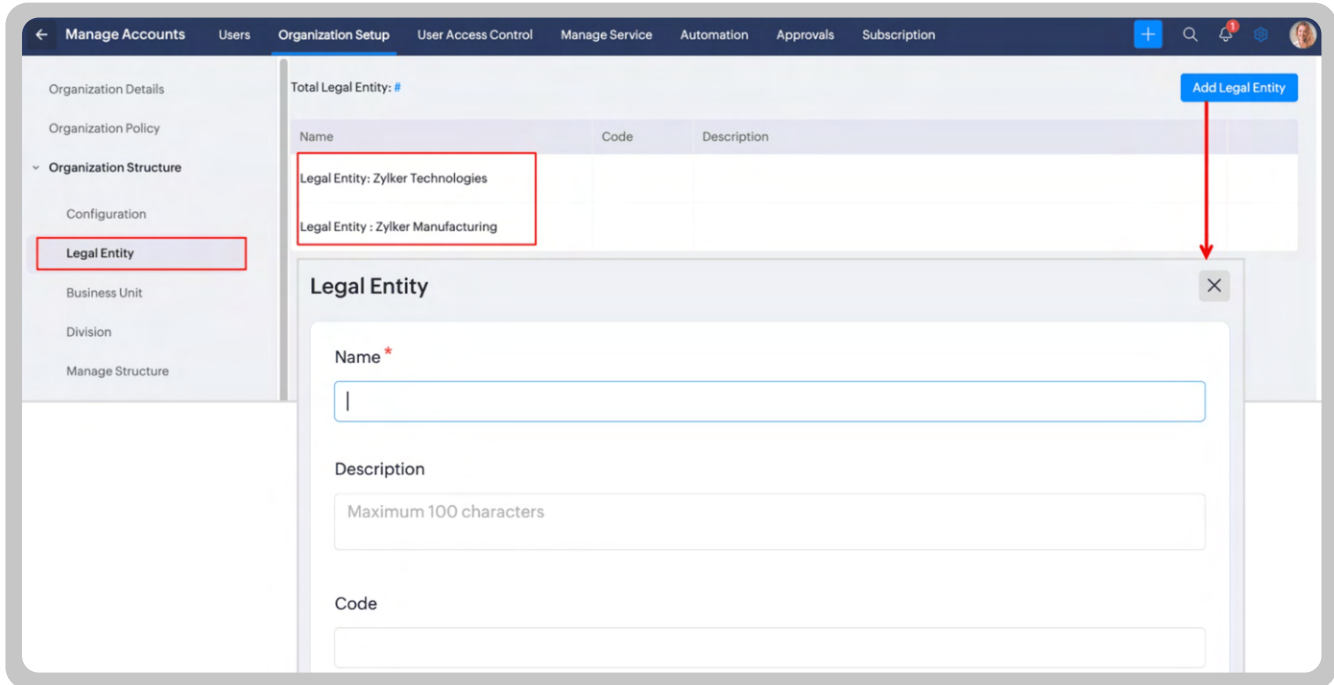


2. Enable **Organization Structure**.

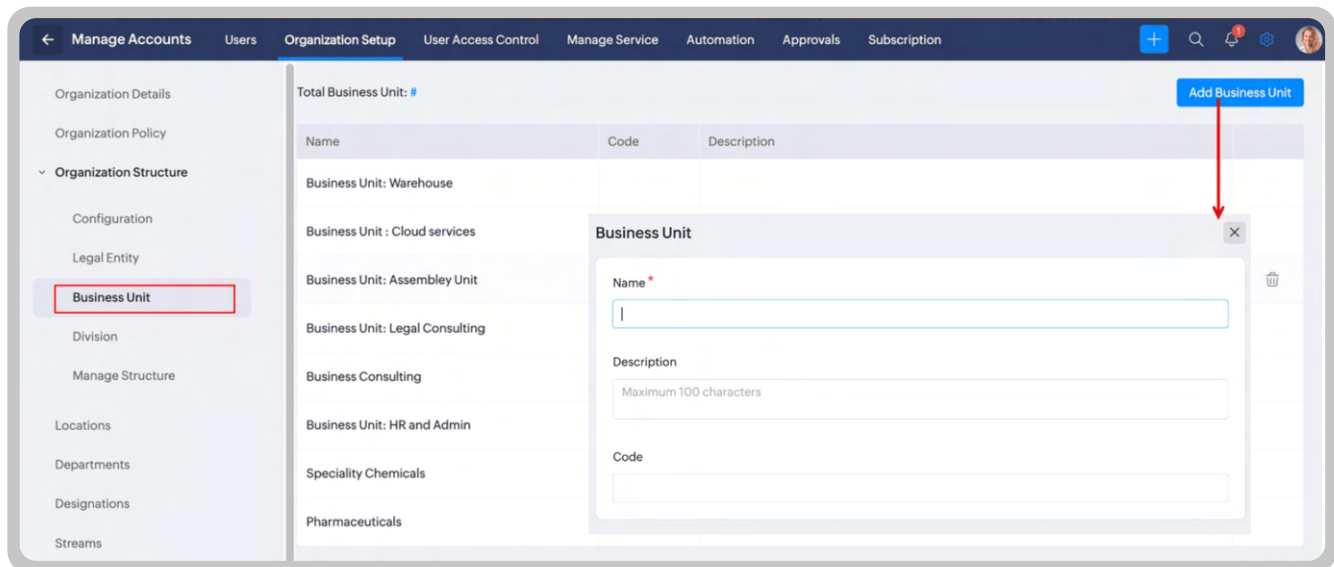
IDEA:

You can edit the name of the organization structure components as per your organizational preference. For example, a Legal entity can be renamed as a Legal Business Entity or Company.

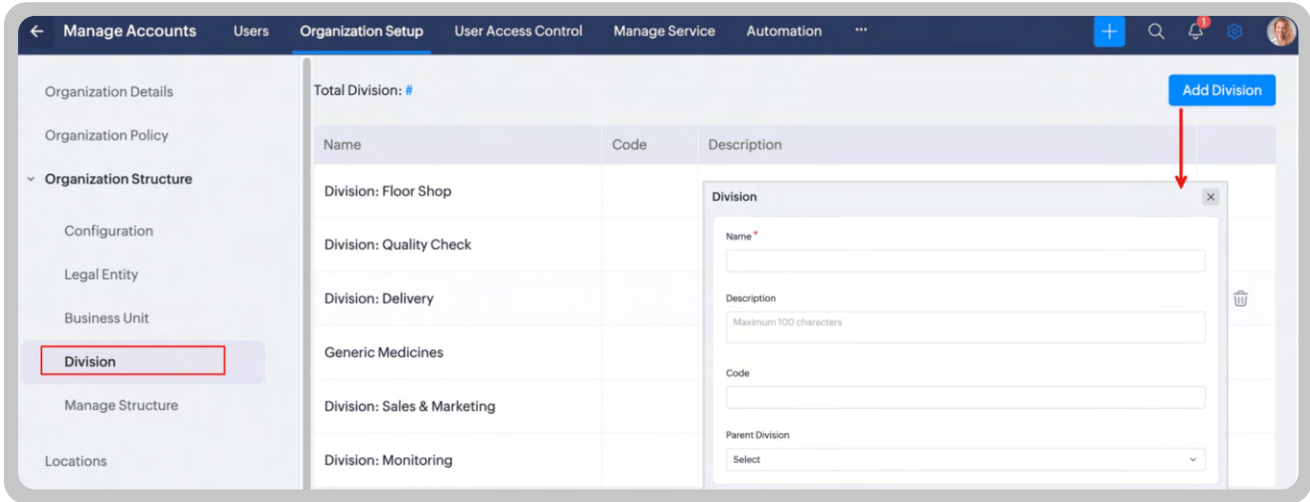
3. Navigate to the **Legal Entity** tab and define the legal entities of your organization.



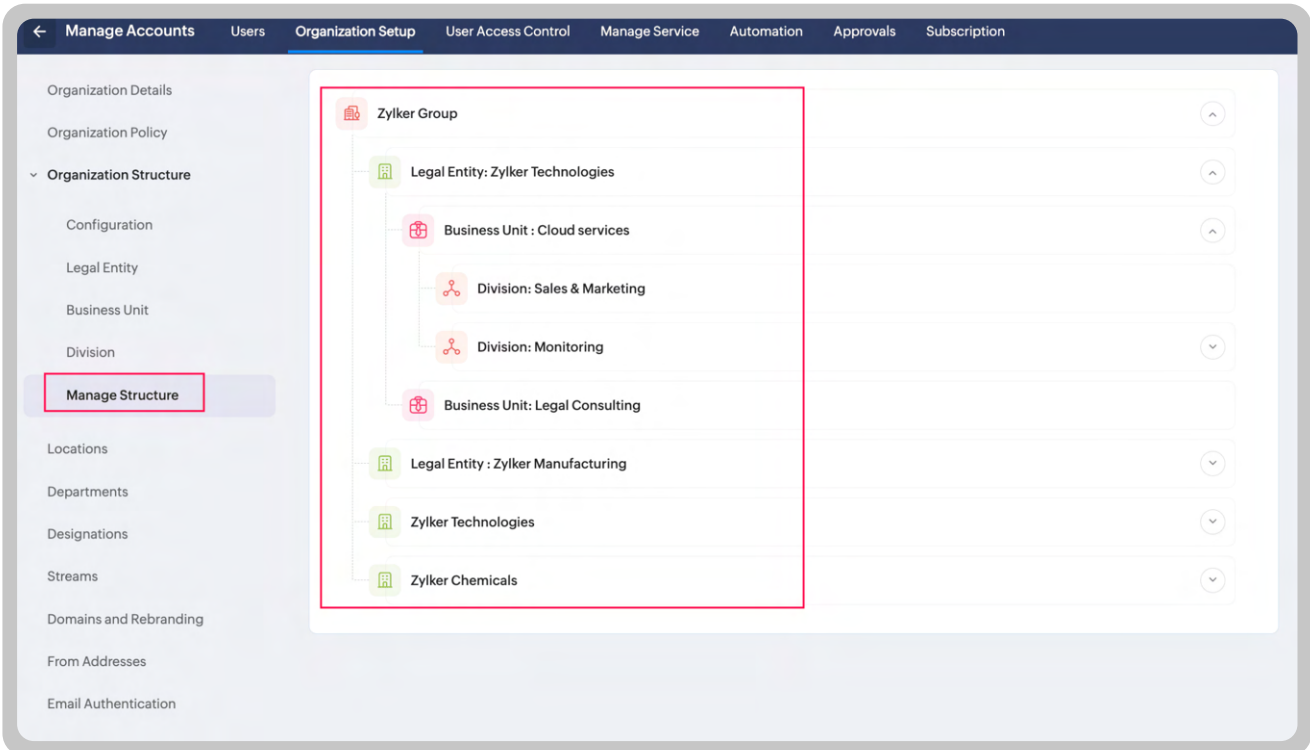
4. Navigate to the **Business Unit** tab and define the business units of your organization.



5. Navigate to the **Divisions** tab and define the divisions of your organization.



6. After defining your organization's Legal Entity, Business Unit, Divisions, you can organize and structure them within the Manage Structure tab. This allows you to set up a clear hierarchy and efficiently manage the various layers of your organization.



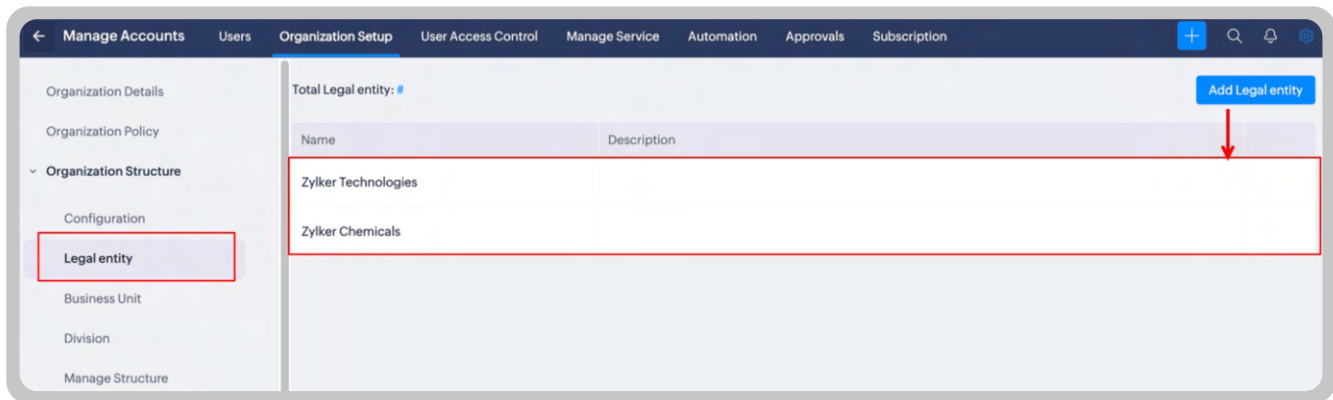


Let's say an organization has two legal entities:

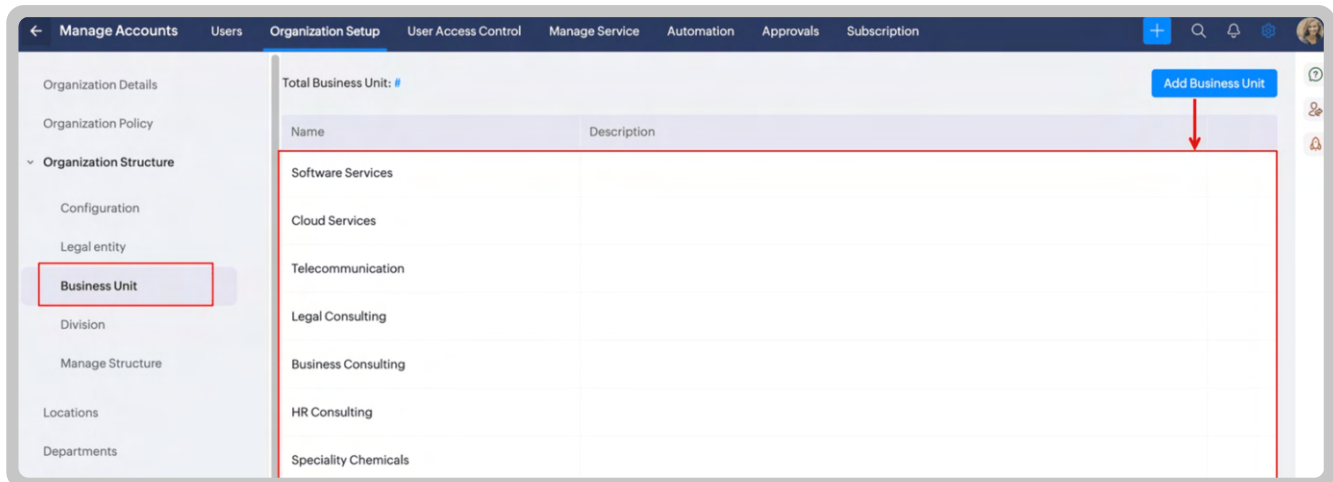
- **Zylker Technologies**
- **Zylker Chemicals**

You want to manage the details of both companies within a single Zoho People account. Enable the Organization Structure and do the following steps:

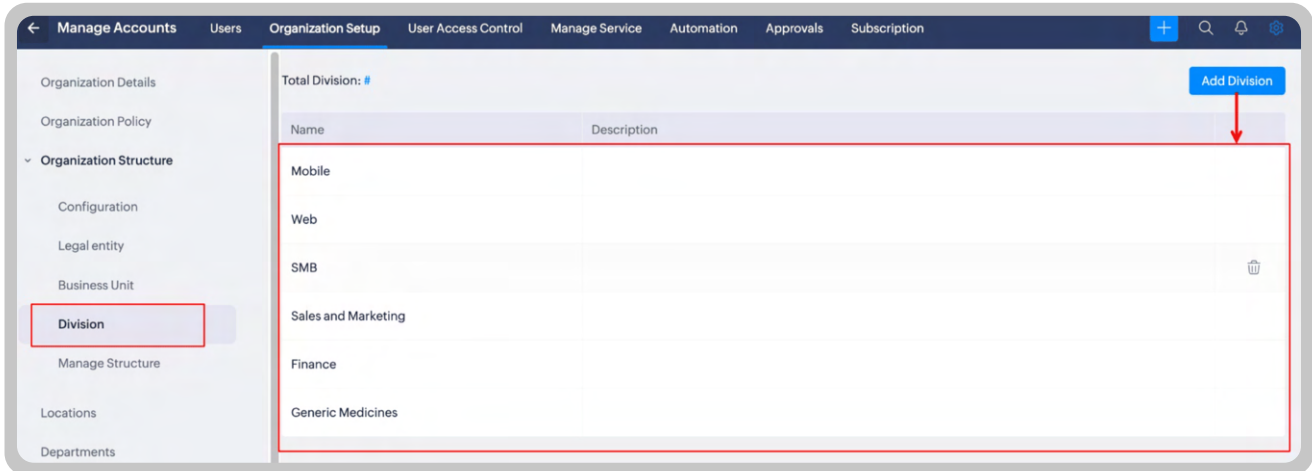
1. Navigate to **Legal Entity** tab and add **Zylker Technologies** and **Zylker Chemicals** as legal entities.



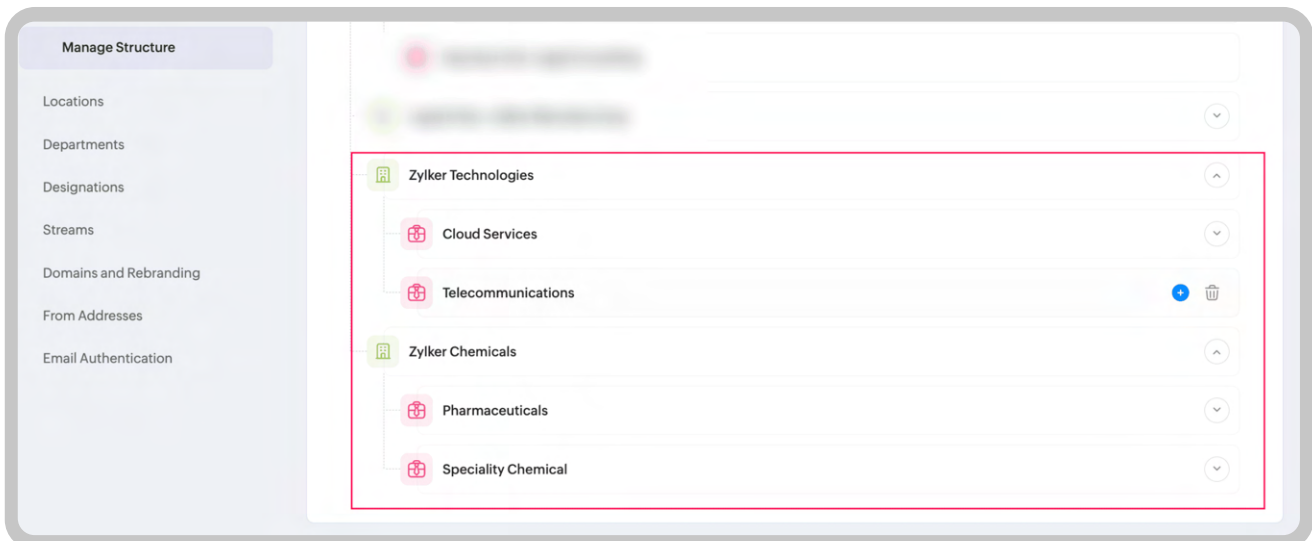
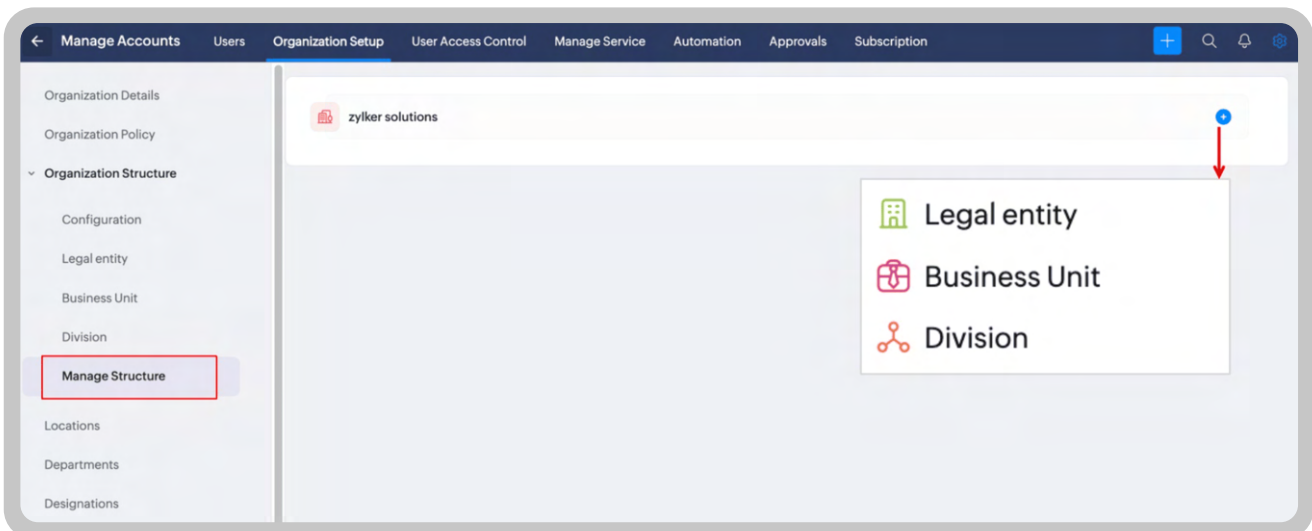
2. Navigate to the **Business Units** tab and add the required business units as follows:



3. Navigate to **Divisions** tab and add the divisions of the organization.



4. Navigate to the **Manage Structure** tab and set up your organization hierarchy using the organizational elements you added above.





Based on the above structure, Zylker is the parent company and Zylker Technologies and Zylker Chemicals are sub-companies under it. Cloud services, telecommunications are business units within Zylker Technologies. Pharmaceuticals and specialty chemicals are corresponding business units within Zylker Chemicals.

Map Legal Entities, Business Unit, and Division to Employees

1. Navigate to **Operations > Employee Information > Employees** tab and click on the employee record to edit information.

Photo	EmployeeID	First Name	Last Name	Email ID	Date of joining	Department	Birth Date	Designation
	HRM22	Eduardo	Vargas	eduardov@zylker.com				
	HRM21	Dan	Jenkins	danj@zylker.com				
	IT24_001	Pedro	Martinez	pedro.m@zylker.com	26-Sep-2014	Information Technol...		Sales Executive
	CND193	Tom	Lee	tom@zylker.com				
	CND192	Bella	Stone	bella@zylker.com				
	CND191	Bruce	Bruce	bruce@zylker.com				
	CND190	Frank	Ocean	frank@zylker.com	01-Dec-2023			
	CND188	Rachel	Addams	racheladdams@zylker.com	31-Jul-2024			
	CND187	Jack	Lewis	jacklewis@zylker.com	31-Jul-2024			
	CND185	Thomas	Shelby	thomasshelby@zylker.com				
	CND176	Grace	Brown	gracebrow@zylker.com	30-Jul-2024			

2. Tag the Legal entity, business unit and division to the employee and save the record.



Edit Employee

Employee ID * IT24_001

Last Name * Martinez

Preferred Name

Added By ZY198 - Christine - Spalding

Added Time 27-Sep-2024 02:59 PM

Appraisal Facilitator Select

Contract Expiry Date dd-MMM-yyyy

Offer Letter Upload from Desktop / Zoho WorkDrive / Others

Reporting Manager Select

Photo -

Secondary Reporting Manager Select

First Name * Pedro

Middle Name

Email address * pedro.m@zyker.com

Personal Mobile Number Select

Modified By ZY198 Christine - Spalding

Modified Time 30-Sep-2024 12:21 PM

Probation start date dd-MMM-yyyy

Legal Entity * Zyker Technologies

Business Unit Cloud Services

Division Email and Collaboration

Alternate Contact

Date of Birth dd-MMM-yyyy

[Learn more about Organization Structure use cases and examples.](#)

From Address

It serves as the default email address (sender's email address) for all your system e-mails triggered and sent from Zoho People to your employees.

The default From Address will be **noreply@zohopeople.com**. To add a new from address, click on the **Add Email From Address** button and follow the steps given below.

Click on the star icon to set the newly added from address as your default from address.

Manage Accounts Users **Organization Setup** User Access Control Manage Service Automation Approvals ...

Organization Details Add Email From Address

Organization Policy

	Display name	Email from address	Verification status	Authentication Status
> Organization Structure	★ noreply	noreply@zohopeople.com	✓ Verified.	Authenticated

Locations

Departments

Designations

Domains and Rebranding

From Addresses

Email Authentication



Employee Database

Once you have set up your organization details, you can start adding users to your account. Users can be added through three different methods in Zoho People.

Before that, let's distinguish the two types of employees that can be added in Zoho People:

Users

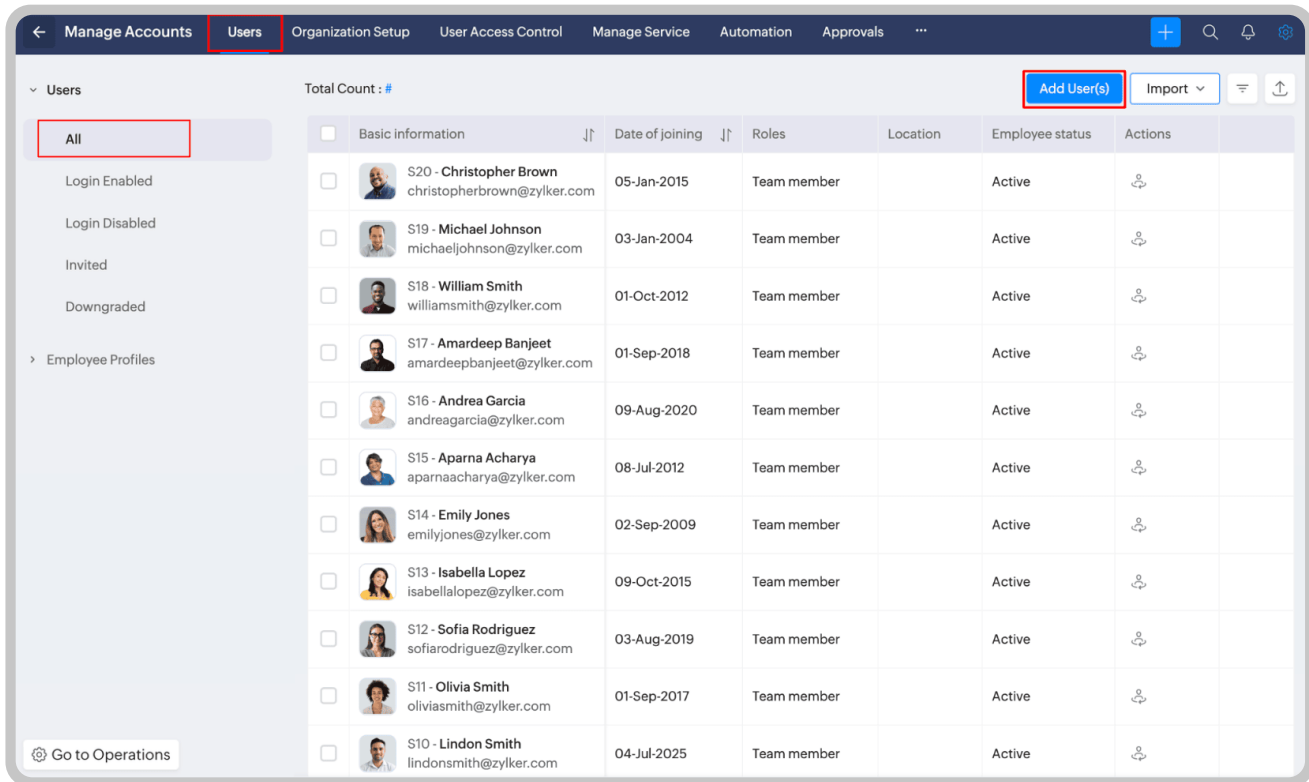
These are employees who will have an email address and password and will be able to log in to their account. They can access their self-service page and perform actions such as applying for leave, submitting timesheets, submitting self-appraisals, etc. First name, last name, employee ID, and email address are mandatory fields for adding a user.

Employee Profiles

These are employees who cannot log in to their account. These employees' details are maintained by the organization in the account. Security staff and contract workers can be examples of such employees. Since these employees cannot log in to their account, based on set permissions, their manager or the admin can apply for leave or submit timesheets for them. Employee ID and first name alone are mandatory fields for adding an employee profile.

Adding Users

To add a new user to your organization, click Add User(s).



Choose 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.

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,

From your home page, go to **Settings > Manage Accounts > Users > Add User(s)**.



1. To invite users through email, select invitation.

1 Selection 2 Sync Users from Zoho 3 Summary

Total License: 7000 | 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.

Google Workspace Users from Google Workspace can be added in Zoho People.

Microsoft 365 Users from Microsoft 365 can be added in Zoho People.

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

1 Selection 2 Create User Account 3 Edit User Data 4 Trigger Onboarding

Total License: 7000 | Employees added: 6020 | Remaining: 980

Fill in the mandatory fields, and click invite. User gets email invitation sent to the email id mentioned. Once the invitation is accepted, the user becomes part of the organization.

Employee ID *
HRM_1859
Last Employee ID HRM_1858

First Name *
Ryan

Last Name *
Gosling

Email address *
ryangosling80@gmail.com



3. 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.
4. After editing, click **Update**.

Add User(s)

1 Selection 2 Create User Account 3 **Edit User Data** 4 Trigger 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 * Zyker Zoho Role Manager
Business Unit Zyker Marketing Employment Type -
Division - Employee Status Probation
Department Support Source of Hire Referral +
Location Chennai Date of Joining 06-Nov-2024 +

Update Skip

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

1 Selection 2 Create User Account 3 Edit User Data 4 **Trigger Onboarding**

Trigger Onboarding

Yes No

Onboarding will be triggered for this record

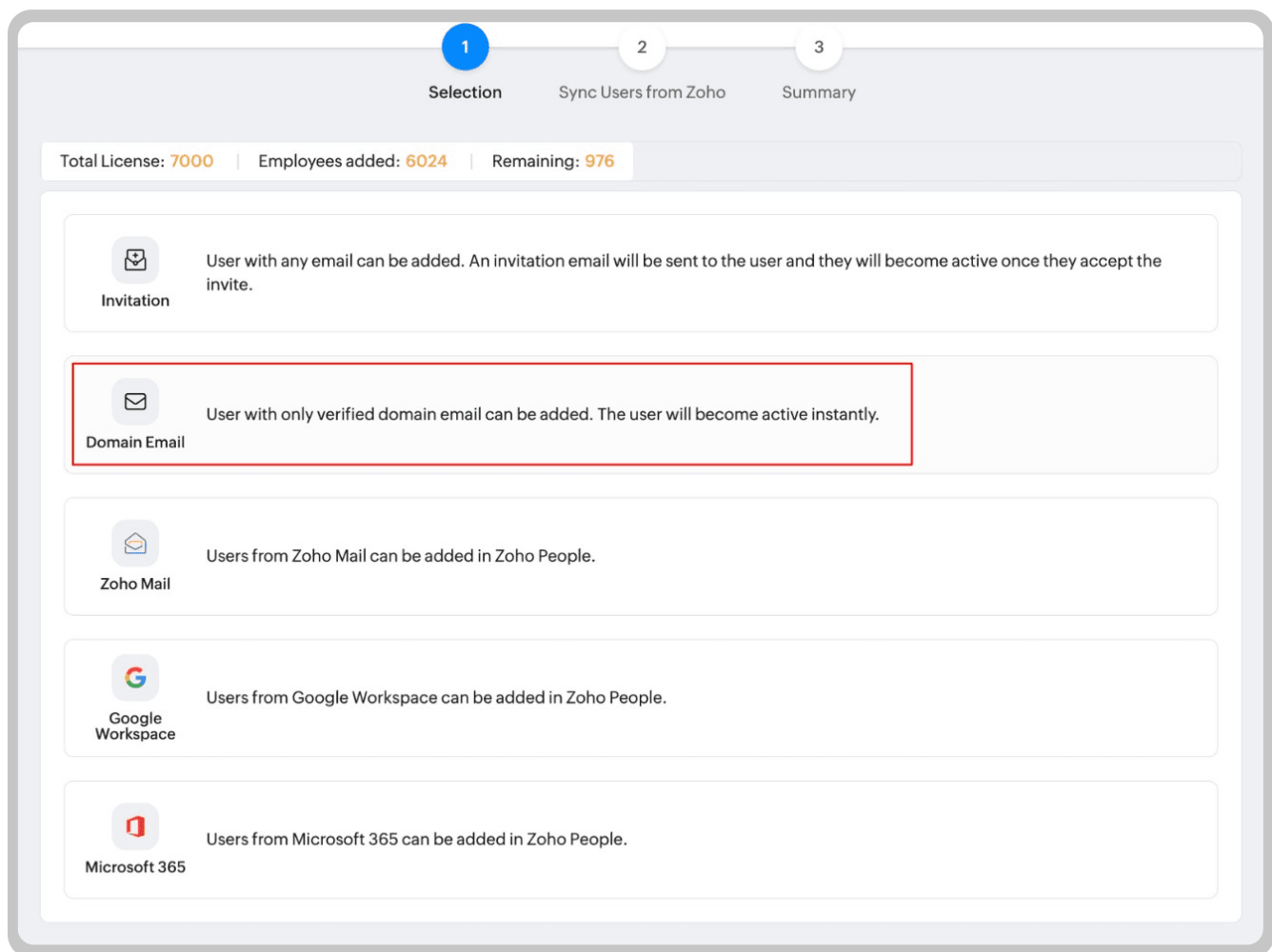
6. Click **Finish** after the onboarding process has been triggered.



Domain Email

This is a method to add users directly to your organization with verified domain email. You can give the users' username 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 **Settings > Manage Accounts > Users > Add User(s)**.
2. Select **Domain Email** to add users.



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



1 Selection 2 **Create User Account** 3 Edit User Data 4 Trigger Onboarding

Total License: 7000 | Employees added: 6021 | Remaining: 979

Once your domain is verified, you will be able to add users directly. Enter the email id and password and click 'Add'. The user will be directly added to the organization and can log in to the account with the password that you provide.

Auto-Generated Password
This auto-generated password will be send to your email address

Employee ID *
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.

← Add User(s) 1 Selection 2 Create User Account 3 **Edit User Data** 4 Trigger Onboarding

Basic information

Employee ID * HRM_1860 Nick name
First Name * Jack Email address * jackreynolds76@zylker.com
Middle Name
Last Name * Reynolds

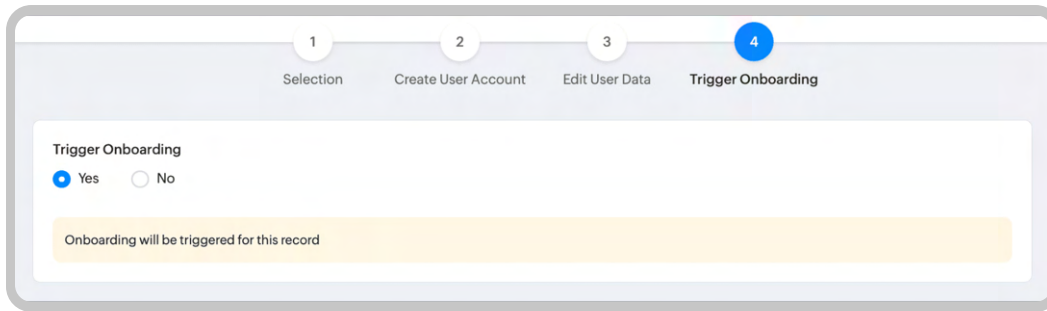
Work Information

Company * Zylker Zoho Role Team member
Business Unit Zylker Marketing Employment Type -
Division - Employee Status Active
Department Designer Source of Hire Direct
Location Bangalore Date of Joining 11-Nov-2024

Update Skip



5. After editing, click **Update**.



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

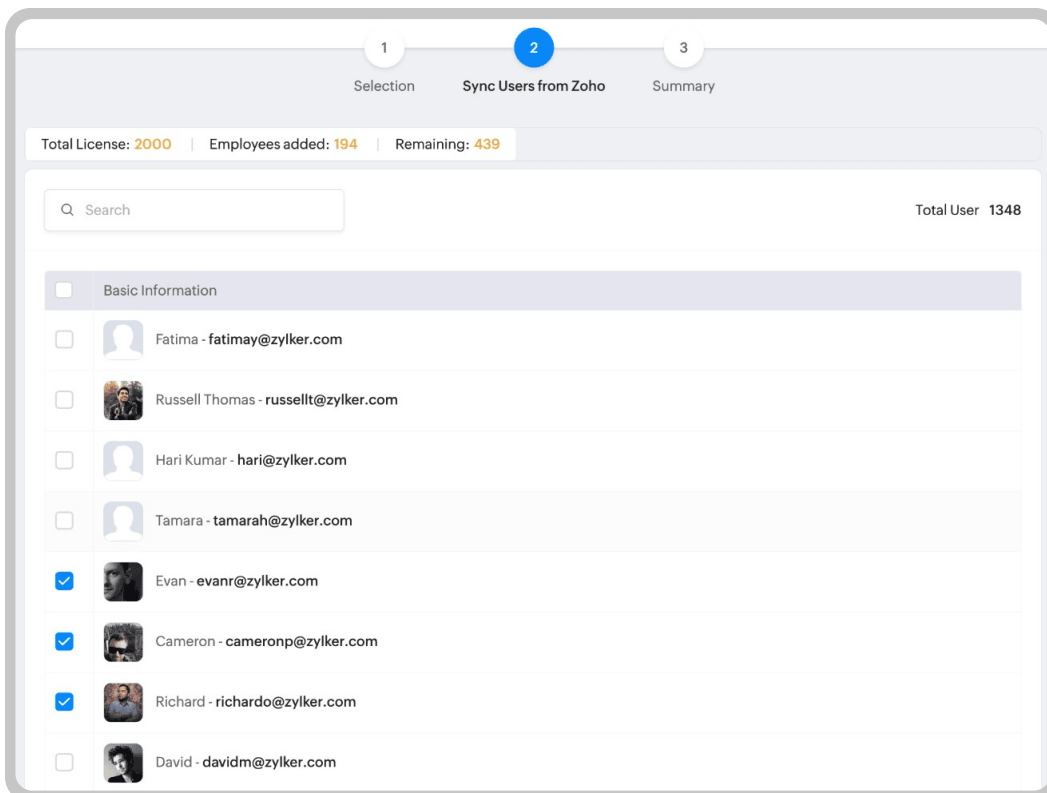
7. Click **Finish** after the onboarding process has been triggered.

Zoho Mail

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

1. From home, go to **Settings > Manage Accounts > Users > Add User(s)**.

2. Click **Zoho Mail** to sync users.





3. Search users using the **search box**.

Email ID	Message
evanr@zylker.com	Users added successfully.
cameronp@zylker.com	Users added successfully.
richardo@zylker.com	Users added successfully.

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

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

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](#)

Photo	EmployeeID	Name	Email ID	Date of joining	Department	Birth	Role
	ZY103	Linda Wilkins	taree@zphone.zylker.com	07-Mar-2016	Logistics	05-A	
	ZY104	Alex Calotescu	taivas@zphone.zylker.com	01-Dec-2020	Creative	15-J	
	ZY105	Espartaco Elizabeth	espartaco@zphone.zylker.com	01-Dec-2020	Inventory	09-M	
	ZY106	Sam Elian	elian@zphone.zylker.com	01-Dec-2020	Procurement	23-Nov-1992	Procurement Executi
	ZY107	Rahul J	kalliden@zphone.zylker.com	13-May-2024	Human Resources	17-May-1993	HR Manager
	ZY108	Elston Susan	elston@zphone.zylker.com	22-Jan-2016	Administration	24-Jan-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.

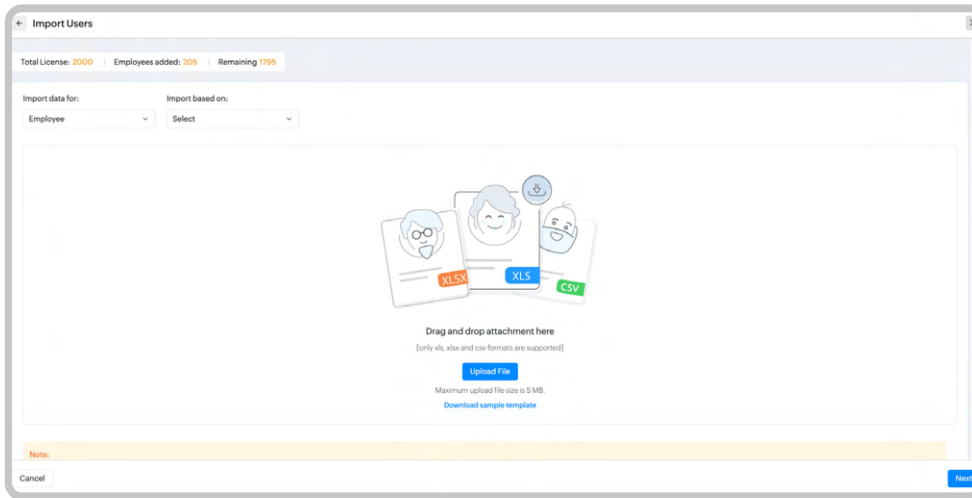
Adding employees to your organization can also be done by navigating to **Operations > Employee Information > Employees > Add Employees**.

Importing Users / Migrating Users into Zoho People

You can import multiple employee records into Zoho People using an Excel or CSV file. This is useful when onboarding new employees in bulk or migrating data from another system.

Key Features

- An Import sample template file is available for download.
- Supports Excel (.xls/.xlsx) and CSV formats.
- Allows you to map your file columns to Zoho People fields.
- Detects duplicate records.
- Enables assignment of roles, departments, and reporting managers during import.
- Generate employee IDs based on rule codes.



Steps to generate employee ID during import in Zoho People:

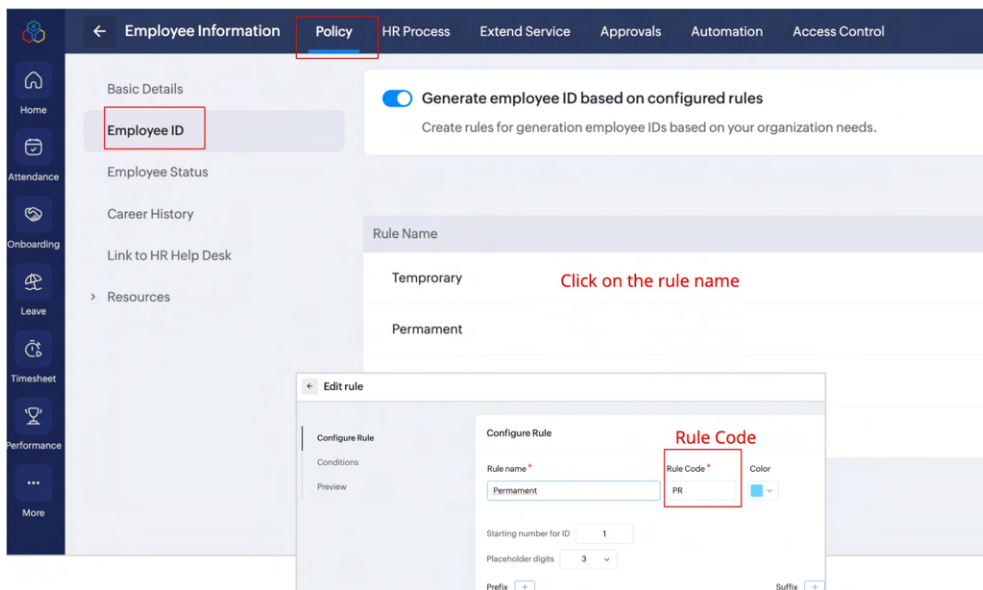
To automatically generate employee IDs during import, you must first configure employee ID generation rules.

Follow these steps:

Step 1:

Set up employee ID generation rules, refer to [Employee ID Generation](#). Define the necessary rules for generating employee IDs (e.g., prefix, number format).

Note down the **Rule Code** assigned to each rule.





Step 2:

Prepare the Import File.

In the import file, include a column named Employee ID or Employee ID rule.

Instead of entering actual IDs, input the Rule Code (created in Step 1) for each employee under this column.

B Import File		C	D	E
Employee ID		First Name	Last Name	Nick name
TEM		Christopher	Brown	Chris
TEM		Michael	Johnson	Mike
TEM		William	Smith	William
TEM		Amardeep	Banjeet	Amardeep
TEM		Andrea	Garcia	Andrea
TEM		Aparna	Acharya	Aparna
PR		Emily	Jones	Emily
PR	Employee ID Rule	Isabella	Lopez	Isabella
PR	Codes	Sofia	Rodriguez	Sofia
PR		Olivia	Smith	Olivia
PR		Lindon	Smith	Lindon
PR		Caspian	Jones	Casie
PR		Asher	Miller	Ash
PR		Hazel	Carter	Hazel

Step 3:

Import the File

1. Go to **Settings > Manage Accounts > Users** and click **Import**.
2. Upload your **xls/xlsx** or **csv** import file and click **Next**.



3. In the map details section, enable Employee ID, which will be generated based on the Rule Code.
4. Map the Rule Code column to the Employee ID field (field name in the import file).
5. Proceed with the import.
6. Once imported, employee IDs will be automatically generated based on the rule codes provided for each employee.

Employee Form

The employee form is the most basic and important form while setting up an organization's account in Zoho People. It contains all the details of each employee and is referred to by HR professionals on a daily basis for all HR processes right from joining until exit. [Learn more about creating and editing a form.](#)



User Access Control

Once employees have been added to the organization, they must be assigned to roles. You can create roles and assign different permissions in terms of accessing data, performing various actions across the system and other related actions. Roles in Zoho People can be classified as General Role and Specific Role.

General Role

In Zoho People, the General Role serves as the system-defined role, providing a set of predefined roles with permissions that can be assigned to employees. These roles include Admin, Director, Manager, Team Member, and Team Incharge. They are not restricted by location, department, or designation and can be assigned to any user within your organization. You can also add custom roles of your organizational preference.

Admin Role:

Admins have unrestricted access to all Zoho People services, including all forms, services, operations and settings. This role is ideal for administrators managing system-wide configurations and overseeing HR processes.

Director, Manager, Team Member and Team Incharge Roles:

These roles come with configurable access permissions, allowing you to tailor access levels based on job responsibilities and requirements. Permissions can be adjusted to control access to specific forms, fields, and services.

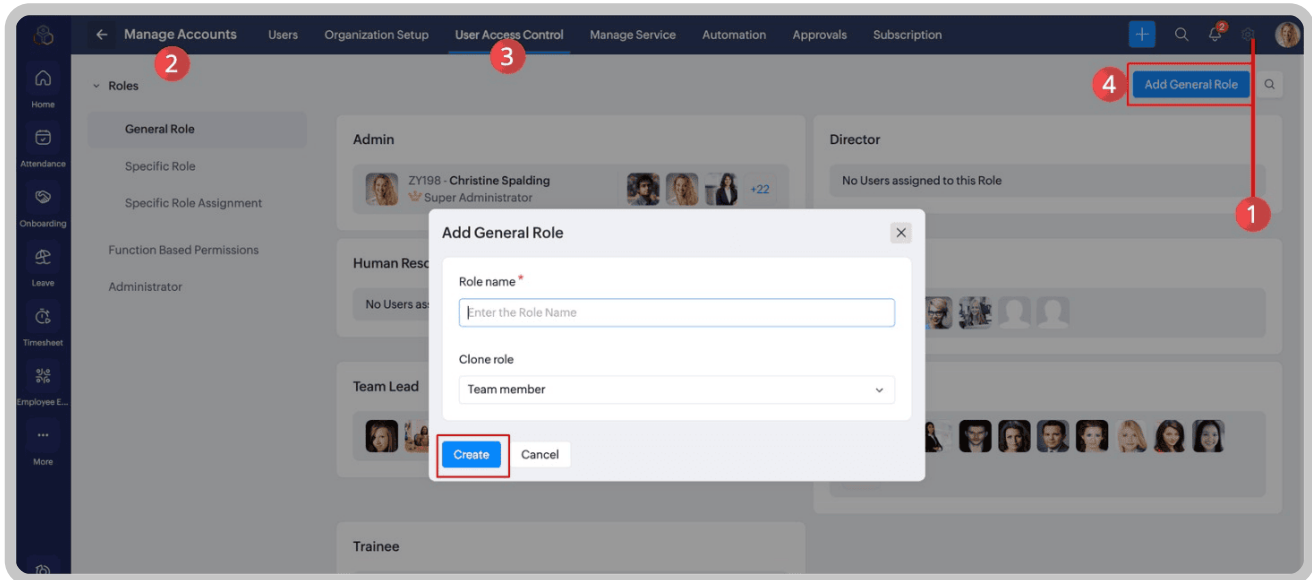
Add General Role

To add a new general role:

1. Navigate to **Settings > Manage Accounts > User Access Control > Roles > General Role.**



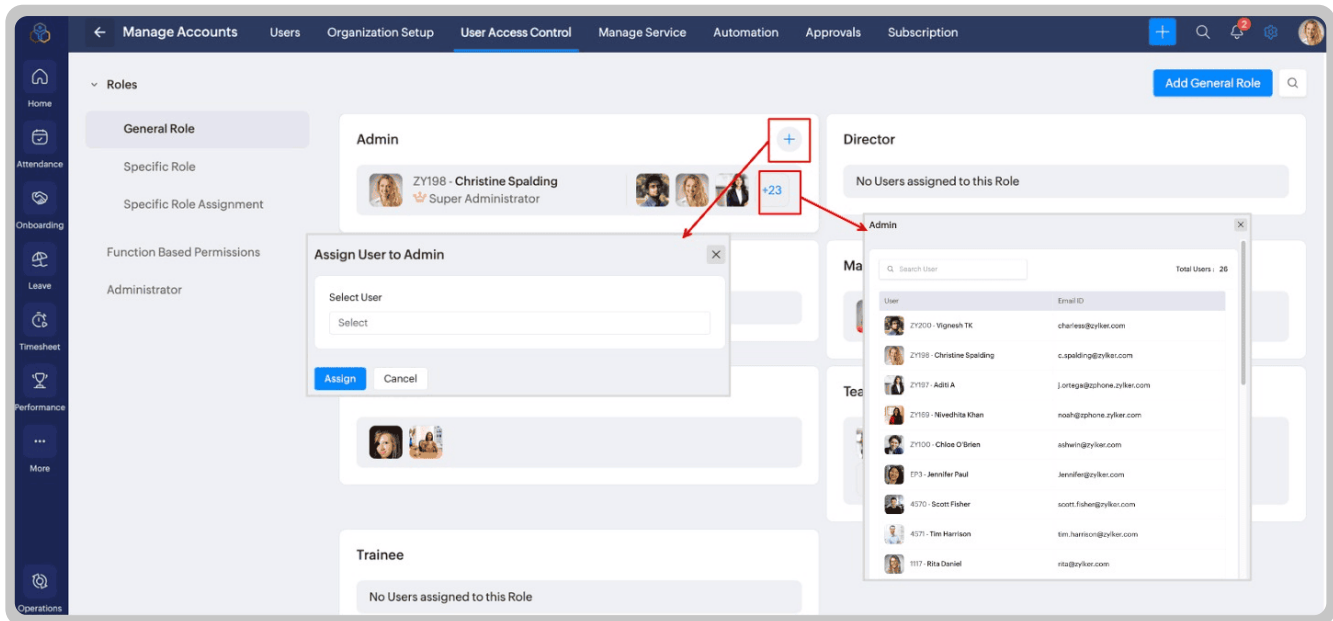
2. Click **Add General Role**.
3. Enter the role name.



4. Select a particular role from the Clone role drop-down, thereby allowing you to create a role that is similar to that of an existing role. This means that the same set of permissions or access will be applicable to the cloned role as well.
5. Click **Save**.

Assign General Role

You can assign a general role to a user by hovering over the desired role, clicking the add icon at the top-right corner of the role, and selecting the user. You can also view the number of users assigned to each role.



NOTE:

Alternatively, you can:

*Navigate to **Settings > Manage Accounts > Users**, click on the **user record** and search for the role field and change the role.*

*Navigate to **Operations > Employee Information > Employees**, click on the **user record**, search for the role field and change the role.*

Specific Role

In addition to a standard general role, an organization might require an employee to have an additional role, such as handling the HR operations for a specific location or department. This can be achieved by creating specific roles and assigning them to your employees.

NOTE:

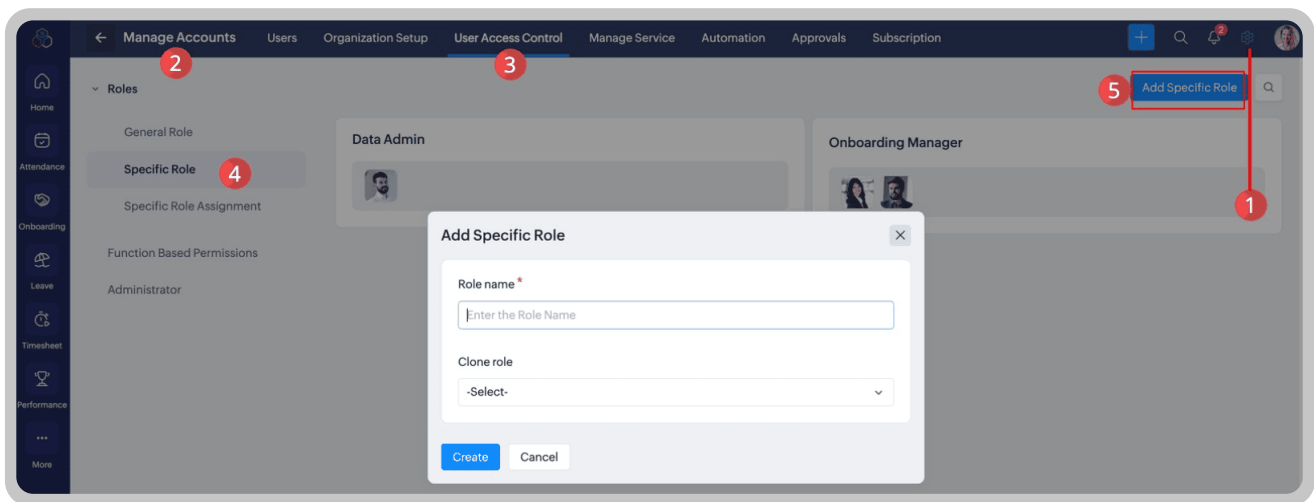
The Specific Role feature is available only for Enterprise plan users. [Learn more.](#)



Add Specific Role

To add a specific role,

1. Navigate to **Settings > Manage Accounts > User Access Control > Roles > Specific Role**.
2. Click **Add Specific Role**.
3. Enter the **Role name**.



4. Select a particular role from the Clone role drop-down to create a role that is similar to that of an existing role. This means that the same set of permissions or access will be applicable to the cloned role as well.
5. Click **Create**.

Assign Specific Role

To assign the specific role to your employees:

1. Navigate to **Settings > Manage Accounts > User Access Control > Roles > Specific Role Assignment**.



2. Click **Assign Specific Role**.
3. Select the employee.

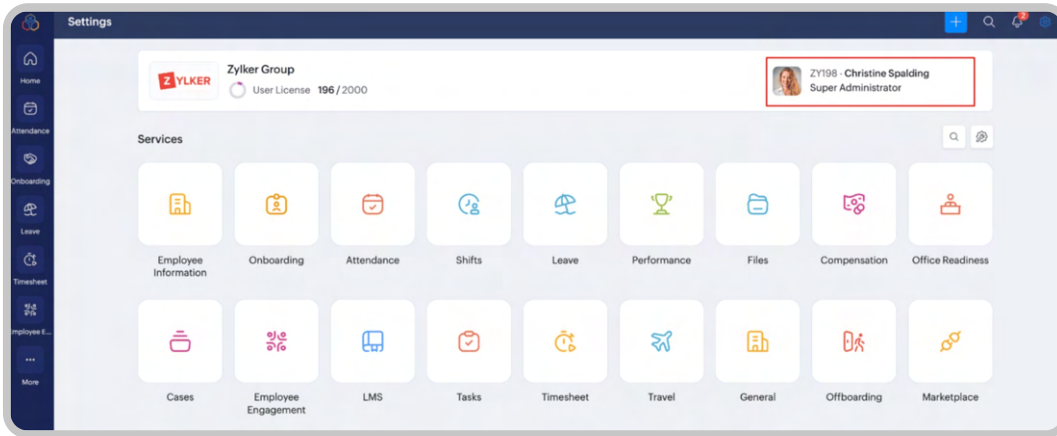
4. Select the specific role which you would like to assign to the selected employee.
5. Set the role applicability.
6. Click Save.

Super Administrator

The person who creates the account, by default, is assigned as the Super Administrator. However, you can click Transfer admin rights and select another employee as the super administrator. All license-related emails and other official correspondences will be sent to the selected email address

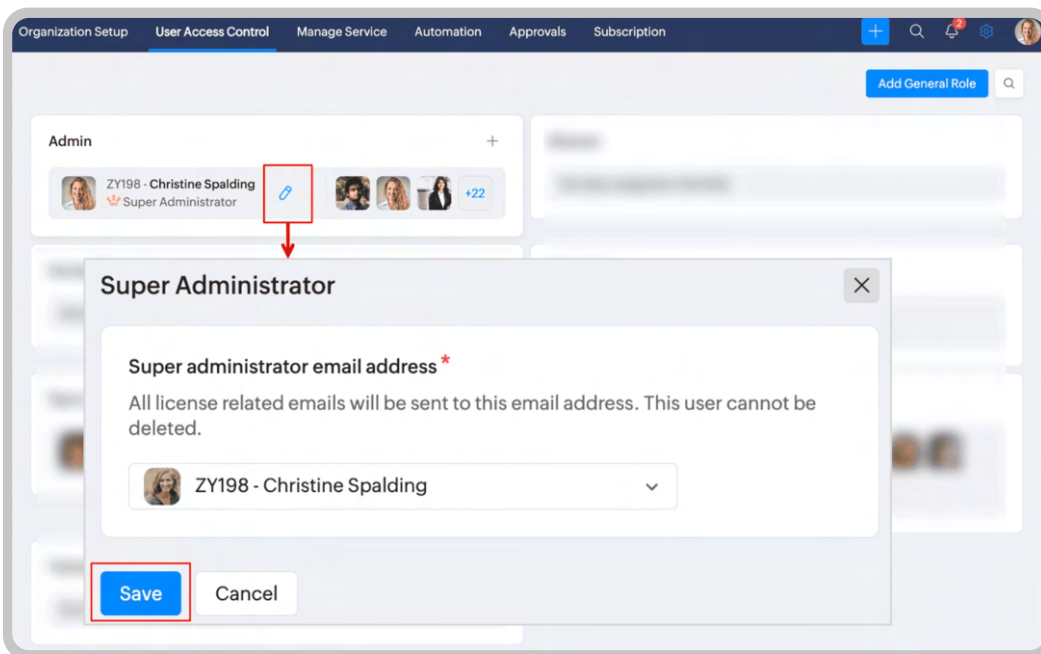
NOTE:

The account Super Administrator profile is visible on the settings page.



Change Super Administrator

1. Log in as a super administrator of the account.
2. From your home page, navigate to **Settings > Manage Accounts > User Access Control > Roles > General Role**.
3. In the Admin Role, click the edit icon and select any admin role users as super administrators.



Authenticate with the account password to transfer the rights.



Configure Specific Role Permissions for a Form

You must associate a specific role with the required Zoho People form and define permissions to enable users in that role to manage the corresponding form data.

Navigate to Settings > Select a Service > Permissions > Specific Role.

The screenshot shows the 'Permissions' configuration page for the 'Background verification form'. The 'Specific Role' tab is selected, and the 'Onboarding Manager' role is highlighted. The 'Field permissions' modal is open, showing a table of permissions for various fields. The 'Background verification form Details' section is expanded, showing permissions for fields like Official Name, Address, Added time, Modified time, and Lookup 1. The 'View' and 'Edit' permissions are checked for all these fields.

Name	View	Edit
Official Name	✓	✓
Address	✓	✓
Added time	✓	✗
Modified time	✓	✗
Lookup 1	✓	✓

On the Record permissions > Specific role, Field permissions, Import and Export permissions, and Tabular Section Permissions, set up the required specific role permissions (View, Edit, Add and Delete).

The screenshot shows the 'Import and Export Permissions' configuration page for the 'Background verification form'. The 'Onboarding Manager' role is highlighted, and the 'Import' and 'Export' permissions are checked for this role. The 'Specific role' label is visible next to the 'Onboarding Manager' role name.

Role name	Import	Export
Candidate	✗	✗
Director	✗	✗
Human Resource	✗	✗
Manager	✗	✗
Onboarding Manager	✓	✓
Team Lead	✗	✗
Team member	✗	✗
Trainee	✗	✗



Record Permissions

Form Candidate Tabular Sections Education

Field Permissions

Import and Export Permissions

Tabular Section Permissions

Role name	Q	Add	Edit	Delete
Candidate		✓	✓	✗
Director		✓	✓	✗
Human Resource		✓	✓	✗
Manager		✓	✓	✗
Onboarding Manager	Specific role	✓	✓	✓
Team Lead		✓	✓	✗
Team member		✓	✓	✗
Trainee		✓	✓	✗

Function Based Permissions

You can configure function based permissions to general role users. Select the general role, and enable or disable access to the following functions in Zoho People.

Manage Accounts Users Organization Setup User Access Control Manage Service Automation Approvals Subscription

Roles

Function Based Permissions

Administrator

Role Team member

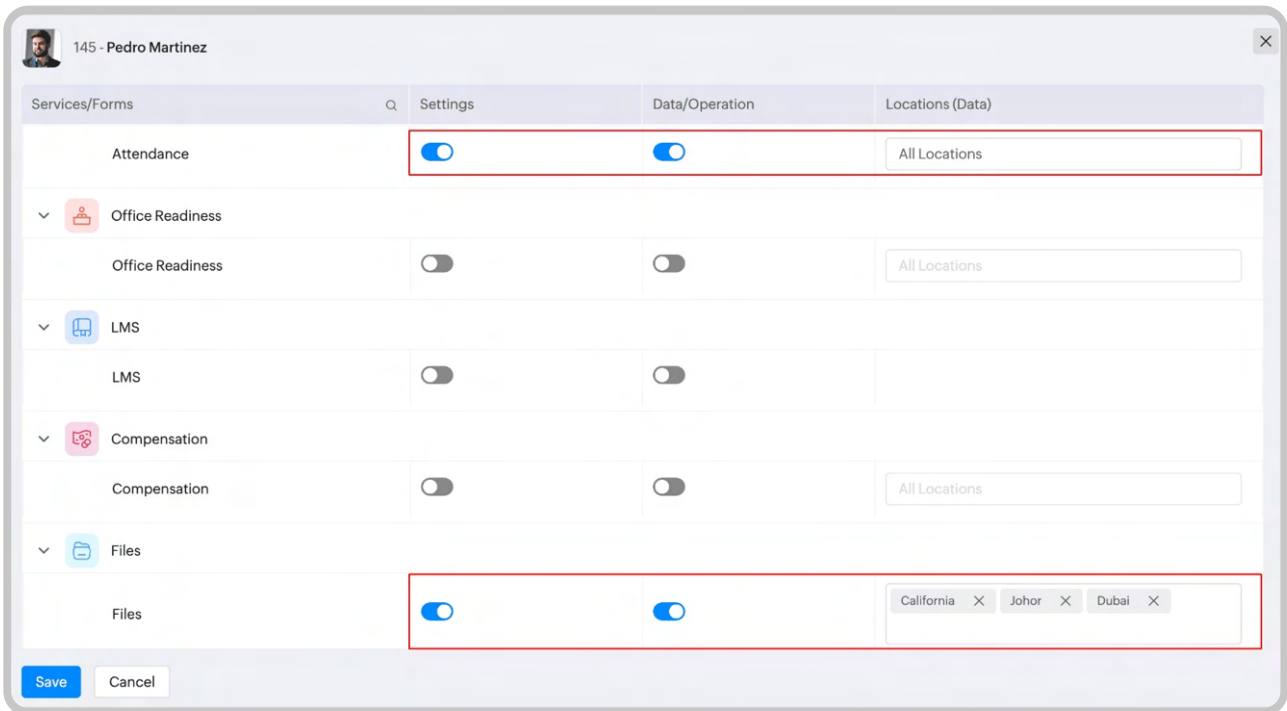
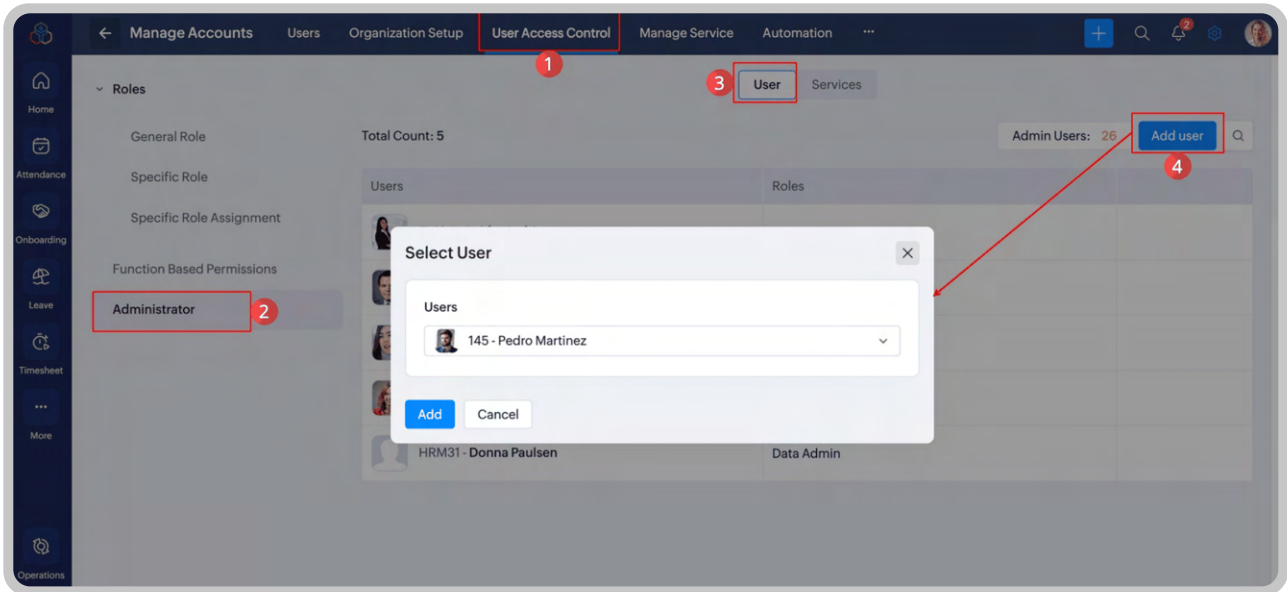
Function	Access
Department Tree	✓
Department data	✓
Employee Tree	✓ <input checked="" type="radio"/> Organization Tree <input type="radio"/> Reportee Tree
Search Employee	✓
Attendance widget	✓
Delegation	✓
Birthday Buddy	✓
New joinee list	✓
Favorites	✗
Work Anniversary	✓
Wedding Anniversary	✗
Quick Links	✗
Tags	✓
API Access	✓
Show designation based on permission	✗
Announcements	✓

Add / Edit / Delete



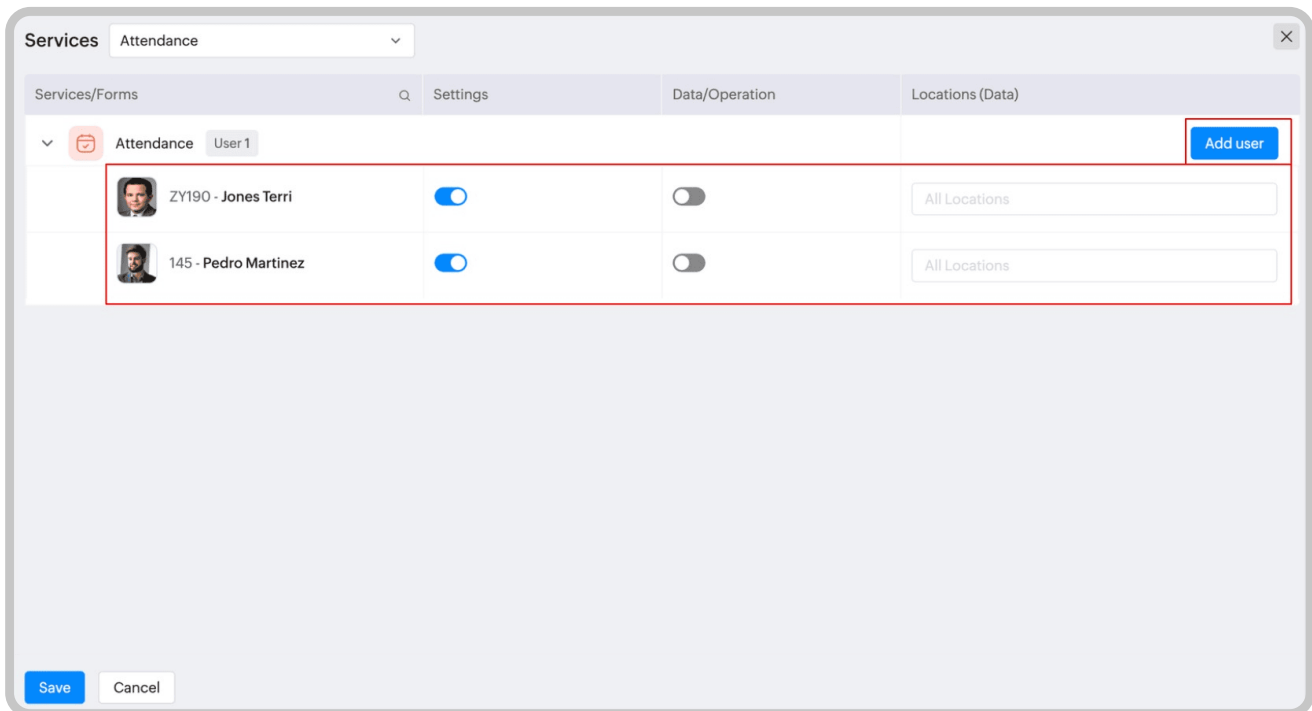
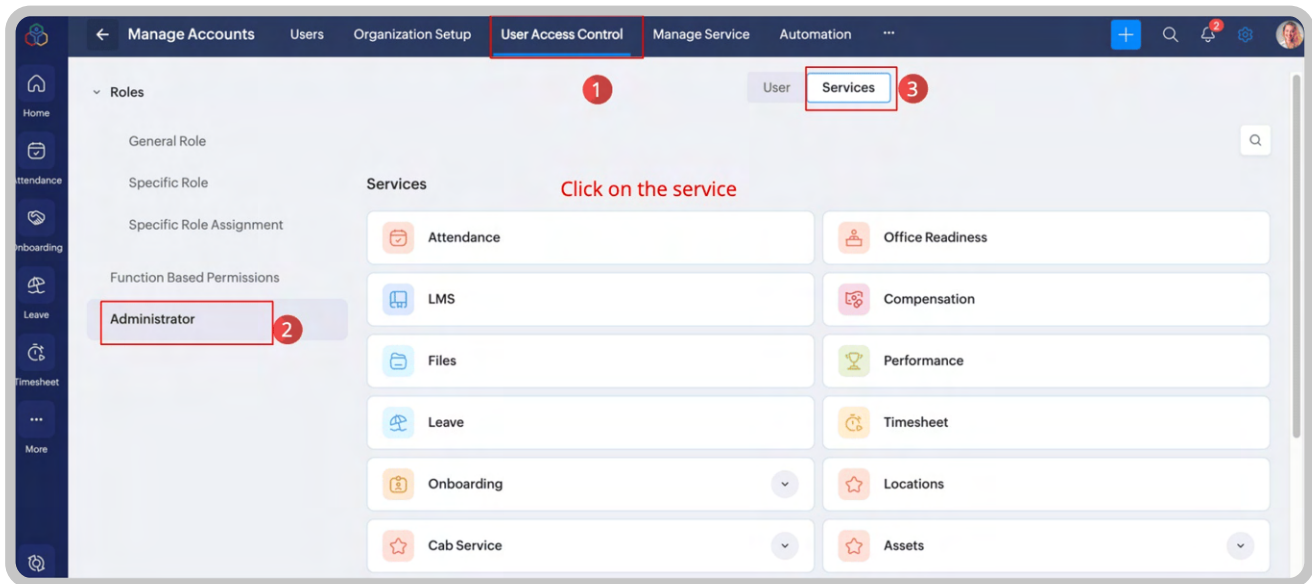
Administrators

This tab allows you to assign employees as administrators for specific Zoho People services. You can enable access to settings and operations for each listed service and specify the applicable location to control access.





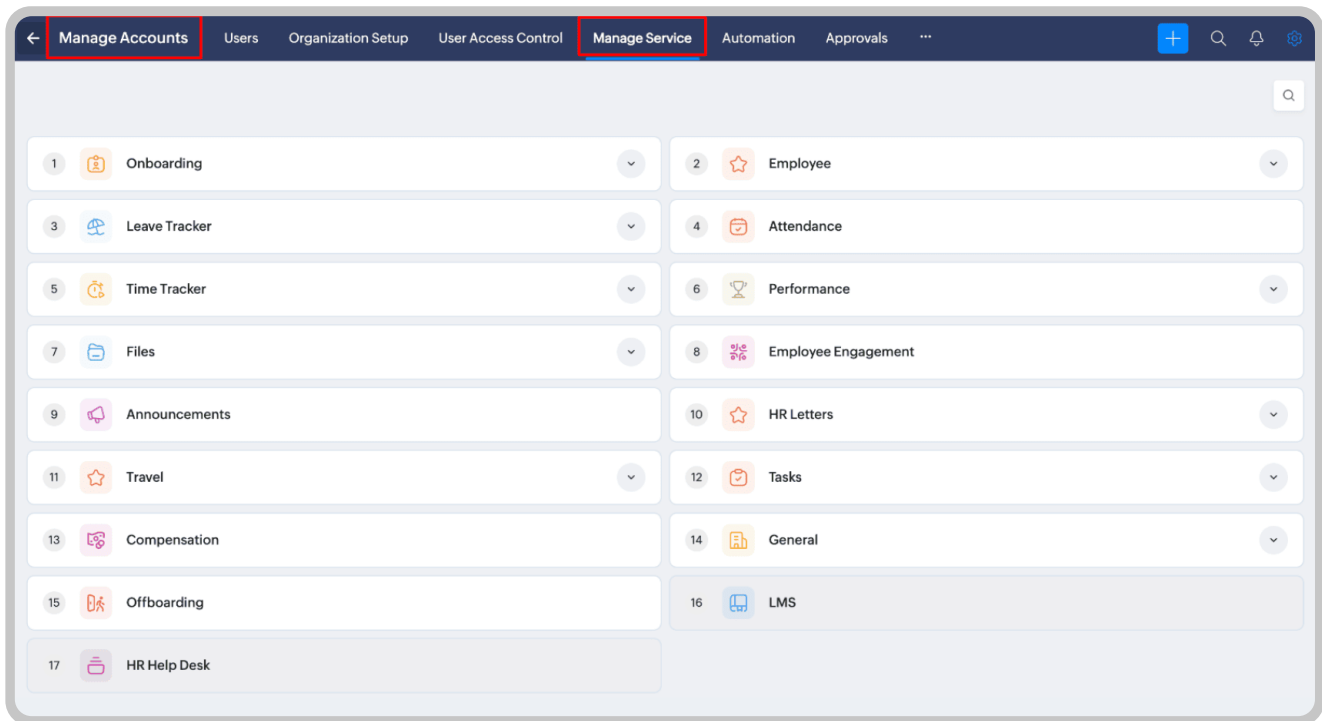
Alternatively, to assign an administrator to a specific service, navigate to the Services tab to view the available services. Click on the desired service to add an administrator and enable access to settings and operations.





Manage Service:

In this setting, you can edit the service names according to your organization's needs and you can enable or disable the services.



Explore the services available in Zoho People, with more details about each service in the section below.



Leave Management

Setting up leave policies is an important part of onboarding. Soon after employees start using the HR tool, they will have to update their leave information. In Zoho People, you can create and customize leave policies as per the needs of your organization.





To configure leave policy, navigate to **Settings > Leave > Configuration > Leave Policy > Add Leave Policy**.

Types of leave policies

- **Fixed entitlement:** A simple policy with a fixed amount of leaves, such as 12 days per year. [Refer to this example](#).
- **Experience-based entitlement:** An advanced policy with a variable amount of leave based on the employee's years of experience. [Refer to this example](#).
- **Grant-based entitlement:** A policy that credits special leave to specific employees based on a request, such as maternity leave. [Refer to this example](#).
- **Attendance based entitlement:** A policy that credits leave to employees based on their worked hours or days. [Refer to this example](#).



Add Leave Policy ✕

-  **Fixed entitlement**
A simple policy with a fixed amount of leaves, such as 12 days per year
-  **Experience based entitlement**
An advanced policy with a variable amount of leave based on the employee's years of experience
-  **Grant based entitlement**
A policy that credits special leave to specific employees based on a request, such as maternity leave
-  **Attendance based entitlement**
A policy that credits leave to employees based on their worked hours or days

or pick country wise compliances from our [Leave Policy Gallery](#)

Next Cancel

Leave Type Gallery

The Leave Type Gallery has a set of preconfigured leave policies tailored to specific regions worldwide. It includes ready-to-use leave setups designed to align with regional regulations.

To configure leave policy gallery, navigate to **Settings > Leave > Configuration > Leave Policy > Leave Policy Gallery**.



INFO:

The leave gallery has preset policies for India, USA, United Kingdom, Singapore, Japan, the UAE, China, and Hong Kong - making it easy to adopt region-specific leave policies with minimal effort

[Learn more about Leave Service in Zoho People.](#)

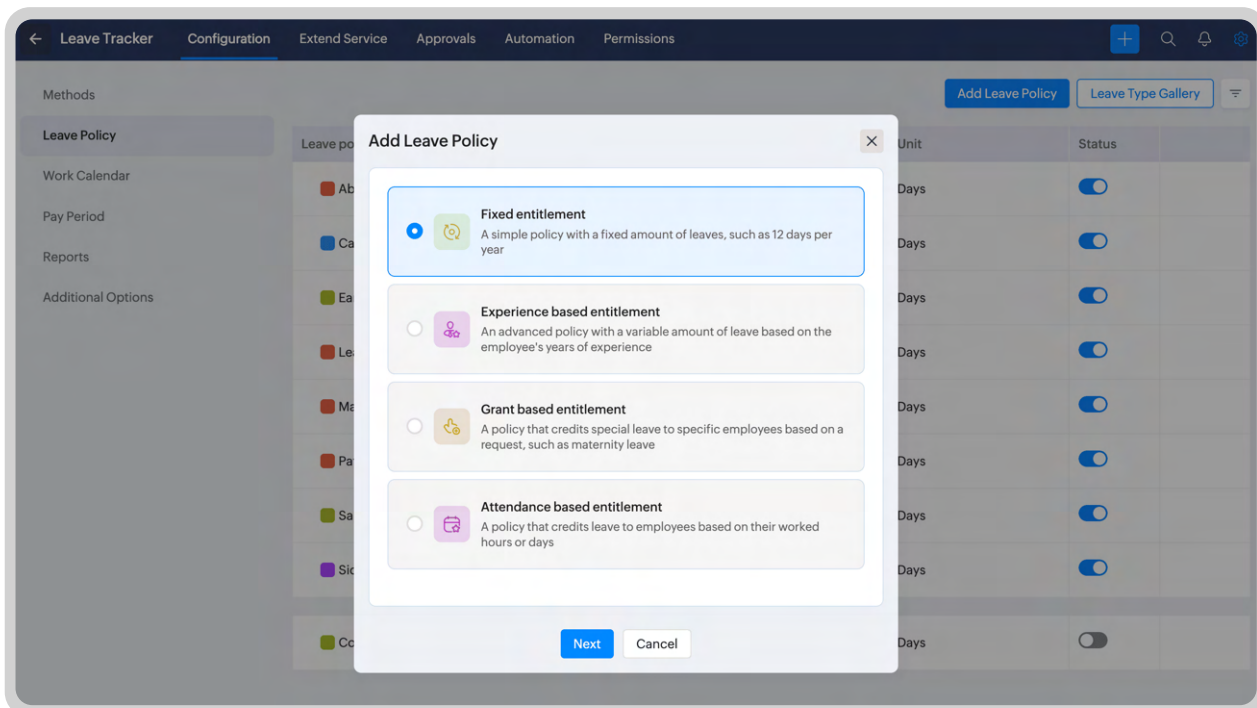
Leave Settings

Leave Policy

To add a new leave policy, clone, edit or delete, go to **Settings > Leave > Configuration > Leave Policy** (for Administrators).

IDEA:

The Leave Type Gallery helps you quickly add leave policies using region-specific preset templates. [Learn more about configuring a leave policy using a preset template.](#)

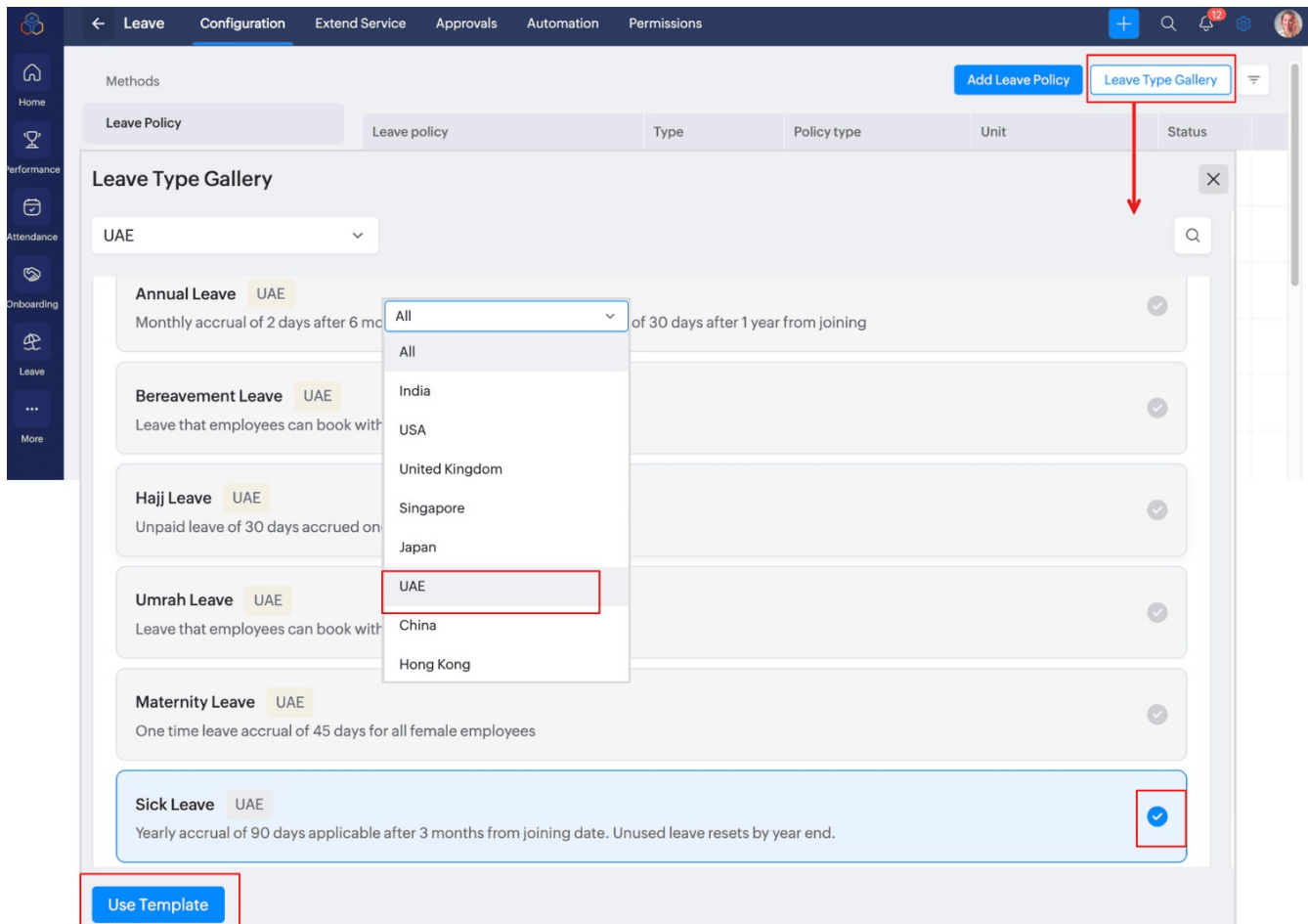




Leave Type Gallery

The leave type gallery has a set of preconfigured leave policies tailored to specific regions worldwide. It includes ready-to-use leave setups designed to align with regional regulations.

To add a leave policy using the leave type gallery, navigate to **Settings > Leave Tracker > Configuration > Leave Policy**.



[Learn more about leave type gallery.](#)



Compensatory Off

Compensatory off allows employees to take time off for extra hours worked beyond their regular schedule. They can mark weekend or holiday work for future leave, if approved by the organization.

To set up compensatory off, go to **Settings > Leave > Compensatory Off**.

Compensatory Off
Compensatory Off is an entitled leave that an employee can take on a regular working day as compensation for working on a holiday or weekend

Mode of requests
Select the allowed ways of requesting for compensatory off

Compensatory off can be requested

- manually by raising a request
- automatically through a scheduler

• To automatically convert overtime to compensatory off leave, use [Schedulers](#)

• To include the process of approving compensatory off requests, use [Approvals](#)

[Learn more about setting up compensatory off.](#)

Work Calendar

The Work Calendar in Zoho People refers to establishing the workdays, weekends, annual year, and statutory weekends specific to your organization. Configure diverse calendar settings for various geographical locations across your organization.

Work Calendar
Define the work days, weekends, year, and statutory weekends for your organization. Set up multiple calendar settings for each geographical location within your organization.

[Add Work Calendar](#)

Location	Calendar year	Work week
Default	01-Jan-2025 - 31-Dec-2025	Monday - Friday



To add work calendar, navigate to **Settings > Leave > Configuration > Work Calendar > Add Work Calendar**.

Learn more about configuring [Work Calendar](#), [Half working day & half weekend](#) and [Statutory weekend](#).

Pay Period

A pay period refers to a predefined timeframe during which employee work hours are tracked, payroll processes are automated, and reports are generated to ensure timely and accurate payment to employees.

Pay Period can be configured from three places; **navigate to Settings > Leave / Attendance / Timesheet > Pay Period > Configuration**.

The screenshot shows the 'Pay Period Configuration' page. The left sidebar has 'Configuration' highlighted. The main content area has a sub-header 'Pay Period' and a description: 'Creating a pay period can help you automate the payroll process, generate payroll reports, and ensure that employees are paid on time'. Below this is a table with columns: 'Pay period name', 'Pay period cycle', 'Payroll processing day', and 'Applicable locations'. There are four rows of data. An 'Add Pay Period' button is visible in the top right corner of the table area.

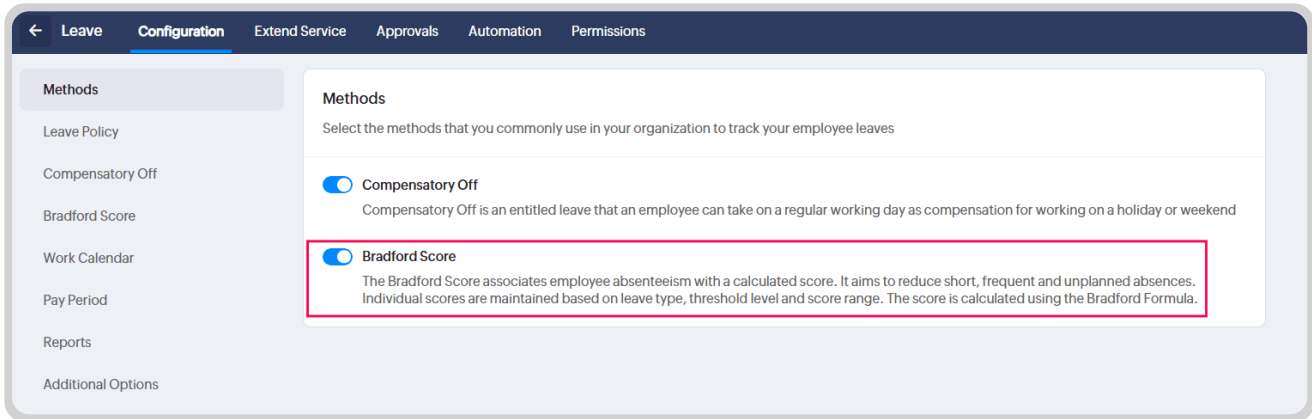
Pay period name	Pay period cycle	Payroll processing day	Applicable locations
Mumbai Pay Period	1st of current month - Last day of current month	3rd of next month	Mumbai
Bruges Pay Period	21st of previous month - 20th of current month	Last day of current month	Bruges
Busan	16th of previous month - 15th of current month	17th of current month	Busan
PAN locations	Tuesday - Monday	Tuesday of following week	Singapore Tokyo California +5

[Learn more about setting up pay period.](#)

Bradford Score

The Bradford Score is a tool used to measure the impact of employee absences, especially frequent unplanned ones. It was developed by Bradford University and is used across various industries. Unplanned absences can disrupt workflows more than occasional planned leave. This score helps organizations track and manage absenteeism effectively.

[Learn more about setting up Bradford Score.](#)



To configure Bradford score, navigate to **Settings > Leave > Configuration** and enable **Bradford Score**.

[Learn more about setting up Leave Service.](#)

Defining Holidays

You have two methods for adding holidays in Zoho People 5.0:

Add Holiday (Manual method): Add Holidays lets you manually create and assign holidays based on shift or location-based applicability. [Learn more.](#)

Navigate to **Operations > Leave > Holidays**, click on **Add Holiday**.

Holiday Gallery: Select region-specific holidays and add them to your organization's calendar. [Learn more.](#)

Navigate to **Operations > Leave > Holidays**, click on **Add Holidays drop-down** and select the **Holiday Gallery** option.

[Learn more about Leave Service Operations.](#)



Leave - User Service

- View Leave Summary (**Leave > My Data > Leave Summary**) for a quick overview of the available leave policies and their corresponding balance, shortcuts to apply leave, check recent absence, upcoming holidays or leave information, past leave and holidays information. [Learn more about leave user service.](#)

Past Leaves & Holidays	
25-Dec-2025, Thu → 26-Dec-2025, Fri	Earned Leave = 2 days Cancelled
24-Dec-2025, Wed → 25-Dec-2025, Thu	Earned Leave = 2 days Cancelled
12-Dec-2025, Fri → 14-Dec-2025, Sun	Annual leave = 2 days Approved
03-Nov-2025, Monday	Annual leave = 1 day Approved

- Apply leave, or raise compensatory / leave grant requests. You can do this by using the Apply Leave button or from within the corresponding tabs.
- Click on an absence record to quickly apply leave for that specific day.
- View Bradford score information from the Bradford Score tab (if feature is enabled).
- View shift information and assign Shift (if applicable) from the Shift tab.

[Learn more about Leave/Time Off Service in Zoho People.](#)



Shift Management

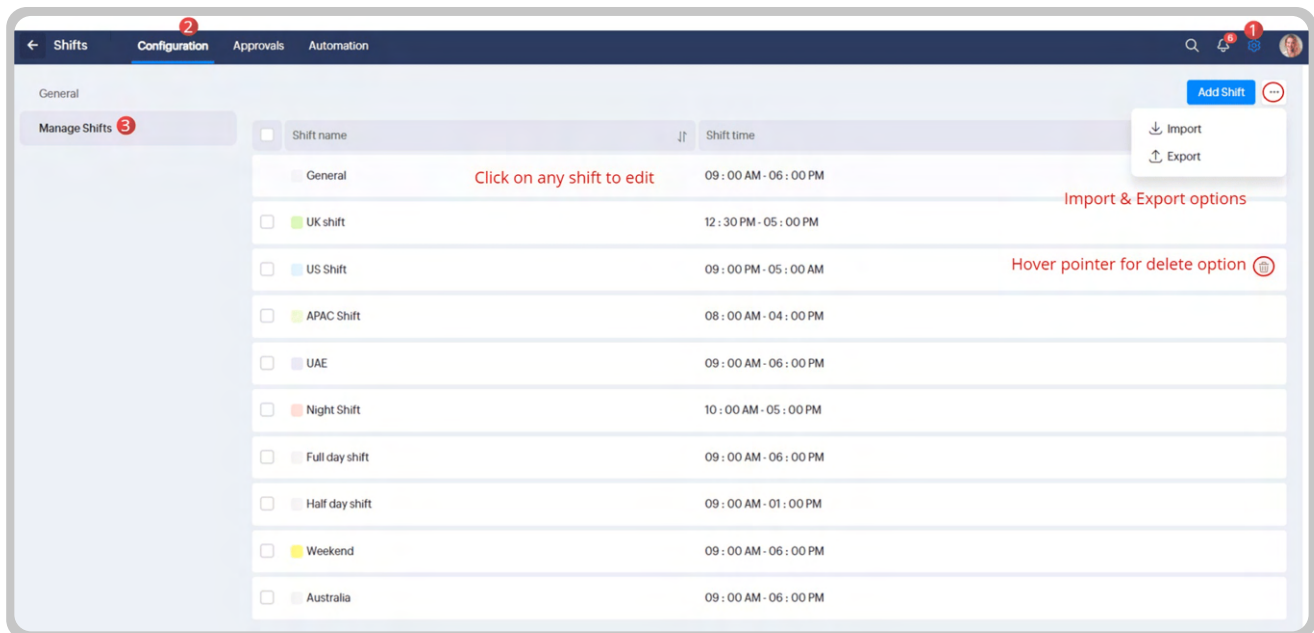
If your organization has more than one shift, then you will be in need of a tool that can manage all your shifts. There are various challenges like assigning all employees to different shifts, taking care of shift rotation etc. With Zoho People you can add shift, edit shifts and also have shift rotation done automatically.

Defining Shifts and Shift-based Weekends

To Manage Shifts, navigate to **Settings > Shifts > Configuration > Manage Shifts tab**. As the name suggests, this space allows you to create, delete, edit shifts, and all of its associated preferences.

IDEA:

Shifts can also be managed from **Operations > Shift > Manage Shift**. The purpose of allowing access to manage shifts from the Operations space is to allow non-administrators who have been given exclusive access to Shift Operations to access this service without granting them access to Shift Settings, this ensures better security.





Adding and Editing Shifts

1. To add a new shift, click on **Add Shift**. To edit any added shift, simply click on one of the shifts listed here.
2. Enter a shift name and choose an identification color.
3. Specify the shift duration.
4. If shift times are not too specific in your organization, you can allow employees to check in/check out earlier or later than the shift duration. Enable and adjust the **Shift Margin** preferences as required. With the settings depicted in the screenshot below, the shift starts at 9:00 AM and ends at 06:00 PM. However, employees can check in as early as 08:00 AM and leave as late as 07:00 PM.

Edit Shift

Shift name * Color

From * To *

Shift Margin
Define boundaries within which payable hours will be calculated

hours before the shift starts
 hours after the shift ends

Check-in/ check-out entries only within 8:00 AM - 7:00 PM will be considered as payable hours

Core Working Hours
Define the time frames during which employees in this shift are required to be present for work

From To
 -

Core working hours (11 : 00 AM - 11 : 30 AM) overlaps with configured break period

Restrict breaks during core working hours
Automatic and manual breaks for this shift are not allowed during core working hours.

Weekends are based on
 Location Shift



5. You can enable and configure **Core Working Hours** for a shift. These are fixed hours when employees are required to be present at work, even if the shift has flexible start or end times. Once enabled, core working hours are tracked for that shift.

Example: For a General Shift (9:00 AM to 6:00 PM) with core working hours set from 2:30 PM to 3:00 PM. Employees can start earlier or later, but they must be available during the 2:30–3:00 PM period to support team collaboration and operational efficiency.

INFO:

Configure attendance **Grace Period Policy** to take actions such as marking as leave or absent if core working hours are deviated.

6. Enable **Restrict breaks during core working hours** option if you want to prevent employees from availing manual or automatic breaks during the specified core working hours.
7. Choose if weekends are based on location or shifts:
 - For location selection, the weekend configuration from the work calendar will be applied based on shift applicable location.
 - For shift selection, you can set half working days or half weekends by enabling the corresponding option for this shift. Once enabled, you can choose whether the weekend applies to a full day, the first half, or the second half. You can select any weekend that you have defined as statutory weekend to facilitate different pay.

Example: Sundays can be set as holidays, while the first half of all Saturdays can be set as working day and the second half is considered as weekend.



Weekends are based on
 Location Shift

Define weekend days
 Half working day & half weekend

	All	1st	2nd	3rd	4th	5th
Sunday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Full Day ▾	<input checked="" type="checkbox"/> Full Day ▾	<input checked="" type="checkbox"/> Full Day ▾	<input checked="" type="checkbox"/> Full Day ▾	<input checked="" type="checkbox"/> Full Day ▾
Monday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 2nd Half ▾	<input checked="" type="checkbox"/> 2nd Half ▾	<input checked="" type="checkbox"/> 2nd Half ▾	<input checked="" type="checkbox"/> 2nd Half ▾	<input checked="" type="checkbox"/> 2nd Half ▾

Define statutory weekends and track hours separately for payroll

All Selected ▾

- ✓ Sunday
- ✓ Saturday

8. If you wish to record shift allowance, then enable the Provide Shift Allowance option and provide the rate per day. This data is typically exported. The data can be accessed in the Attendance Tabular View and [Presence hours break-up report](#).



Provide shift allowance

Rate per day

Applicable to

Locations

If you edit, the older days weekends also will be changed. Please create a new shift to keep the details of previous days weekends.

9. Finally, select the applicable locations for this shift. Use the Add Criteria button to select departments or divisions within the selected location to have precise control over applicability.
10. Click **Save**.

Employee Shift Mapping

Employee shift mapping, in simple terms, involves assigning specific employees to specific shifts. This process helps effectively manage and complete work on time by ensuring the right resources are allocated to the appropriate shifts at the right time.

To perform employee shift mapping, navigate to **Operations > Shifts > Employee Shift Mapping tab**.

By default, the weekly shift calendar is displayed, with options to cycle to different weeks. A daily shift calendar view is also available. Additionally, you can use the filter option to list employees belonging to specific departments, location, and other criteria.



Shift User-specific Operations Manage Shifts Employee Shift Mapping

28-Jul-2024 - 03-Aug-2024 Weekly Daily Assign shift

Employee

Employee	Sun 28	Mon 29	Tue 30	Wed 31	Thu 01
ZY200 - Vignesh TK	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM
ZY198 - Christine Spalding	Half day shift 9:00 AM - 1:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM
ZY197 - Aditi A	UAE 9:00 AM - 6:00 PM	UAE 9:00 AM - 6:00 PM	UAE 9:00 AM - 6:00 PM	UAE 9:00 AM - 6:00 PM	UAE 9:00 AM - 6:00 PM
ZY196 - Rinzee Wilma	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM
ZY195 - Kavin Edwards	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM
ZY194 - Anitha Joshi	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM	General 9:00 AM - 6:00 PM

Filter

Employee

Search Employee

Show only direct reportees

Legal Entity

All

Business Unit

All

Division

All

Department

All Departments

Designation

Support Engineer

Location

All Locations

Shift(s)

All Shifts

Apply Reset

[Learn more about Assigning Shifts.](#)

Shift Rotation

The Shift Rotation feature allows for automatically changing employee shifts based on a specified frequency. Follow the steps given below to do this.

1. From your home page, go to **Settings > Shifts > Automation > Shift Rotation > Add Shift Rotation**.
2. Give a name for the schedule.
3. Set a frequency for the schedule. It can be daily, weekly, bi-weekly, or monthly. For example, if you select monthly, and give a date, then the shift scheduler will run every month on the given date.
4. Enter the time at which the rotation is to be triggered.



5. Select the period for which the shift is applicable.
6. Under **Applicable for** select the required options from the list of Roles, Departments, Designations, Location, User etc.
7. Under **Rotation of shifts** select the shifts appropriately.
8. Use the **Add Rotation** option to map more shifts.
9. Click **Save**.

Add Shift Rotation

Scheduler details

Scheduler name *
General to Night

Schedule frequency *
Bi weekly ▾ Sunday ▾ once in two weeks

Time of schedule *
04:45 PM ▲▼

Rotation as per the schedule will be applicable for the period *
From Sunday ▾ to Saturday once in two weeks

Next shift change will happen on 04-Aug-2024 (Sunday) and employees will remain in the changed shifts between 04-Aug-2024 to 17-Aug-2024

Rotation of shifts

General ▾ to Night Shift ▾

Add Rotation

Applicable for *

Locations ▾ is Delhi X

Add Criteria

Add Employee

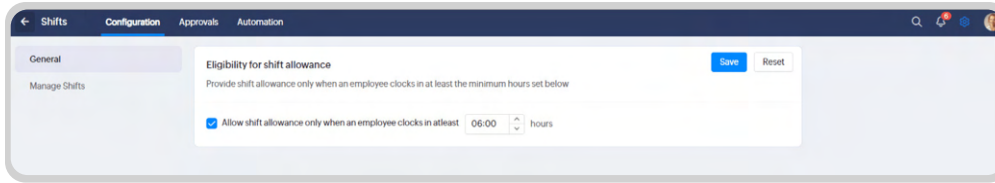
OR

[Learn more with an Example for Shift Rotation.](#)

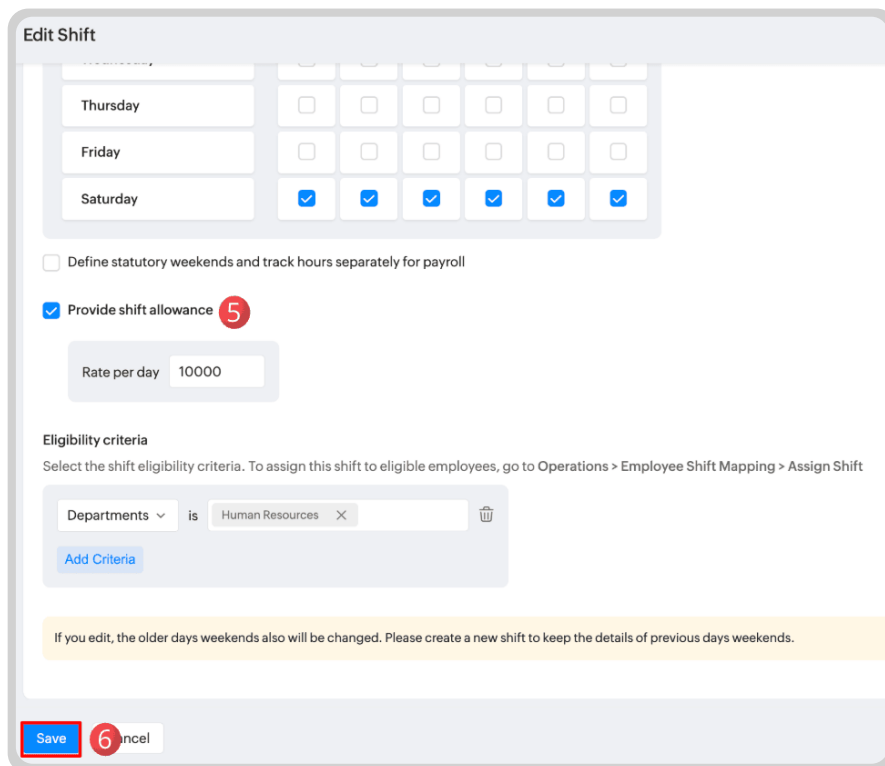


Configuring Shift Allowance

Use this option to control eligibility for a shift allowance based on a minimum time requirement.



Shift allowance rate per day is specified within individual shifts. Navigate to **Settings > Shifts > General > Manage Shifts** and select a shift to enable the **Provide shift allowance** option and specify the rate per day. This data is typically pushed to Zoho Payroll or exported. The data can be accessed in the Attendance tabular view and [Presence hours break-up report](#).



[Learn more about Shifts Service in Zoho People.](#)



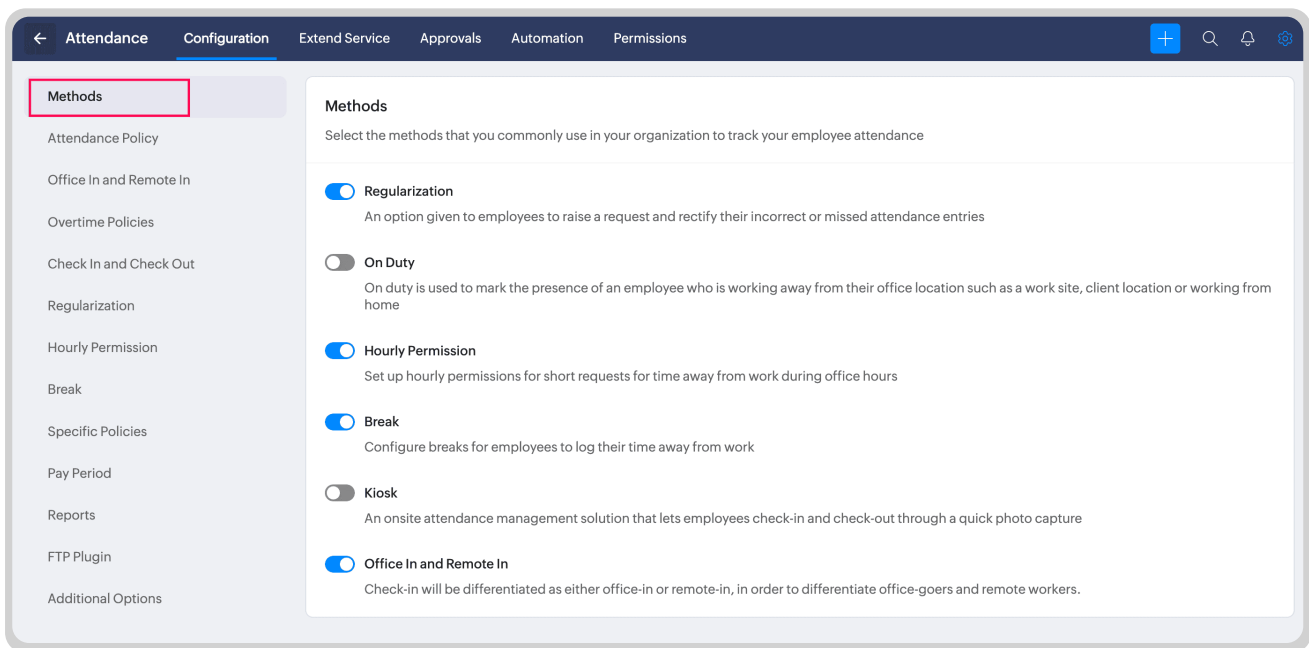
Attendance Management

Defining Attendance Settings is essential to track the attendance of your employees. It involves enabling and configuring attendance tracking methods, defining your organizational attendance policies, and tracking employee check-in, check-out, and everything in between.

Methods

The attendance system lets you enable features like on-duty, remote check-ins, and attendance correction requests as needed.

Navigate to **Settings > Attendance > Configuration > Methods** to manage them.



Regularization: Refers to the formal process through which employees can submit requests to correct or amend inaccurate or omitted entries in their attendance records. [Learn more about enabling and configuring it.](#)

On Duty: The term “on duty” indicates the status of an employee who is actively working outside of their usual office setting, such as at a client’s premises, a project site, or from a remote location like their home. [Learn more about setup and configuration.](#)



Hourly Permission: This allows employees to request a brief period of absence from their duties during standard office hours. [Learn more about enabling and configuring it.](#)

Breaks: A “break” refers to the setup enabling employees to record their periods of absence from work, typically for rest or other personal reasons, within a structured framework. [Learn more about setting up different break types.](#)

Kiosk: An onsite attendance management solution that lets employees check in and check out through a quick photo capture (facial recognition). [Learn more about setting it up.](#)

Office In and Remote In: Check-in procedures are categorized as either “office in” or “remote in,” distinguishing between employees physically reporting to the office premises and those working from a remote location respectively. [Learn more about configuring check-in methods.](#)

Attendance Policy

To configure the attendance policy go to **Settings > Attendance > Configuration > Attendance Policy.**

[Learn more about Attendance Policy settings.](#)

Working hours
Define how you want working hours to be calculated in your organization

Calculate total working hours from
 First check-in and last check-out Every valid check-in and check-out

Expected hours per day
 Strict mode Lenient mode

Set manually Shift hours
Expected hours per day* 08:00 hours

Allow overtime and deviation
If allowed, the system will calculate the extra and deficit time based on logged hours

Impose maximum hours per day
Per Day* 11:00 hours

Round-off
Round-off lets you adjust the first check-in, last check-out and working hours based on the minutes you configure for each

Round off first check-in by up to 10 minutes
Round off last check-out by up to 10 minutes
Round off worked hours by up to 10 minutes

Update older attendance entries
[Update](#)



Calculating total working hours

First check-in and last check-out: This option calculates the time between your first check-in and your last check-out time. In the intervening time, you can check-in and check-out multiple times, which will not be taken into consideration.

Every valid check-in and check-out: This option calculates only the valid check-in and check-out entries. For example, if you check in at 9:00 AM and check out at 11:00 AM and again check in at 12:00 PM, the system will calculate only the hours you were in the office (i.e., between 9:00 AM and 11:00 AM) and will not calculate the hours from the time you checked out (11:00 AM to 12:00 PM).

Expected hours per day

Strict mode: Imposes a fixed number of hours for marking an employee present for half and full days. Select the shift hours option to go as per the shift duration set for half and full days. This is a preferred mode of attendance marking if the organization does not want flexible hours of work.

Lenient mode: Implies that the employee needs to mark their attendance at one fixed time every day. In this mode, a valid check-in or check-out in the system itself means that the employee will be marked as present for the day.

Allow overtime and deviation

Enable this option if you want to include and display overtime or deficit time in the attendance entries and reports. This can be used for any pay calculations as well.

Impose maximum hours per day

This is used to set the maximum working hours for the employees. The maximum working hours can be fixed for both half and full working days in the strict mode. This option is very helpful when you need to set a limit for employee working hours.



NOTE:

If you have enabled overtime for your organization and also enabled maximum working hours, then overtime exceeding the maximum working hours fixed will not be considered overtime.


Update older attendance entries

This option comes in handy if you have made any changes to any of the settings and want the settings to reflect in attendance entries within a time frame.


Update older attendance entries based on the revised policy ✕

The attendance policy has been revised. Do you want to apply the same policy to the existing entries?

From

01-May-2024 

To

15-May-2024 



Pay day / hours calculation

Pay days / hours calculation

Define how pay days / hours are to be calculated in your organization

Select the options to be included in payroll

- Weekends
- Statutory weekends
- Non-Statutory weekends
- Holidays
- Leave

Select the options to be included in payroll:

This setting helps you define whether you would like to include weekends, holidays, leave, statutory, and non-statutory weekends while calculating the days/hours for pay calculation.

Based on the above selection, the total expected payable days/hours will be reflected in the attendance data for the payroll report.

[Learn more about Attendance Management Service in Zoho People.](#)

Biometric Device Integration

This helps organizations to automatically sync attendance data captured by biometric devices (such as fingerprint scanners, face recognition systems, palm readers, and more) instead of manually entering or uploading attendance records.

[Learn more about Biometric Device Integration here.](#)



Timesheet Management

Timesheet management in Zoho People facilitates recording and tracking of employee work hours. It is a platform for employees to log their time spent on tasks and projects. Employers can easily monitor and approve timesheets, ensuring accurate payroll processing and efficient resource allocation.

Adding Jobs

Adding Jobs and logging time for them helps in keeping track of work done by employees. Generally, jobs are associated with Projects which are in turn associated with Clients of the organization. It is also possible to add a job without associating it with a Project.

To manage Jobs, navigate to **Operations > Timesheet > Jobs**.

Jobs	Employee	Department	Division	Add Job			
<input type="checkbox"/>	Job Name	Start Date	End Date	Estimated Hours	Logged Hours	Status	User(s)
<input type="checkbox"/>	Zylker Employee • Zylker			0 Hrs 0 Mins	0 Hrs 40 Mins	In-Progress	
<input type="checkbox"/>	X Ray • Lab work			0 Hrs 0 Mins	0 Hrs 0 Mins	In-Progress	
<input type="checkbox"/>	work	21-Jun-2018		0 Hrs 0 Mins	0 Hrs 0 Mins	In-Progress	
<input type="checkbox"/>	work	21-Jun-2018		0 Hrs 0 Mins	0 Hrs 0 Mins	In-Progress	
<input type="checkbox"/>	White Paper Design • White Papers			0 Hrs 0 Mins	19 Hrs 59 Mins	In-Progress	
<input type="checkbox"/>	White Paper content and pitching • White Paper Publishing			0 Hrs 0 Mins	0 Hrs 0 Mins	In-Progress	

1. Click **Add Job**.
2. Enter the **Job Name**. Select a Project if required. [Learn more about adding Project](#).
3. Give a Start Date and End Date for the Job.



NOTE:

Hours is the sum of the individual estimated hours that you have given for each employee. Hence, it is important to know that Hours here, refers to the total number of estimated hours to complete this job.

The screenshot shows the 'Add Job' form with the following details:

- Job Name:** Draft Creation
- Project:** World HR Event
- Start Date:** 19-May-2024
- End Date:** dd-MMM-yyyy
- Hours:** 00:00
- Assignees:**
 - Christine Spalding ZY198: 00:00 hrs, 0 RPH
 - Silver Goodman 144: 00:00 hrs, 0 RPH
 - Estimated Hours:** 00:00 Hrs
- Departments:** (dropdown)
- Division:** (dropdown)
- Billable Status:** Select
- Work Item:** Enter Work item (with 'Add Work item' button)
- Rate Per Hour:** 10
- Reminder:**

4. Under **Assignees**, select the assignees for the particular job. Enter the estimated hour for each assignee against the names.
5. Under **Billable Status**, select Billable or Non-Billable depending on the nature of the job.
6. Enter the **Rate Per Hour** and enable **Reminder** if it's needed.
7. Click **Submit**.



Assigning Jobs to users, departments or divisions

In addition to assigning jobs to different users, department or divisions when adding or editing a job, you can also do the same from **Operations > Timesheet > Jobs**.

Simply select jobs and click on the corresponding button.

The screenshot shows a user interface for managing jobs. At the top, there are four buttons: 'Delete' (red), 'Assign Users' (blue), 'Assign Departments' (blue), and 'Assign Division' (blue). Below these buttons is a table with three rows of job entries. Each row has a checkbox on the left, a job name in the middle, and a checkmark icon on the right. The first row has an unchecked checkbox, the second and third rows have checked checkboxes. The job names are: 'Understanding the customer requirements • FinePick - Solar Installation', 'Understand the customer requirements • Wings Pvt Ltd -- Solar Plant 5mW', and 'Trial Run • FinePick - Solar Installation'.

<input type="checkbox"/>	Job Name	
<input checked="" type="checkbox"/>	Understanding the customer requirements • FinePick - Solar Installation	✓
<input checked="" type="checkbox"/>	Understand the customer requirements • Wings Pvt Ltd -- Solar Plant 5mW	✓
<input checked="" type="checkbox"/>	Trial Run • FinePick - Solar Installation	✓

Adding Projects

Projects are assignments that employees work on. Each project is associated with a client and different jobs are associated with a project.

To manage Projects, navigate to **Operations > Timesheet > Projects > Add Project**.



Project Name	Estimated Hours	Logged Hours	Status	Jobs
Activites Marketing - Fr (Juillet - Septembre)	-	-	In-Progress	Add Job
Animation 101 - FinePick	-	-	In-Progress	1
Annual Report - FinePick	-	-	In-Progress	1
Attendance Module	-	-	In-Progress	3
Booklet - Dias Pvt Ltd	-	-	In-Progress	1
Brochure - Dias Pvt Ltd	-	-	In-Progress	Add Job
Classes	-	-	In-Progress	2

1. Enter **Project Name**.
2. Select **Client Name** from the drop-down. [Learn more about adding Client](#).
3. Click Choose from CRM if you would like to pick a client from your list of clients in CRM. If you are picking a client from CRM, select from the options like Lead, Account, Contact, and Deal.

Add Project

Project Configuration Details

Project Name * World HR Event

Client Name Digital Corp Choose From CRM +

Project Cost 1500

Project Head Christine Spalding ZY198 Rate RPH

Project Manager Randall Gladstone HR204 0 RPH

Project Users Users Clear

Rahul J ZY107 0 RPH

Silver Goodman 144 0 RPH

> Departments 0

> Division 0

Description

Submit Cancel



4. Enter the **Project Cost**.
5. Select the **Project Head, Project Manager, and Project Users**.
6. Give **Description** if necessary.
7. Click **Submit**.

Associating projects to users, departments or divisions

In addition to associating projects to different users, departments or divisions when adding or editing a project, you can also do the same from **Operations > Timesheet > Project**.

Select projects using the checkboxes provided and click on the corresponding button.

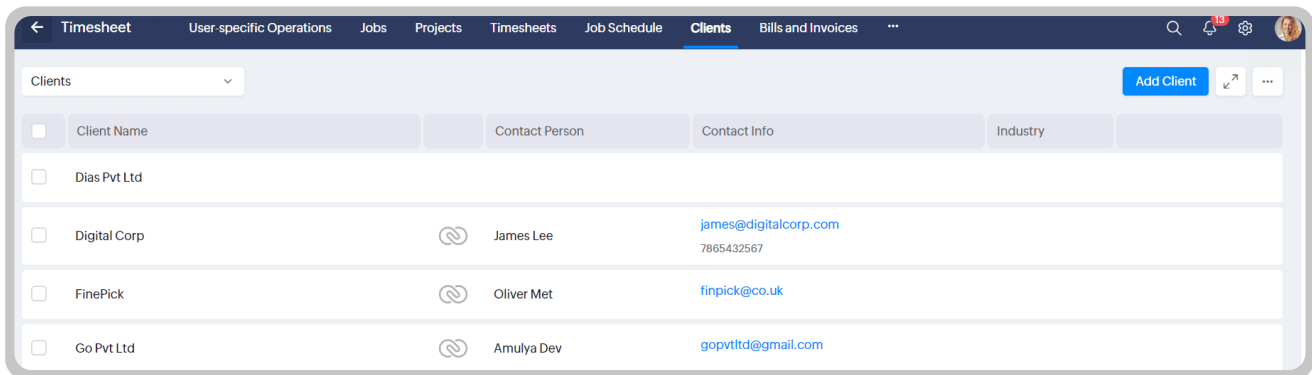
The screenshot shows a mobile application interface with a dark blue navigation bar at the top. The navigation bar contains a back arrow, the text 'Timesheet', and four tabs: 'User-specific Operations', 'Jobs', 'Projects', and 'Timesheets'. The 'Projects' tab is currently selected and highlighted with a blue underline. Below the navigation bar, there is a row of four buttons: a red 'Delete' button, and three blue-outlined buttons labeled 'Assign Users', 'Assign Departments', and 'Assign Division'. Below the buttons is a list of projects. Each project entry consists of a checkbox on the left and the project name on the right. The first entry is 'Project Name' with an unchecked checkbox. The second entry is 'White Paper Publishing' with a checked checkbox. The third entry is 'White Papers' with a checked checkbox. The fourth entry is 'Whitepaper' with a checked checkbox.



Adding Clients

Clients are customers for whom Jobs are done. Projects are associated with Clients and Jobs are done on Projects for Clients.

To manage Clients, navigate to **Operations > Timesheet > Clients > Add Client**.



1. Enter **Client Name** and **Currency**.
2. Under **Billing Method**, if you select:
 - **Hourly Job Rate:** The bill will be generated based on the rate per hour that you define in Job.
 - **Hourly User Rate:** The bill will be generated based on the rate you define for the user under Payroll settings.
 - **Hourly User Rate - Jobs:** The bill will be generated based on the rate per hour you define for each assignee in Job.
 - **Hourly User Rate - Projects:** The bill will be generated based on the rate per hour that you define for each Project User in Project.



Add Client

Client

Client Name*

Currency*

Billing Method

Contacts

EmailId

First Name

Last Name

Phone

Mobile

3. You can fill in the client's contact details and location details, if required.

4. Click **Submit**.

Importing Clients from CRM

The screenshot shows the 'Clients' page in the Timesheet application. The breadcrumb navigation is 'Timesheet > User-specific Operations > Jobs > Projects > Timesheets > Job Schedule > Clients'. A table lists clients with columns for Client Name, Contact Person, Contact Info, and Industry. A menu is open over the table with options: Import, Import From Zoho CRM, and Export. The 'Import From Zoho CRM' option is highlighted with a red box.

Client Name	Contact Person	Contact Info	Industry
Dias Pvt Ltd			
Digital Corp	James Lee	james@digitalcorp.com 7865432567	Digital marketing
FinePick	Oliver Met	finpick@co.uk	
Go Pvt Ltd	Amulya Dev	gopvtld@gmail.com	

1. To import Clients from Zoho CRM, navigate to **Operations > Timesheet > Clients > Ellipsis icon** (3 dots).



Import From Zoho CRM ✕

CRM Account ▼

Zac

ZCL

Zylker Corporation

< 1 - 3 >

Import Cancel

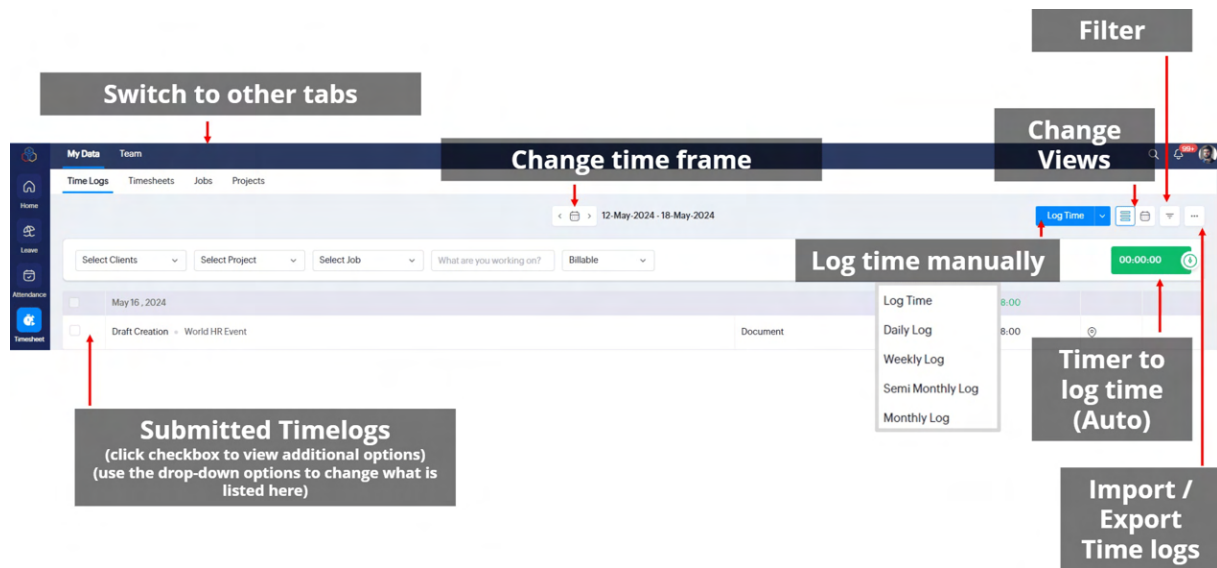
2. In the drop-down, make a selection from the options, Lead, Account, Contact, and Detail.
3. Select the customer name and click **Import**.
4. Your CRM clients are now imported into your Zoho People account.



Time Logging

View and add time logs:

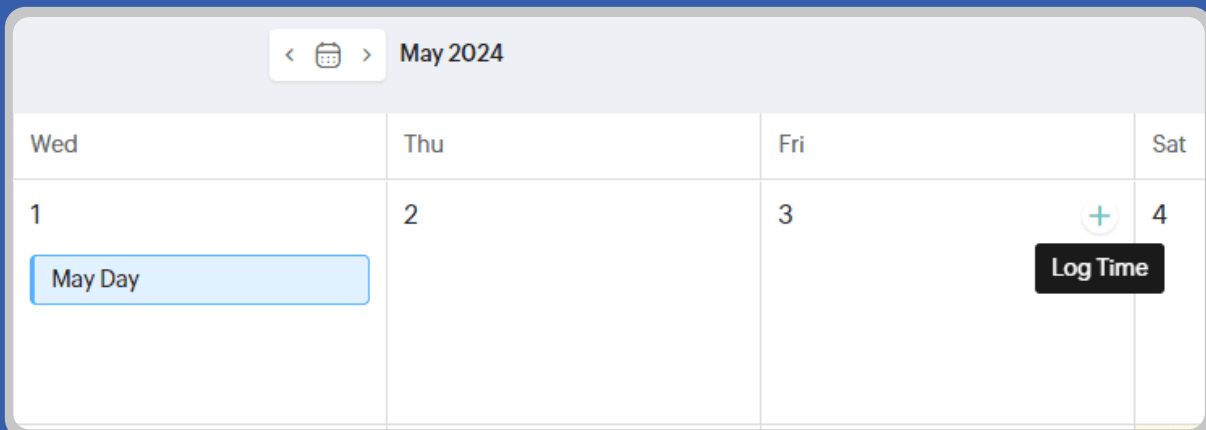
There are two views available, namely **List View** and **Calendar View**. Switch between the available views from **Timesheet > My Data > Time Logs** and click the corresponding view icons.



From the Time Logs tab, you have options to log time manually or using the timer, change views, apply a filter, import or export time logs, and more.

NOTE:

When using the calendar view you can directly click on the **+ icon** that appears when hovering pointer over a date to directly add a time log.





Adding a time log:

1. From Timesheet > My Data > Time Logs, click Log Time.
2. Select the client, project, and job. Enter the work item name.

Log Time

Client Name: Digital Corp

Project Name: World HR Event

Job Name *: Draft Creation

Work item: Draft Blueprinting

Date *: 19-May-2024

Hours *: Total hours Start and end time Timer
10:00

Billable Status *: Billable

Attachment: [Upload from Desktop](#) / [Zoho WorkDrive](#) / [Others](#)
Max. size is 5 MB

3. Enter the time log date. When entering hours, you can choose between **Total Hours**, **Start** and **End** time or use the **Timer** option if you have used the automatic timer to mark time on that particular day.
4. Click **Submit**.

Submitting Daily, Weekly, Semi Monthly, Monthly logs

1. From **Timesheet > My Data > Time Logs** open the **Log Time** drop-down and choose the corresponding option based on the time period you are submitting the time log for.
2. Use the drop-down to select Client, Project and Job.
3. Enter work item details, select the billable status, and enter the worked hours for the corresponding time period.
4. Click **Submit**.



145 - Pedro Martinez

< > 22-Sep-2024 - 28-Sep-2024 Weekly Log Clone

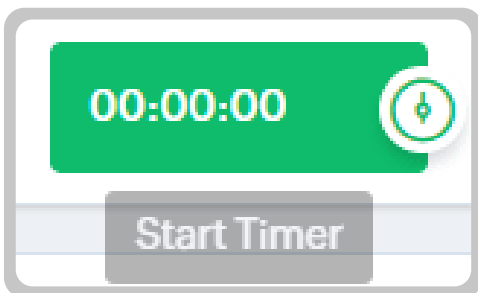
S.No	Client Name	Project Name	Job Name	Work Item	Billable Status	Sep 22 Sun	Sep 23 Mon	Sep 24 Tue	Sep 25 Wed	Sep 26 Thu	Sep 27 Fri	Sep 28 Sat	Total	
1	Digital Corp	World HR Event	Draft Creation	Blueprinting	Billable	00:00	10	00:00	00:00	00:00	00:00	00:00	10:00	
2	Digital Corp	World HR Event	Draft Creation	Finalizing	Billable	00:00	00:00	10	00:00	00:00	00:00	00:00	10:00	
3	Digital Corp	World HR Event	Draft Creation	Writing	Billable	00:00	00:00	00:00	10	00:00	00:00	00:00	10:00	
4	Digital Corp	World HR Event	Draft Creation	Formatting	Billable	00:00	00:00	00:00	00:00	10	00:00	00:00	10:00	
5	Digital Corp	World HR Event	Draft Creation	Publishing	Billable	00:00	00:00	00:00	00:00	00:00	10	00:00	10:00	
Add Row						Total	00:00	10:00	10:00	10:00	10:00	10:00	00:00	50:00

IDEA:

You have options to clone an added time log (navigate to the time period you have submitted a time log for, and click **Clone**) You can also add additional rows using the **Add Row** option.

Log time using the timer (automatic method)

1. Go to **Timesheet > My Data > Time Logs** and simply start the timer after selecting the corresponding project.

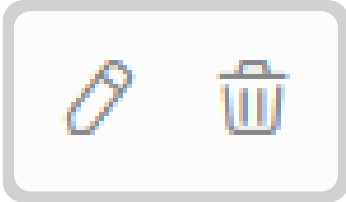


3. Once initiated, you will have options to stop timer, edit, add a note (Hover the pointer over the time log entry).
4. If you wish to submit the automatically logged time, click on log time option and select the **Timer** option within the **Hours** option.



Editing or deleting a time log:

1. Go to **Timesheet > My Data > Time Logs**.
2. Hover the pointer over an existing time log entry to view options to edit and delete.



3. Use the corresponding icon to perform the desired action.

[Learn more about Timesheet user service here.](#)

Geo Restrictions

The Geo Restriction feature in Zoho People lets admins limit attendance, timesheet, and file access to specific locations, so employees can access them only from approved office or remote locations.

IDEA:

Geo Restriction feature is available in Attendance, Timesheet and Files Service.

INFO:

For Attendance service, Zoho People captures location data from browser for web-based geo-restricted check-ins. However, if the browser's location data is altered by users, the actual location data may become inaccurate. To ensure accurate location tracking and successful geo-restricted check-ins, it is recommended to use the Zoho People mobile app, as it provides more reliable location data through the device's GPS.



Configuring Geo Restrictions:

1. Navigate to **Settings > Attendance / Timesheet / Files > Permissions > Geo Restriction**.
2. Click **Add Geo Restriction**.
3. Enter a name and select the applicable services. (Attendance, Files, Timesheet can be selected)

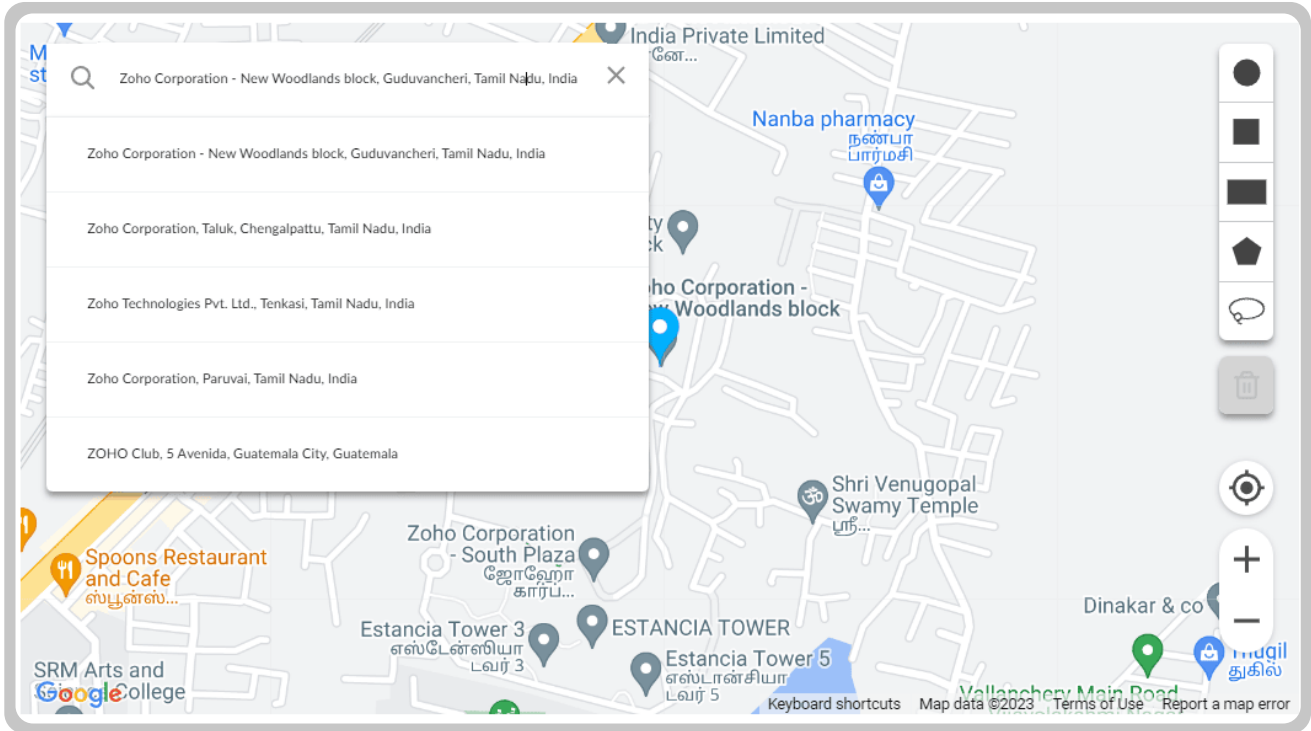
Add Geo Restriction

Name *

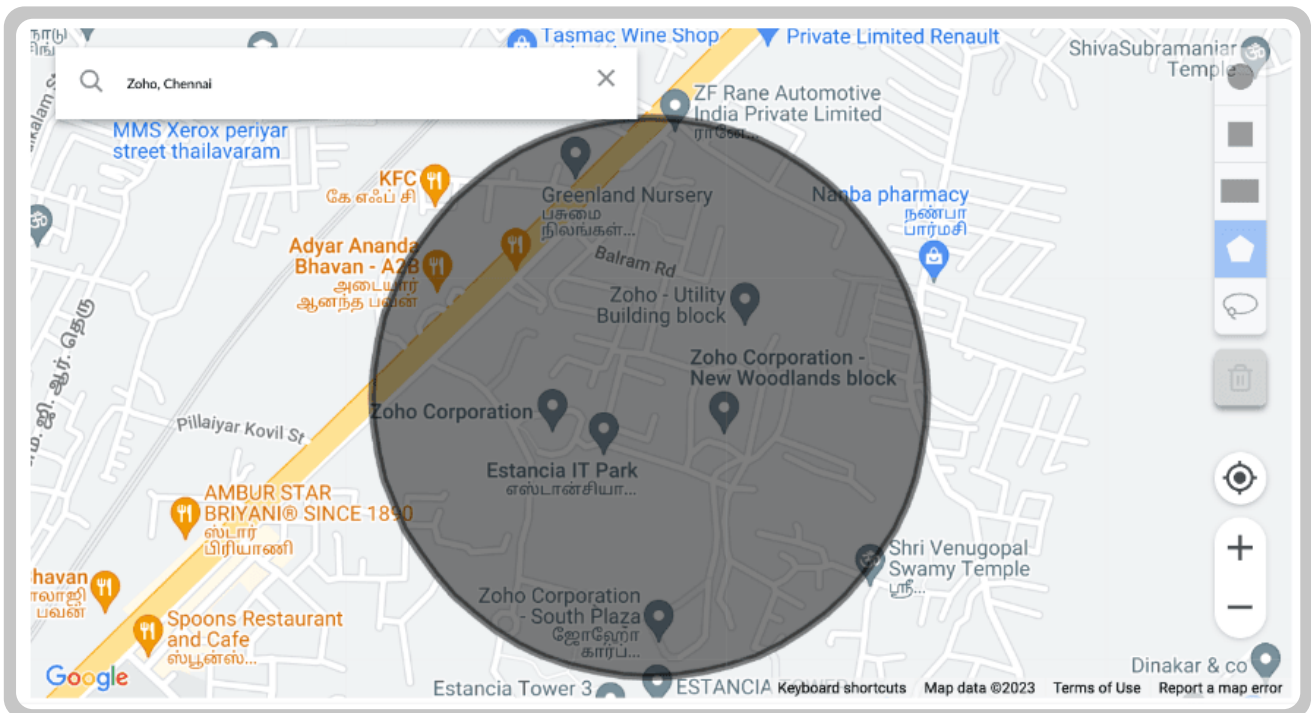
Applicable services *

Attendance × Timesheet ×

4. Use the Search bar to search for the starting location of your range. You can pin the location by entering the location name or the latitude and longitude coordinates of the location.




5. Use the drawing tool (choosing from a variety of shapes like circle, rectangle, polygon, etc) bar on the right-hand side to mark the range.





NOTE:

- You can use the Show My Location icon () and grant required permission to let the system automatically show your current location. This will be easy to automatically move the map to the location you're accessing the system from.
- Use the Lasso tool to crop the selection precisely.
- Use the delete icon to delete any added shape (region).

6. Configure applicability by selecting specific users or all users.
7. When selecting **Specific users**, use the provided drop-down to Select from Department, Location or Designation. More criteria can be combined and individual employees can be added too.
8. Configure **Exceptions** if required.
9. Click **Save**.

IDEA:

*Geo Restriction and **IP Restriction** feature can be used together to enforce a stricter access restriction.*

[Learn more about Timesheet Service in Zoho People.](#)

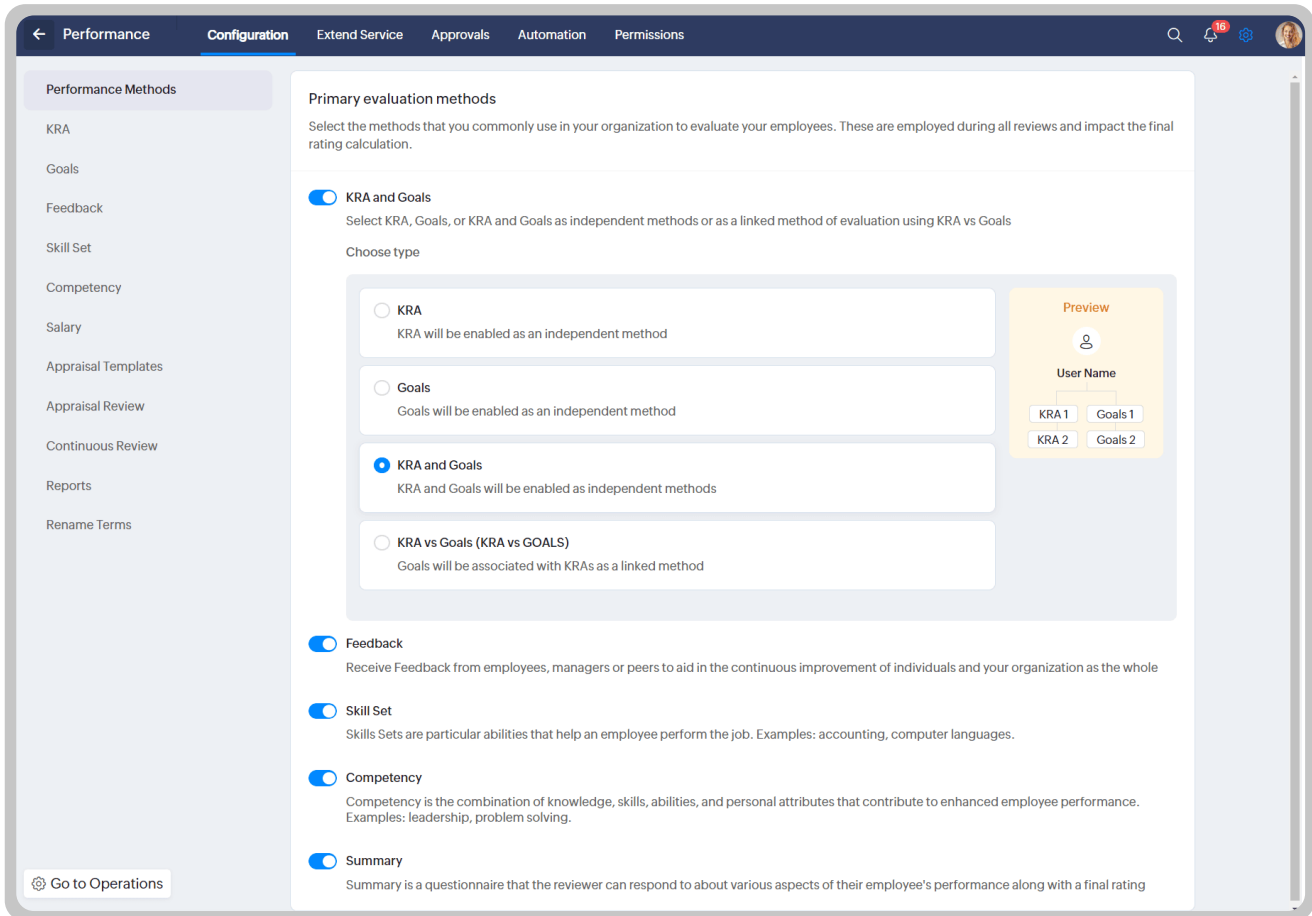
Performance Management

Performance service in Zoho People offers tools to track and evaluate employee performance, making it easy to collect feedback through self reviews, appraisals, continuous reviews, multi-rater reviews, and more.



Performance Methods

To enable performance methods, navigate to **Settings > Performance > Configuration > Performance Methods**. Use the switches to enable the applicable methods.



Goals are defined objectives aimed at achieving desired outcomes. They provide performance targets and are crucial for gauging employee dedication. An effective goal should adhere to the SMART criteria: Specific, Measurable, Achievable, Realistic, and Time-bound. These goals can also be associated with the positions created in Timesheet.

KRA (Key Result Area) encompasses the essential tasks required to fulfill job responsibilities and meet organizational objectives. It's vital that KRAs are clearly defined, specific, and measurable, outlining ongoing responsibilities and the purpose and benefits of fulfilling them. Goals can also be aligned with KRAs and assessed accordingly.



IDEA:

Goals and KRA can be used individually, simultaneously, or in a linked manner.

Feedback enables employees to give and receive feedback through various methods, including peer-to-peer, reporting, and 360-degree feedback.

Skill Set refers to specific proficiencies necessary for job execution. Examples include accounting and programming languages. Skill Sets can be categorized into different domains and subsequently linked to employees to assess their performance.

Competency represents a blend of knowledge, skills, abilities, and personal attributes contributing to improved employee performance. Examples include analytical prowess, networking abilities, communication skills, and people management capabilities.

Summary serves as a questionnaire guiding both new and existing managers to gain a comprehensive understanding of their team members' performance.

[Learn more about setting up Performance Settings here.](#)

Appraisal Cycle

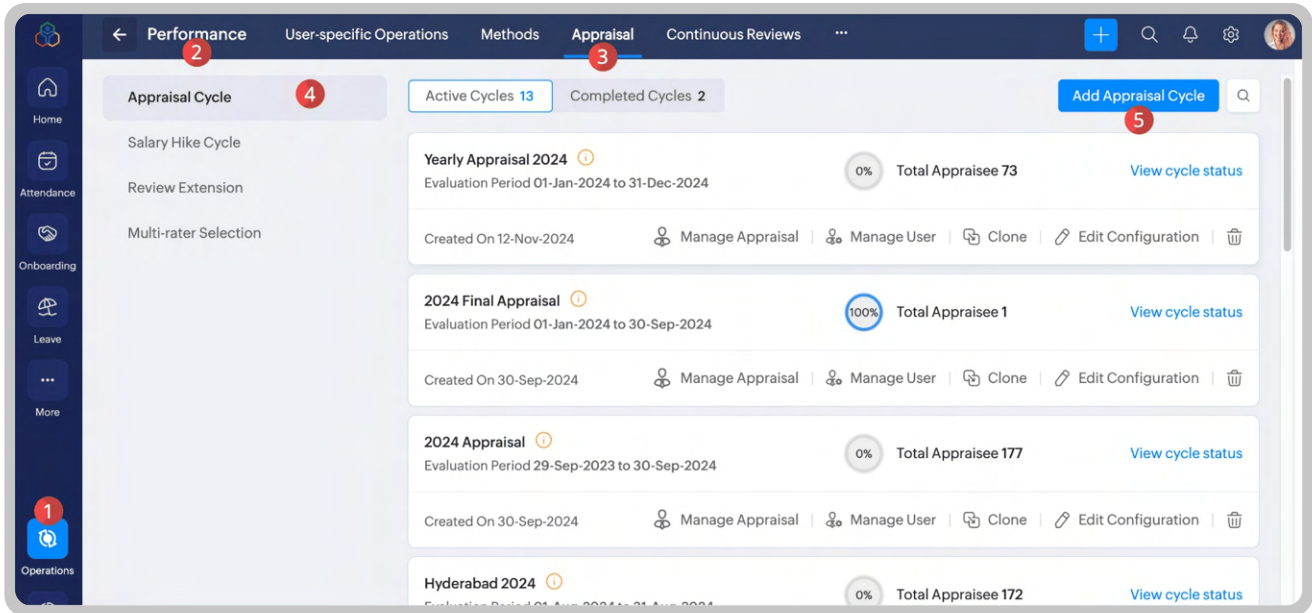
An appraisal cycle refers to the process in which an organization evaluates employee performance for a specific period of time. It includes self-assessment, manager reviews, feedback sessions, and final ratings.

Create an Appraisal Cycle

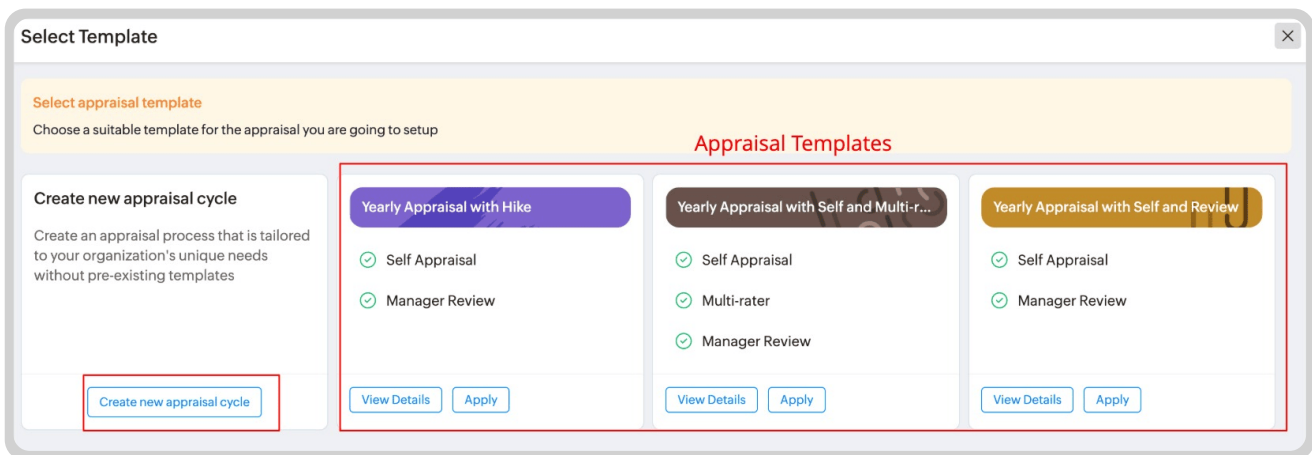
To help you understand the features, we've enabled all available employee performance evaluation methods. Based on your organization's requirements, you can configure the appraisal cycle by selecting the appropriate evaluation methods and criteria.

To run an appraisal cycle in your organization:

1. From your home page, navigate to **Operations > Performance > Appraisal > Appraisal Cycle**, and click **Add Appraisal Cycle**.



2. Click on **Create New Appraisal Cycle** to create a **custom appraisal cycle**.



3. Zoho People provides three system appraisal templates to streamline the creation of your appraisal cycles as follows:

- Yearly appraisal with self-appraisal and manager review
- Yearly appraisal with self-appraisal, multi-rater review, and manager review
- Yearly appraisal with only self-appraisal and manager review
- Click the Apply button on your preferred template to create an appraisal cycle.

To set up or configure Appraisal Template, refer to [Appraisal Template Settings](#).



4. In the Create New Appraisal Cycle section, you can choose the performance evaluation methods that suit your organization's needs, such as Self-Appraisal, Multi-Rater Review, and Manager Review. Additionally, you can enable and configure post-appraisal processes like Normalization and Salary Hike to align with your company's policies.

Create new appraisal cycle

How do you want to assess your employees?

- Self Appraisal**
An employee's analysis of their own performance
- Multi-rater**
Feedback taken from other team members with whom an employee has worked with
- Manager Review**
The final stage of feedback given by the reviewers chosen for this cycle

What processes do you want to run after the appraisal?

- Normalization**
It is the process of adjusting employee ratings according to the overall defined ideal rating distribution in the organization
- Salary Hike**
The process of altering the salary of an employee at the end of the appraisal process

Create

NOTE:

We have selected all available options in the appraisal cycle creation process to provide you with a comprehensive explanation.

5. After selecting the required options, click **Create**.



6. The Add Appraisal Cycle configuration section will appear, allowing you to set up the appraisal cycle. [Learn more about the step-by-step process to set up an Appraisal Cycle.](#)

7. After setting up the Appraisal Cycle configuration, click on **Submit**. The appraisal Cycle will be created and available in **Active Cycles** tab.

[Learn more about Performance Operations here.](#)

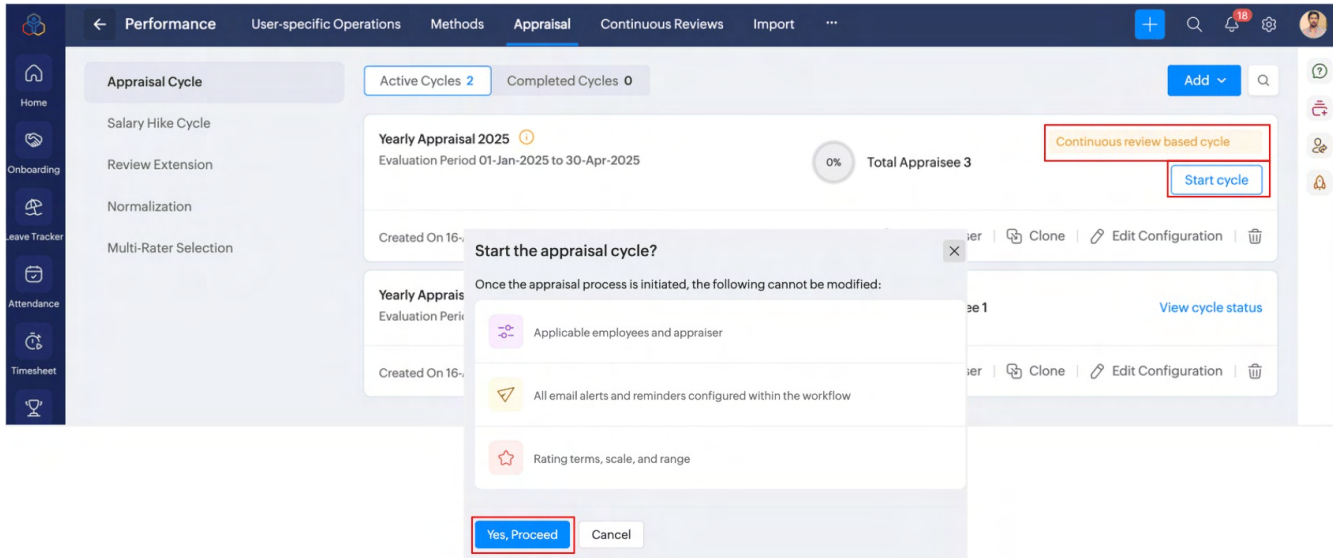
Active Cycles

After creating an Appraisal Cycle, you can manage it by navigating to **Operations > Performance > Appraisals** and selecting the **Active Cycles** tab. Here, you can view all active appraisal cycles. Continuous review-based appraisal cycles are highlighted with a banner.



Start Cycle:

To initiate the continuous review based appraisal process, click on **Start Cycle**, this action officially begins the appraisal cycle and enables evaluations to proceed as configured.



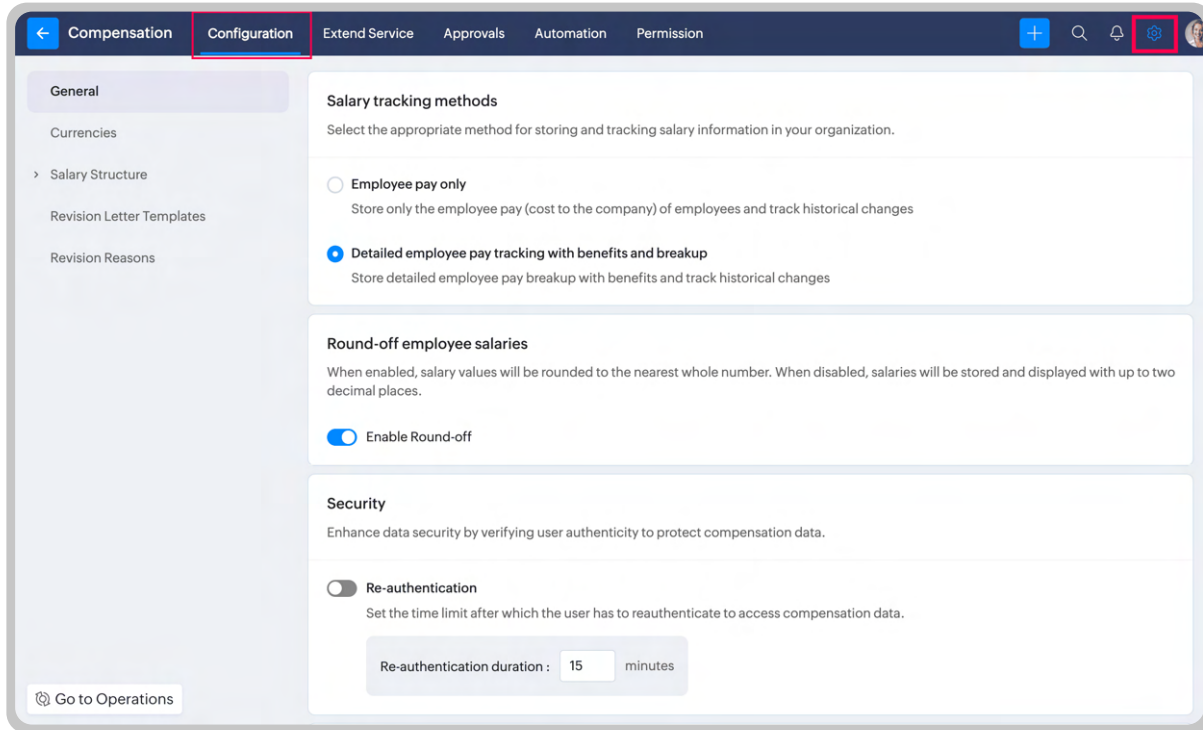
[Learn more about Performance Service in Zoho People.](#)

Compensation Service

The Compensation Service in Zoho People simplifies the recording, tracking, and management of employee salaries and benefits. It includes salary revisions, generating revision letters, and integration with the performance service.

Configuring Compensation Service Settings

To configure compensation settings in Zoho People, go to **Settings > Compensation > Configuration**.

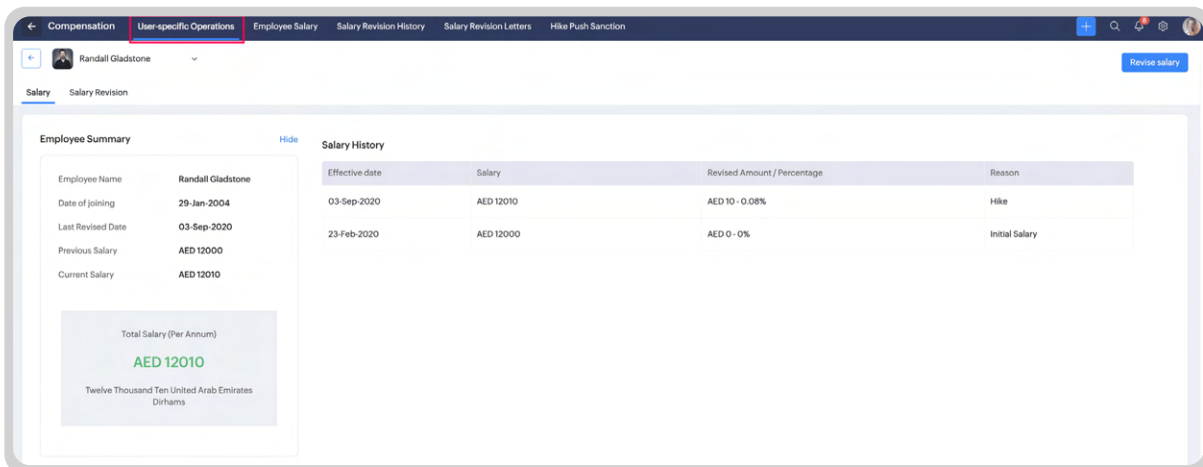


[Learn more about setting up Compensation service.](#)

Compensation Operations

User-Specific Operations

To search and view a specific employee's compensation data, revise their salary, head to **Operations > Compensation > User-specific Operations** tab and search for a specific employee.





Employee Salary

The employee salary section lists one's team and other employees' salary details and can be viewed based on set permissions.

Furthermore, the salary breakup and history of changes in each salary can be viewed by clicking on a specific employee's salary.

	Name	Experience	Salary	Salary Package	Last Revised Date	
<input type="checkbox"/>	CND190 - Frank Ocean	2 year(s) 3 month(s)	INR 12,00,000	Entry Level	01-Dec-2023	Revise salary
<input type="checkbox"/>	ZY200 - Vignesh TK Administrative Head	6 year(s) 8 month(s)	AED 100000		14-Oct-2019	Revise salary
<input type="checkbox"/>	198 - Christine Spalding HR Executive	7 year(s) 7 month(s)	AED 300000	Senior Associate	21-Nov-2024	Revise salary
<input type="checkbox"/>	ZY197 - Aditi A	8 year(s) 1 month(s)	AED 12000		14-Oct-2019	Revise salary
<input type="checkbox"/>	ZY196 - Rinzee Wilma	9 year(s) 10 month(s)	AED 7000		13-Oct-2019	Revise salary
<input type="checkbox"/>	ZY195 - Kavin Edwards	5 year(s) 2 month(s)	AED 900000		15-Aug-2018	Revise salary
<input type="checkbox"/>	ZY194 - Anitha Joshi HR Manager	8 year(s) 2 month(s)	AED 8000		14-Oct-2019	Revise salary
<input type="checkbox"/>	ZY181 - Rodriguez Sue HR Manager	2 year(s) 3 month(s)	AED 100000		14-Oct-2019	Revise salary
<input type="checkbox"/>	ZY134 - Rebecca Biaggio HR Manager	8 year(s) 6 month(s)	AED 1400000		16-Aug-2018	Revise salary
<input type="checkbox"/>	ZY111 - Keb Lisa HR Manager - Recruitment	9 year(s) 1 month(s)	AED 70000		16-Oct-2019	Revise salary

To view employee salary, go to **Operations > Compensation > Employee Salary**.

[Learn more about adding salary details of an employee.](#)

Salary Revision History

To view Salary Revision History, approve, reject, cancel revision, generate revision letters, navigate to **Operations > Compensation > Salary Revision History** tab. Revision letter status will also be displayed here.



	Name	Revised Salary	Pay schedule	Salary Variation (%)	Reason for Revision	Last Revised Date	Revision Status	Revision Letter Status
<input checked="" type="checkbox"/>	1004 Ben Mathews	INR 1,35,801.60	Annual Pay	INR 12,345.60 - 10.00 %	Hike	18-Feb-2026	Processed	Not generated
<input checked="" type="checkbox"/>	1010 Lee Cooper	INR 6,60,000.00	Annual Pay	INR 60,000.00 - 10.00 %	Hike	18-Feb-2026	Processed	Ready to publish
<input checked="" type="checkbox"/>	1013 Rajith Singh	INR 1,75,000.00	Annual Pay	INR 25,000.00 - 16.67 %	Hike	18-Feb-2026	Processed	Ready to publish
<input type="checkbox"/>	1019 Anu Lakshmi	INR 3,00,000.00	Annual Pay	INR 0.00 - 0.00 %	Initial Salary	01-Jan-2026	Processed	Published

- Click on a record for employee specific compensation data, and to **Approve / Reject or Cancel** salary revision from the **Salary Revision View**.
- Use the checkboxes to select individual or multiple records here to generate revision letters (using the Generate Revision Letter button) or delete revisions.
- Use the view selection drop-down on the top-left corner to change views, create custom views, this will be particularly handy if you want to generate revision letters for specific employees based on a created view.

Salary Revision Letters

Send salary revision letter to employees to help them stay informed.

To generate revision letters, navigate to **Operations > Compensation > Salary Revision Letters > Generate Revision Letters**.



Generate Revision Letters

Revision letters will be generated and kept ready upon clicking Generate. Click the list view entry, verify the generated letters and click Publish to share the letters to the applicable employees.

Letter display name*
Salary Revision Letter_2025

Revision letter template*
Revision Letters-Role Team Member

Effective date range of revisions*
01-Apr-2025 - 30-Apr-2025

Include revisions with a future effective date

Select applicability
 All employees Employee criteria Specific employees

Default entities		Org structure entities	
Location	All	Legal Entity	All
Designation	All	Business Unit	All
Employee type	All	Division	All
Reporting To	All	Department	All

The letter display name (along with their employee ID) will be shown to the employee upon publishing their revision letter

[Save](#) [Cancel](#)

Once a hike push is received from the Performance Service or it is approved through the Compensation Service, any generated letter will be ready to be published (indicated by a blue **Ready to publish** process status) by clicking on a record here and clicking on Publish.

Salary Revision Letters

Generate and send multiple revisions letters

Letter display name
Salary Revision-24

Applicable employees: 14
Processed letters: 14
Published letters: 0 [More](#)

Salary Revision-24 01-Apr-2019 - 31-May-2020
Initiated by ZY198 - Christine Spalding using Revision Letters-Role Team Member at 24-Apr-2024 01:33:53 PM

Employee	Effective date	Status	Action
ZY200 - Vignesh TK	14-Oct-2019	Ready to publish	
ZY198 - Christine Spalding	14-Oct-2019	Ready to publish	
ZY197 - Aditi A	14-Oct-2019	Ready to publish	
ZY196 - Rinzee Wilma	13-Oct-2019	Ready to publish	
ZY194 - Anitha Joshi	14-Oct-2019	Ready to publish	
ZY181 - Rodriguez Sue	14-Oct-2019	Ready to publish	
ZY111 - Keb Lisa	14-Oct-2019	Ready to publish	
ZY111 - Keb Lisa	14-Oct-2019	Ready to publish	
ZY111 - Keb Lisa	16-Oct-2019	Ready to publish	
ZY107 - Rahul J	15-Oct-2019	Ready to publish	
Jeenie Smith - Jeenie Smith	14-Oct-2019	Ready to publish	
144 - Silver Goodman	23-Feb-2020	Ready to publish	

[Publish](#) [Close](#)



The published revision letters can be downloaded both here and by navigating to the Compensation user service in the left bar of Zoho People.

The screenshot displays the 'Salary Revision' page for an employee named Sam Wilson. The page is divided into two main sections: 'Employee Summary' and 'Salary Breakup'. The 'Employee Summary' section includes fields for Employee Name, Date of joining, Last Revised Date, Previous CTC, and Current CTC. A callout box shows the 'Cost to the Company' as INR 1800000.00. The 'Salary Breakup' section is divided into 'CTC Components' and 'Benefits', with a total salary of INR 1800000.00.

Employee Summary	
Employee Name	Sam Wilson
Date of joining	13-07-2008
Last Revised Date	01-05-2024
Previous CTC	INR 1794430.00
Current CTC	INR 1800000.00

Cost to the Company
INR 1800000.00
One Million Eight Hundred Thousand India Rupees

Salary Breakup	
CTC Components	
Basic Pay	900000.00
House Rent Allowance	360000.00
Fixed Allowance	534000.00
Fuel Allowance	6000.00
Benefits	
Gift Card	60000.00
Bonus	50000.00
Meal Pass	6000.00
Total Salary In INR	1800000.00

NOTE:

Revision letter generation can also be done from **Operations > Compensation > Salary Revision History** tab. To do this, use the checkboxes to select records and click on the **Generate Revision Letter** option.

Hike Push Sanction

Hike push sanction allows the salary hike pushed from performance to be reflected in compensation only after it is sanctioned in compensation. This process helps validate the salary details and check for any discrepancies before they are viewed by employees. If it is not enabled, the salary hike pushed by performance will automatically be reflected in compensation and be viewed by employees.

The hike push sanction process acts as a checkpoint before the salary hike information is revealed to the employees. This process is also used during payroll processing. This is done by sending all push hikes to be validated and sanctioned by the compensation administrators.

To perform a hike push sanction, go to **Operations > Compensation > Hike Push Sanction**.



INFO:

Salary hike must first be pushed to the Compensation service from Performance Service.

Let us look at how the process flows:




Once salary hikes are completed in performance, the next step will be to push the salary hikes to compensation. To view the salary hike status in performance, click on the corresponding appraisal cycle name in the list view. (**Operations > Performance > Appraisal > Select a cycle > View Cycle Status > Push to Compensation**)

The screenshot displays the 'Performance' dashboard with the 'Appraisal' section active. It shows two appraisal cycles: 'Yearly Hike Cycle' (37% completion, 8 appraisees) and 'May Hike' (0% completion, 2 appraisees). A 'View cycle status' link is visible for the Yearly Hike Cycle. An inset window provides a detailed view of the 'Yearly Hike Cycle' status, showing a 'Salary Hike Status' of 22-05-2024 to 24-05-2024. It includes a progress bar for 'Salary Hike Total: 8' (3 Completed, 5 Pending) and a 'Remind' button. Below, it shows 'Hike Pushed Total: 3' (0 Pushed, 3 Unpushed) and a 'Push to compensation' button highlighted with a red box. A 'View Hike Status' button is also present.

Click **View Hike Status** for a detailed view of each employee's status.



Hike push status

	1000 - John Mathews Cybersecurity Analyst - Cloud Services	Ready to push to compensation
	1001 - David Harper Database Administrator - Quality Assurance	Ready to push to compensation
	1002 - Lee Smith Database Administrator - Cloud Services	Ready to push to compensation

Once all salary hikes have been pushed, click **Push to Compensation**.

If hike sanction is enabled in compensation, all pushed salary hikes will be listed under the **Hike Push Sanction** tab (within **Operations > Compensation**), where the compensation administrator can check each salary hike that has been pushed from performance. Once they are satisfied, the hike push will be sanctioned. In case of any discrepancies, the hike push will not be sanctioned, in which case it will need to be revisited and checked for any errors.

Navigation: Compensation | User-specific Operations | Employee Salary | Salary Revision History | Salary Revision Letters | **Hike Push Sanction**

Hike Push Sanction

Hike push sanction allows the salary hike from performance to be reflected in compensation only after it is sanctioned in compensation.

Message	Appraisal Cycle	Requested On	Status
 HRO20 Allan Fredrick has sent the hike push of Yearly Salary Hike to be sanctioned	Yearly Salary Hike	02.02.2026 11:09:17	Pending

Yearly Salary Hike

01/11/2025 - 31/12/2026 Pending

HRO20 Allan Fredrick has sent the hike push data of Yearly Salary to be sanctioned.

Name	Revised Salary	Hike Percentage	Hike Amount	Last Revised Date	Effective from	Action
HRO20 - Allan Francis	5788125	5.00%	275625	01/10/2025	02.02.2026	<input checked="" type="radio"/> <input type="radio"/>
ZP22 - Tara Mathews	588993	5.00%	28047	01/10/2025	02.02.2026	<input checked="" type="radio"/> <input type="radio"/>
ZP23 - Austin Mayer	22050	5.00%	1050	01/10/2025	02.02.2026	<input checked="" type="radio"/> <input type="radio"/>
ZP53 - Jennifer Jackson	551250	5.00%	26250	01/10/2025	02.02.2026	<input checked="" type="radio"/> <input type="radio"/>
ZP61 - George Dwell	441000	5.00%	21000	01/10/2025	02.02.2026	<input checked="" type="radio"/> <input type="radio"/>
ZP49 - Pedro Martinez	55125	5.00%	2625	01/10/2025	02.02.2026	<input checked="" type="radio"/> <input type="radio"/>

✓ (Green Tick) → Include in Salary Revision
✗ (Red Cross) → Exclude from Salary Revision

Click here to proceed with the Salary Hike Push. Includes an option to change the 'effective from' date



To finalize the process, and to update the salary of the employee click on the **Push Hike** button, you will be allowed to select a custom 'effective from' date.

Hike push sanction ✕

The salary hike will be updated in the employee's compensation effective from the following date. You can change the hike effective date if required.

Effective from

📅

Confirm Cancel

Select the required **Effective from date**, the salary of the employee will be updated on Confirming, effective from the date selected here. Click **Confirm** to finalize.

ALERT:

To use the **Hike Push Sanction** feature, the **Manage Hike Push Sanction** option must be enabled.

If this option is disabled, the compensation administrator will not review or finalize salary hikes. Instead, hikes will be finalized directly through the Performance service.

Enabling this option ensures a secure process by including a mandatory salary hike review by the compensation administrator through the Compensation service.

You can enable **Manage Hike Push Sanction** from **Settings > Compensation > Configuration > General tab**.

[Learn more about Compensation Operations.](#)



Compensation User Service

It is primarily for viewing your own compensation data (salary) and salary history.

[Learn more about Compensation user service.](#)

Navigate to **Compensation (left side tab) > My Data.**

NOTE:

Managers and administrators with reportees can be authorized to view the reportee's compensation data and even revise their salaries from here.

[Learn more about Compensation Service in Zoho People.](#)

Onboarding Service

The onboarding service in Zoho People allows you to set up a process to welcome and add new employees to your organization.

In this section, we will cover **Candidates Onboarding Process** and **Employees Onboarding Process** along with a view on how the process appears.

Candidates Onboarding Process

A pre-onboarding flow that you can customize to send an invite to selected candidates, enabling them to fill out their personal and professional details. You can release and obtain a signed copy of offer letter, terms and conditions of employment, a background check authorization letter, and other company-specific forms that are required to be completed by the candidate before joining the organization. [Learn more about Candidate Onboarding Flow.](#)

Set Up Candidate Onboarding Flow

To set up a Candidate Onboarding Flow, navigate to **Settings > Onboarding** and do the following.



Set Up a Portal Name

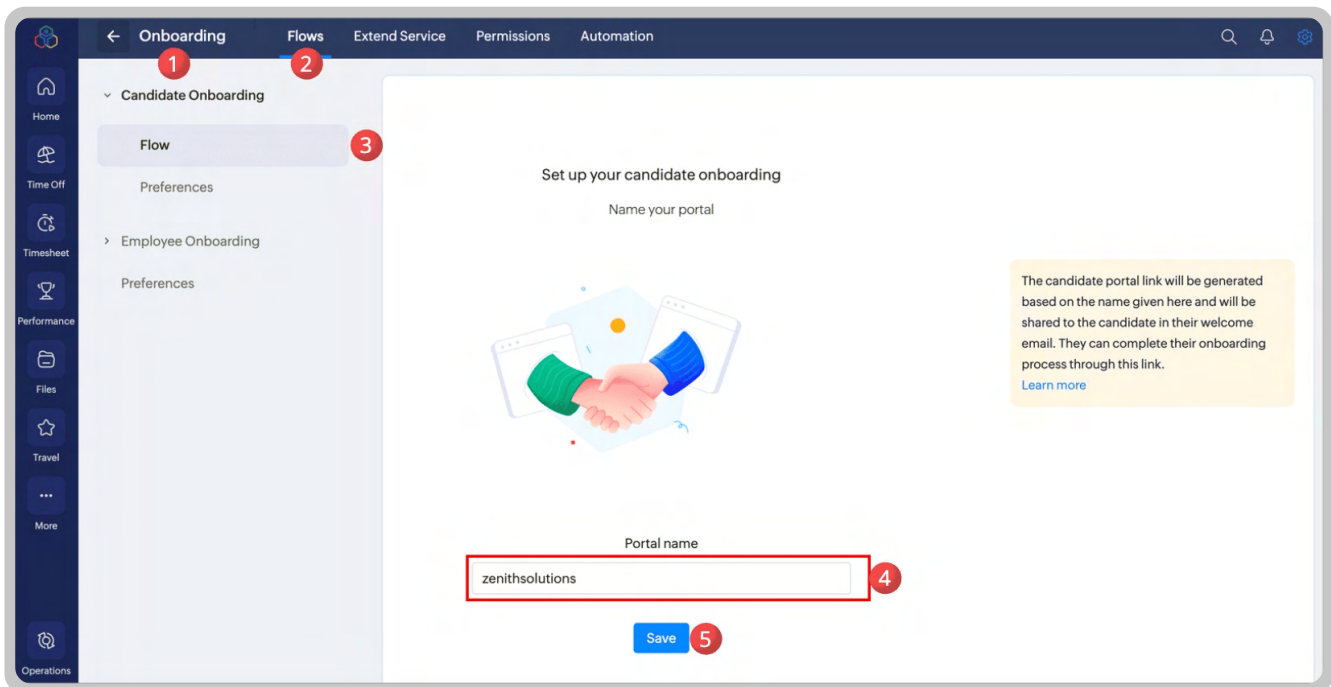
Candidate onboarding is facilitated through a portal. Define an appropriate portal name for your candidate onboarding flow. When a candidate is added and onboarding is triggered, the portal becomes accessible to them. Once a candidate completes the onboarding process, they will no longer have access to this portal.

INFO:

The portal access URL will typically be in this format:
people.zoho.com/[portalname]/cp/preonboarding.

To set up a portal:

1. If you are a first time user, navigate to **Settings > Onboarding > Configuration > Candidate Onboarding > Flow**, and enter your Candidate Onboarding portal name.



NOTE:

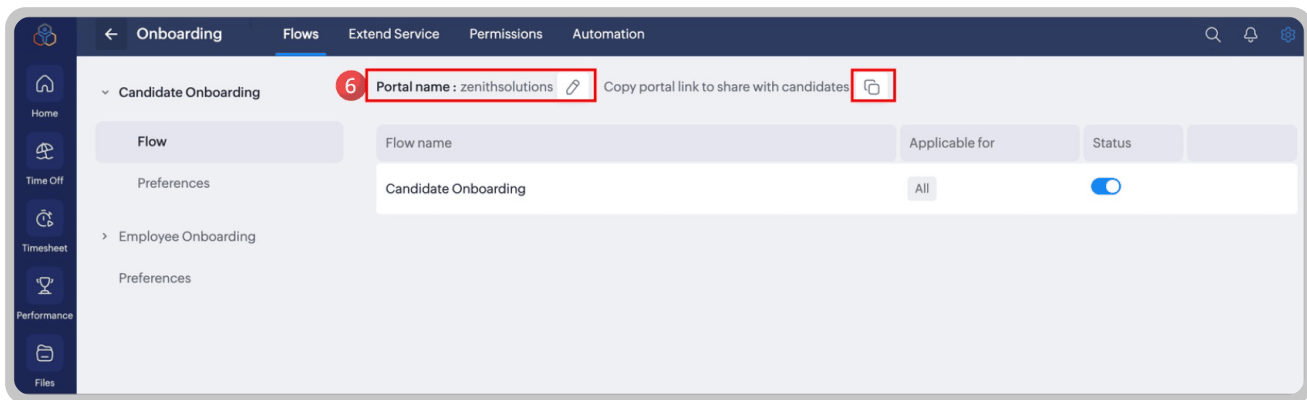
The entered portal name URL will be
people.zoho.com/zenithsolutions/cp/preonboarding.



2. If portal name is already defined, you can click on the edit (pencil) icon to edit and enter the new portal name.

INFO:

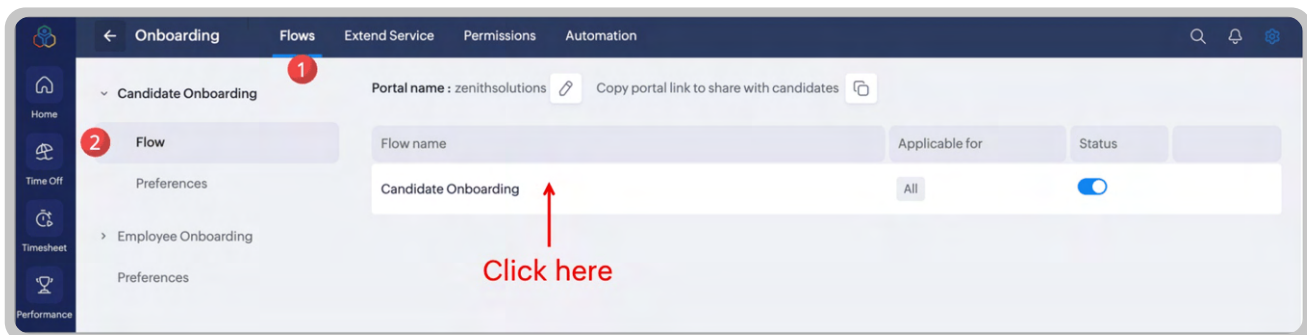
If you have already initiated the Candidate Onboarding process for your new hire and later updated the portal name, the existing link shared with your new hire will become invalid. You will need to send them the updated link to access and complete the Candidate Onboarding process.



3. Click **Copy portal link to share with candidates**, to copy and share updated Candidate Portal website URL to your Candidates for whom the onboarding is initiated.

Set up Candidate Onboarding Flow

The candidate onboarding flow contains the following tabs, that you can define and customize to your organizational preference, thereby making the onboarding process for your new hires more aligned with your company's policies and requirements.





To set up a Candidate Onboarding Flow, navigate to **Settings > Onboarding > Configuration > Candidate Onboarding > Flow**, and click on the **Flow name**.

[Learn more about setting up Candidate Onboarding Flow.](#)

Add New Candidate Onboarding Flow

You can create multiple candidate onboarding flows for your organization, which enables you to conduct a personalized onboarding process for your new hires based on their work location and designation.

To create a Candidate Onboarding flow based on location and designation:

1. Navigate to **Settings > Onboarding > Configuration > Candidate Onboarding > Flows**.
2. On the flows tab, Click **Add New Flow**.
3. Enter the **Flow name**.

The screenshot displays the 'Candidate Onboarding' configuration page. The top navigation bar includes 'Onboarding', 'Flows', 'Extend Service', 'Permissions', and 'Automation'. The 'Flows' tab is active, showing a table of existing flows. A red circle '1' is next to the user profile icon in the top right. A red circle '2' is next to the 'Onboarding' menu item in the left sidebar. A red circle '3' is next to the 'Flows' tab in the top navigation. A red circle '4' is next to the 'Flow' list in the left sidebar. A red circle '5' is next to the 'Add New Flow' button in the top right of the table area. A red arrow points from the 'Add New Flow' button to the 'Add New Flow' modal form.

Flow name	Applicable for	Status
Pre-Onboarding - Austin	Locations: Austin	<input checked="" type="checkbox"/>
Candidate Onboarding	All	<input type="checkbox"/>

Add New Flow

Flow name *

Applicable locations

Applicable designations

Portal access duration



4. Select **Applicable locations**.
5. Select **Applicable designations**.
6. Enter the **Portal access duration** in days and click **Save**.

INFO:

The candidate onboarding portal will be accessible to candidates only for a specified number of days from the initiation of the process. If the portal expires, candidates can contact their HR partner to regain access and complete their onboarding.

7. Upon adding the flow, set up the Onboarding Process, refer to [Set Up Candidate Onboarding Flow](#).
8. Click **Save**. A new onboarding flow for specified location and designation will be created.

Employee Onboarding Flow

An onboarding flow that you can customize to provide your new hire with a comprehensive introduction to the company. This includes documents and policies that need to be read and accepted, an introduction to their team members, and a brief overview of their goals and required training for a smooth transition into their role once they have joined the organization.

[Learn more about Employee Onboarding Flow.](#)

Add New Employee Onboarding Flow

Employee Onboarding supports multiple onboarding flow creation, allowing you to conduct a personalized employee onboarding process based on your new hire's work location, role, or designation.

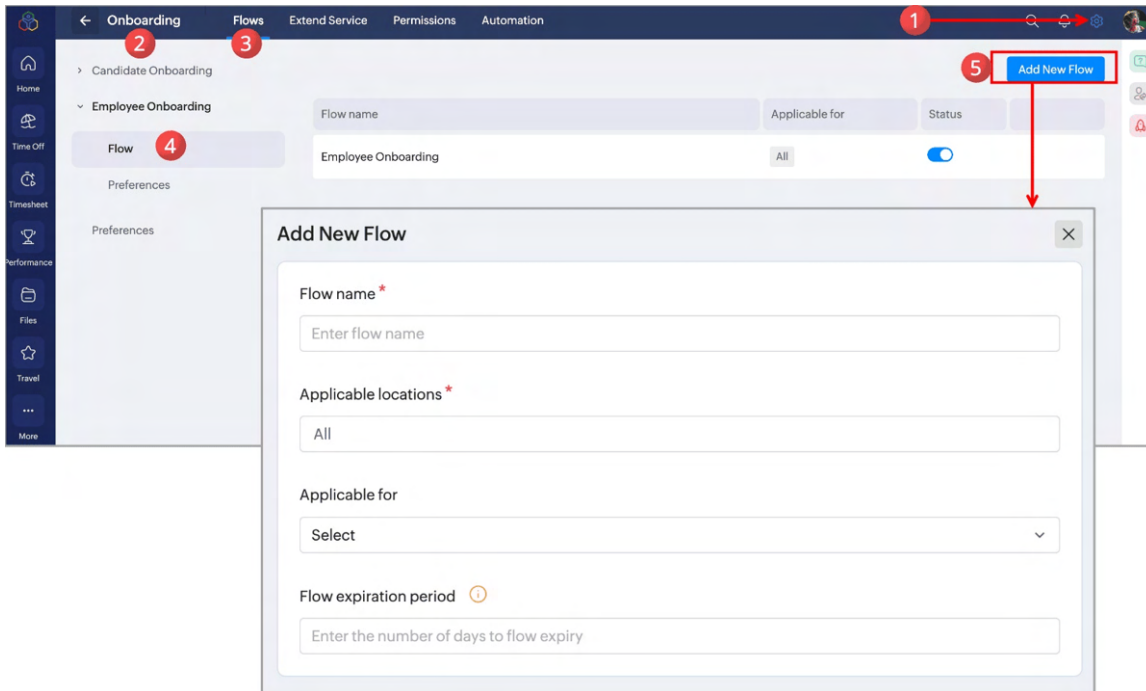
To create an employee onboarding flow:

1. Navigate to **Settings > Onboarding > Configuration > Employee Onboarding > Flow**.



2. Click **Add New Flow**.

3. Enter the **Flow name**.



4. Select the **Applicable location** for this onboarding flow.

5. Select **Applicable for** based on role or designation.

6. Enter the **Flow expiration period** in days and click **Save**.

7. After adding the flow, set up the onboarding process. For more details, refer to [Set Up Employee Onboarding Flow](#).

IDEA:

The maximum allowed expiry period is 120 days.

NOTE:

The employee onboarding flow will remain accessible for a specified period from the initiation date. For example, if set to expire in 15 days, it will deactivate after that time. Employees will need to contact their HR partner to reactivate the onboarding flow.

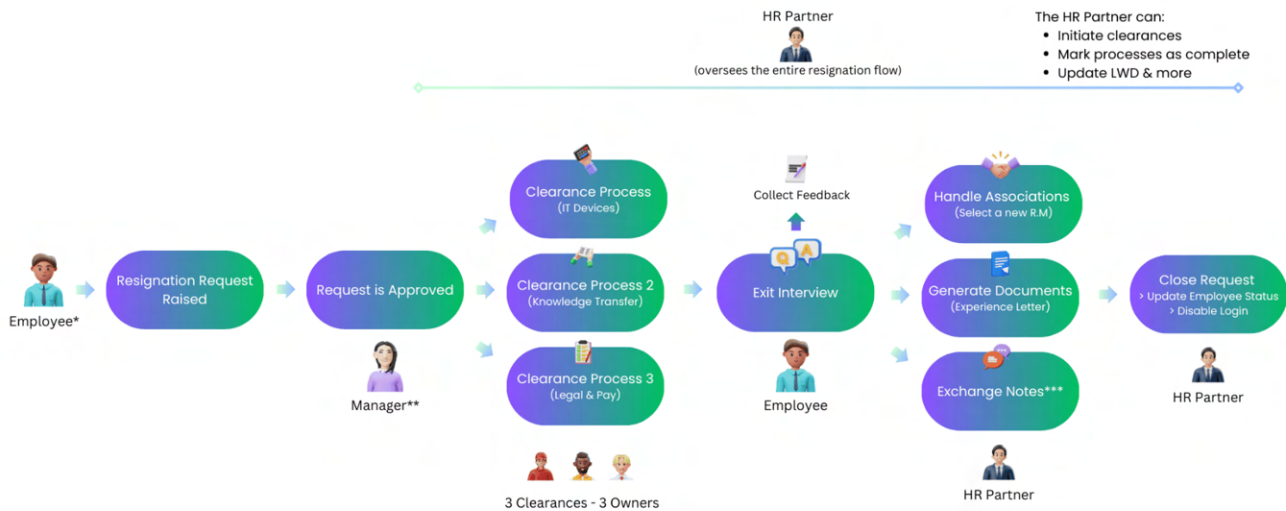
[Learn more about Onboarding Service in Zoho People.](#)



Offboarding Service

Offboarding is the formal process of transitioning employees out of an organization. This separation may occur due to resignation, termination, layoffs, or retirement. Zoho People’s Offboarding service is designed to support HR and employees at every stage of this journey, ensuring a smooth and efficient transition.

Here is a visual representation of how resignation requests are handled in Zoho People:



* Depends on permissions (Managers and administrators can also raise requests on the employee's behalf)

** Approver can be configured

*** Managers, Administrators and HR partners can view notes

Offboarding Settings

Configuring Offboarding Process

Creating Resignation Flows

1. Begin by navigating to the offboarding service settings. To do this, navigate to **Settings > Offboarding > Resignation Flow** tab.



- You will see the list of resignation flows. By default, only the **General flow** is available. Click on the listed general flow to edit or click on the **Add New Flow** button to create a new resignation flow.

[Learn more about adding a new resignation flow for your organization.](#)

Flow name	Applicability	Status
German Offboarding Flow	Location: Germany	<input checked="" type="checkbox"/>
Exit Process- L1 Executives	Location: Singapore, Japan; Designation: Manager-Leadership Staff	<input checked="" type="checkbox"/>
Dubai Offboarding	Location: Dubai	<input checked="" type="checkbox"/>
Team Member Resignation Flow	Designation: Content Writer	<input checked="" type="checkbox"/>
General	All	<input checked="" type="checkbox"/>

Managing Clearance Forms

To manage and create new clearance forms, navigate to **Settings > Offboarding > Extend Services > Clearance Forms**.

To create a new clearance form, click on **Add New Clearance Form**.

[Learn more about adding a new clearance form in offboarding service.](#)

Clearance	Owner	Due Date
Admin Clearance	Rodriguez Sue	1day(s) before last working date
Manager clearance	Randall Gladstone	1day(s) before last working date
Finance Clearance	Mary Hansley	1day(s) before last working date
HR Resignation clearance	HR partner	1day(s) before last working date

INFO:

The clearance forms created here can be used in resignation flows. Click on an **existing clearance form** to edit it, or hover the pointer to view the **delete** option.



Manage Exit Interview Templates

To manage and create new exit interview templates, navigate to **Settings > Offboarding > Extend Services > Exit Interview Templates**.

To create a new exit interview template, click on the **Add New Template** button.

[Learn more about adding a new exit interview template.](#)

Exit interview templates	Questions	Actions
Team Member Resignation Flow	04	
Team Member Resignation Flow	04	
Team Member Resignation Flow	04	
Team Member Resignation Flow	04	
HR Resignation flow	05	
General	10	

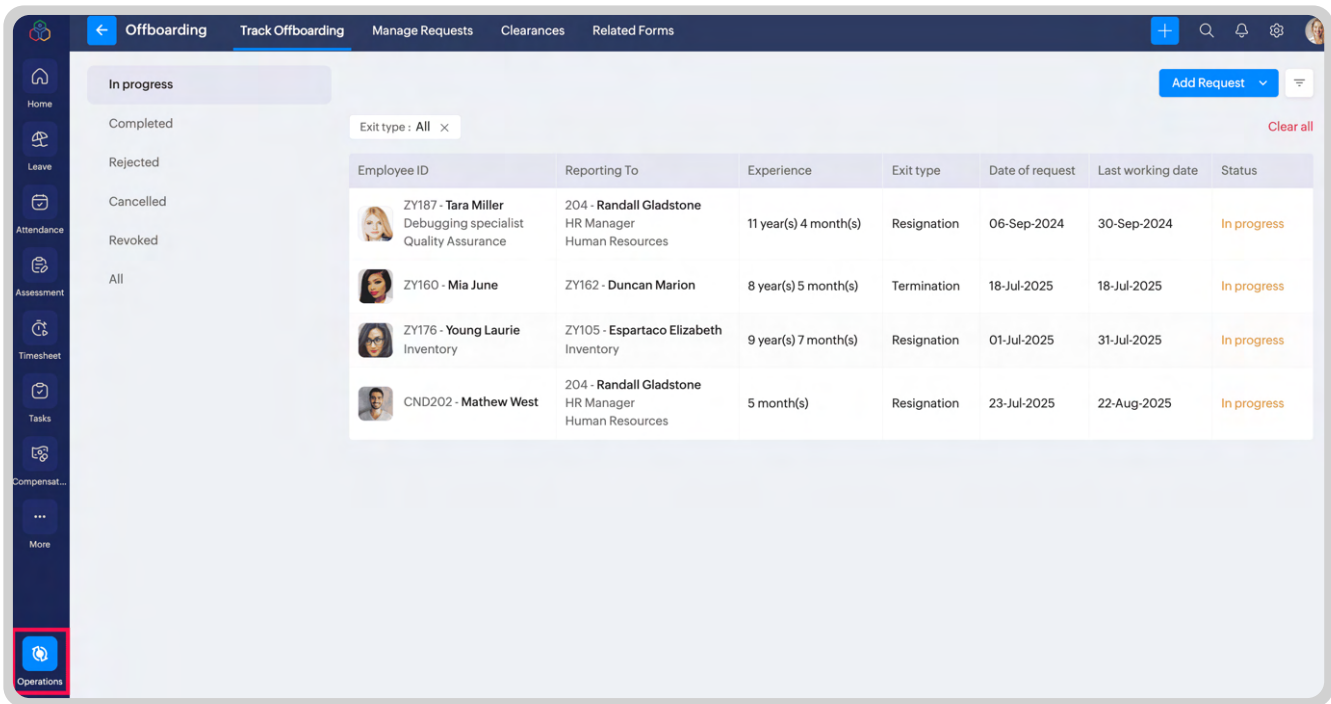
INFO:

The exit interview templates created here can be used in resignation flows. Click on an **exit interview template** to edit it, or hover the pointer to view additional options such as **delete** and **edit**.

[Learn more about setting up offboarding settings for your organization.](#)

Offboarding Operations

To navigate to offboarding operations, click on the **Operations** icon from the bottom-left corner and select **Offboarding**.



Administrators can do the following actions from offboarding:

- Track offboarding request by status.
- Add offboarding related requests, this includes:
 - > Resignation requests on other employees' behalf
 - > Termination records
 - > Deceased records
- View termination, deceased, and resignation records.
- Cancel or Revoke resignation requests.

Handle applicable clearances.

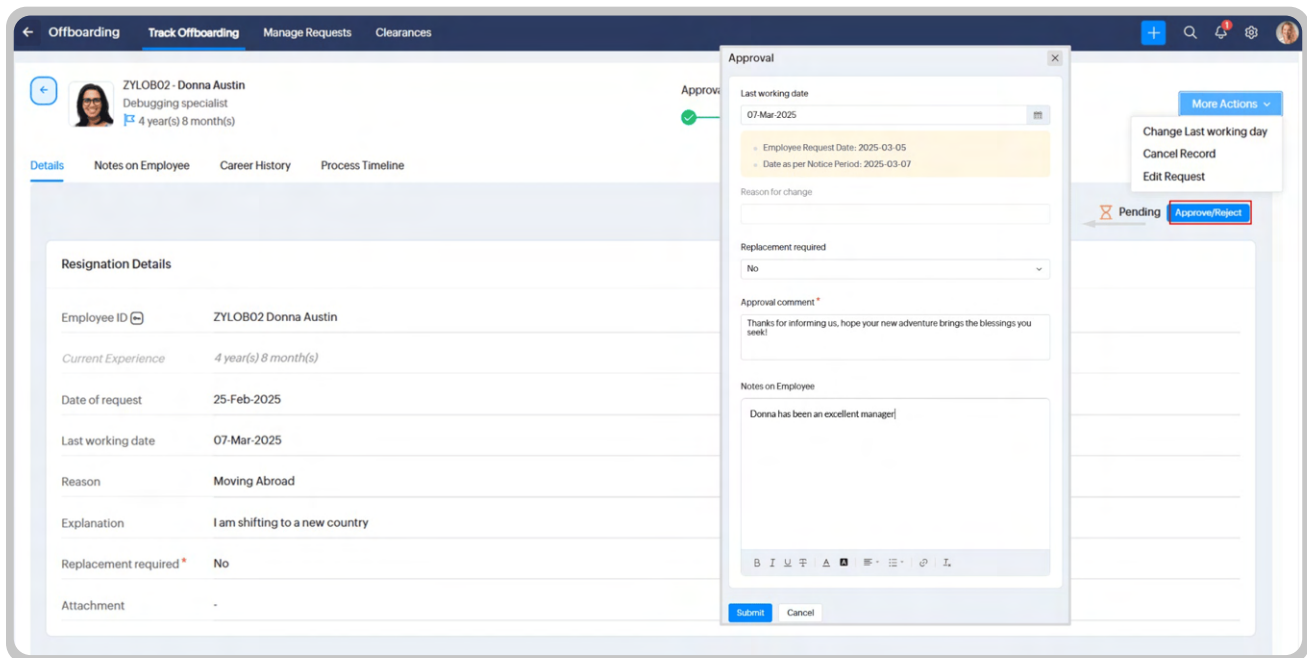
[Learn more about offboarding operations.](#)



Handling a Resignation Request (HR Partner)

Approving a Resignation Request

When an approval request is raised, the HR partner must first approve the request. To do this first navigate to the corresponding resignation request (**Operations > Offboarding > Track Offboarding**) and open the resignation request.



1. Click on the **Approve/Reject** button.
2. Make any changes to the Last Working Date if required. The system will display dates based on the standard notice period associated with the resignation flow and the date requested by the employee.
3. You can also specify if a replacement is required using the provided drop-down.
4. Enter an approval comment and add a note on the employee if required (the employee will not be able to view the note. It is only for HR partner, reporting manager, and administrators).
5. Click **Submit**.



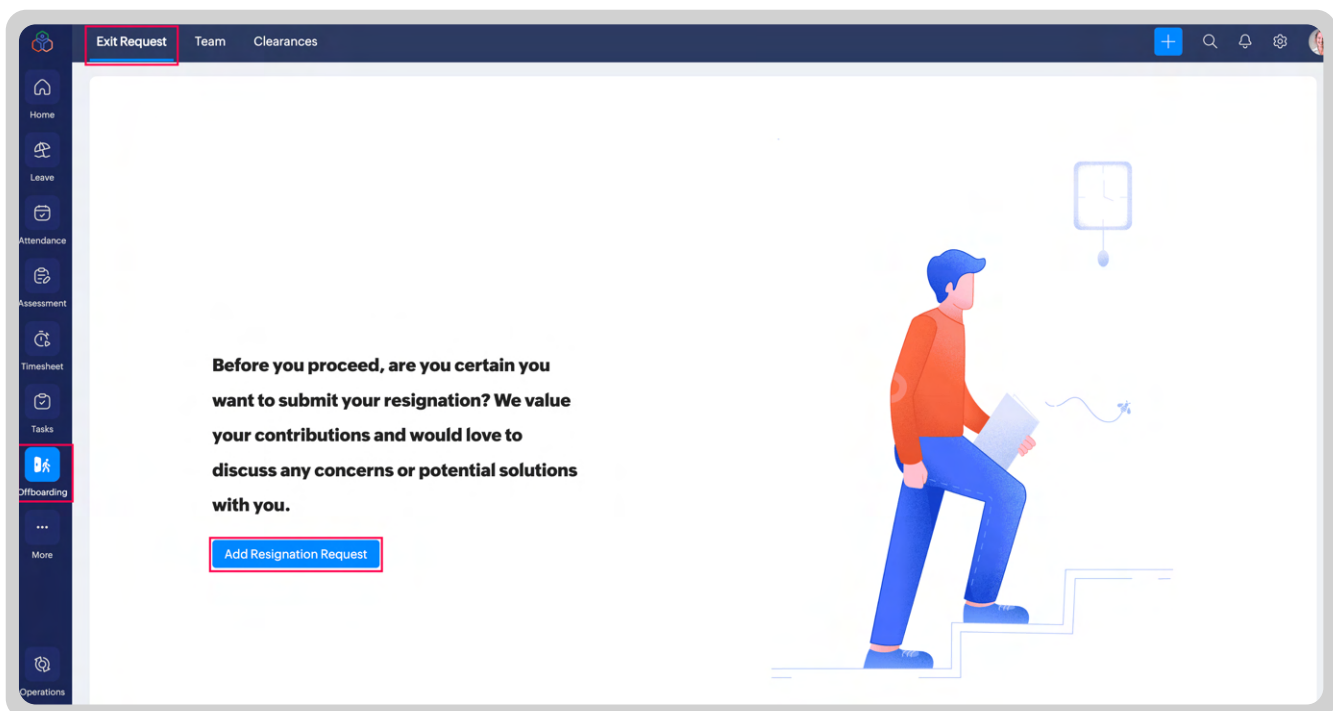
Once the request is approved, it will be moved to the clearance stage.

[Learn more about offboarding operations.](#)

Offboarding User-Service

Raising a Resignation Request

After careful consideration, proceed with the following steps to raise a resignation request:



1. Navigate to the **Offboarding** user service from the left bar. Click on the **Add Resignation Request** button.
2. Fill in the details; this includes the expected last working date, reason, and explanation. Add any related attachments if required.



Add Resignation

Resignation Details

Employee ID *	ZYLOB02 Donna Austin
Current Experience	4 year(s) 8 month(s)
Last working date	20-Mar-2025
Reason *	Career Opportunities
Explanation	I have decided to shift to a new organization that is closer to my home.
Attachment	<p>Upload from Desktop / Zoho WorkDrive / Others</p> <p>Max. size is 5 MB</p>

[Submit](#) [Cancel](#)

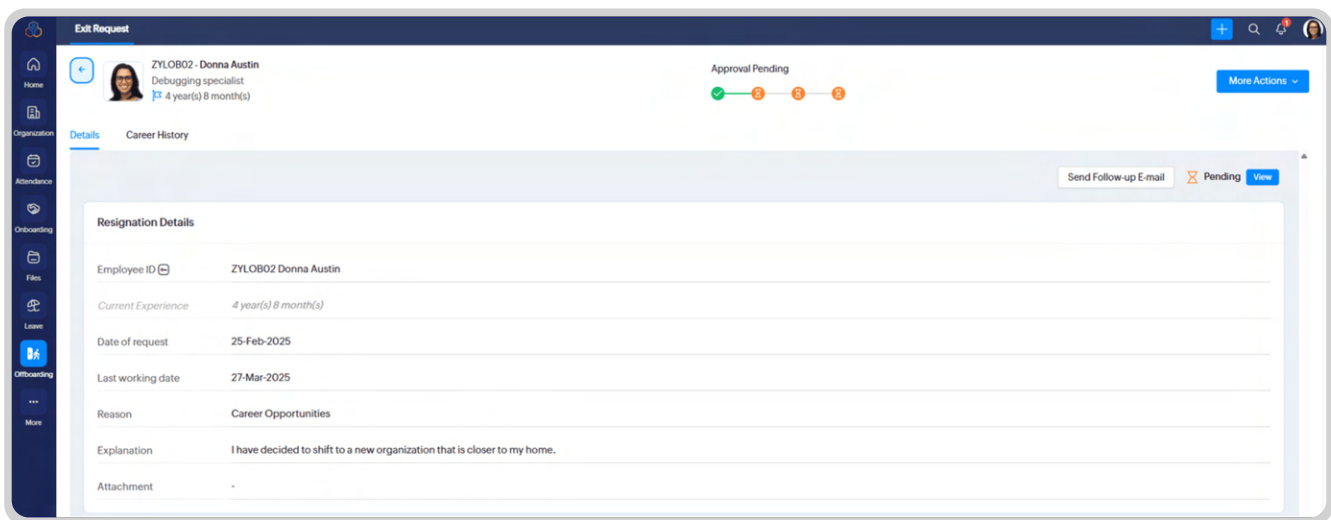
INFO:

Your organization can have different notice periods in place for resignation processes. The person handling the resignation requests can change the notice period.



3. Click **Submit**. You will be required to consent once more and proceed with a **Yes**.
4. Your resignation request is now raised. The status can be tracked from the offboarding service (left bar). The person handling the resignation requests must approve the resignation request for it to proceed.

From here, you can also view your career history (click on the career history tab), see the offboarding request timeline bar, send a follow-up email, or click on View to see approver details.



[Learn more about offboarding user service.](#)

INFO:

If you try to add a resignation record that has a past date selected, it is mandatory that the current login status of that particular employee is in enabled state.

For past dated records, the login will then be switched to disabled, and the request will be auto-approved and auto-completed by the system.

Additionally, you may see a dialog box that includes an option to initiate the flow if required.

[Learn more about Offboarding Service in Zoho People.](#)



File Management

The Files service in Zoho People is a centralized repository for storing and accessing your organization's files. You can send documents for e-signing and manage all e-signed documents in one place.

Zoho People allows you to store and access files of your organization in the following types:

Organization Files: Generic documents like company handbooks, leave policies, code of conduct folios, legal and compliance documents can be stored in this repository. [Learn more about Organization Files and adding it.](#)

Employee Files: Documents containing sensitive information and files specific to employees can be stored under Employee Files with increased privacy. [Learn more about Employee Files and adding it.](#)

Personal Uploads: This space is exclusively for employees' documents. The personal uploads can be accessed only by employees. Administrators will not have access to anyone's personal files. [Learn more about Personal Uploads and adding it.](#)

Setting Up Files Service

To set permissions for file service access from home page, go to **Settings > Files > Configuration > General**.

Employee Files

To set restrictions on who can access the Employee Files tab, enable Restrict access for viewing Employee files tab and select the following:

- For specific roles and employees (select roles and employees upon selecting this option)
- For all employees



Personal Uploads

To set restriction who can access Personal uploads, enable Allow access for viewing personal files tab and select the following:

- For specific roles and employees (select roles and employees upon selecting this option)
- For all employees

You can set the maximum number of personal files allowed per employee.

Employee files

Upload important employee files, such as IT Statements and payslips, which may contain sensitive data.

Restrict access for viewing Employee files tab

For specific roles and employees For all employees

Roles: Manager x

Employees: 144 Silver x

Personal uploads

A space for employees to store their confidential personal files securely, such as passport or driver's license copies. Access to these files is completely restricted for other users, administrators can only view the number of files and the space utilized.

Allow access for viewing personal files tab

For specific roles and employees For all employees

Roles: Director x

Employees: 144 Silver x

The maximum number of personal files allowed per employee is



Personal Uploads

To set restriction who can access Personal uploads, enable Allow access for viewing personal files tab and select the following:

- For specific roles and employees (select roles and employees upon selecting this option)
- For all employees

You can set the maximum number of personal files allowed per employee.

The screenshot shows two configuration panels. The top panel, titled 'Employee files', has a 'Save' button and a 'Reset' button. It contains a toggle for 'Restrict access for viewing Employee files tab' which is turned on. Below this are two radio buttons: 'For specific roles and employees' (selected) and 'For all employees'. Under the selected option, there are two input fields: 'Roles' with 'Manager' selected and 'Employees' with '144 Silver' selected. The bottom panel, titled 'Personal uploads', also has 'Save' and 'Reset' buttons. It contains a toggle for 'Allow access for viewing personal files tab' which is turned on. Below this are two radio buttons: 'For specific roles and employees' (selected) and 'For all employees'. Under the selected option, there are two input fields: 'Roles' with 'Director' selected and 'Employees' with '144 Silver' selected. At the bottom of the panel, there is a label 'The maximum number of personal files allowed per employee is' followed by an input field containing 'Enter a valid number' and a small up/down arrow icon.

File View

Select the default type of view of organization and employee files:

- List
- Folder



Team Files

To allow department heads to add team files, enable **Allow department head to add team files**.

Reportee Files

To allow reporting managers, and their managers to view files specific to their reportees, select these options:

- Immediate reporting managers can access.
- Reporting managers and their managers can access.

Organization Files

User with administrator role can only access the organization files tab in operations.

File View

Specify the default type of view of organization and employee files

List

Folder

Team Files

A space for files shared with a particular department by the department head such as team documents, project plans, and training materials.

Allow department head to add team files

Reportee files

Files specific to employees that can be shared with reporting managers and their managers

Immediate reporting managers can access

Reporting managers and their managers can access

Organization Files

Upload essential files such as policies or company handbooks that can be shared across the entire organization or for selected business entities, locations, departments, etc



Exempt mandatory document acknowledgement

Select the user roles that should be excluded from the mandatory document acknowledgement requirement. Users in these roles will be able to access Zoho People even after the acknowledgement due date, while other users will be restricted until they acknowledge the documents.

Exempt mandatory document acknowledgement

Employees in the selected roles below are exempted from mandatory document acknowledgement, even on the last day.

Roles

E-Sign Documents

This helps ensure a secure and accurate online signing process in Zoho People, allowing you to send files that require employee acknowledgement and signatures.

NOTE:

You can send a file for e-signature only after integrating with one of the e-sign platforms. For information on integrating with an e-sign platform, refer to [E-Sign Application Integrations](#). Upon integration, the E-Sign Documents tab and e-sign options will be visible in the **Files > Operations** section.

Creating E-Sign Templates

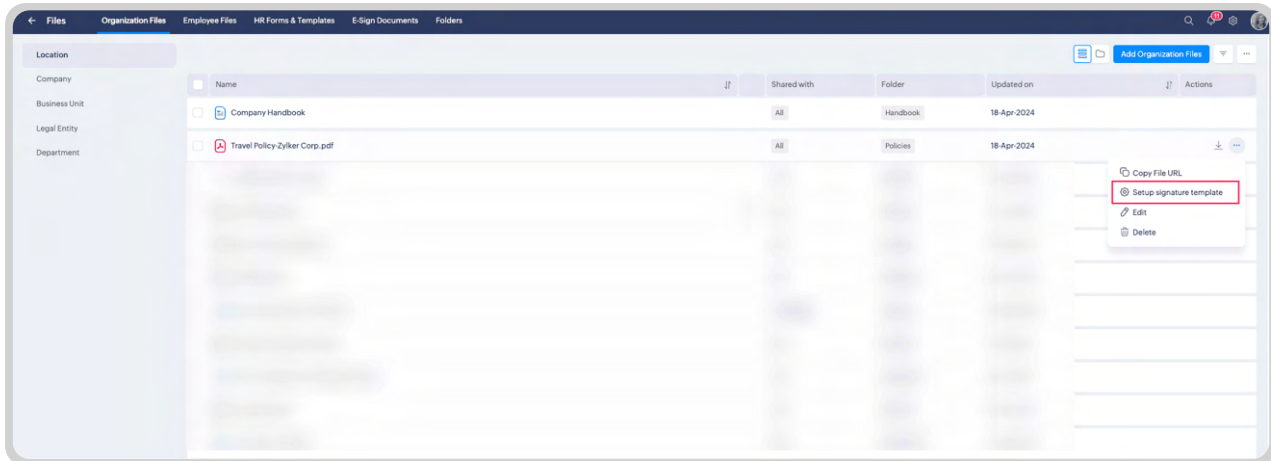
You can create an E-sign template at the following interfaces and use them wherever needed.

- Zoho People - Organization Files
- Zoho Sign application



To set up a new signature template for e-sign:

Go to **Operations > Files > Organization Files > Actions**, hover the pointer over an existing file and click on the ellipses icon and select **Setup signature template**.

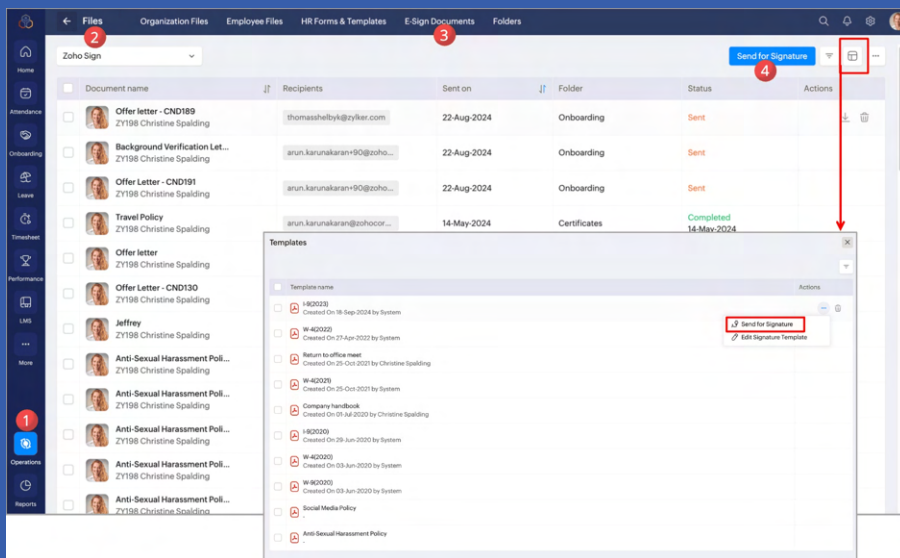


[Learn more about creating E-Sign Templates here.](#)

NOTE:

After setting up a new signature template, learn more about how to [send a document for E-Signing](#).

To send a document for e-signature:
From your home page go to **Operations > Files > E-Sign Documents**.





E-Sign Application Integrations

Zoho People supports e-signing through integrations with Zoho Sign, Adobe Sign, and DocuSign. You can send documents for e-signature across multiple areas - including Onboarding, Forms, the Files module, and E-Sign Flows in Automation - allowing recipients to sign documents electronically with ease.

Learn more about how to enable E-Sign integration for [Zoho Sign](#), [Adobe Sign](#) and [DocuSign](#).

NOTE:

Only one e-sign platform integration can be enabled at a time in Zoho People.

[Learn more about Files Service in Zoho People.](#)

Learning Management System (LMS)

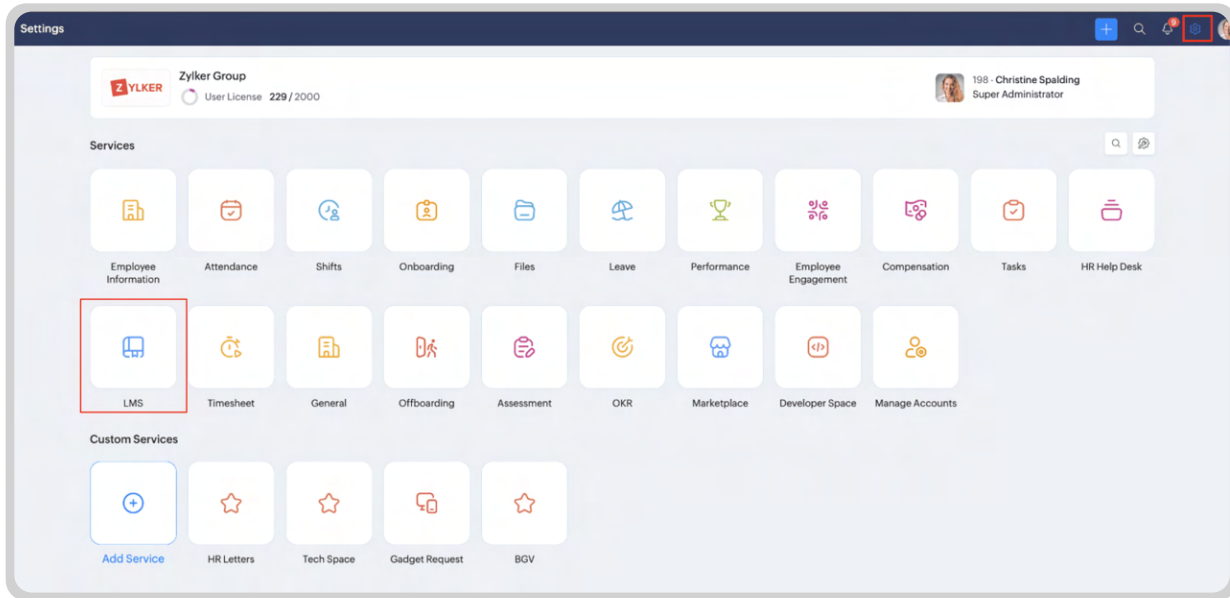
An online platform to facilitate different types of courses and chart out specific learning plans for your employees. Employee training is always vital, and it aids in the overall growth and development of the organization. In essence, LMS involves creating curated courses for your employees, evaluating employees on courses through tests, and awarding new skills and certificates to employees.

Setting Up LMS

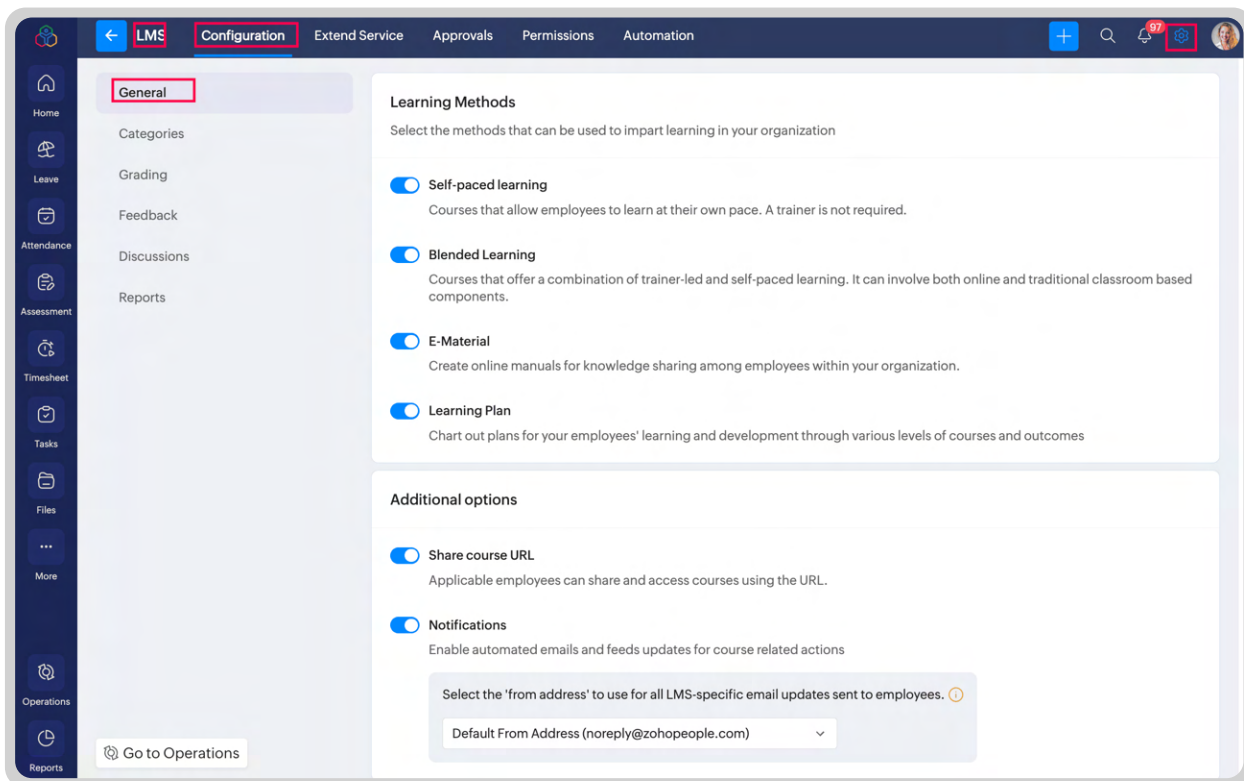
Configuration

General

To access LMS Settings, Go to Settings > LMS. Configure LMS related settings that affect all courses throughout LMS. Use the various tabs on the right to view other settings.



In the general page of settings, enable the type of courses that your organizations will feature. You can also enable course sharing and enable or disable automatic email notifications.



[Learn more about setting up LMS.](#)



Courses in LMS

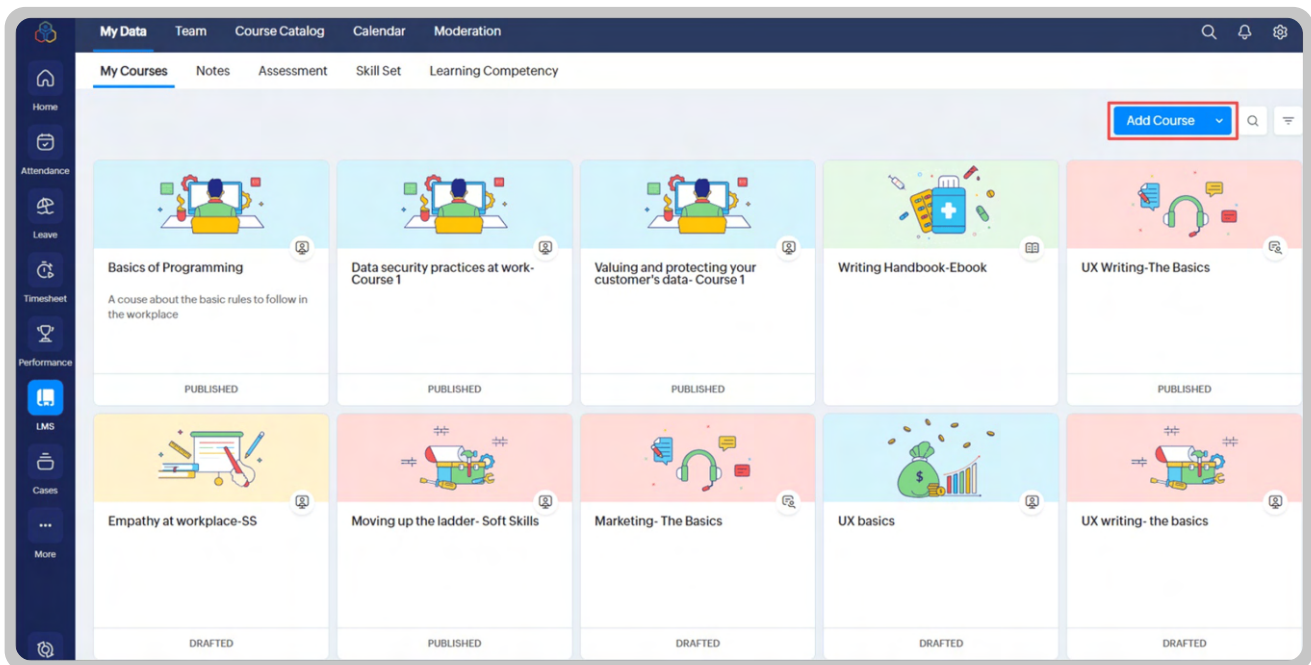
LMS offers various types of courses, which include self-paced, blended, e-material, and learning plans.

Self Paced Learning

A learning method where the learner can move from one subject/course to other based on how much they have understood the previous ones. This can include reading content or tutorials that do not involve an instructor and the learning can go at their own pace.

To add and manage a self paced learning course:

1. Go to **LMS (from left bar) > My Data > My Courses**.
2. Click **Add Course**.



3. Enter the **course name**.
4. Select the type of course: **Self Paced Learning**.



Add Course ✕

Name *

Type

Create

5. Click **Create**.

NOTE:

Once the course is created, you can start adding [Modules](#) and [Course Entities](#). Course entities in a Self Paced Learning includes [File](#), [Link](#), [Assignment](#), [Offline Test](#), [Online Test](#), and [Content](#).

Blended Learning

A hybrid learning method that combines classroom instruction with self paced online training, guided by an instructor. It generally concludes with an assessment.



To add and manage a self paced learning course:

1. Go to **LMS (from left bar) > My Data > My Courses**.
2. Click **Add Course**.
3. Enter the **course name**.
4. Select the type of course: **Blended Learning**.

Add Course ✕

Name ^{*}

Type

Batch name ^{*}

Start date ^{*}

End date ^{*}

Capacity

Minimum ^{*}

Maximum ^{*}

Create



5. Enter the batch name.
6. Select the start and end date of the batch.
7. Enter the minimum and maximum capacity of the batch.
8. Click **Create**.

NOTE:

Once the batch is created, sessions can be defined. [Learn more about Sessions.](#)

Once the batch and sessions are created, you can start adding [Modules](#) and [Course Entities](#). Course entities in a blended learning course includes [File](#), [Link](#), [Assignment](#), [Offline Test](#), [Online Test](#), and [Content](#).

E-Materials

To add and manage an E-material:

1. Go to **LMS (from left bar) > My Data > My Courses**.
2. Click **Add Course**.

The screenshot shows a dialog box titled "Add Course" with a close button (X) in the top right corner. Inside the dialog, there are two input fields. The first is labeled "Name*" and contains the text "Soft Skills Training". The second is labeled "Type" and is a dropdown menu currently showing "E-Material" with a downward arrow. At the bottom left of the dialog, there is a blue button with the text "Create".



3. Enter the e-material name.

4. Click **Create**.

Learning Plan

The learning plan in Zoho People is to help train employees with the help of a curriculum or a syllabus-like focused approach. A carefully crafted learning plan can include a set of selected courses that employees belonging to a specific role or designation can undertake in order to improve themselves thereby becoming more valuable people in the company.

[Learn more about creating a Learning Plan.](#)

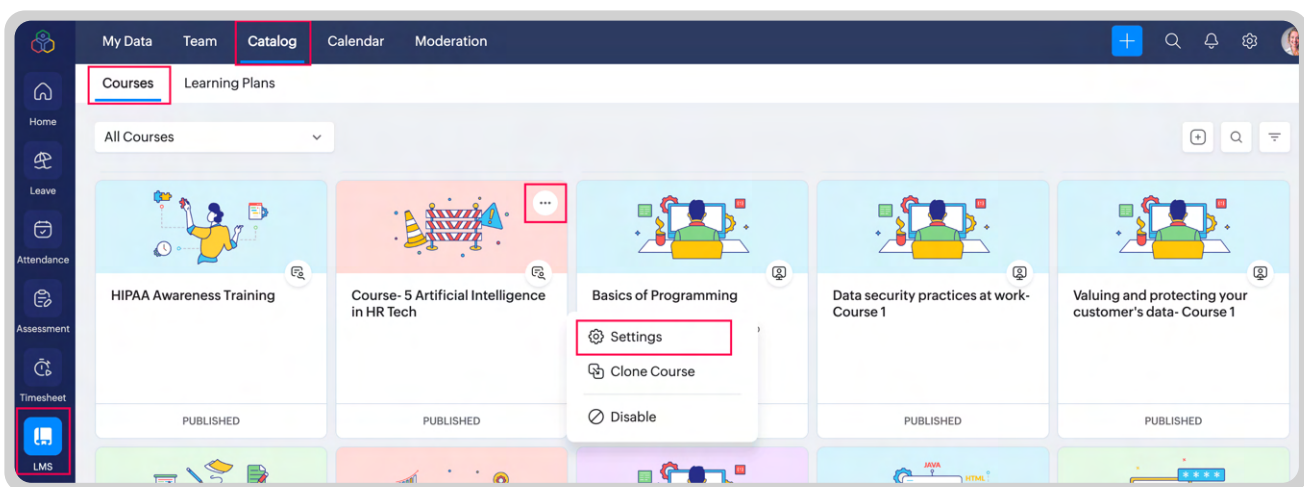
LMS - Course Settings

Course Settings refers to the settings that you can define for each course. Learning methods refer to the various approaches to how learners will engage with it, such as self training, online classes with instructors, or through study materials.

[Learn more about setting up the course settings in LMS.](#)

The first common step is to create a new course:

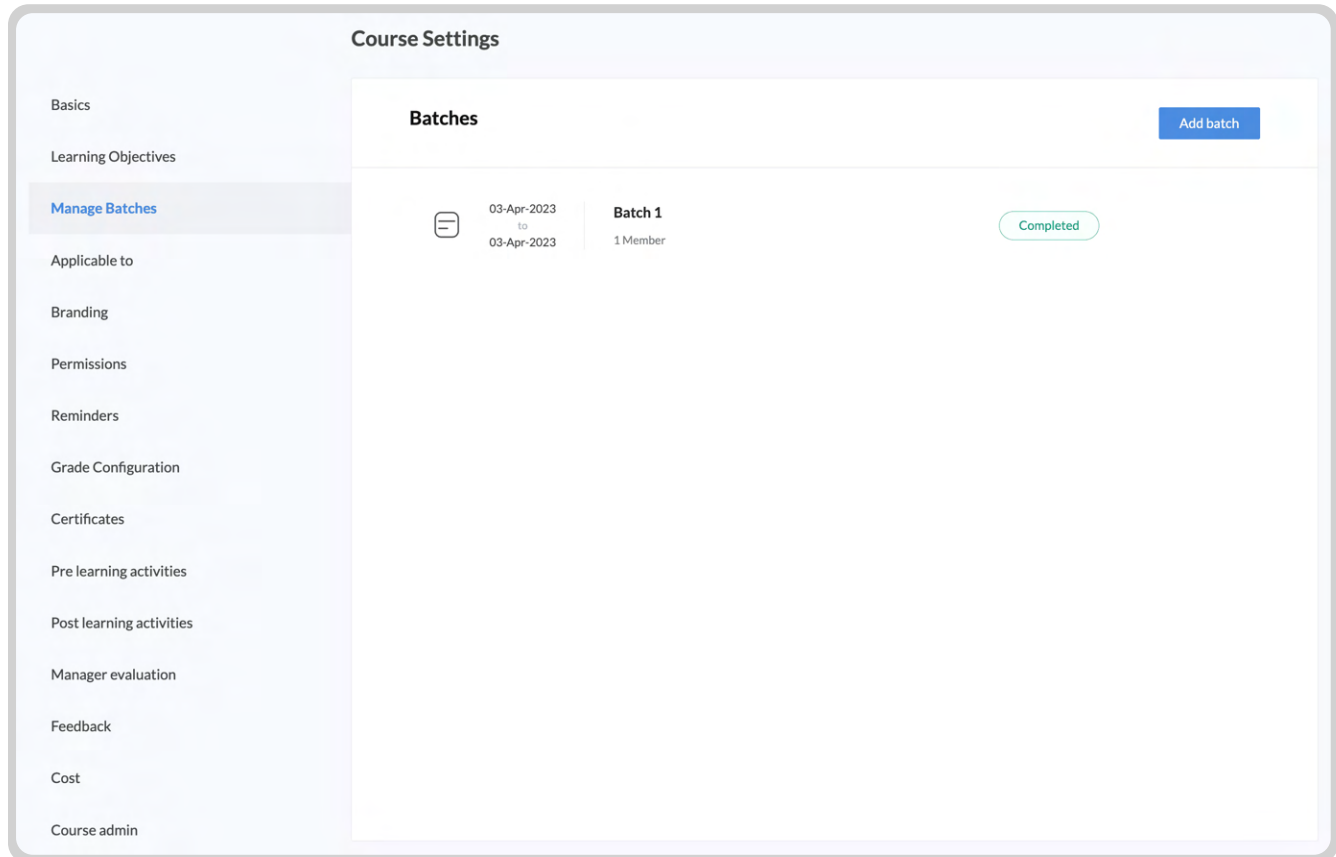
Go to **LMS (from left bar) > My Data > My Courses**. Click **Add Course**.





The next important step is to access and define the settings of a particular course:

1. Go to **LMS (from left bar) > Catalog > Courses**.
2. Click on the ellipsis icon of the course. Click **Settings**.



[Learn more about LMS Service in Zoho People.](#)

Employee Engagement

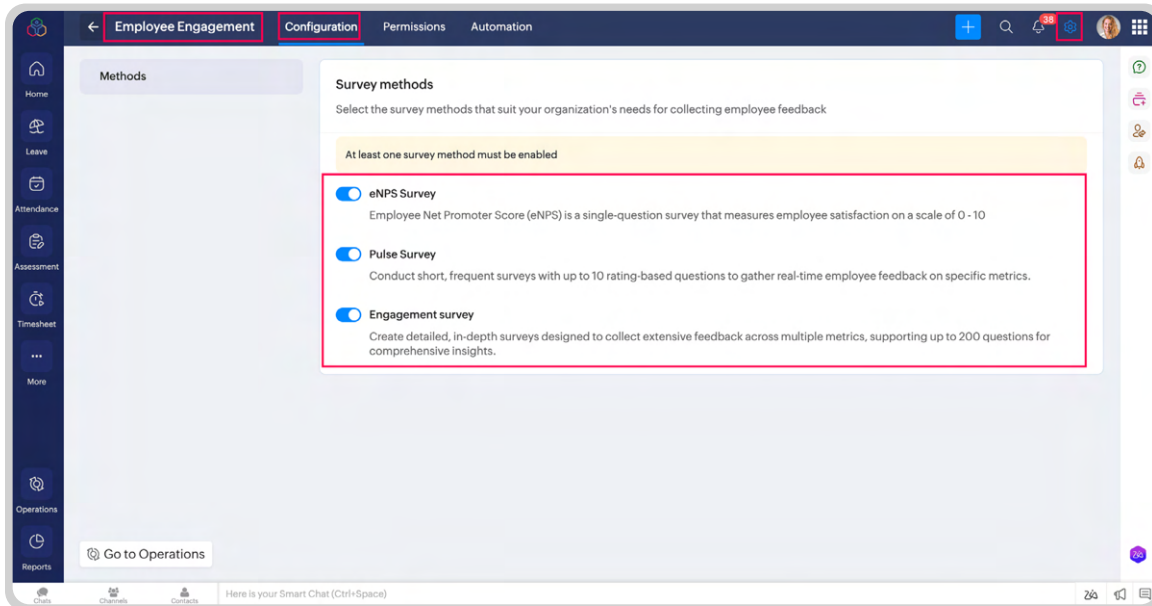
Employee engagement in Zoho People empowers you to conduct surveys in your organization to gather feedback from your employees on their level of job satisfaction, work-life balance, teamwork, compensation and benefits, employee recognition, and other aspects of their experience with your organization. Surveys can be conducted anonymously to gather honest feedback.



Enable or disable survey methods

To enable or disable survey methods:

1. Navigate to **Settings > Employee Engagement > Configuration tab.**



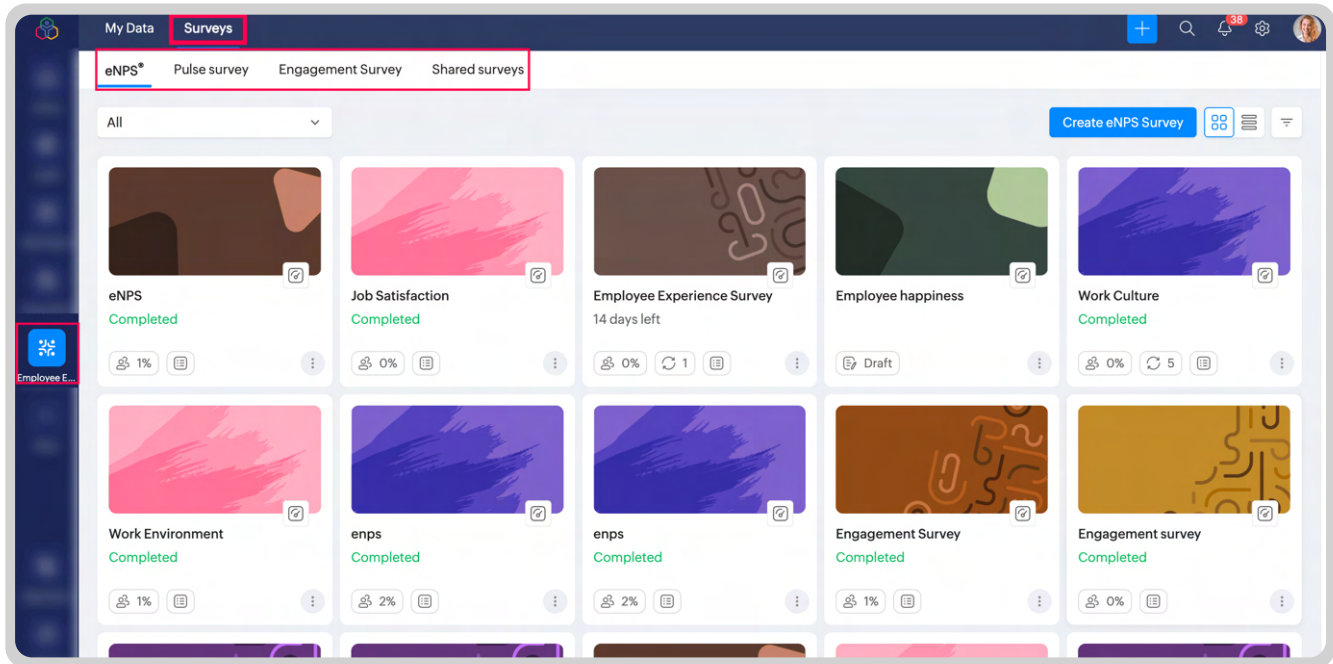
2. Use the toggle button to enable or disable the survey methods. The following are the types of surveys. (Learn more about the corresponding survey type below to learn more in detail).

- **eNPS Survey** - The Employee Net Promoter Score (eNPS) survey in Zoho People allows you to conduct a survey and measure employee loyalty and satisfaction. It is based on the Net Promoter Score (NPS) methodology used in customer satisfaction surveys. [Learn more](#).
- **Pulse Survey** - These surveys help you quickly analyze feedback and take timely action. You can include up to 10 questions per pulse survey and schedule them to repeat weekly, biweekly, monthly, or quarterly. [Learn more](#).
- **Engagement Survey** - The survey aims to gather comprehensive feedback from employees regarding various aspects of their work environment, job satisfaction, and overall engagement levels. An extensive survey to measure employee engagement and satisfaction that can contain up to 200 questions. [Learn more](#).



This action hides or displays the corresponding survey tabs within the employee engagement service.

Additionally, the [Shared Survey](#) tab will be visible if a survey is shared with the logged in user.

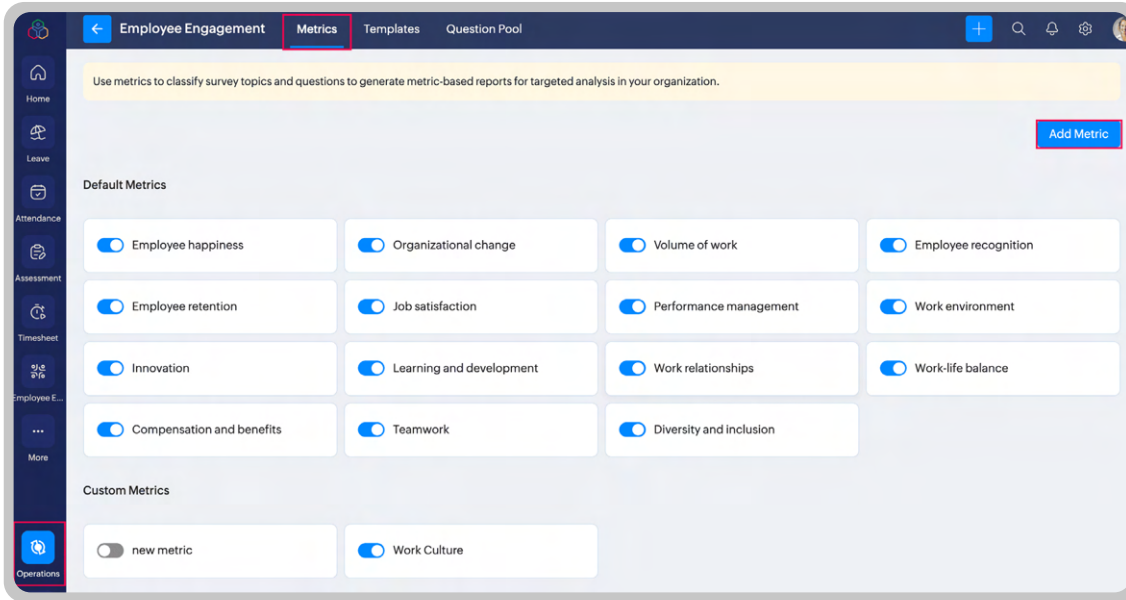


[Learn more about Employee Engagement Settings.](#)

Employee Engagement Operations

Metrics

Metrics in employee engagement are categories under which your survey topics and questions fall. Metrics can be tagged with survey questions and can be used to view surveys based on metrics.

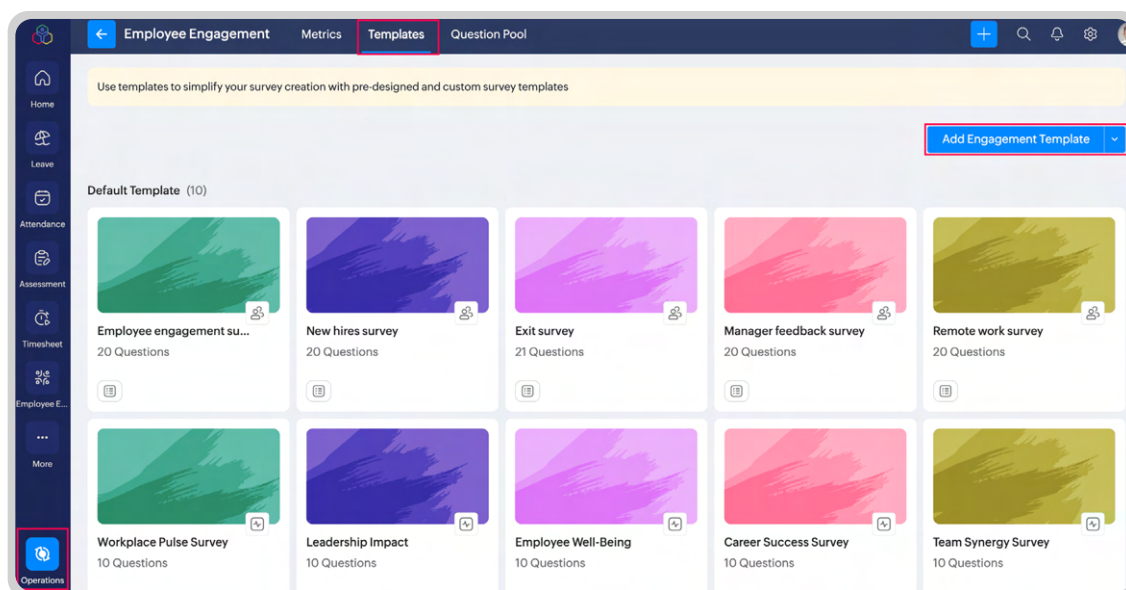


To create custom metrics, navigate to **Operations > Employee Engagement > Metrics > Add Metric**.

[Learn more about adding custom metrics.](#)

Survey Template

Survey templates are used to conduct hassle-free surveys in your organization with pre-designed or custom survey templates.





To add custom survey template, navigate to **Operations > Employee Engagement > Templates**.

[Learn more about adding custom engagement template.](#)

Question Pool

Question pool is a repository of pre-defined questions that can be used when creating a survey or template. All new questions added to an eNPS survey, engagement survey, or template are automatically added to the question pool.

To add questions to question pool, go to **Operations > Employee Engagement > Question Pool**.

The screenshot shows the 'Question Pool' interface. The top navigation bar includes 'Employee Engagement', 'Metrics', 'Templates', and 'Question Pool' (highlighted with a red box). The 'Add Question' button is also highlighted with a red box. The main content area displays a table of questions:

Questions	Question Type	Actions
<input type="checkbox"/> Rate the services offered in your organization	Star	
<input type="checkbox"/> Rate your skill development opportunities in your current team	Star	
<input type="checkbox"/> Rate your current team satisfaction level	NPS	
<input type="checkbox"/> Do you feel valued and generally feel appreciated for the work that you do?	Yes/No	
<input type="checkbox"/> Are you able to maintain a healthy work life balance?	Yes/No	
<input type="checkbox"/> Rate your team experience	Rating Scale	
<input type="checkbox"/> How would you rate your work experience in our team?	Star	
<input type="checkbox"/> Does your organization support work-life balance well?	NPS	
<input type="checkbox"/> How much do you agree to your manager's vision of your team	Rating Scale	
<input type="checkbox"/> Rate your team	Star	

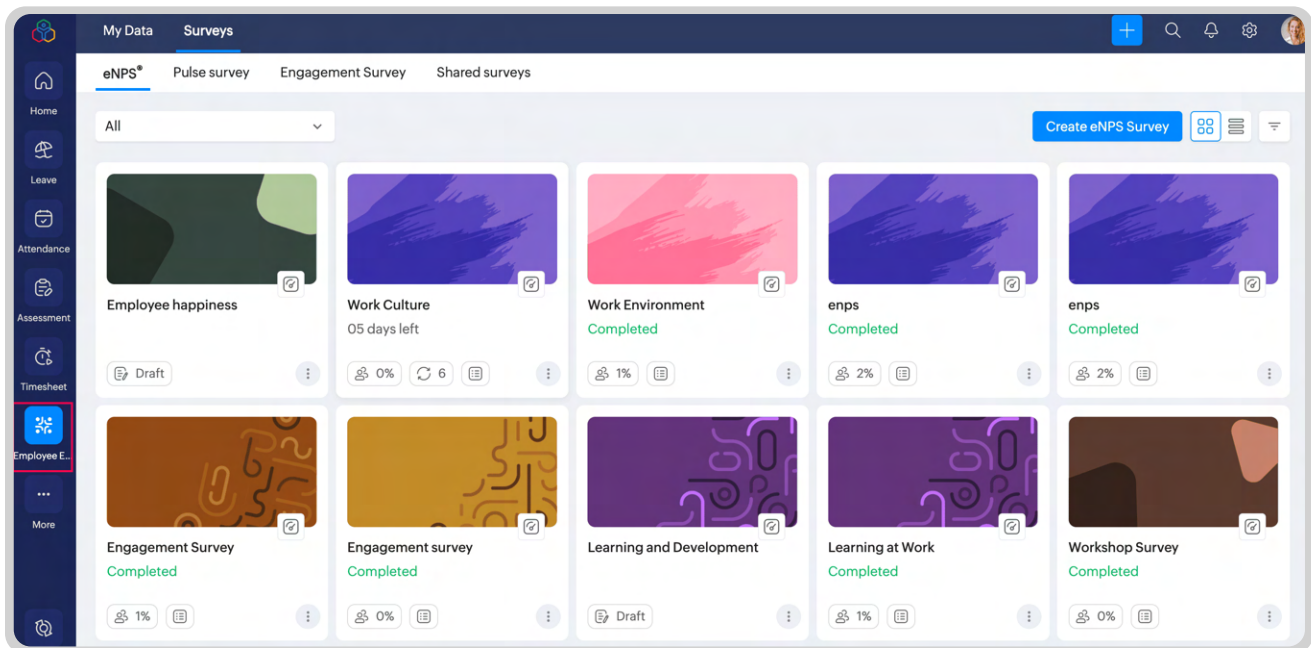
[Learn more about adding questions to question pool.](#)



Employee Engagement User Service

It is a space where all the surveys created by the organization that are applicable to the employees are listed. Employees can participate in surveys, view their responses, and track their status.

Learn more about [submitting a survey response](#) and [view responses on a completed survey](#).



[Learn more about Employee Engagement in Zoho People.](#)

HR Help Desk

HR Help Desk service in Zoho People is an advanced employee query management system through which you can handle queries, requests, and inquiries swiftly and systematically within your organization. It facilitates efficient HR query handling and ensures that employee queries are resolved effectively, thereby significantly improving employee satisfaction.



Glossary Terms

Categories: Categories are the divisions under which you can raise queries. The 'General Queries' category is available by default. You can also add more categories based on your organizational needs.

Query: Query refers to the question you raise to the HR. Once raised, a query becomes a 'Request' and can be tracked.

Subcategory: Divisions within each category. For example, under the 'Travel' category, 'Domestic' and 'International' are the subcategories.

Tasks: For each query, Tasks can be added and assigned to themselves or their subordinates.

Agent: An agent can refer to an individual, group, or a department.

Requestor: One who has raised a query.

HR Help Desk Agent: One who handles and resolves the query submitted in a specific category.

[Learn more about HR Help Desk glossary terms.](#)

HR Help Desk - Categories

These are divisions under which queries can be categorized. Zoho People provides the following default categories, and additional ones can be added based on your organizational needs:

General Queries: When enabled, this category allows employees to view and submit queries related to general topics. You can customize the General Queries category based on your organizational preferences.

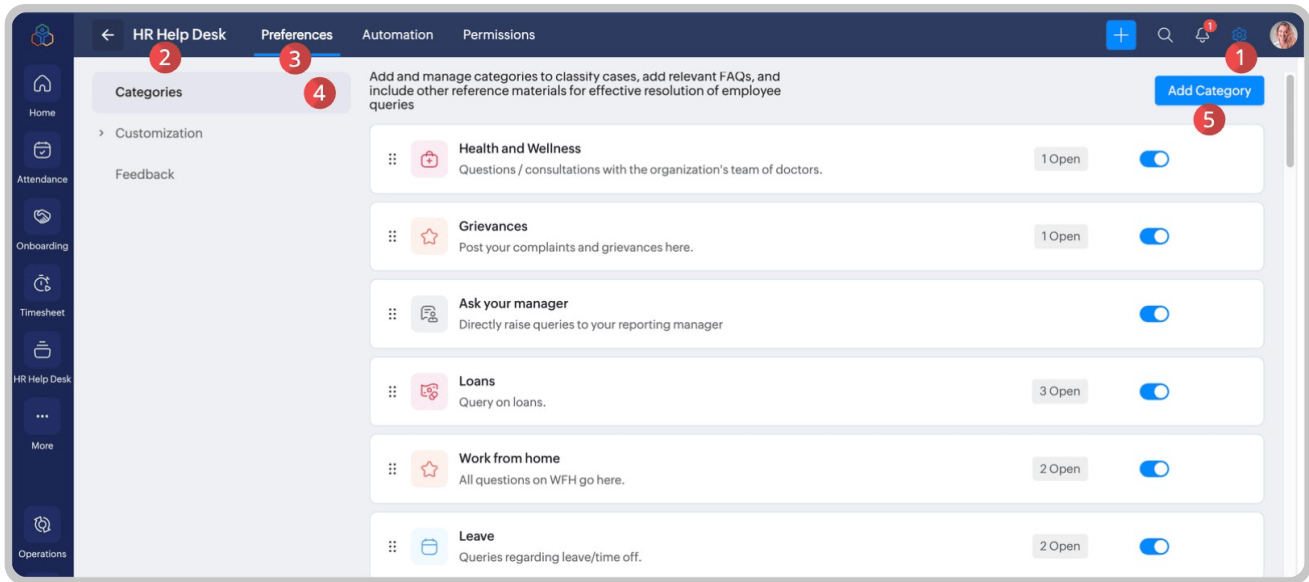
Ask Your Manager: This category is disabled by default. When enabled, it allows employees to raise queries that will be directed to their reporting manager for resolution.



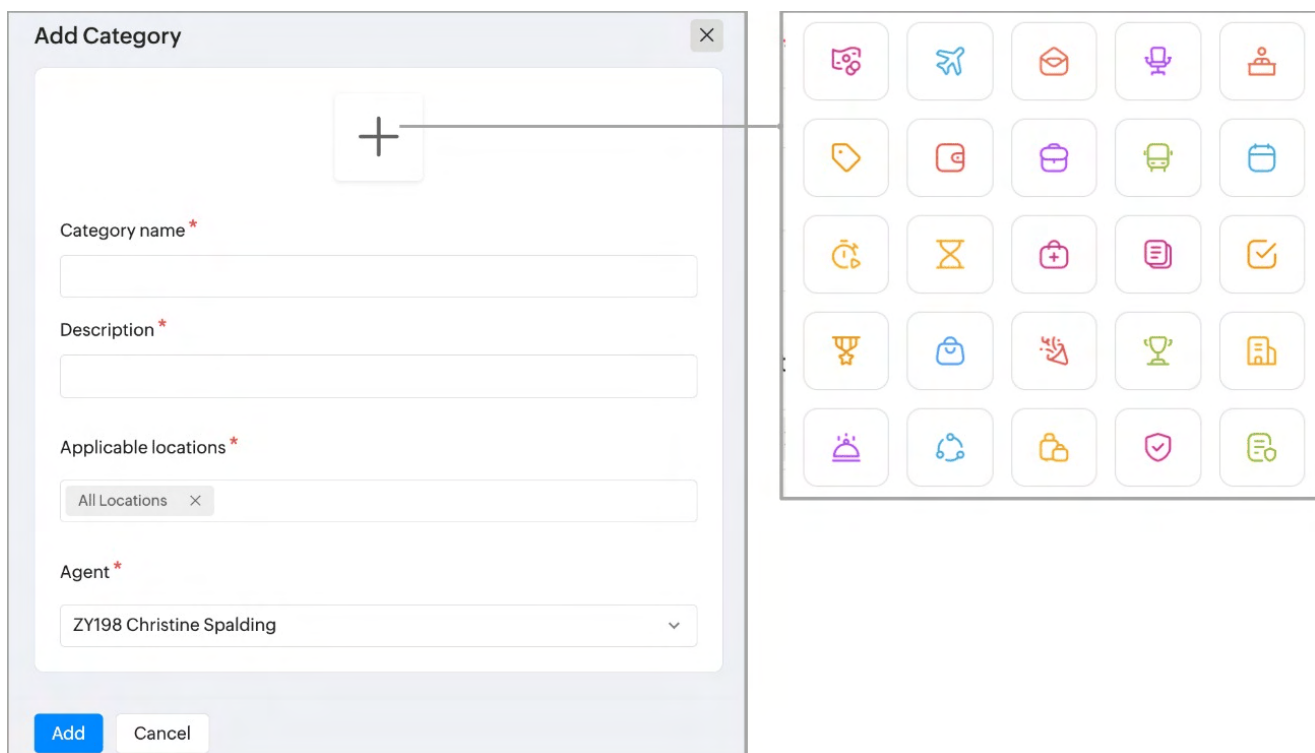
Add HR Help Desk Category

To add an HR Help Desk category:

1. From your home page, go to **Settings > HR Help Desk > Preferences > Categories** and click **Add Category**.



2. Select the icon for the HR Help Desk category.





3. Enter the name and short description for the category.
4. Select locations for which this category will be applicable.
5. Select the agent who can manage HR Help Desk in this category.
6. Click **Add**. The category will be added and saved as draft. After adding a category, the category setup page appears.

Set Up and Enable HR Help Desk Category

Once the category is added, you can set up advanced options and enable it.

To set up an HR Help Desk category, navigate to **Settings > HR Help Desk > Preferences**.

[Learn more about setting up HR Help Desk category.](#)

HR Help Desk - Customization

Customization in HR Help Desk allows you to edit and reorder **case status** and **sources of request** labels. Set restrictions on reopening and commenting on closed cases.

Cases Status

To customize case status texts, navigate to **Settings > HR Help Desk > Preferences > Customization** and select **Case Status** tab.

[Learn more about how to customize cases status.](#)

Set up HR Help Desk Feedback System

Feedback setting in HR Help Desk, allows you to set up feedback system to improve your employee query resolution experience. Enabling this setting allows your employees to provide feedback on the agents who resolved their query.

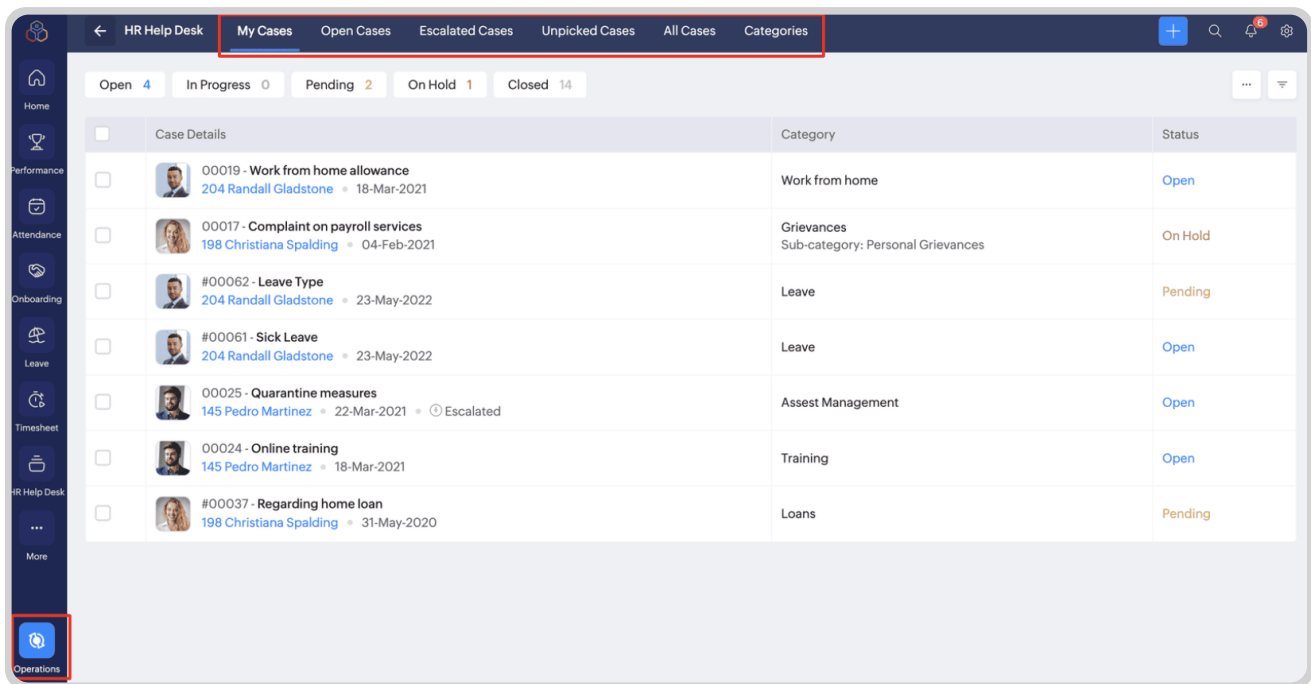


To set up HR Help Desk feedback system, navigate to Settings > HR Help Desk > Preferences and select Feedback tab.

[Learn more about setting up feedback system.](#)

Operations - HR Help Desk

It lets them view, assign, and resolve cases from one place. You can also add a case for another user under the categories tab.



My cases: All the cases for which the user is assigned as the agent will be shown.

Open cases: All cases with an Open or In-Progress status will be shown.

Escalated cases: Cases that are escalated based on the defined SLA will be shown here.

Unpicked: All cases that are yet to be assigned to an agent by the category admin will be shown.

All cases: The admin will be able to view all the cases listed.

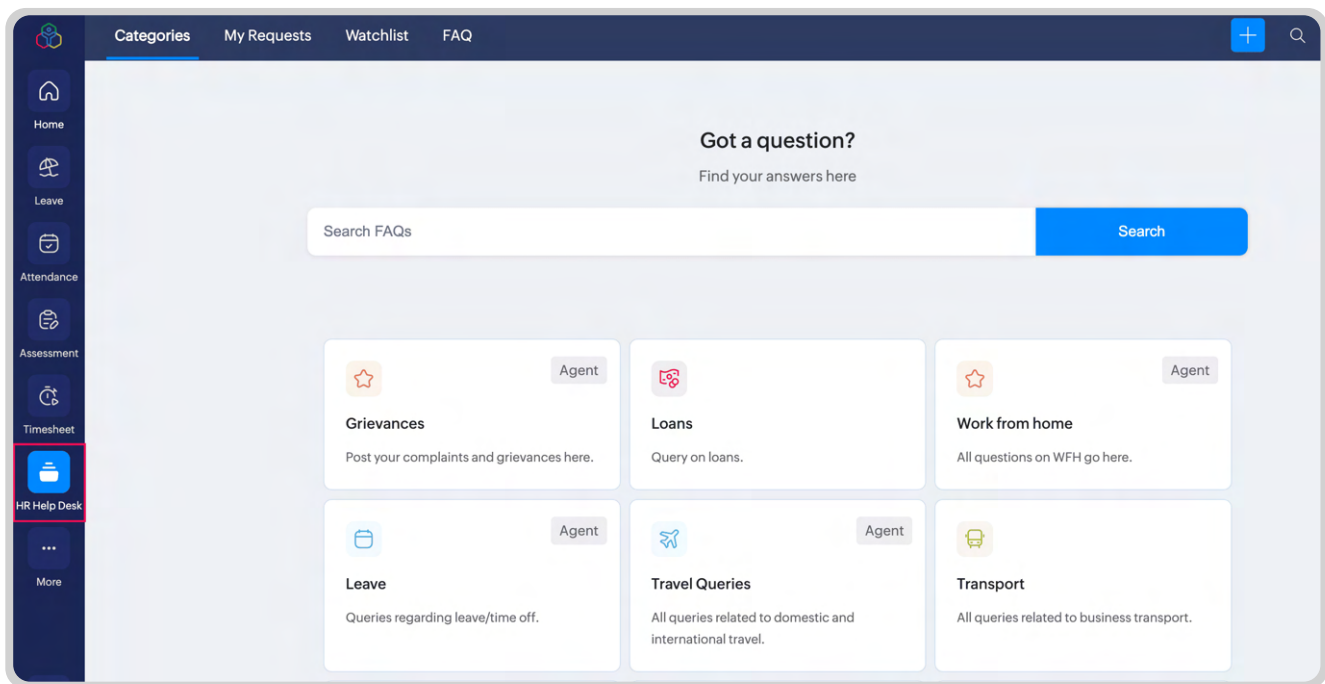


Learn more about [Assigning Case](#), [Unassigning from Case](#), [Resolving Case](#), [Adding and Attaching a FAQ](#), and [Submitting Category](#).

User Service - HR Help Desk

Here employees can submit case requests, and agents can manage and resolve them. It also features a watchlist that displays cases in which you've been @mentioned, along with a FAQ section that provides answers to common questions related to case categories.

[Learn more about what can be done in HR Help Desk user service.](#)



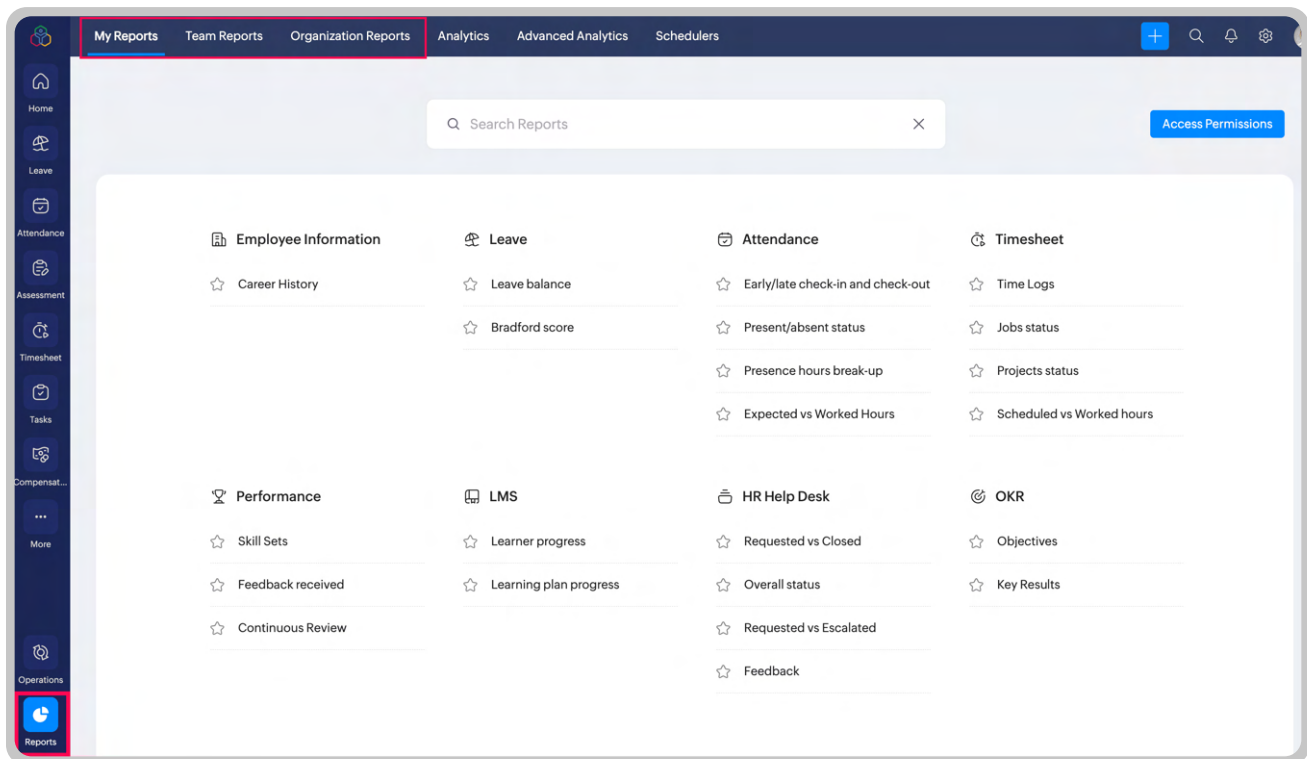
[Learn more about HR Help Desk in Zoho People.](#)



Reports in Zoho People

Reports is a consolidated space for all reports from the various services. It is useful for providing actionable insights and giving a bird's-eye view of what is going on in your organization. Reports are useful for everyone, including administrators, HR, and managers.

To access reports, click on the **Reports** icon at the bottom-left of any screen.



Reports are primarily classified into **My Reports**, **Team Reports**, and **Organization Reports**, each with varying data scopes.

[Learn more about how Reports in Zoho People can be used effectively by you, your team, and your organization across various services.](#)



Visit us



www.zoho.com/people

Contact us

support@zohopeople.com
support@eu.zohopeople.com

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