ZOHO People

Implementation Guide

TABLE OF CONTENTS

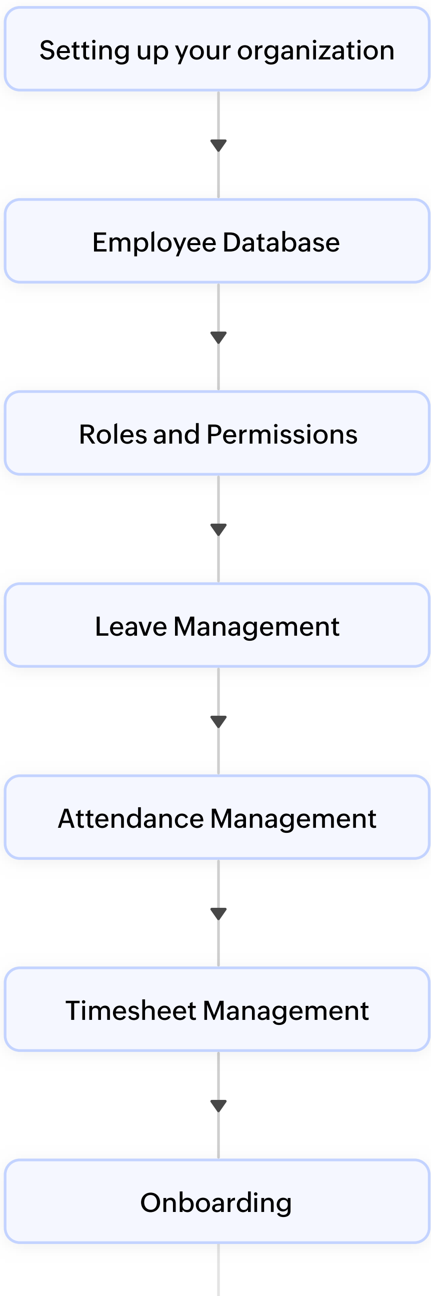
INTRODUCTION

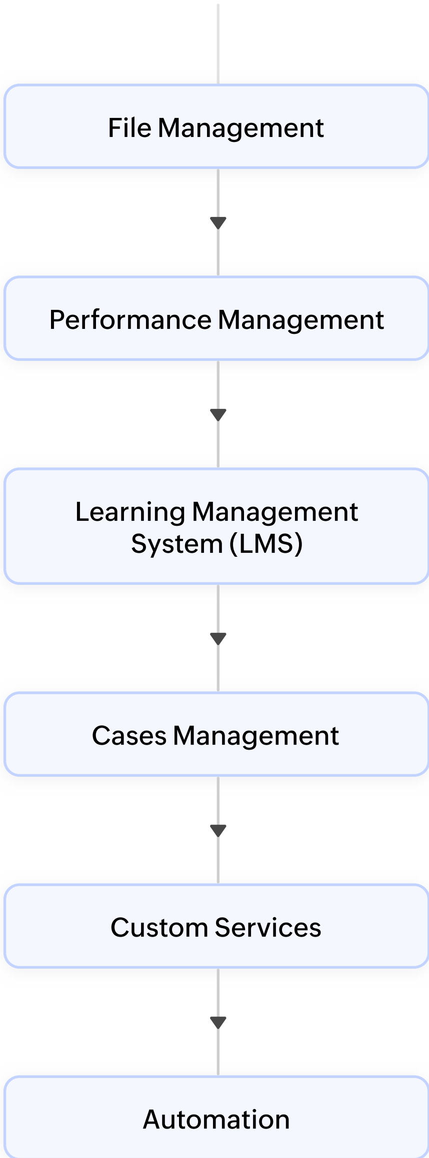
Welcome aboard!

We are delighted that you have chosen Zoho People. This guide helps you on your journey as the Administrator of your Zoho People account. We will be with you every step of the way as you set up Zoho People for your organization. It will be smooth and effortless as possible.

The purpose of this guide is to help onboard your Zoho People account. The steps you need to follow in each module will be explained so that your experience of setting up the account is straightforward.

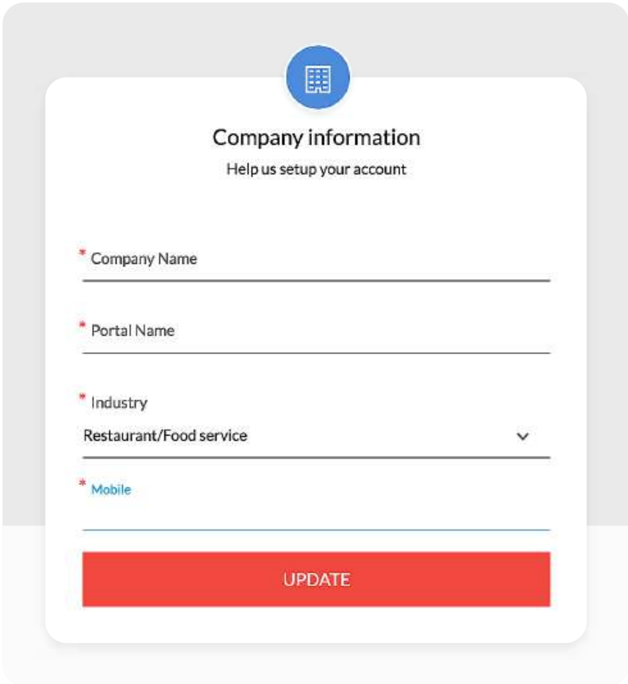
The below flowchart helps you get started with your account. However, it is not necessary for you to follow the same flow exactly. The modules you set up depend entirely on your needs.




File Management
Performance Management
Learning Management System (LMS)
Cases Management
Custom Services
Automation

GETTING STARTED

When you log into Zoho People for the first time, you will be greeted with a screen as shown below. You can start by filling out the details listed on the screen.

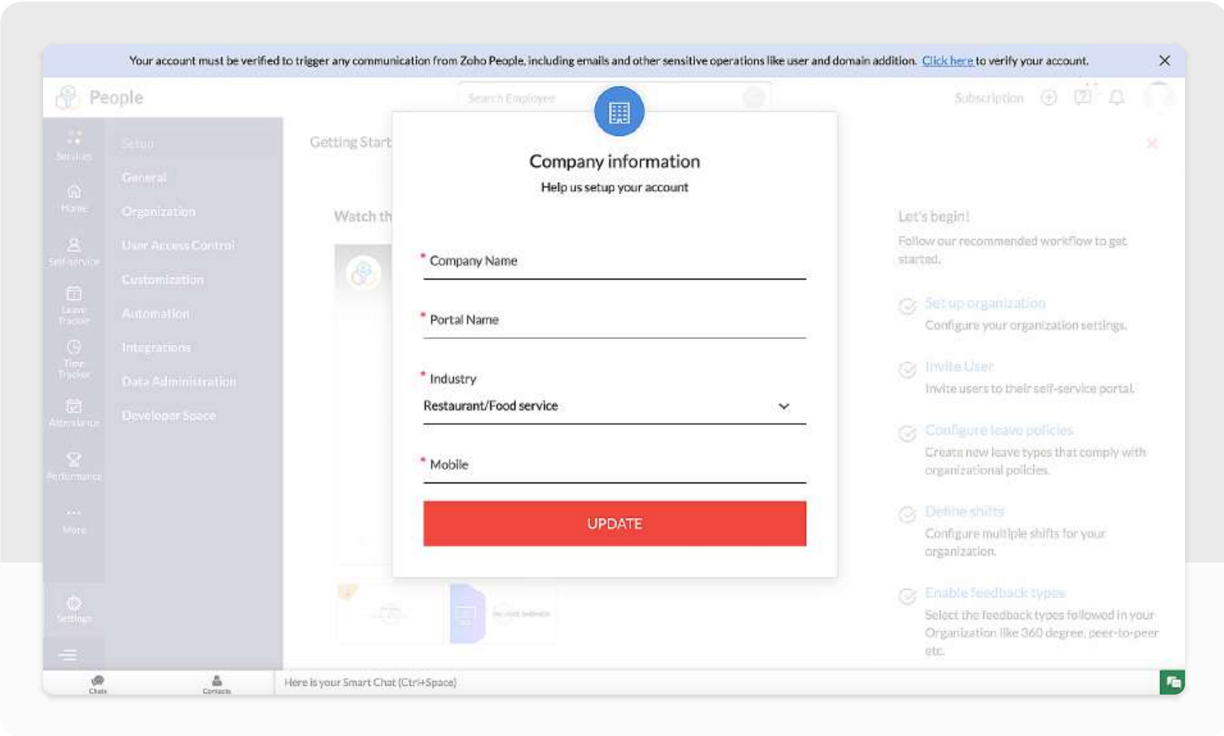


NOTE :** The portal name you enter will be part of the portal URL. For example if you enter "portalname", the URL will be **https://people.zoho.com/portalname/

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 you do not verify your account, many key functionalities may be hindered. Some of the services that need a verified Zoho People account include User Addition, Domain Addition, Onboarding, Approvals, Reminders, Shift Management, Custom Action, and Announcements.

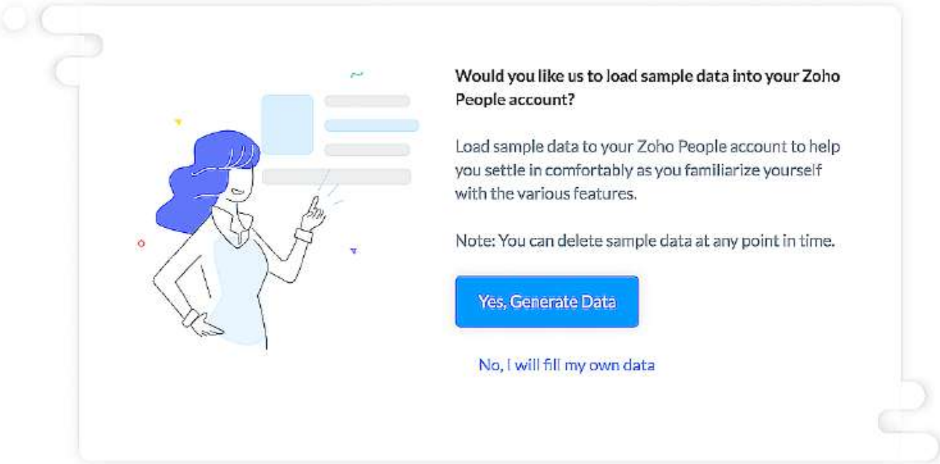
NOTE: *Account verification will be skipped if you have already verified your account in* ***accounts.zoho.com****.*

Sample data for setup

In Zoho People, new sign-ups can opt for sample data. Sample data helps administrators work with content that is similar to actual data that they would be working with at a later point. Sample data can help in providing a hands-on test experience and provides a safe way to get familiarized with the product. Sample data can be deleted at any point.

On signing up and entering Zoho People for the first time, users are drawn towards setting up their company details settings page. On completion, a prompt asking if you would like to load sample data in your account would appear. Simply click **Yes, generate data** or **No, I will fill my data**, per your choice.

NOTE: *Sample data cannot be added at a later point*



Supported Languages

Zoho People is offered in the following languages.

1. English (US)
2. English (UK)
3. Arabic
4. Chinese
5. Dutch
6. French
7. German
8. Hebrew
9. Italian
10. Korean
11. Portuguese (Portugal)
12. Russian
13. Spanish
14. Swedish
15. Turkish
16. Vietnamese
17. Polish
18. Serbian

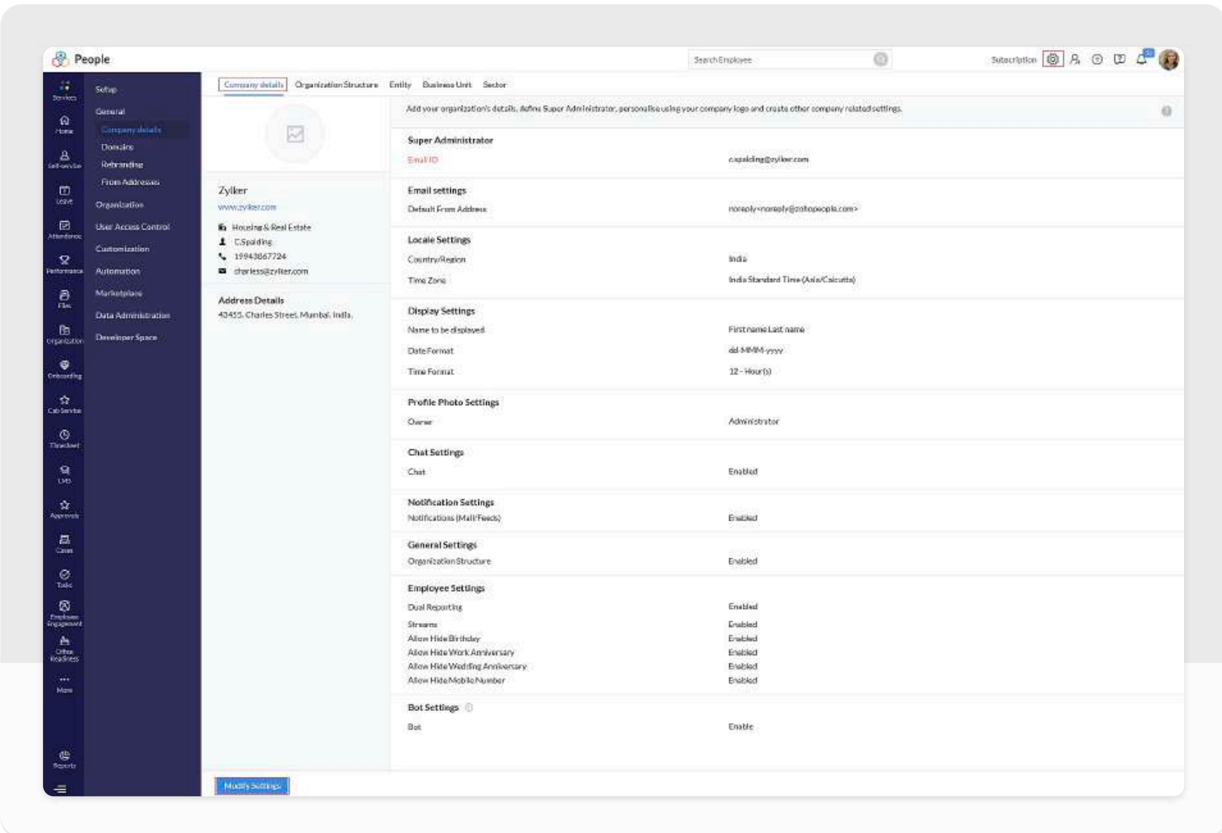
NOTE: *Only the Tabs/Sub-tabs/Fields that are non-editable by the user will be changed to the respective language. The fields that are editable will remain the same.*

SETTING UP YOUR ORGANIZATION

Company Details

You can set up the basic details of your organization under **Settings(gear icon) > Organization > Company Details.**

1. From home, go to **Settings (gear icon) > Organization > Company Details > Modify Settings**
2. By default, Zoho People logo will be here. Click **Change Logo.** You can replace the Zoho People logo with your own custom logo. Your company logo will appear at the top of your Zoho People account. Your logo must be the same size as specified. Create your logo in the 80 * 55 size for the best resolution
3. Click **Choose File** and select your own custom logo from your computer
4. Click **Upload logo**
5. Enter your Organization's contact information such as name, address, contact number and email address



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

Tip: In order to see all the admin users in the drop-down, you need to assign the 'Administrator' role to the respective users in the Employee form.

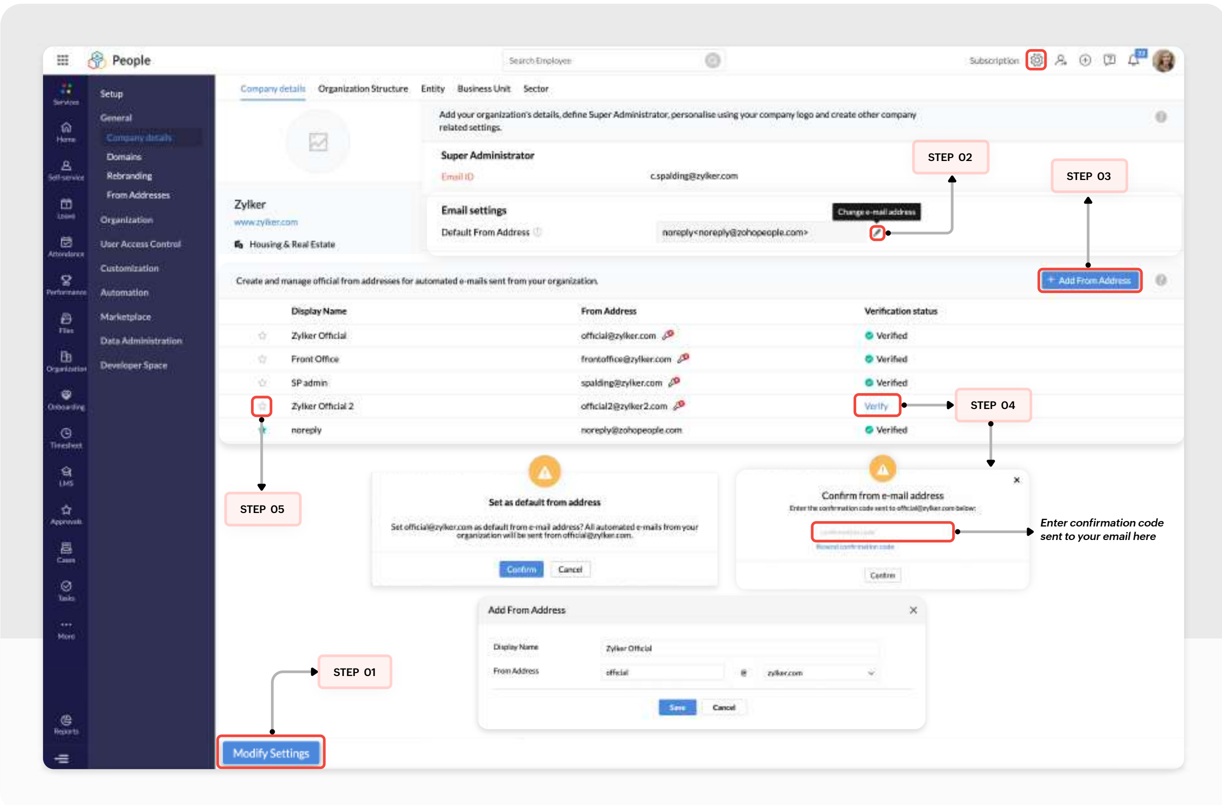
From Addresses - Email Settings

Default From Address

Default From Address as the name suggests, serves as the default e-mail address (sender's e-mail 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 Edit - pencil icon (click **Modify Settings**) and follow the steps shown below..

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



Adding Multiple From Addresses

From addresses can be used in mail alerts, approvals and schedulers. Using unique from address for emails of different intents can help employees easily observe the nature of the mail received and is handy for users who use mail filters. For example, leave alerts, official announcements, events etc.

Navigate to **Settings > From Addresses > + Add From Address** to add a new from address. Follow the steps shown above to add multiple from addresses.

NOTE:

- *It is recommended that the from address you are adding is of a verified domain. Learn about domain verification.*
- *Key icon indicates that DKIM Authentication is not completed. DKIM authentications ensure that the recipients receive all emails in their inbox without any complications. Learn about DKIM Authentication.*
- *When adding a from address that uses a verified domain, verification is not required. (same goes for DKIM authenticated domains)*

Locale Settings

Enter the operating location of your company under **Country/Region**. This will be displayed across the system, in all records and views.

Also select the default time zone you want to apply to your organization's account.

Display Settings

You can have the names of the employees displayed in the four different ways as mentioned below.

- First Name
- Last Name
- First Name Last Name
- Last Name First Name

Similarly, you can set your desired date and time format as well from the respective drop downs.

Profile Photo Settings

You can choose from the admin and employees and set permissions for them to change the profile photo the employees in the organization.

Chat Settings

Under Chat settings, you can either enable or disable chat options for your organization.

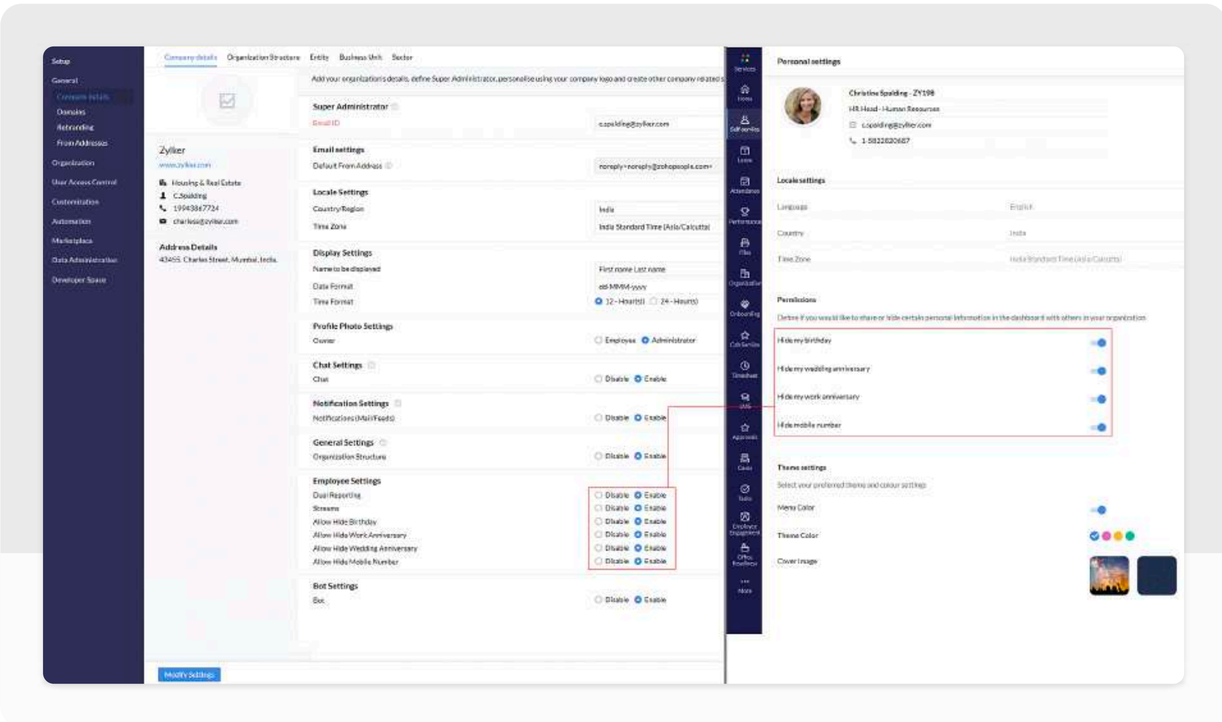
Notification Settings

You can enable or disable notification sent to you via mail from Zoho People. All emails and feed notifications from Zoho People will remain disabled or enabled as per your settings configured here.

General Settings

You can enable the organization structure feature for your organization here.

Employee Settings



Enable dual reporting structure for your organization. Click here to learn more about Dual Reporting.

Learn how you can group related designations under one name. Click here to learn more about Streams.

Additionally, if you want to disallow employees from hiding birthday, mobile number,work and wedding anniversary, these options can be used.

This will hide the corresponding options in the **Self-Service > Personal Settings** page.

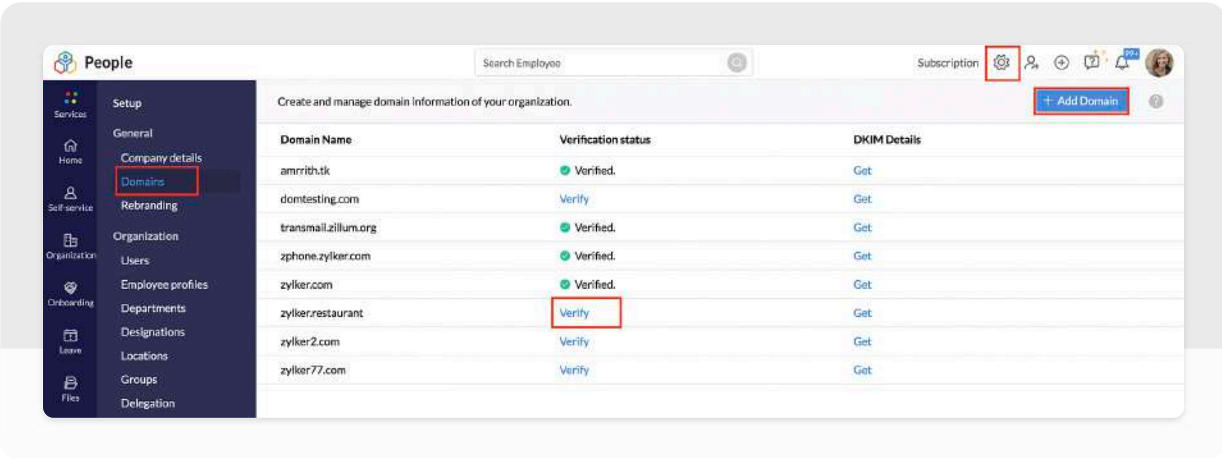
Bot Settings

Define if you want to enable or disable the Zia- AI bot for your organization.

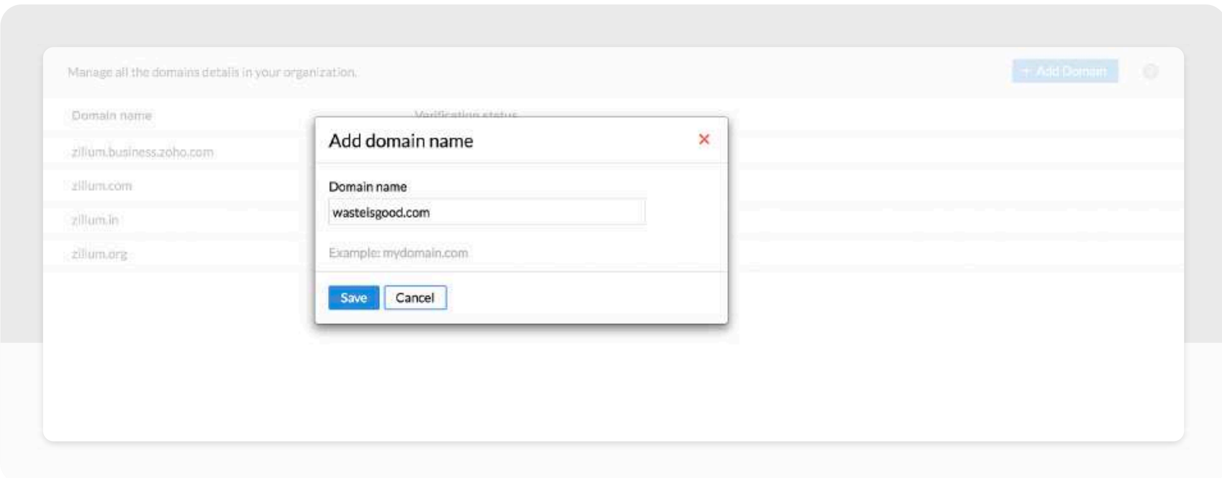
Domains

You can have domains added to the system and verify them to add users directly into Zoho People and to have a rebranded login URL for your organization. Follow the steps given below to add your domain.

1. From your home page, go to **Settings (Gear icon) > Organization > Domains**



2. Click **Add Domain**
3. Enter your domain name



4. Click **Save**. You have successfully added your domain. Any domain added should be verified by Zoho to check its validity and authenticity. Verification is an integral step to prevent any misuse of domain names

5. Click **Verify**

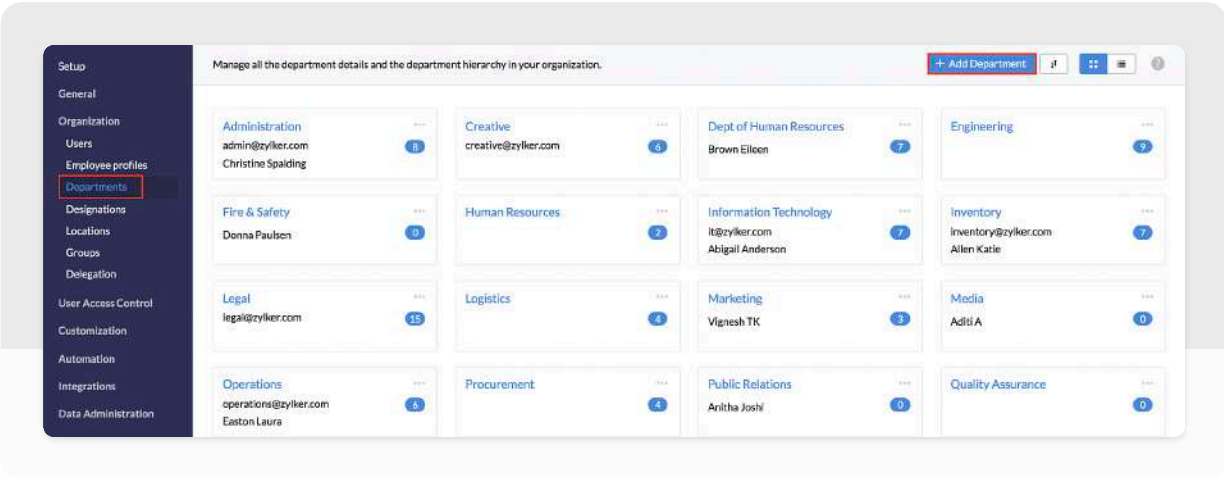
Follow the steps given below to verify your added domain.

Learn more about Domain verification.

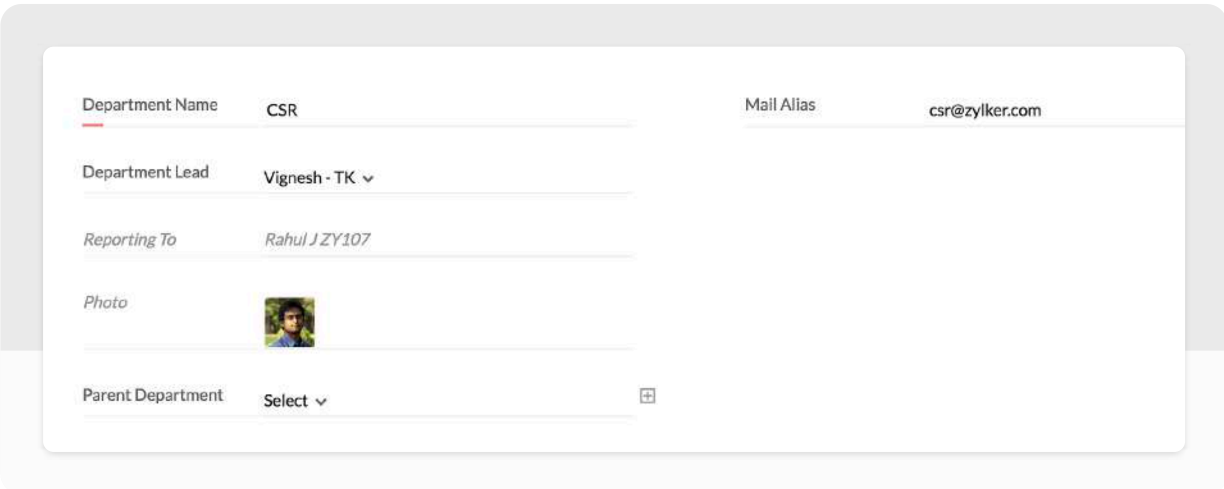
Departments

To create a department

1. From home, go to **Settings (gear icon) > Organization > Department**
2. Click **Add Department**



3. Enter the department name



4. Enter the mail alias
5. Select the Department Lead from the drop down

6. Select the Parent Department, if required

7. Click **Submit**

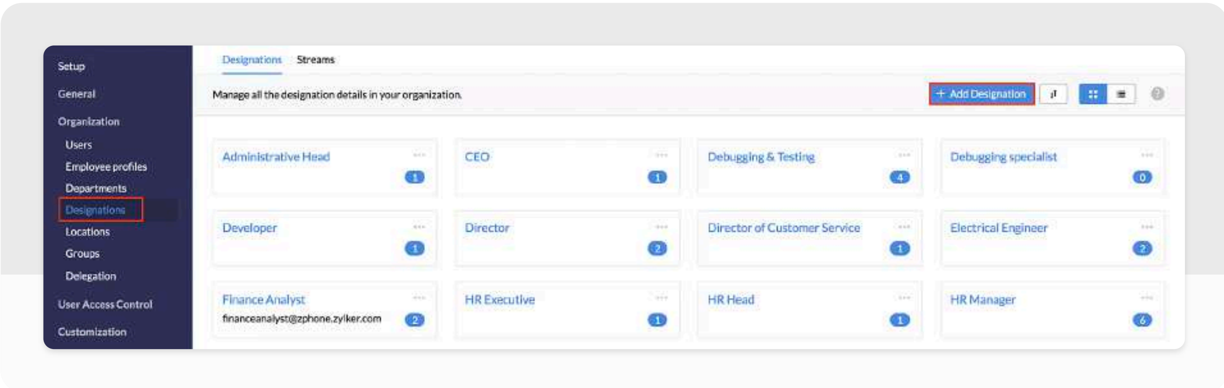
To edit details of a department, click the Edit icon at the end of the department name that you would want to edit and click Submit.

To delete department, click the delete icon at the end of the department you want to delete.

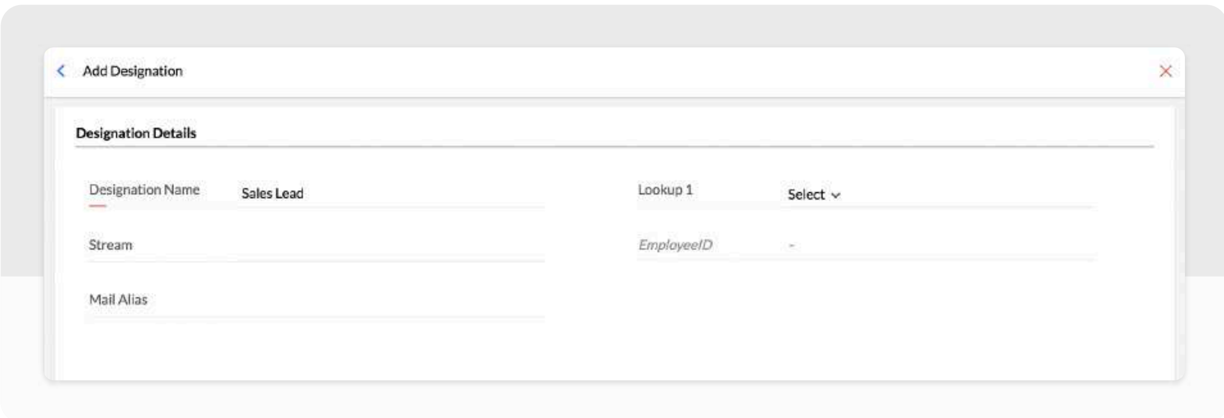
Designations

To add designation,

1. From home, go to **Settings (gear icon) > Organization > Designation**



2. Click **Add Designation**



3. Enter the designation name

4. Enter the mail alias

5. Enter the stream, if required

6. Click **Submit**

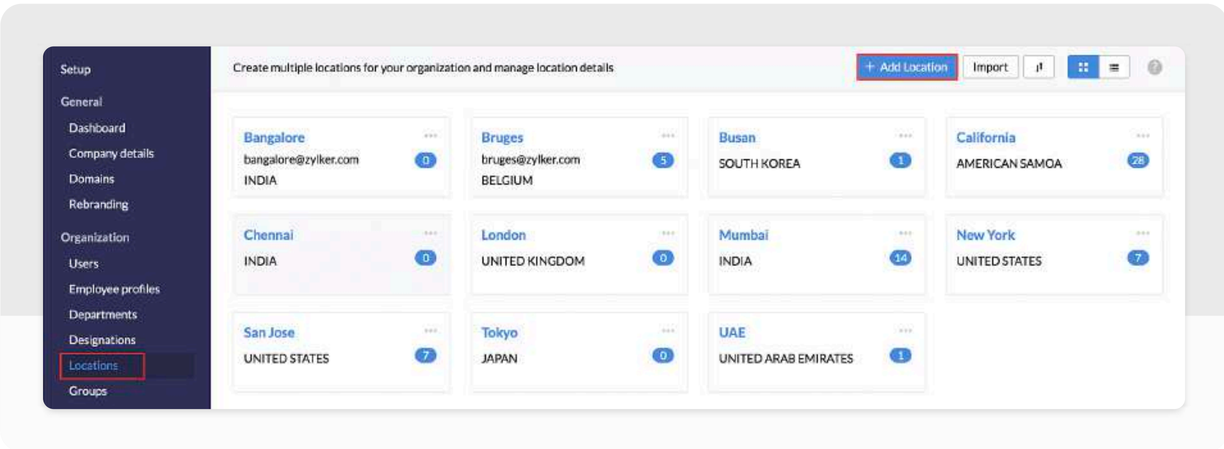
To edit a designation, click the edit icon at the end of the designation name that you want to edit, and click **Submit**.

To delete a designation, click the Delete icon at the end of the designation name that you want to delete.

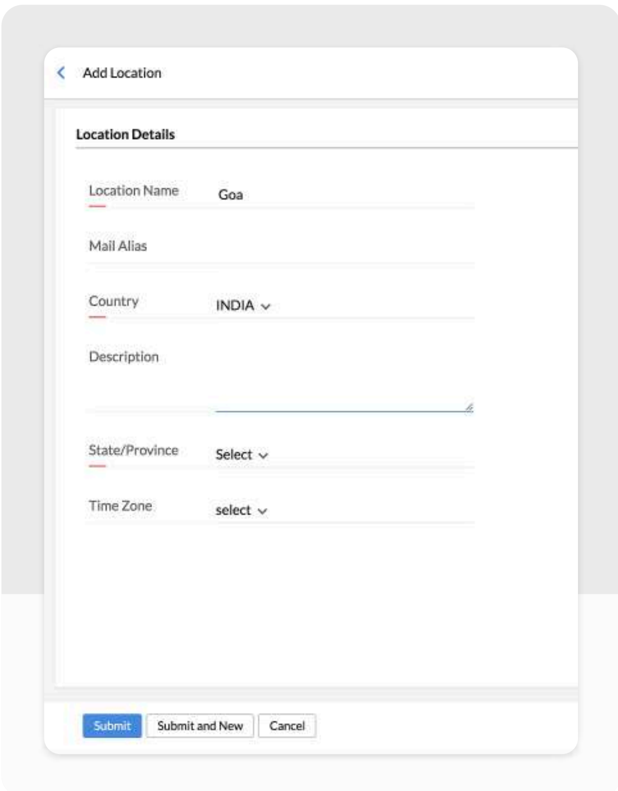
Locations

If your organization has set up a working office in more than one location, you will have to create multiple locations. Follow the steps given below for doing this:

1. From home, go to **Settings (gear icon) > Organization > Locations**



2. Enter location name and select the country



3. Enter other details like Mail alias and description
4. Click **Submit**

ADDITIONAL FEATURES IN ORGANIZATION SETUP

Streams

Streams in simple words, would be the grouping of related designations under one name. Streams can be configured to work independently or in association with a particular designation based on your organization's requirements.

Streams are helpful in two ways, it can either be used to group related designations in your organization, or it can be used to widely group employees who may have the same nature of jobs.

Learn more about Streams.

Multiple Organizations

Using Zoho People, you can manage multiple organizations using a single email address and password of your Zoho People account. This gets efficient when you operate in multiple organizations with different lines of work. You can manage multiple organizations from one administrator account in Zoho People without having to use different email addresses and passwords. Different organizations can be accessed, using a URL with a unique portal name, generated when you add different organizations in your Zoho People account.

Learn more about managing multiple organizations.

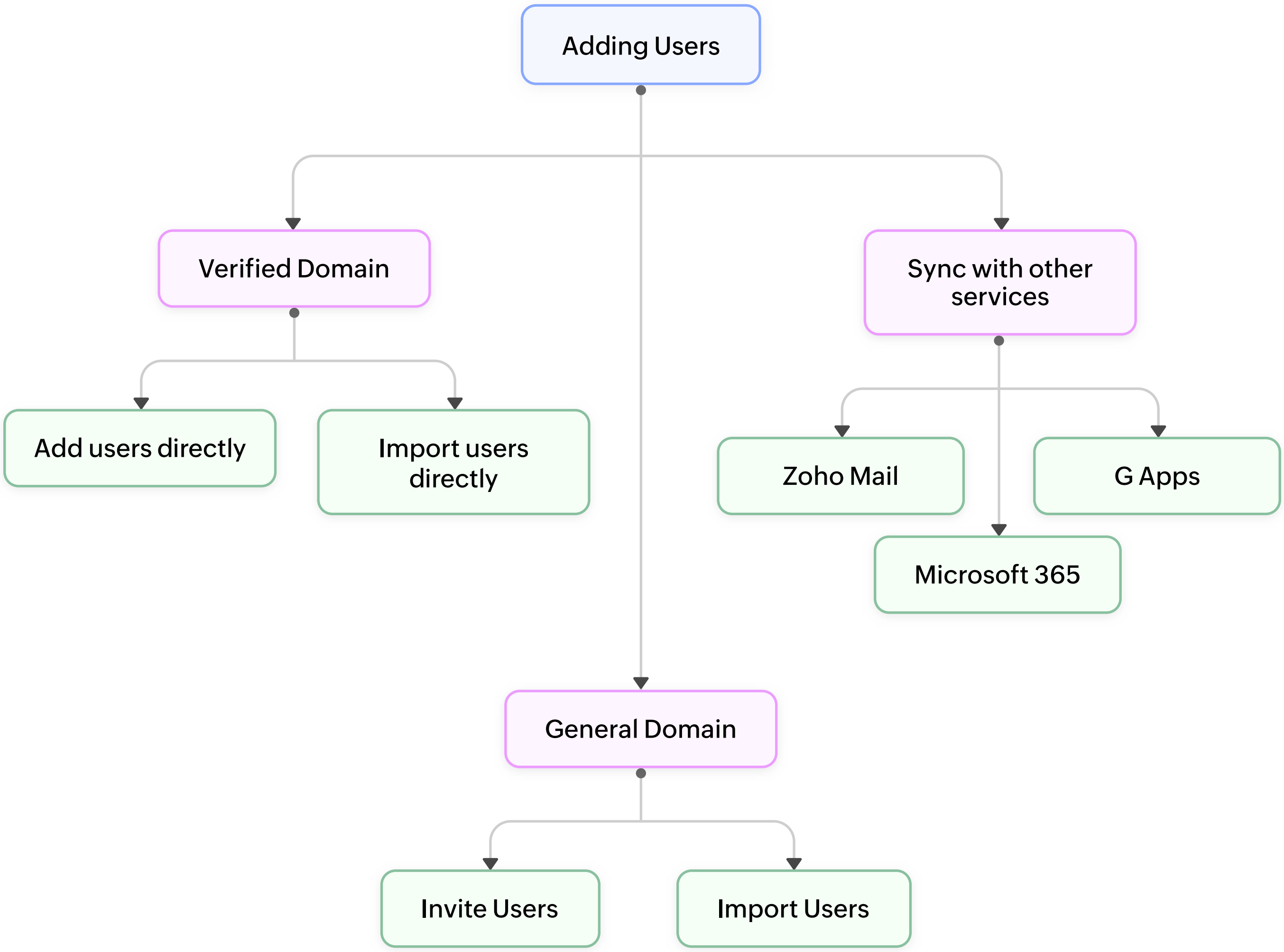
Organization Structure

Zoho People's organization structure setting lets you configure your organization's hierarchy and maintain the data of multiple companies in the same Zoho People account.

Learn more about organization structure.

EMPLOYEE DATABASE

Once you have set your organizational details, you can add users to your account. There are three easy methods to add users to your account, which are illustrated below.



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 login into their account. They can access their self service page and perform actions such as apply leave, submit timesheets, submit self appraisal etc. First name, Last name, Employee ID and Email Address are mandatory fields for adding a User.
- **Employee Profiles or Non-Users** – These are employees who cannot login to their account. These employees' details are maintained by the organization in the account. Security staff, contract workers can be examples of such employees. Since these employees cannot login 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/ Non-User.

Adding Users

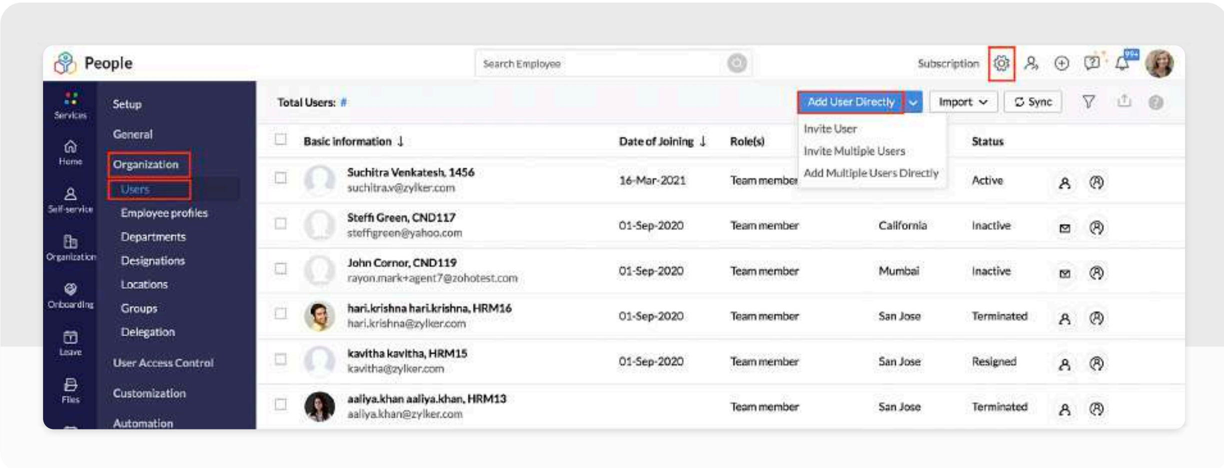
Verified Domain

Users can be added into the Zoho People account directly if a verified domain is used. Learn more about Domain addition and verification.

Add User Directly

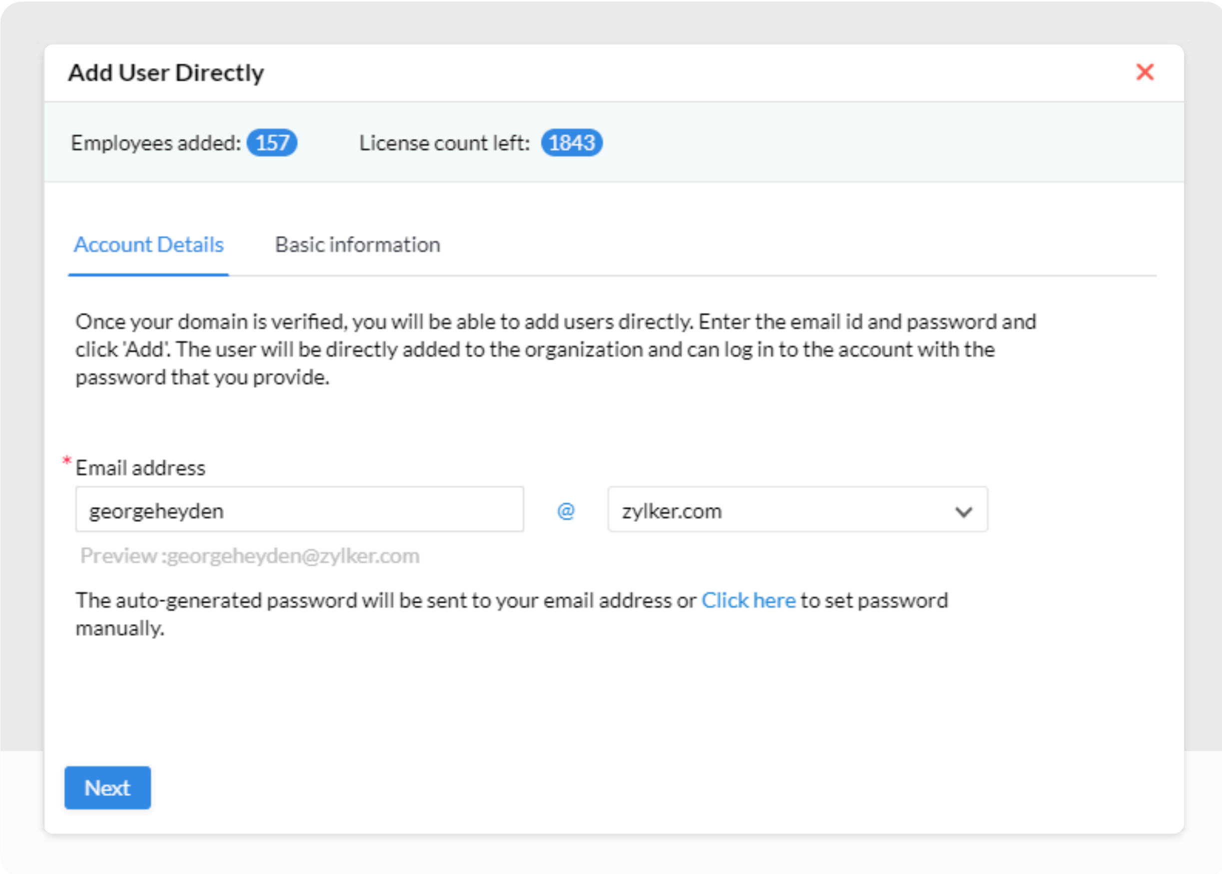
Use this feature to add users directly into your organization. Enter the user name, password and directly add them to organization. They can change their password later. Follow the steps below to add users directly.

1. From your home page, go to **Settings > Organizations > Users**
2. Click on **Add User Directly** if you would like to add a single user or **Add Multiple Users Directly** if you want to add many users



3. Enter the email address, select a verified domain from the drop-down provided
4. Note that by default auto-generated passwords will be used. If you wish to enter the password manually, use the Click here to set password manually option
5. Click **Next**

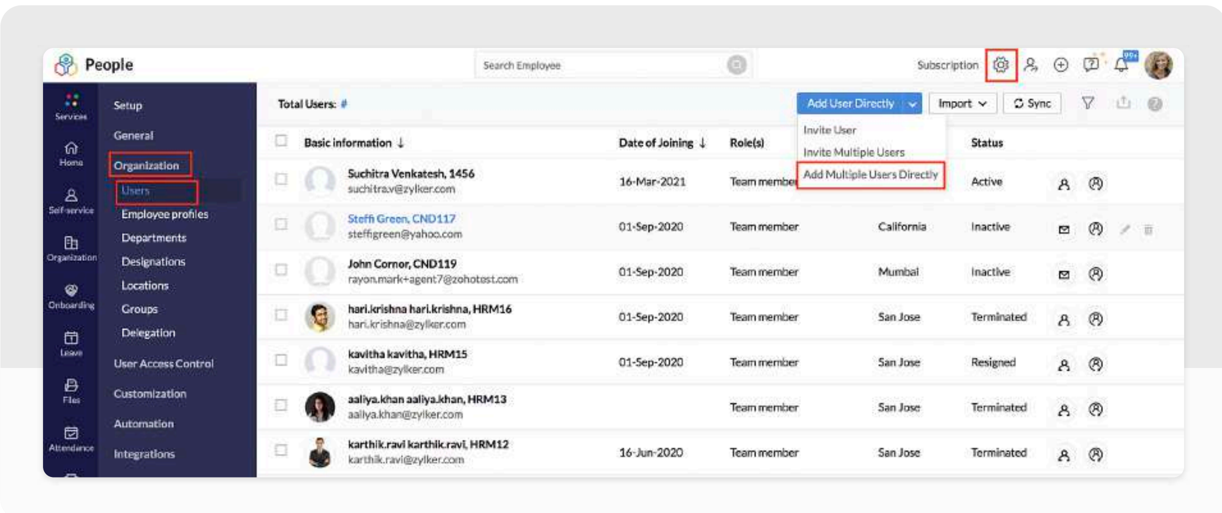
EMPLOYEE DATABASE



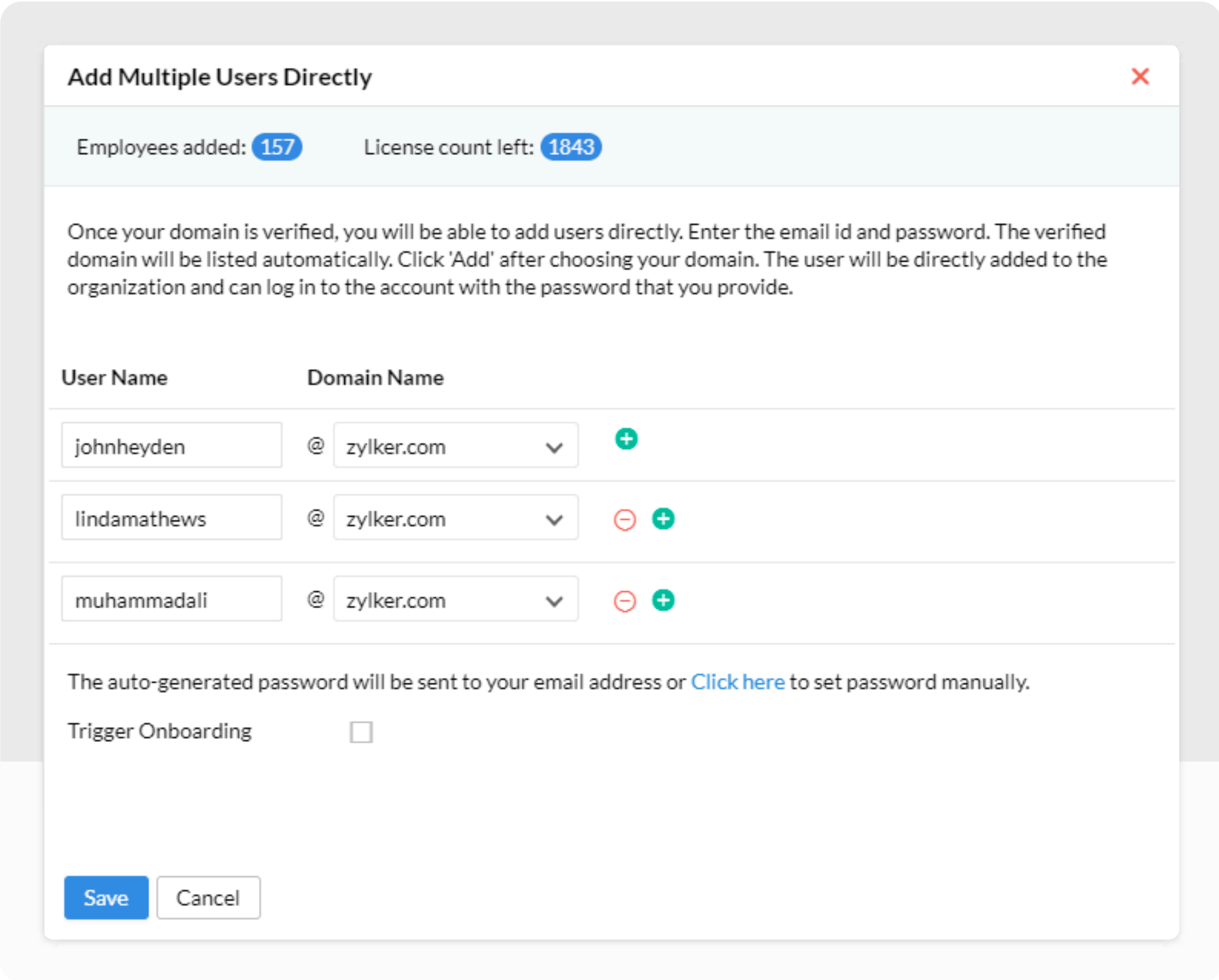
An account will be set up for the user you added, an email will then be sent to you (Administrator) the email includes the email id and the password for that particular user

Add Multiple Users Directly

The process is similar when adding multiple users directly. Go to **Settings > Organization > Users,** click on the down-facing arrow next to Add User Directly button and select **Add Multiple User Directly** option.



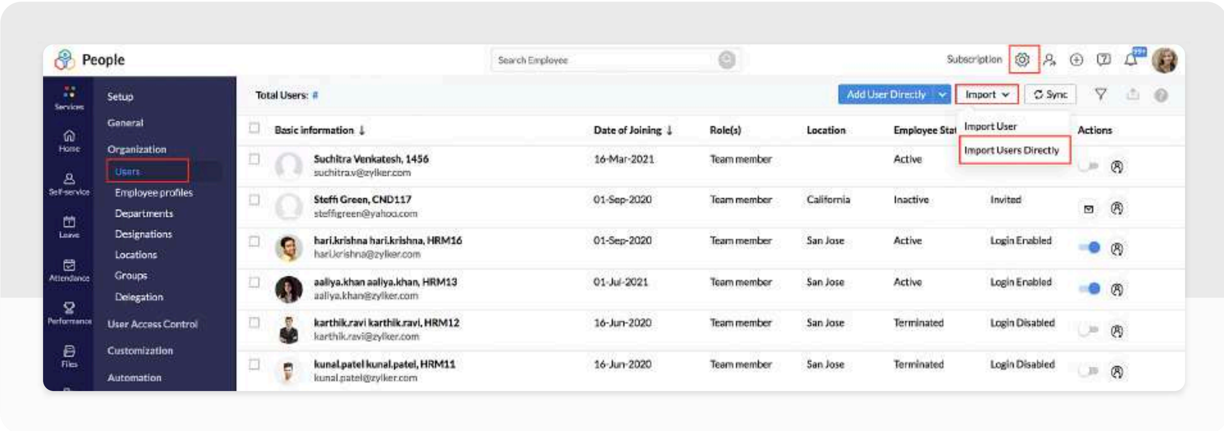
Use the **+** icon to add multiple email addresses to invite multiple users. Note that the email you (Administrator) receive will contain a table consisting of the various email addresses and their respective passwords.



Import Users Directly

If you have a verified domain, you can Add users directly. However, if there are too many users to be added, you can opt for the import users directly option.You can import multiple users directly only if you have a verified domain. Follow the steps given below:

1. From your home page, go to **Settings > Organization > Users > Import Users Directly**



2. Under Applicable domain, select the domain as per your need
3. Click **Upload File** and select a file which has details like user name, password, first name, last name, etc
4. Click **Next**

Once the file is uploaded, all the users will be part of the organization. In this method, there is no need to send invitations. As an administrator, you will be creating user name and temporary password for your users. This can be communicated to the users when they login for the first time in their account. The temporary password can be changed by the user in consecutive logins.

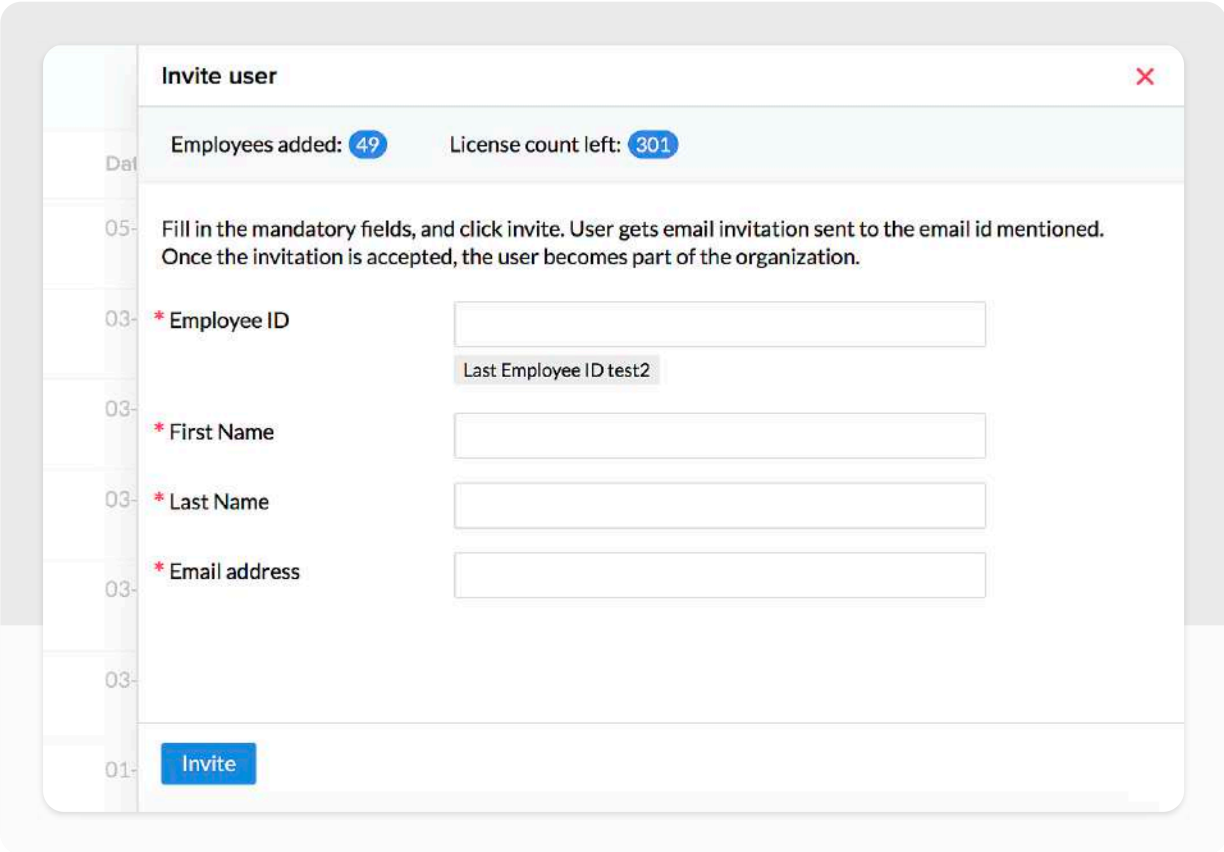
General Domain

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.

Invite User

To invite users,

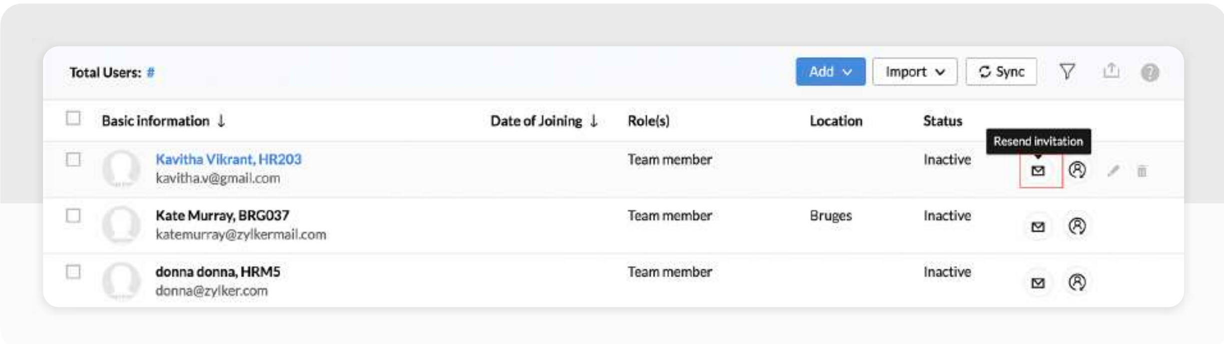
1. From your home page, go to **Settings (Gear icon) > Organization > Users >Invite User**



2. Fill in the mandatory fields, and click **Invite**

The user gets an email invitation sent to the email id mentioned. This email will expire in 7 days and if the user does not accept the invitation within this time, then a re-invite is sent to the user.

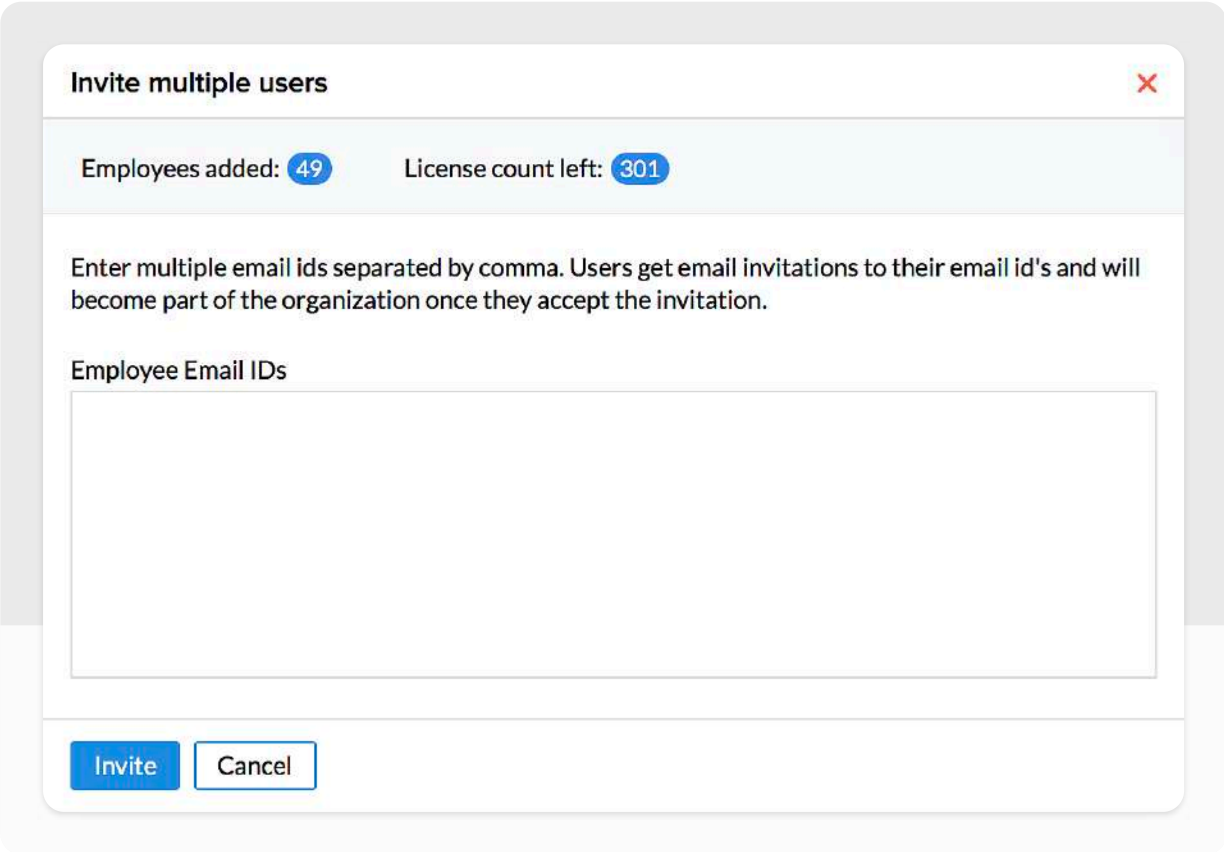
To resend the invitation, click the envelope icon beside the invited user.



Once the invitation is accepted, the user becomes part of the organization.

Invite Multiple Users

1. From your home page, go to **Settings (Gear Icon) > Organization > Users > Invite Multiple Users**



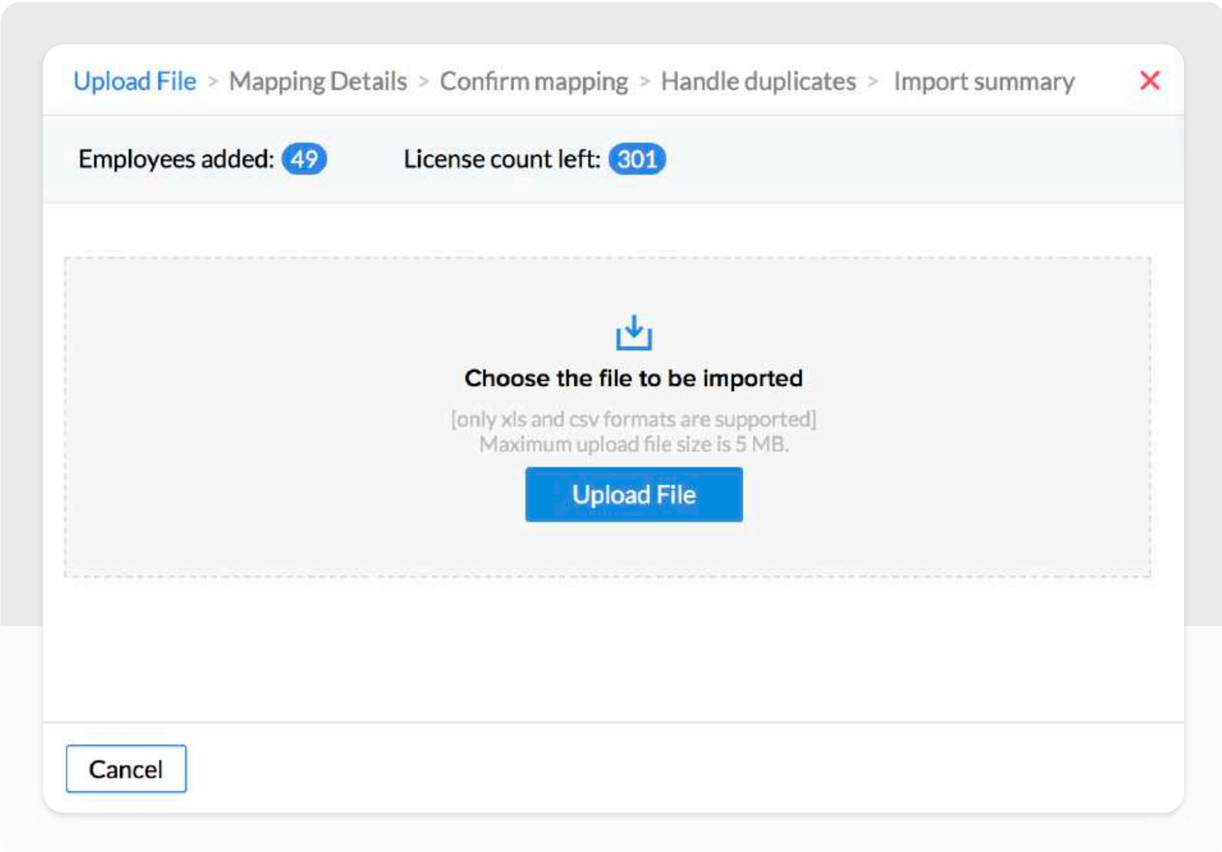
2. Fill in the mandatory fields, and click **Invite**

Users get email invitation sent to the email id mentioned. Once the invitation is accepted, the users become part of the organization.

Import User

The Import user option lets you import users from your existing files without the need to add users manually.

1. From your home page, go to **Settings (Gear icon) > Organization > Users > Import User**
2. Click **Upload File**, and select a file with first name, last name, email id, etc and click **Next**
3. Map the fields, confirm the mapping and handle the duplicates if any



4. Click **Next**

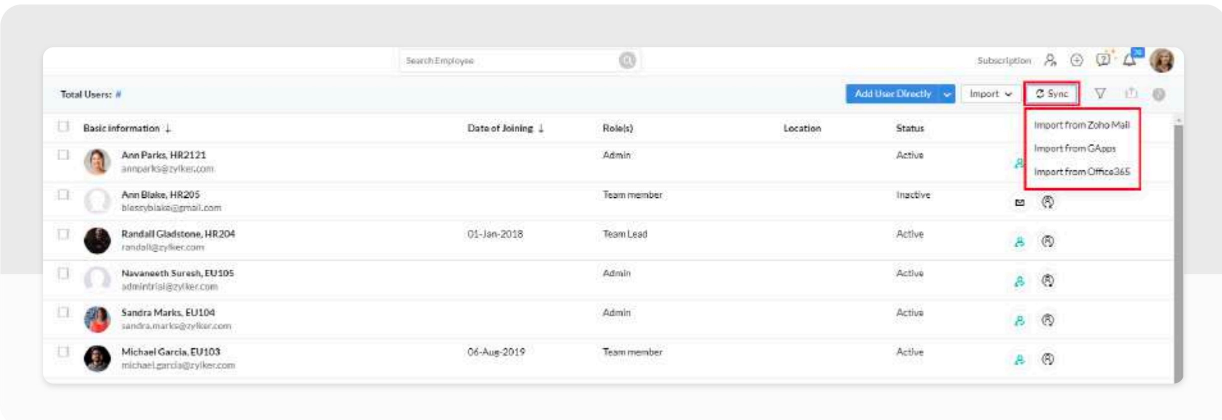
The users will receive an invite to their email id (which you have given in the file during upload). Once they accept the invitation, they will be part of the organization. They can change the password in the consecutive logins.

Syncing users from other services

If you have an existing database or employee repository, you can sync users from the following services with your Zoho People account.

To sync users, simply navigate to **Settings > Organization > Users > Sync**

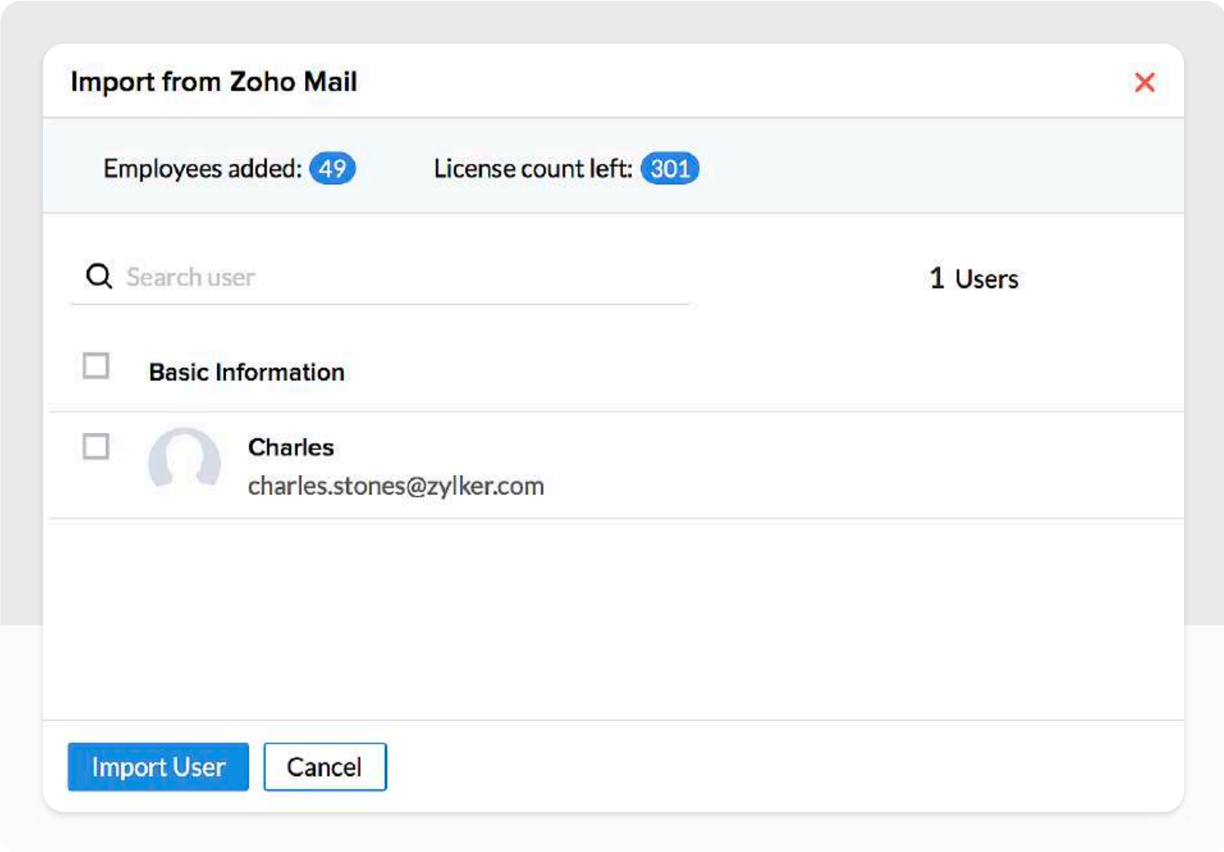
Select from the following options - Zoho Mail, GApps, Office365.



Zoho Mail

You can add bulk users from Zoho Mail to Zoho People in a single click.

1. From home, go to **Settings (Gear icon) >Organization > Users > Sync**
2. To sync users from Zoho mail, click **Import from Zoho Mail**
3. Search user using the Search box



The same steps can be followed if you would like to sync users from Google Apps or from Office365.

Adding Users through mobile number verification

In addition to adding users by email id verification, Users can also be added by verifying their mobile number.

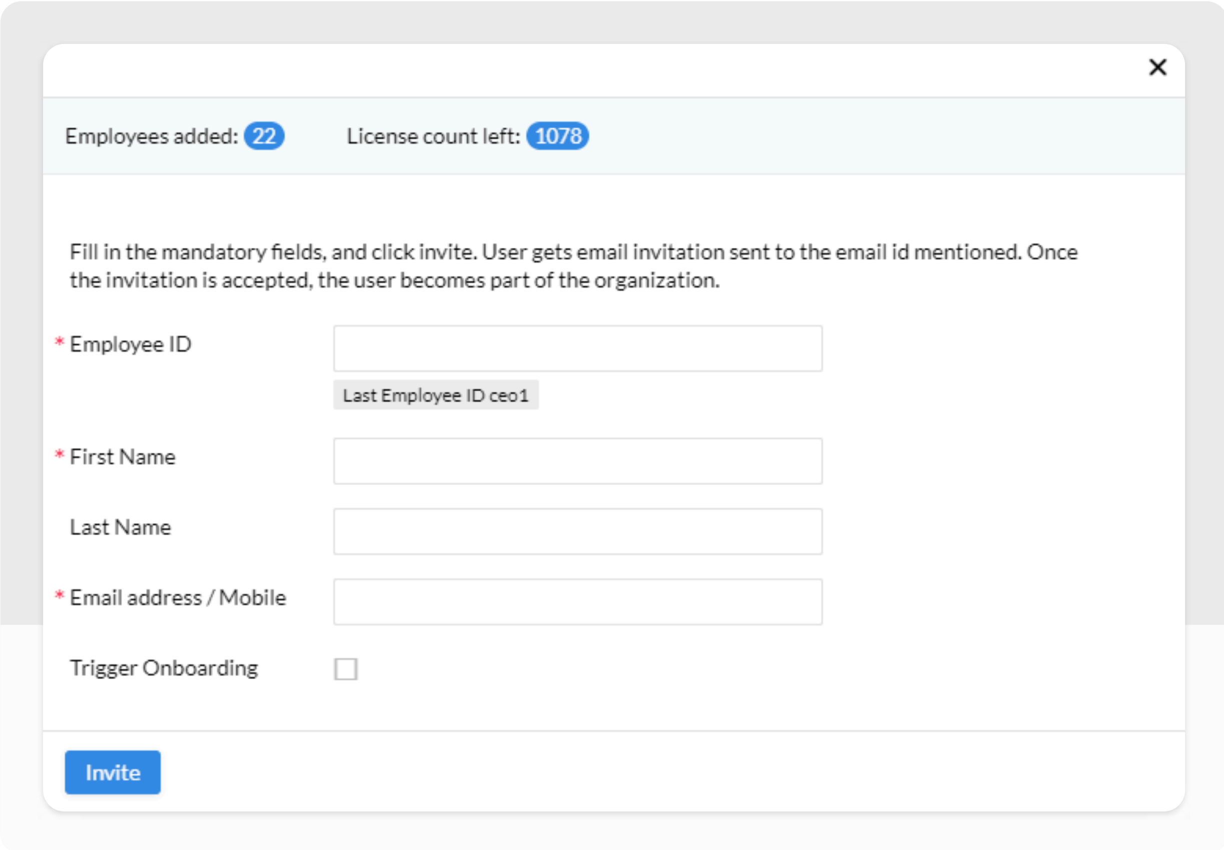
NOTE: *This feature is not open to all by default, but can be activated on demand. Please contact support@zohopeople.com to enable this feature.*

Once this feature is enabled the following prerequisites must be met to add users using mobile number verification:

- A verified domain for your Zoho People account.
- User must have Admin privileges.

Adding a single user

1. Navigate to **Settings > Users > Add**

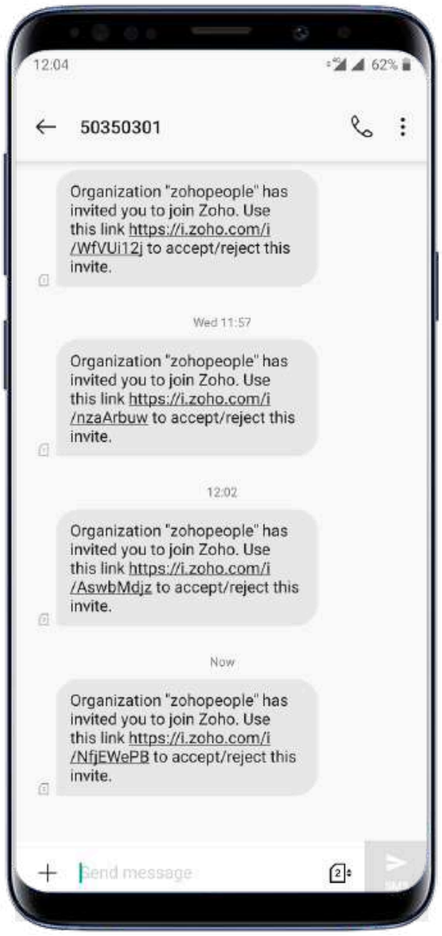


2. Fill in the details, fields with a red asterisk are mandatory
3. Enter the mobile number of the user you are trying to add

Dial code is required. Example 91-900320XXXX (91 is the dial code for India)

4. Click **Invite**

The user will receive a link in their mobile phone via text message, Account verification will be done once the user opens the link and sets up their password.



NOTE: *If the user already has an existing Zoho account, then they will be prompted to login directly using existing credentials.*

Adding multiple users using the import feature

1. Navigate to **Settings > Users > Import > Import Users**
2. Now in the file you are importing (xls, xlsx and csv formats supported), Leave Email ID column data blank. However, mobile Number column must be filled. The format is dialcode-mobilenumber.
   Example: 91-900320XXXX

NOTE: *Add user directly, Add Multiple User Directly, Invite Multiple Users options cannot be used while adding users via mobile number verification.*

Here are some points to note when mobile-only users added:

- Users added through mobile number verification, cannot be defined as an administrator.
- Once the invitation is accepted and the user is added, The Mobile number of the active user cannot be changed.
- They are not authorized to import or export users.
- Password protected mail functionality cannot be used as an email address is required.

NOTE: *Email address can be updated for users added through mobile number verification. However, an email address with a verified domain is required. Once an email address is added, complete functionality is restored without any restrictions.*

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.

Basic form operations in the Employee form

- Adding & Customizing Fields
- Lookup Fields
- Show/Hide Form Fields Based on Rules & Conditions
- Marking a Field Mandatory

Learn more about Forms.

Fields unique to Employee Form

- Identity Information
- Marking a field as Personal Data
- Marking a field as ePHI data
- Calculating Employee's Total Experience
- Address Field Component

Learn more about Employee Forms.

ADDITIONAL FEATURES IN EMPLOYEE DATABASE

Employee Information reports

These reports provide important statistics that aid in key decision-making on an organizational level such as resource planning and budgeting.

Learn more about Employee Information reports.

ROLES AND PERMISSIONS

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 Roles.

General Role

The General Role is the default role in Zoho People, General roles include a few preset roles such as Administrator, Director, Manager, Team Member, and Team Incharge. All presets have customizable access to various forms and modules and can also be fine-tuned at a later point (except Administrator role). The person setting up the product (owner) would be an Administrator and other users can be assigned as Administrator too. (Administrators have complete access to all forms and settings). All invited users by default would be a Team member under General Role.

Specific Role

In addition to a standard General Role, a company might require an employee to have an additional role, such as handling the HR operations of a specific location or department. This can be achieved by creating specific roles. Data Admin Role provides complete Data access over all forms and modules for the specified location and department.

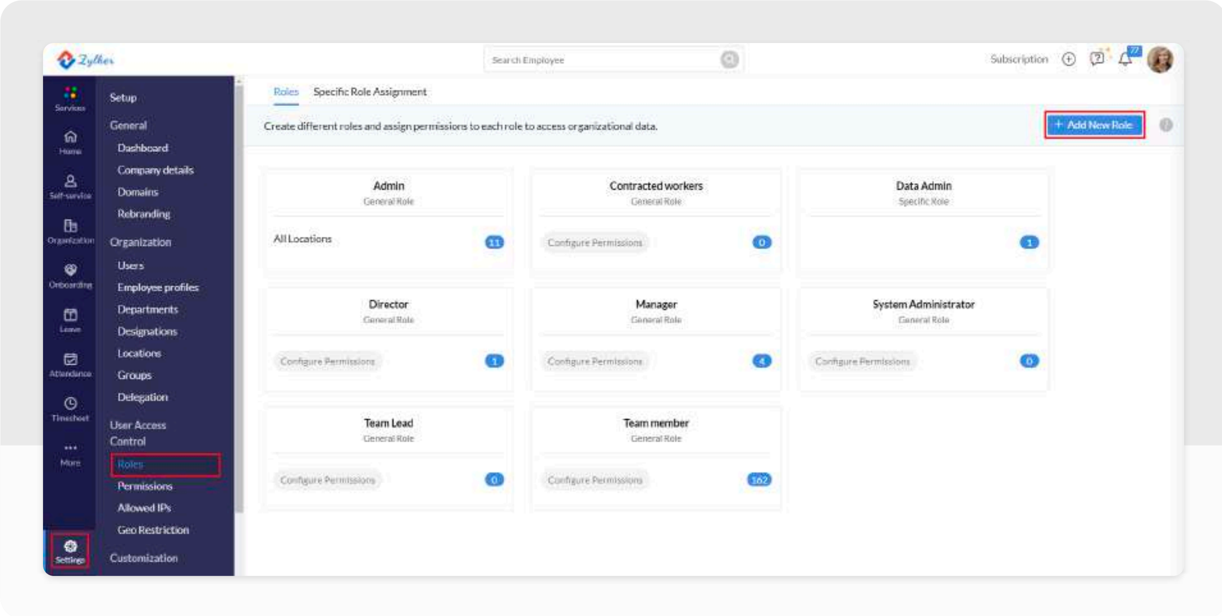
> ***NOTE:*** *By default, only specific role (data admin) will be available. For creating custom specific roles contact* ***support@zohopeople.com***

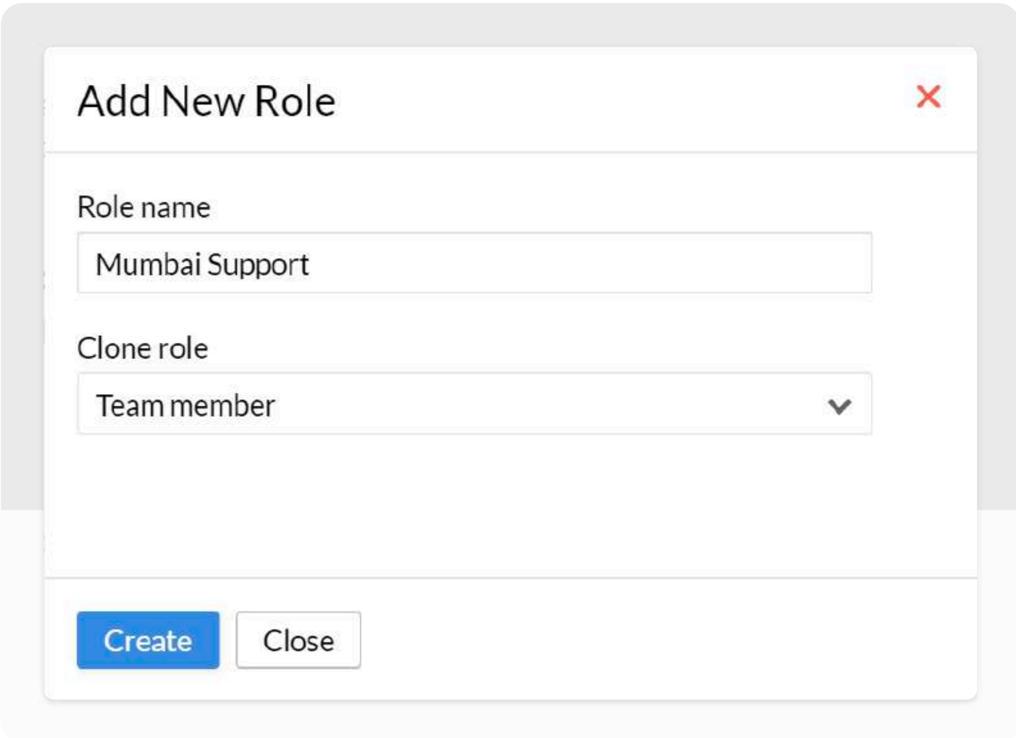
Adding a New General Role

Follow the steps given below to create a new role.

1. From your Home page, go to **Settings (gear icon) > User Access Control > Roles**
2. Click on **+ Add New Role**

ROLES AND PERMISSIONS



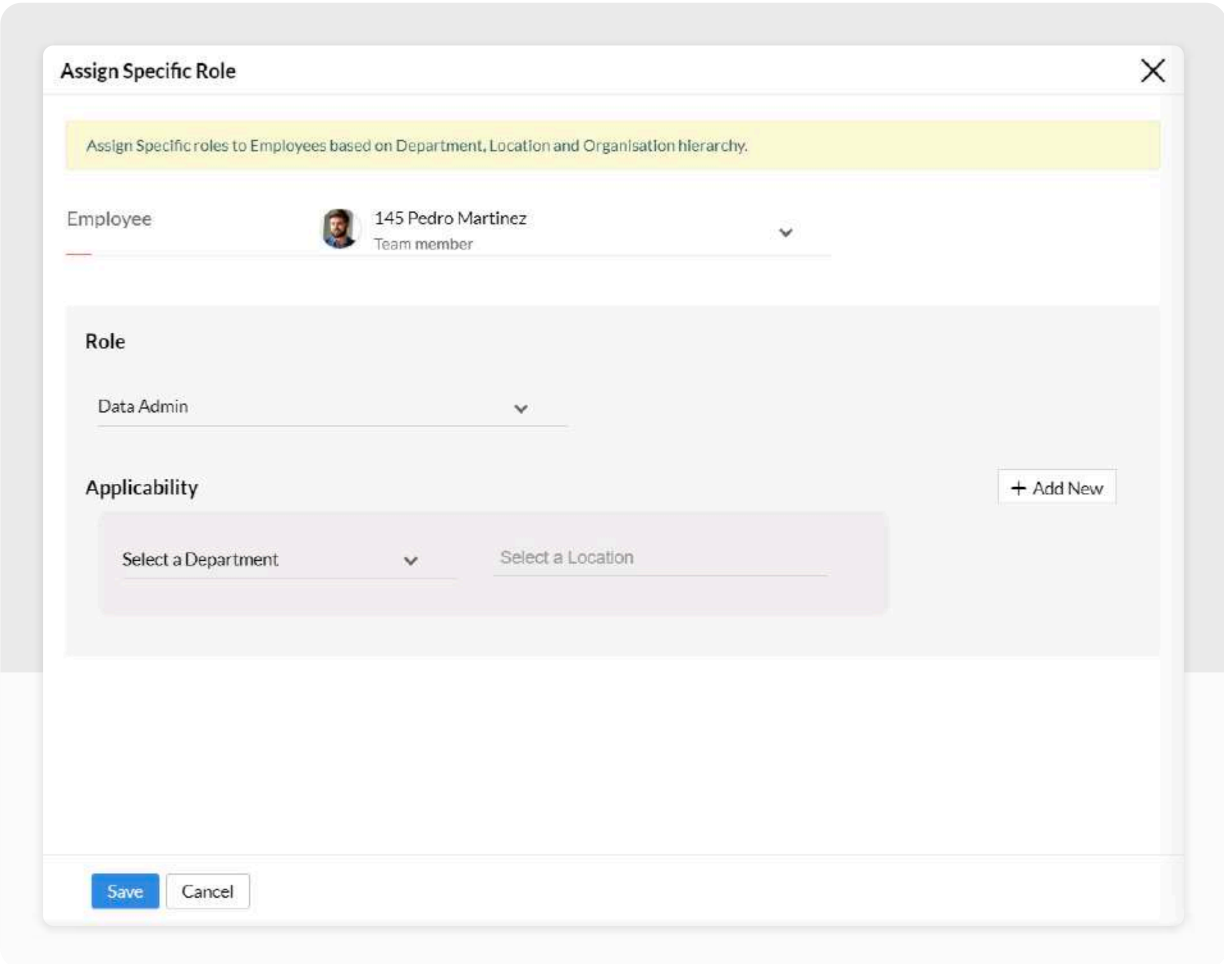


3. Enter a suitable name for the role that you would like to create
4. Select a particular role from the *Clone role* drop-down thereby allowing to create a role that is similar to that of an existing role. This means that the same set of permissions or access will be applicable to the cloned role as well
5. Click **Create**

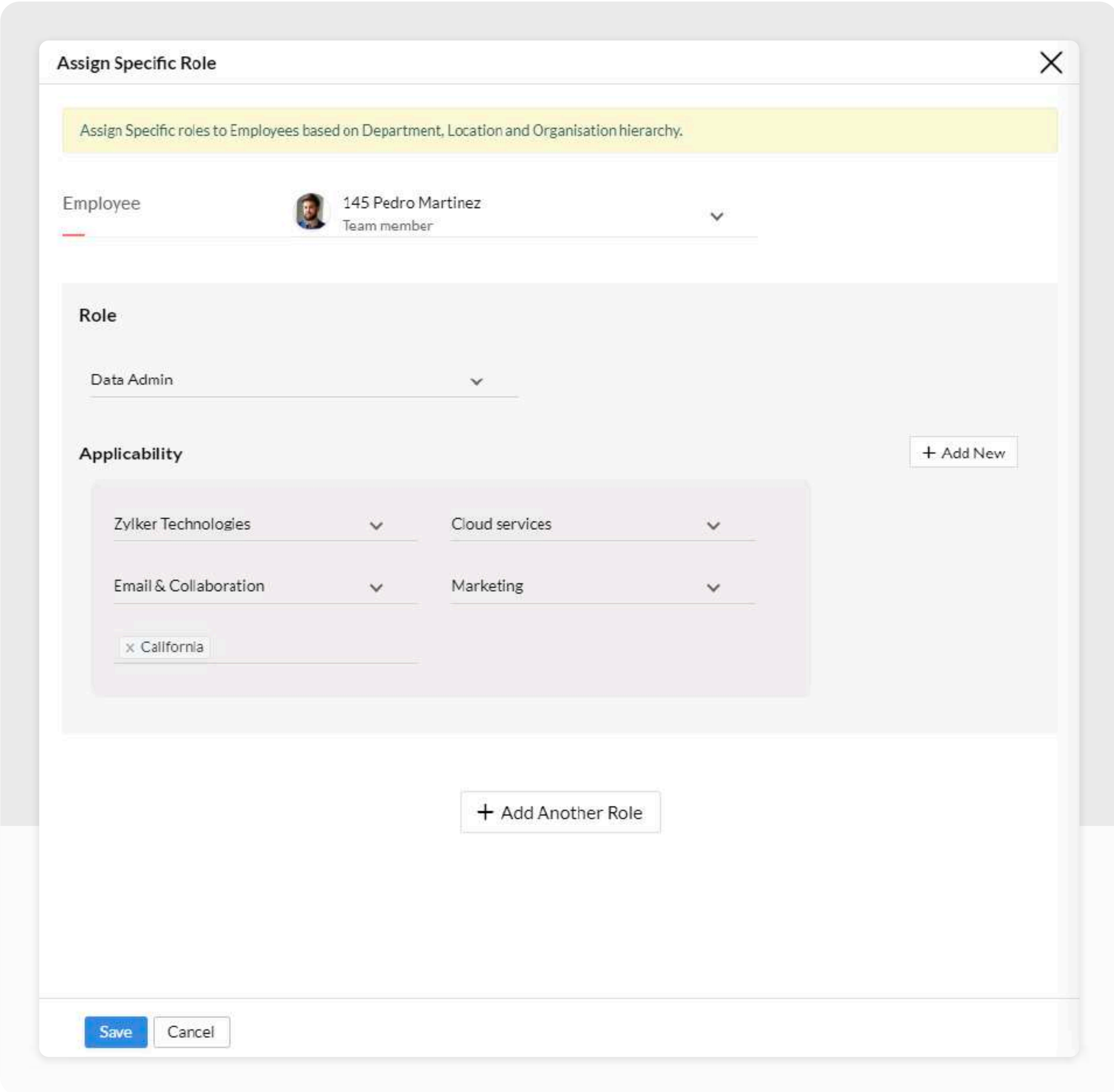
Assigning an Admin for a Specific Location or Department

You can create new admin roles for particular locations or departments. The assigned user will become the administrator only for the location, department that is tagged with the created role.

1. From your homepage, click on **Settings (gear icon) > User Access Control > Roles**
2. Go to Specific **Role Assignment** tab
3. Click **Assign New Role**
4. Select the employee who you wish to assign as Administrator
5. Under *Applicability* select the Location and Department
6. Click **Save**



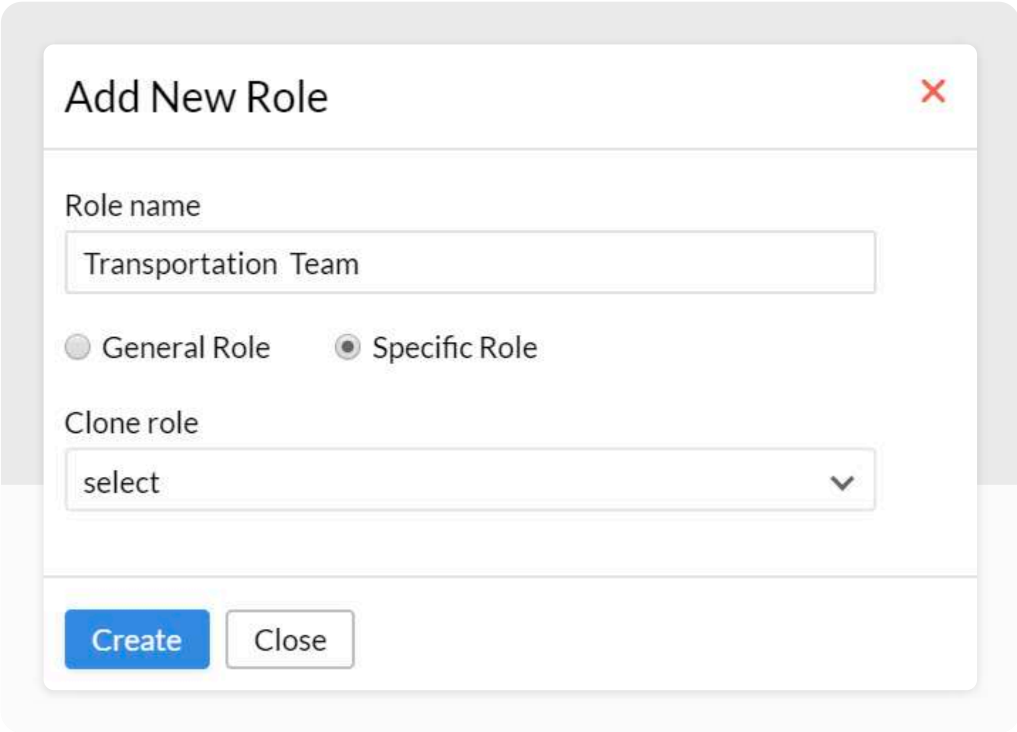
NOTE: *If Organizaton Structure feature is enabled under general settings, in addition to Location and Department, Legal Entity, Business Units, Division settings are also included under Applicability. The screenshot below shows all applicability options with Organization Structure enabled.*



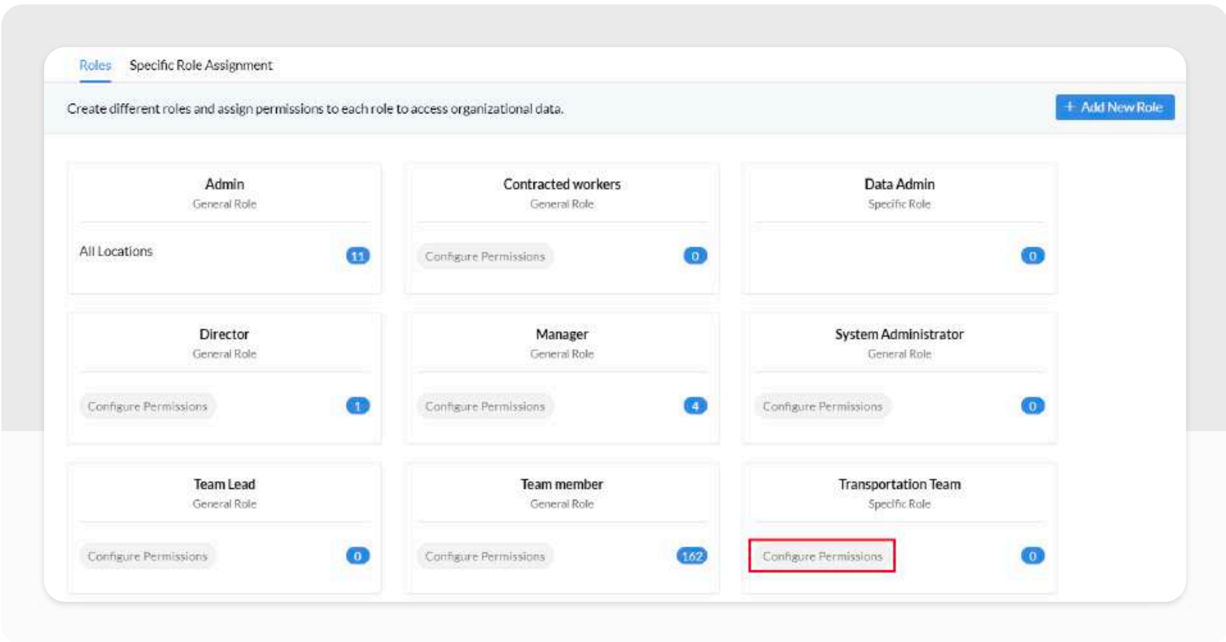
Adding a New Specific Role

In your organization, there could be employees who besides their general roles might also need to handle payroll, transport, event planning and so on. However, they do not really require Data Admin access for a complete department or location, but rather they would be needing access for a specific form. Specific Roles can be created and view, edit, add ,delete permissions can be granted as required for specific forms.

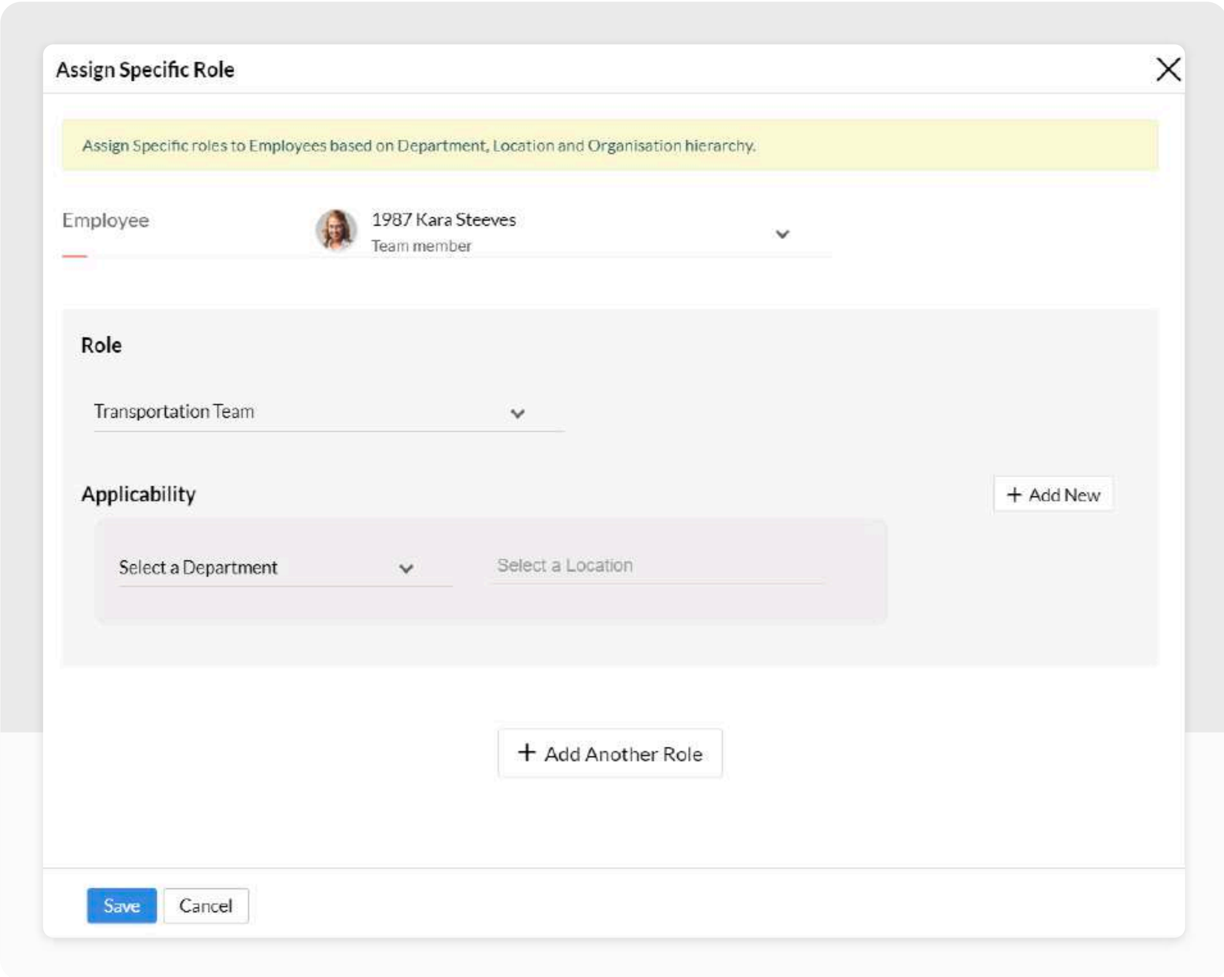
1. From your homepage, click on **Settings (gear icon)** > **User Access Control** > **Roles**
2. Under *Roles* tab, select **+ Add New Role**. Select Specific Role radio-button



3. Enter name, click **Create**
4. Now in the *Roles* page, click configure permissions within the newly created specific role



5. Select the form you wish to give access to, and permissions can be configured here
6. Now go to Assign Specific Role screen, assign the created specific role to an employee

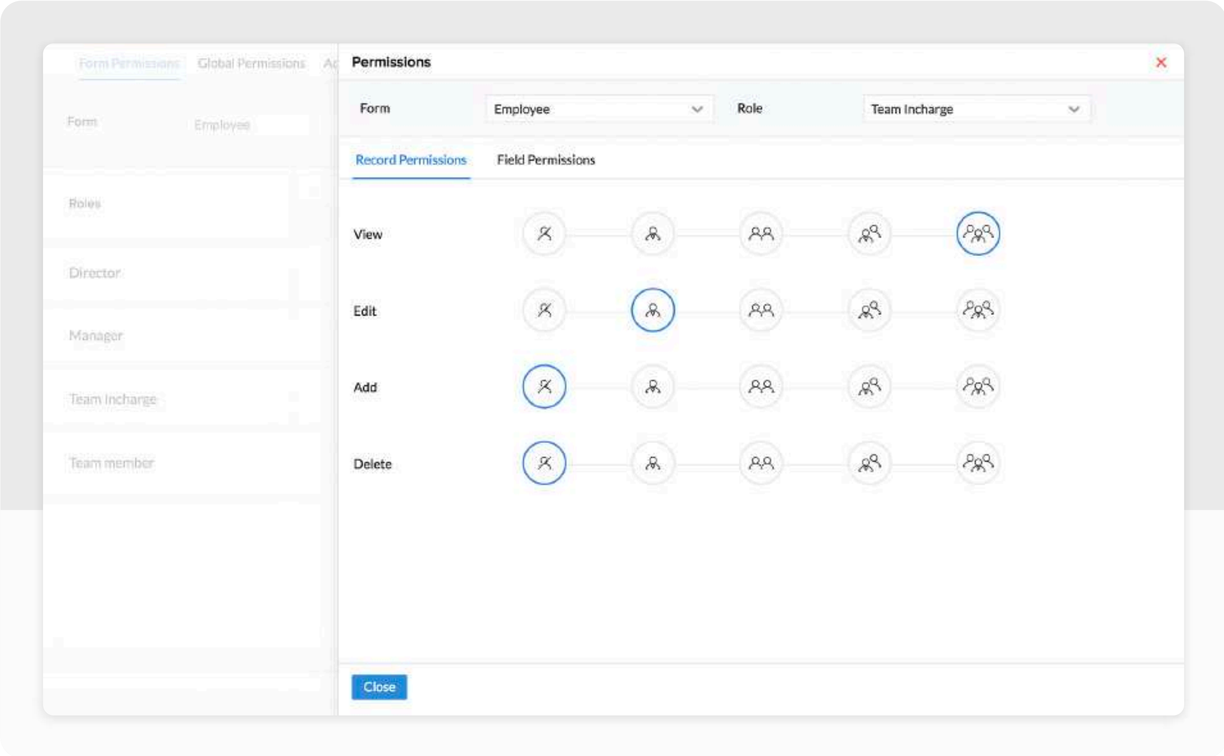


NOTE: *The created specific role can be directly assigned to any number of employees who could be under the same role. No need to create new roles everytime.*

Configuring Permissions for a Role

To configure permissions:

1. Under **Setup (gear icon) >User Access Control > Roles**, you will see all the roles
2. Go to the role for which you need to configure permissions and click **Configure Permissions**
3. Select the form for which you would like to set permissions
4. Go to the *View/Edit/Add/Delete* section based on the type of permission you would like to give



5. Select the type of data (*No data/My data/reportees' data/reportees' data + My data/All Data*) for which you would like to set permissions

NOTE: *To set Add or Edit permissions for a record, you should have first configured View permissions for the same. Also, if you would like to give Edit/Add permission for reportees' data + My data, you cannot do it unless you have given View permission for reportees' data + My data. In other words, permissions to view records should be set before setting permissions to edit or add the same record.*

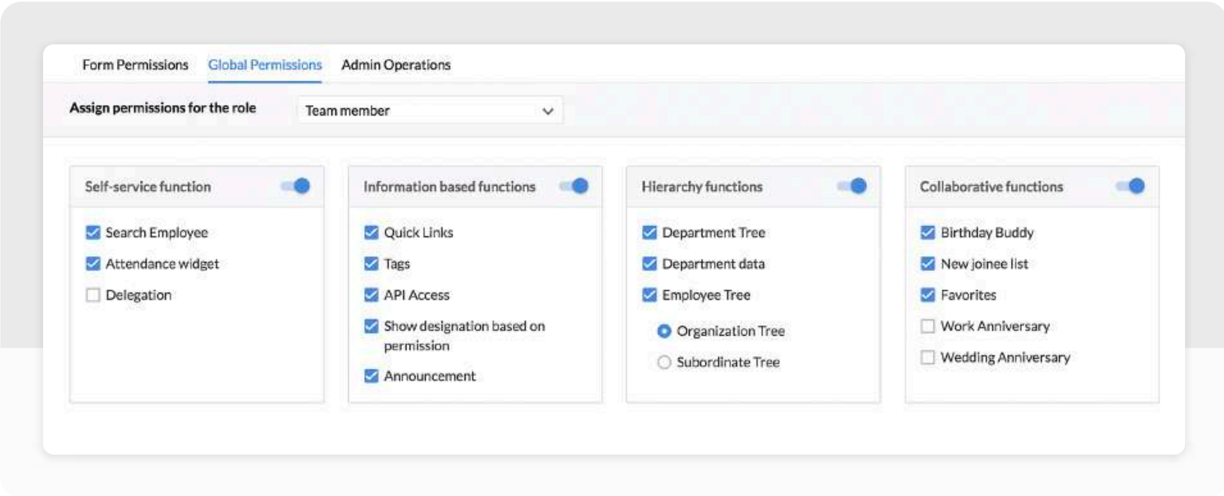
Data Permissions

There are other features in Zoho People that help you control data permissions. Let's look at each of them.

Global Permissions

For certain functions that you can perform across various modules in Zoho People, you can have permissions configured for Users of a particular Role. Follow the steps given below.

1. Navigate to **Settings**, and then to **Permissions**
2. Under *Global Permissions* tab, select the role for which permission has to be set

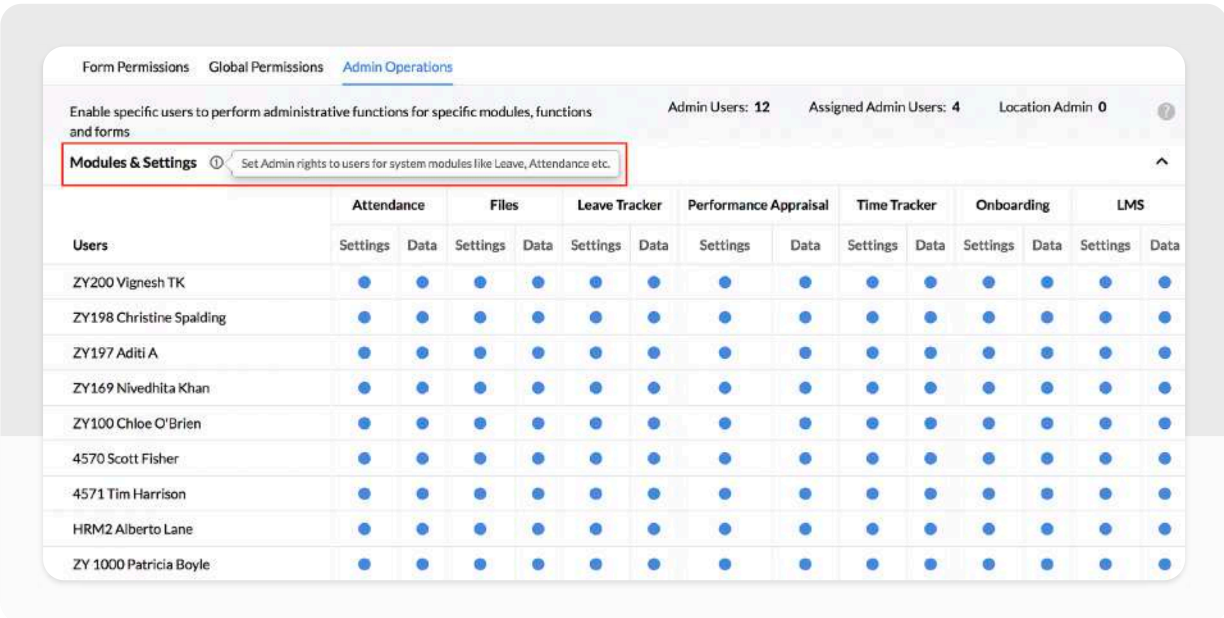


3. Select the functions for which permission needs to be set

The users under that role will be able to access only the selected functions.

Admin Operations for specific users

In this section, we can add specific users to act as admins for various modules, functions and forms. These users are not administrators otherwise.



The added user can be given permission to specifically access only Settings or only data or both. Select the options accordingly

Control Panel Functions ⓘ Set Admin rights to users for specific system functions like Permission settings, Subscription management, etc.

Users	Permissions	Subscription	Automation	Services & Forms Customization	Website Integration	Import & Export History
ZY200 Vignesh TK	●	●	●	●	●	●
ZY198 Christine Spalding	●	●	●	●	●	●
ZY197 Aditi A	●	●	●	●	●	●
ZY169 Nivedhita Khan	●	●	●	●	●	●
ZY100 Chloe O'Brien	●	●	●	●	●	●
4570 Scott Fisher	●	●	●	●	●	●
4571 Tim Harrison	●	●	●	●	●	●

Forms ⓘ Set admin rights to users for forms like Training, travel & other custom forms.

	System Forms				Performance			
Users	Users	Departments	Designations	Locations	Competency	Employee Competency	Company Policy	Training
ZY200 Vignesh TK	●	●	●	●	●	●	●	●
ZY198 Christine Spalding	●	●	●	●	●	●	●	●
ZY197 Aditi A	●	●	●	●	●	●	●	●
ZY169 Nivedhita Khan	●	●	●	●	●	●	●	●
ZY100 Chloe O'Brien	●	●	●	●	●	●	●	●
4570 Scott Fisher	●	●	●	●	●	●	●	●

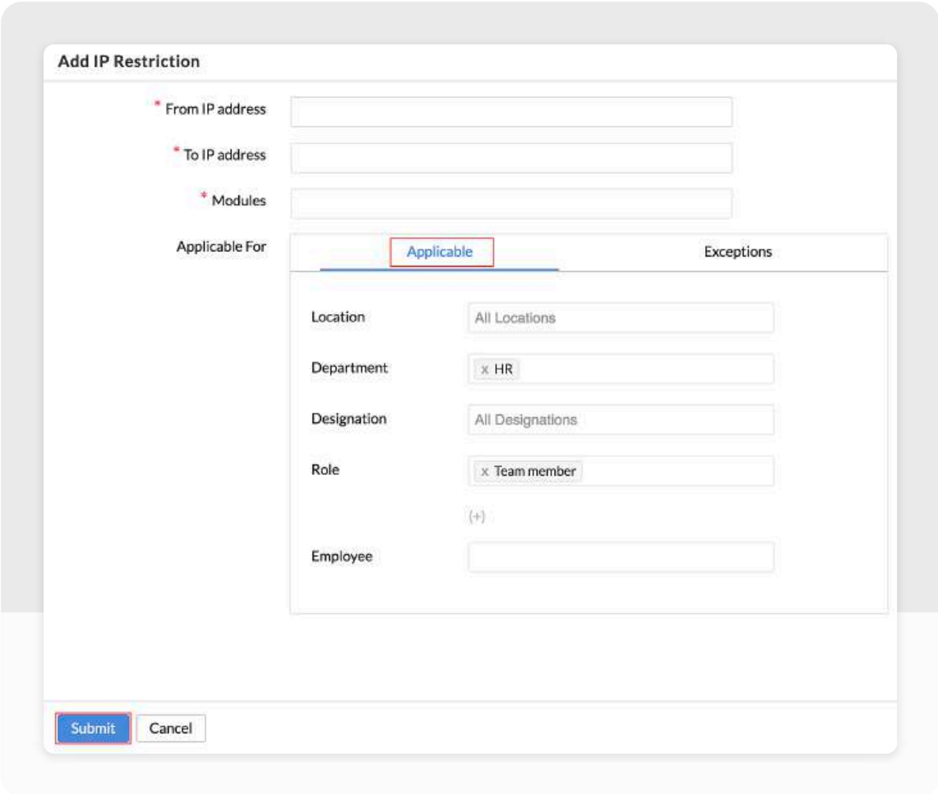
Click the **+** add icon at the bottom of the relevant section, search for the users to enable admin functions for them.

Setting IP and Geo restrictions

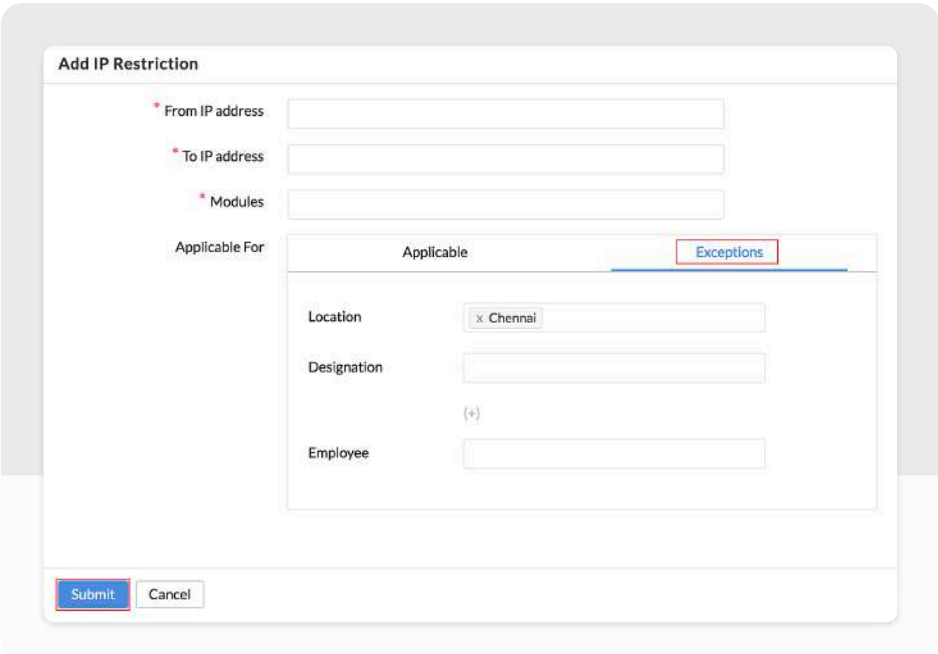
IP Restrictions

Zoho People's IP restrictions lets you set restrictions on accessing certain modules such as attendance, timesheet, and files. For instance, if you would like to prevent employees from marking attendance from outside the office, adding IP restrictions will help you achieve this. If there is an IP range specified by your administrator, then your employees will not be able to mark their attendance from anywhere outside the range. IP restrictions can be set based on roles.

1. Click **Settings (gear icon) > User Access Control > Allowed IPs > Add IP Restriction**
2. Give the IP range
3. Choose the Module
4. Under *Applicable*, select the location, department, designation, role or employee. A combination of what is selected under location, department, designation, and role will be considered as the applicable group. For example, if HR is chosen under Department and Team member is chosen under Role, then this IP restriction will apply to all HRs who are team members.



5. Under *Exceptions*, you can select the location, designation or employee that you want to exclude if required. As per the above example, the IP restriction will apply for all HRs who are team members except those located in Chennai.



5. Click **Submit**

You can set IP restrictions for three modules - Attendance, Timesheet and File storage.

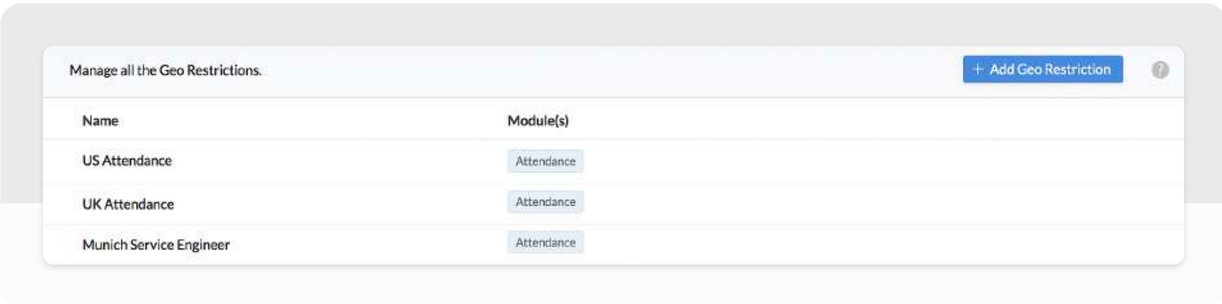
NOTE: *When Configuring IP restrictions, we always recommend using Static IP Addresses as the Dynamic IP Address gets refreshed in every 72 hours. Hence please check with your ISP to get a Static Public IP address to implement the same in Zoho People. Please do let us know at support@zohopeople.com for any further assistance.*

Geo restrictions

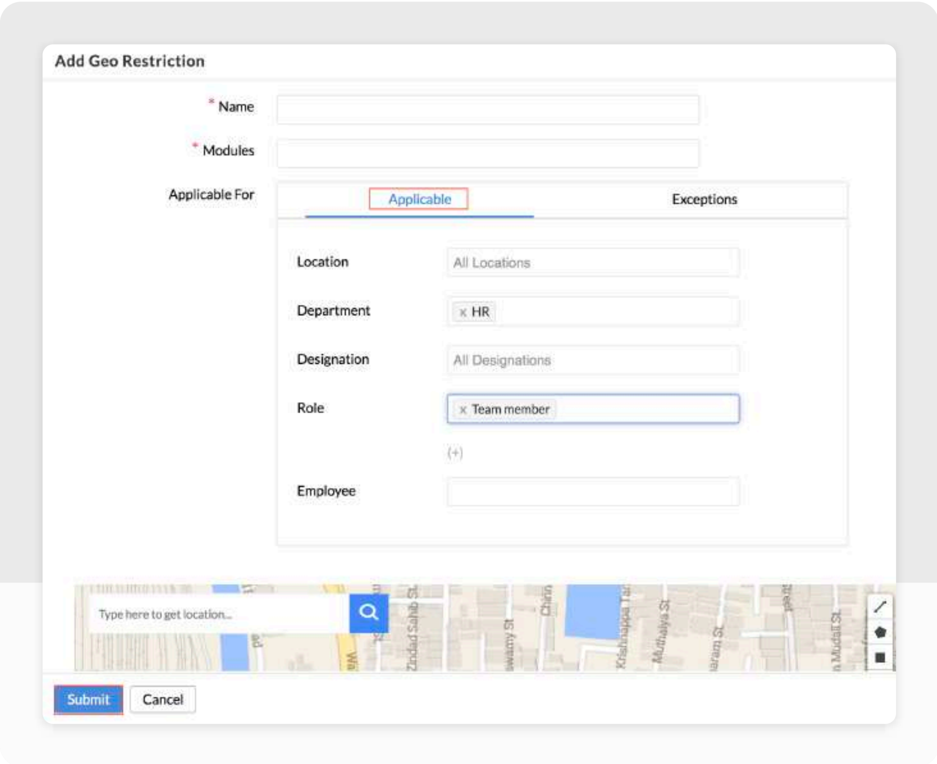
Set geo-boundaries within which your employees can access files, timesheet or attendance. For example, if you would like to define a location range within which employees can mark their attendance, this is possible by adding geo-restrictions. You can set a range on the map and prevent employees from marking their attendance from any range that is outside of the one which is specified by the organization. This restriction can be set even for specific teams, designations, etc.making it useful for you to track the attendance of specific teams like sales, marketing, etc.

Follow the steps given below to do this.

1. From your home page, go to **Settings (gear icon) > User Access Control > Geo Restriction**

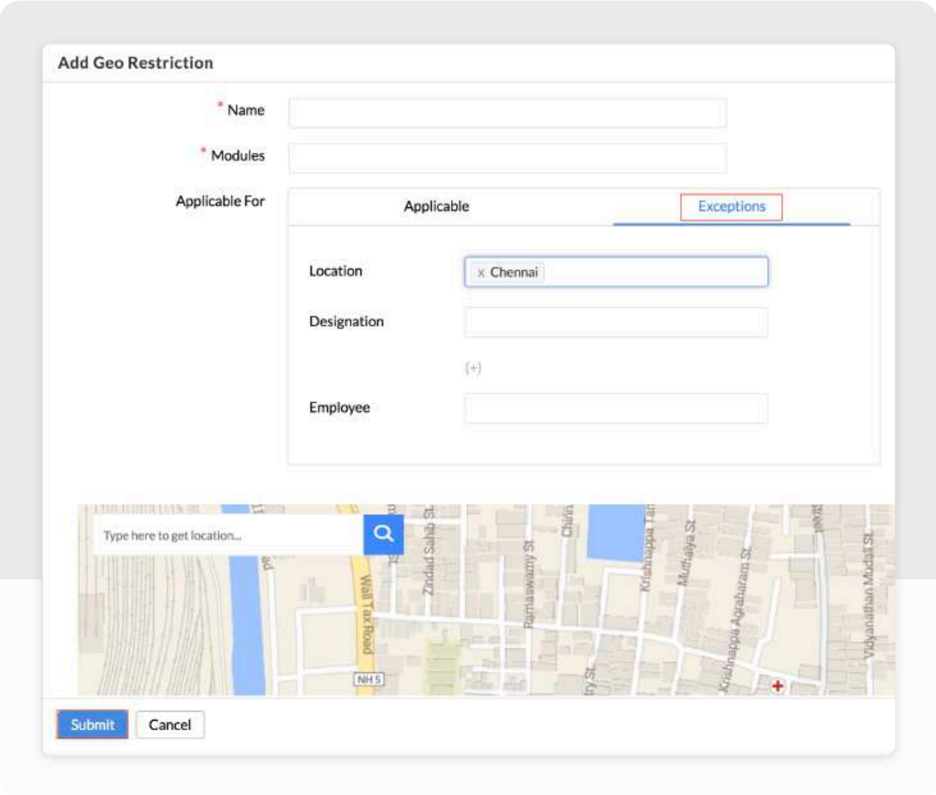


2. Click **Add Geo Restriction**
3. Give a name
4. Select the applicable modules

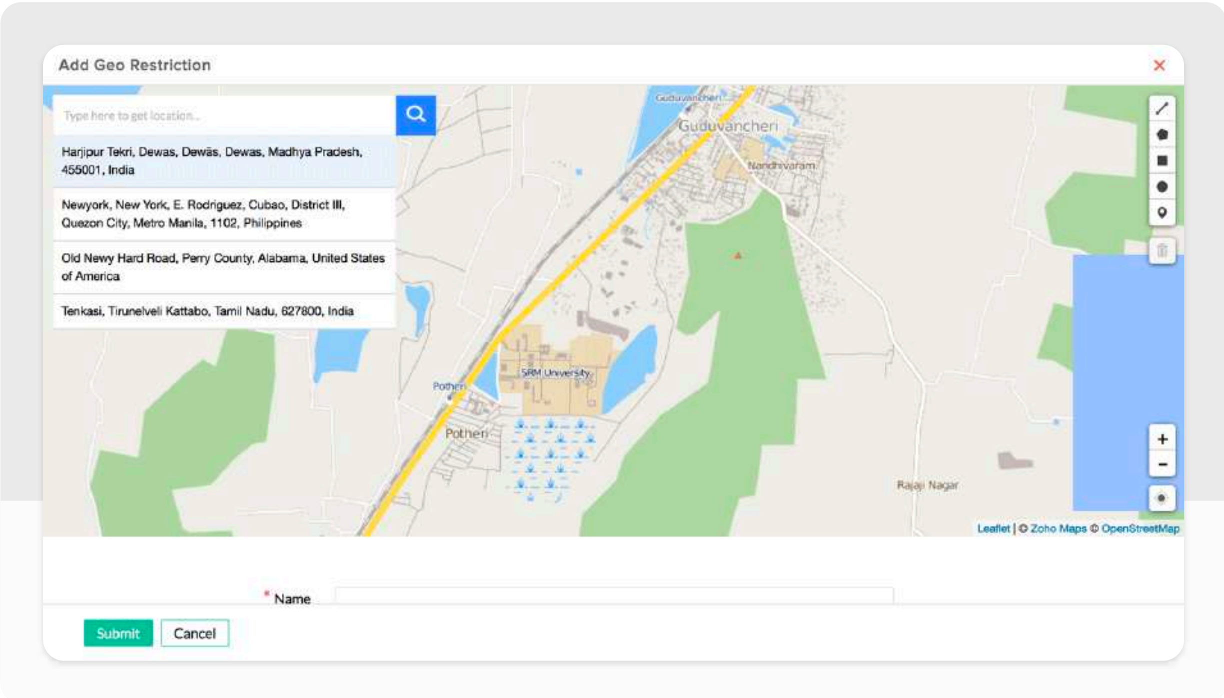


5. Under *Applicable*, select the location, department, designation, role or employee. A combination of what is selected under location, department, designation, and role will be considered as the applicable group. For example, if HR is chosen under Department and Team member is chosen under Role, then this Geo restriction will apply to all HRs who are team members

6. Under *Exceptions*, you can select the location, designation or employee that you want to exclude if required. As per the above example, the geo restriction will apply for all HRs who are team members except those located in Chennai



7. Use the Search tab to search for the starting location of your range



8. Use the drawing tool (choosing from a variety of shapes like circle, rectangle, polygon, etc) bar at the right-hand side to select the range
9. Click **Show My Location** icon to come back to the current location

SHIFT MANAGEMENT

What is Roster Management?

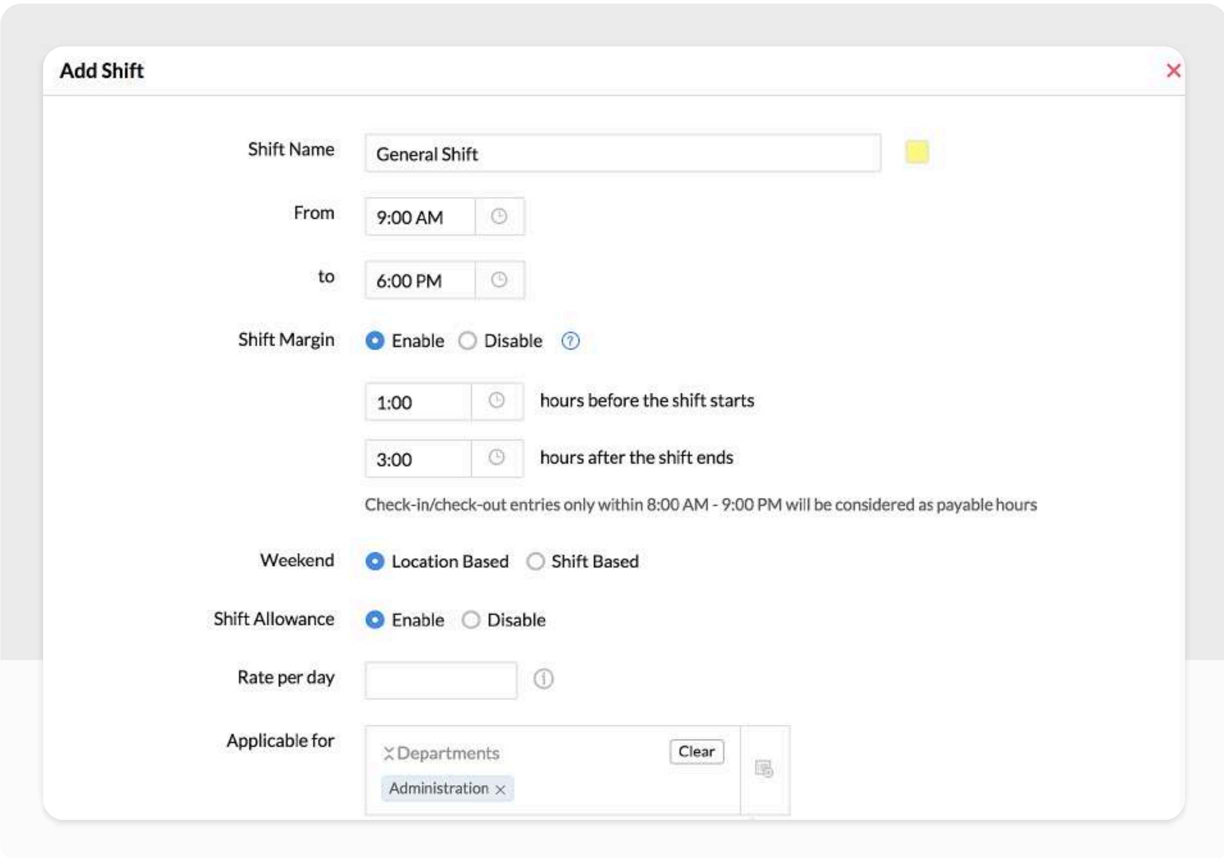
Roster or Shift Management refers to managing employees in an organization who have different working hours based on the shift they are in.

Why is it useful?

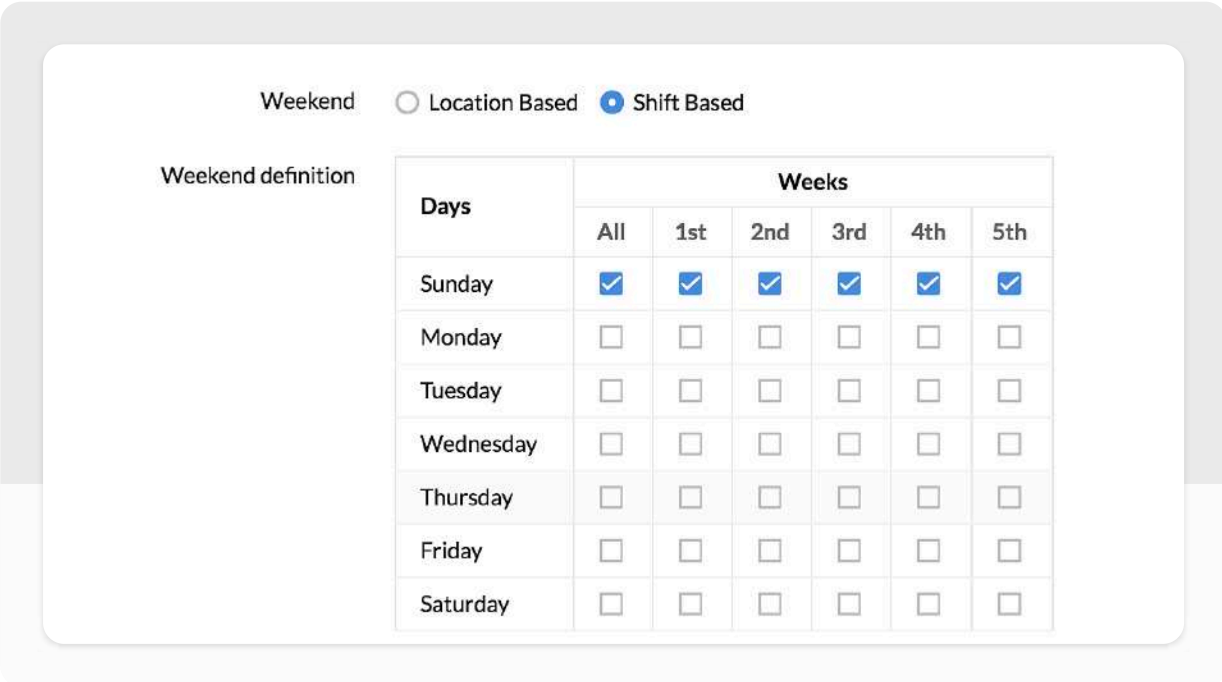
In organizations that provide services in different time zones, a shift management system helps assign employees to multiple shifts, automates shift rotations and sends out timely communication to the employees and managers regarding their shifts.

Adding Shifts

1. From your home page, go to **Attendance > Shift Schedule > Shift(s) > Add Shift**
2. Set the start and end time of the shift under *From* and *To*
3. Enable Shift Margin if required. This will help you set boundaries for shifts. Employees' work done within the set boundary will only be counted as payable hours. Click here to know more.

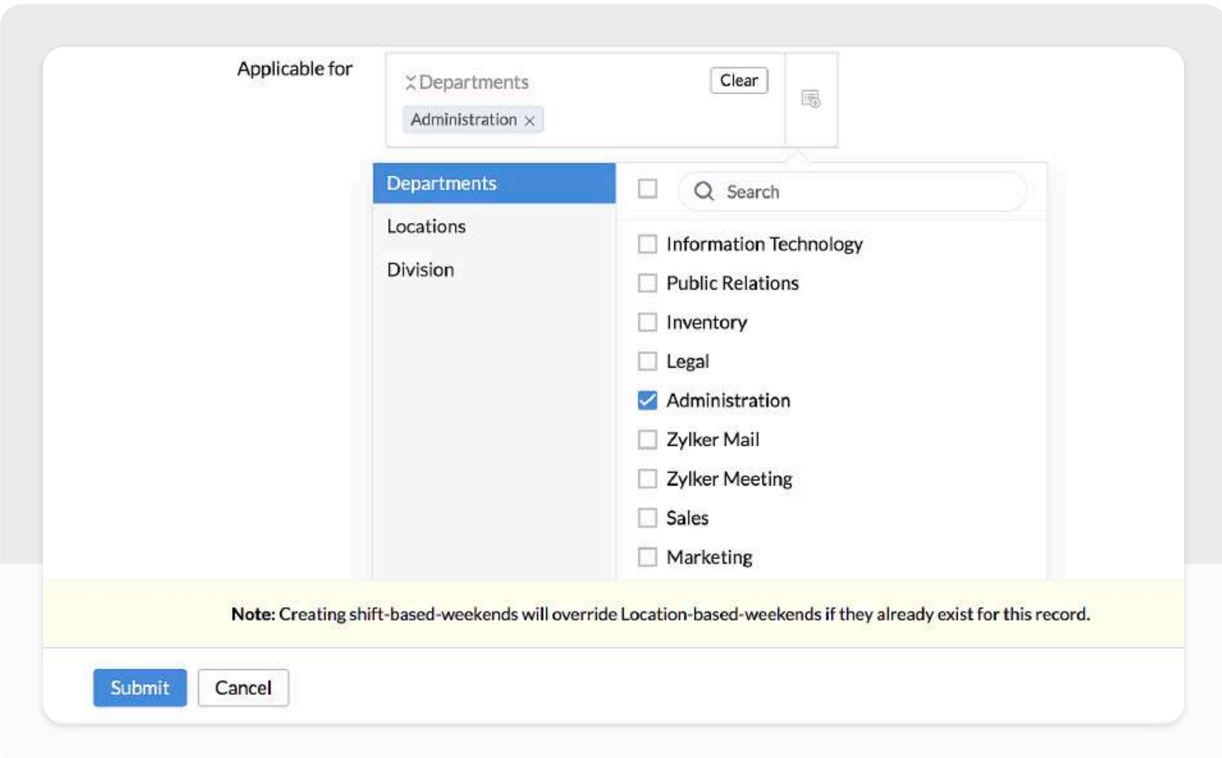


4. Set weekends for the created shift. If weekends have to be set based on locations, select Location based. Weekends set for locations under Calendar Settings will be applicable here
5. To define new weekends for the created shift, click Shift based and mark weekends for the shift



6. Under *Shift Allowance*, check Enable to set a shift allowance if required and enter the Rate per day for the shift. The allowance set here will be applicable when an employee covers the eligible working hours set under **Attendance > General Settings > Eligibility for Shift Allowance**

7. Select the applicability of the shift. You can choose among departments, locations and divisions based on organization structure



Click here to know more about divisions in organization structure.

NOTE:

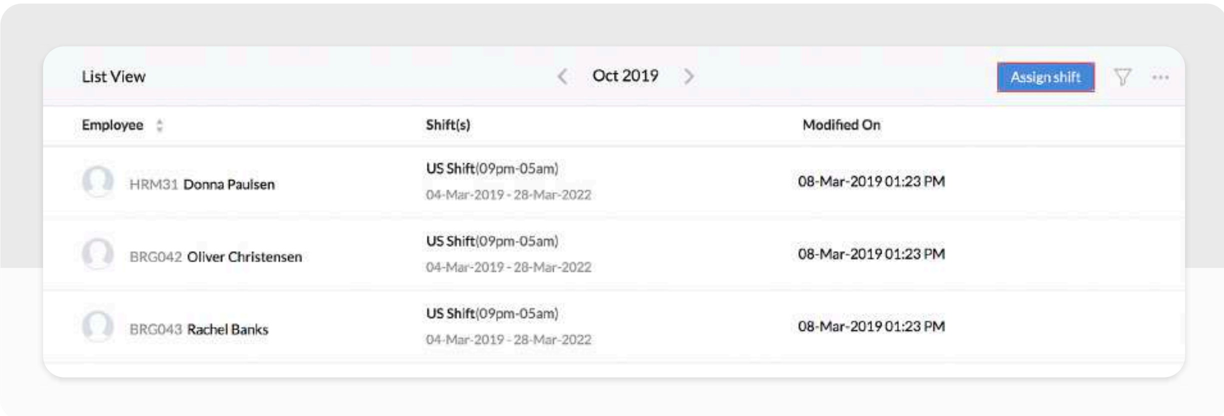
- *If you select Location based Weekend & Holidays then it will be based on the settings configured under Settings > Organization > Holiday Calendar.*
- *While creating shifts and shift-based weekends/holidays, it overrides the weekend/holiday definition for the location-based ones if they already exist for the account.For example, an organization serves clients in the US time zones and Australian ones. Its holidays are configured as per the respective shifts. In this case local (location-based) holidays are overridden, as shift-based weekends/holidays has its effect, even though it's the same work location.*

Mapping employees

An employee can be assigned to a shift by the following options:

From the Employee Shift Mapping tab

1. Go to **Attendance > Shift Schedule > Employee Shift Mapping**

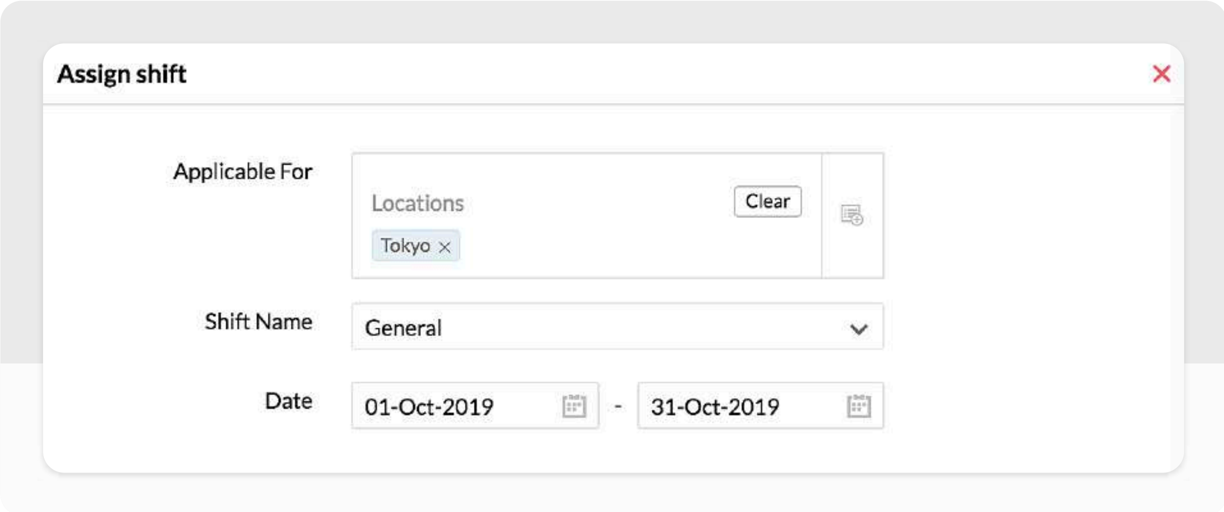


2. Click **Assign Shift**
3. Under *Applicable For*, select the employees

You may also select Location and make employees of that location be included in the Shift.

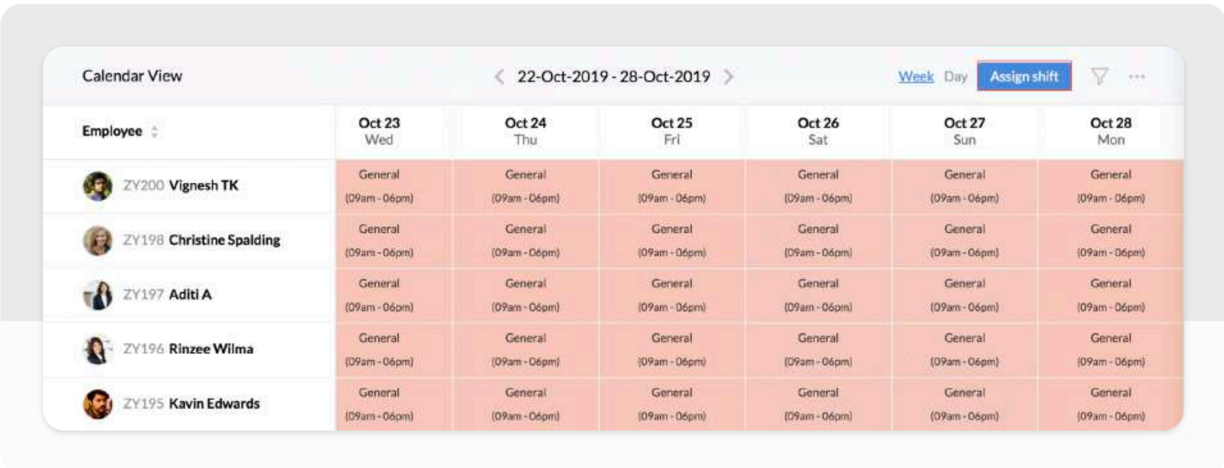
NOTE: *The employees who belong to the location at the point of time when you assign the shift, will only be part of the shift. For eg. If you have selected 'California', then the employees who join in 'California' at the time that you assign the shift will be included as part of the shift. The ones who join after you have completed this association, will not be part of the Shift. To include them as part of the shift, you will have to either assign the employees by selecting 'Users' or click on 'Assign shift' and select 'California' from 'Location' again, to make the new employees part of the shift.*

4. Select the Shift name from the drop-down
5. Provide From and To date



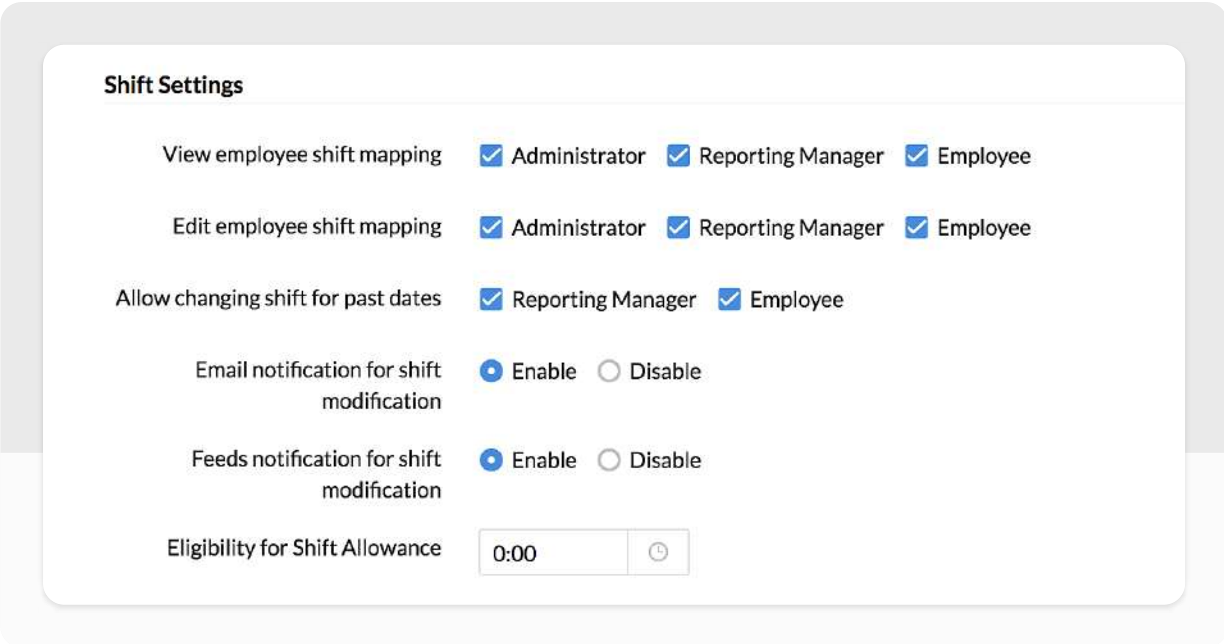
5. Click **Submit**

From the Shift Calendar tab:



1. Go to **Attendance > Shift Schedule > Shift calendar**
2. Click **Assign shift**
3. Enter the details and click **Submit**

Shift Settings and Notifications



- **View employee Shift mapping:** Here you can set as to who needs to view employee shift mapping.
- **Edit employee Shift Mapping:** Permissions to edit employee shift mapping can be set here.
- **Allow changing shift for past dates:** You can define who can change the shifts for past dates.
- **Email notification for shift modification:** You can decide whether to enable or disable the email notification that will be sent to employees.
- **Feeds notification for shift modification:** Here, you can set whether to enable or disable feeds notification sent to employees about any modifications to their shifts.
- **Eligibility for Shift Allowance:** Here, you can specify the minimum hours that an employee should have clocked-in for the day to be eligible for shift allowance.

ADDITIONAL FEATURES IN SHIFT MANAGEMENT

Shift Rotation

The main function of the scheduler is to have the shifts changed automatically for selected employees, based on the frequency that is set. Learn more.

Breaks

Based on the needs of your organization, breaks can be configured in Zoho People. You can choose between an automatic or manual mode, choose if the break is paid or unpaid, configure applicability, set start and end time, and the maximum allowed duration for breaks. Learn more.

Shift Margin

This setting allows you to define boundaries within which payable hours will be calculated. When enabled, the start and end time of the shift will be considered as the default boundaries. You can set additional time limits before or after the shift that provide a bigger interval to calculate the payable hours. Learn more.

From automating simple email alerts to configuring complete workflows that trigger a series of automated actions, learn more about our automation features in Zoho People.

LEAVE MANAGEMENT

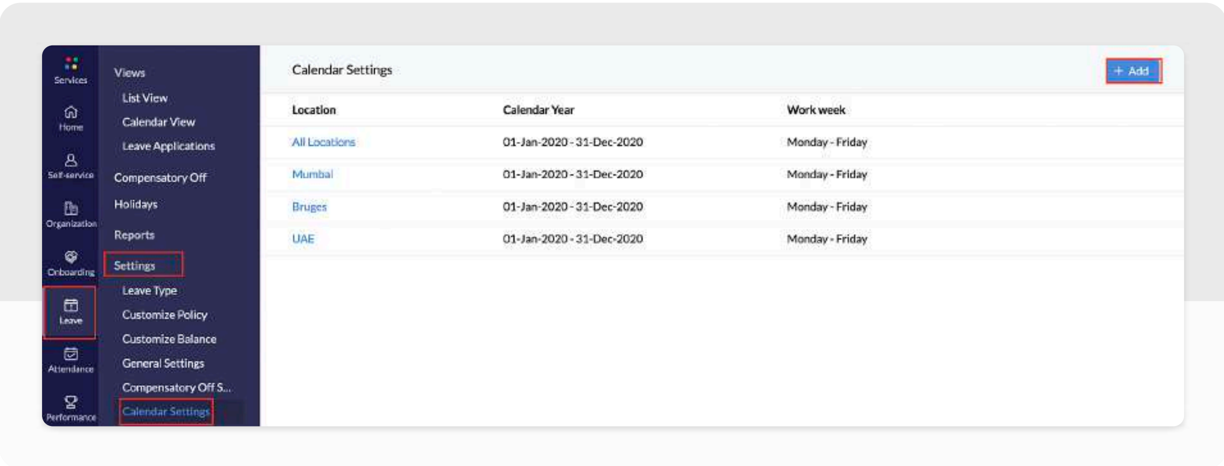
Managing leave is a crucial part of the HR routine and and is also time consuming. Zoho People's Leave is a simple and user-friendly online leave management module that helps you to record, manage and keep track of your employees' leave details effectively with minimised time theft.

Calendar Settings

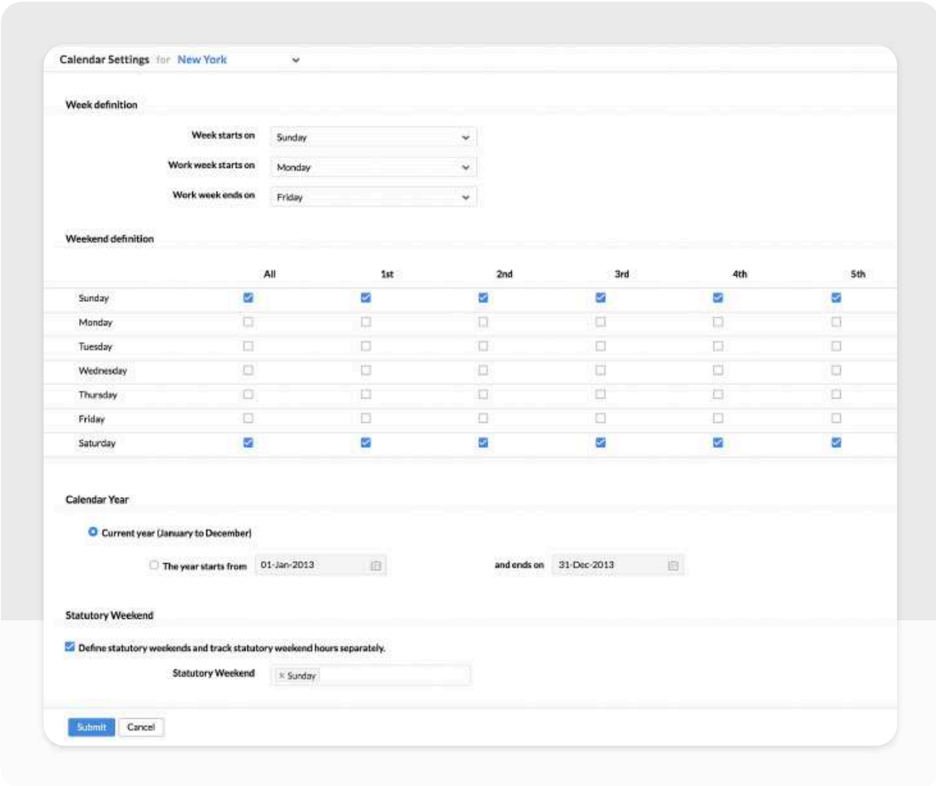
These settings are crucial as they help you define the work days, weekends, year and statutory weekends of your organization. You can setup multiple calendar settings for each geographical location of your organization.

To configure the calendar settings for your organization,

1. Go to **Leave > Settings > Calendar Settings > + Add**



2. Select the location the calendar settings apply for, from the drop-down at the top center of your screen



3. Under *Week definition*, select the days when the week starts, when work week starts, and when work week ends, respectively,

4. Under *Weekend definition*, check the days you want to consider as weekends

5. Under *Calendar Year*, select the applicable year format. If you want it to be January – December, select Current year (January to December), else select your own period in the second option

6. Under *Statutory Weekend*, select the specific days within the defined weekend

7. Click **Submit**

Statutory weekend

Statutory weekend is a subset of the defined weekend, that you define to be tracked separately. The days that do not fall under the defined statutory weekend are considered as non-statutory weekend.

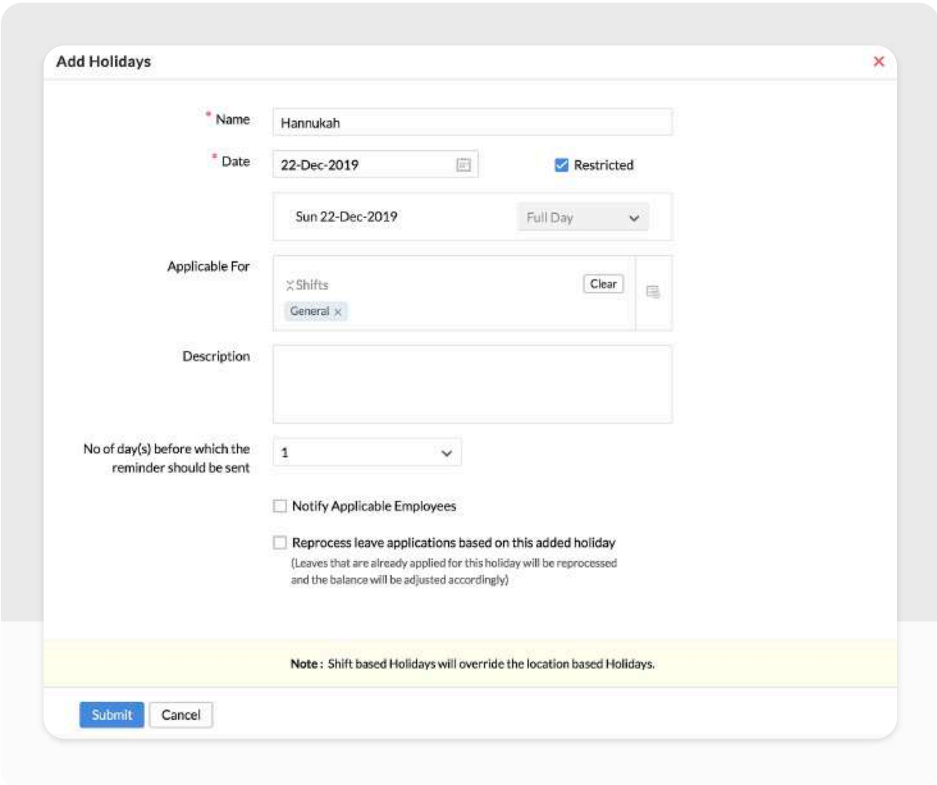
Defining Holidays

Setting up the holiday calendar is one of the important tasks for HRs at the beginning of the year. This is more important if you operate out of multiple locations or multiple shifts. An updated holiday list helps employees plan their leave much ahead of time. This, in turn, helps with work allocation. Having the option to see the official holiday calendar along with the personal calendar is an added advantage. With Zoho People, you will be able to achieve all of this.

Location and Shift based holidays

Follow the steps given below to add location or shift based holidays.

1. From your home page, go to **Leave > Holidays > Add**
2. Enter the name and date
3. Check the *Restricted holiday* box to add a restricted holiday
4. Under Applicable for, click the list icon and select the location and shifts
5. Give a description if needed
6. If you want a reminder to be sent, select how many days in advance it should be sent from the drop-down



7. Check Notify Applicable Employees if required
8. Check Reprocess leave applications based on this added holiday if you want to reprocess leave applications that have been applied on this specified holiday. The leave balance will be adjusted accordingly

The reprocess option can be used while editing or deleting holidays as well. While editing, the leave applications before and after editing will be reprocessed. Let's say June 5th is set for Ramadan initially but then it is edited to June 6th. In this case, the leaves applications for June 5th and 6th will be reprocessed.

When you add a holiday to a location or for a shift, the employees who are mapped to that location/

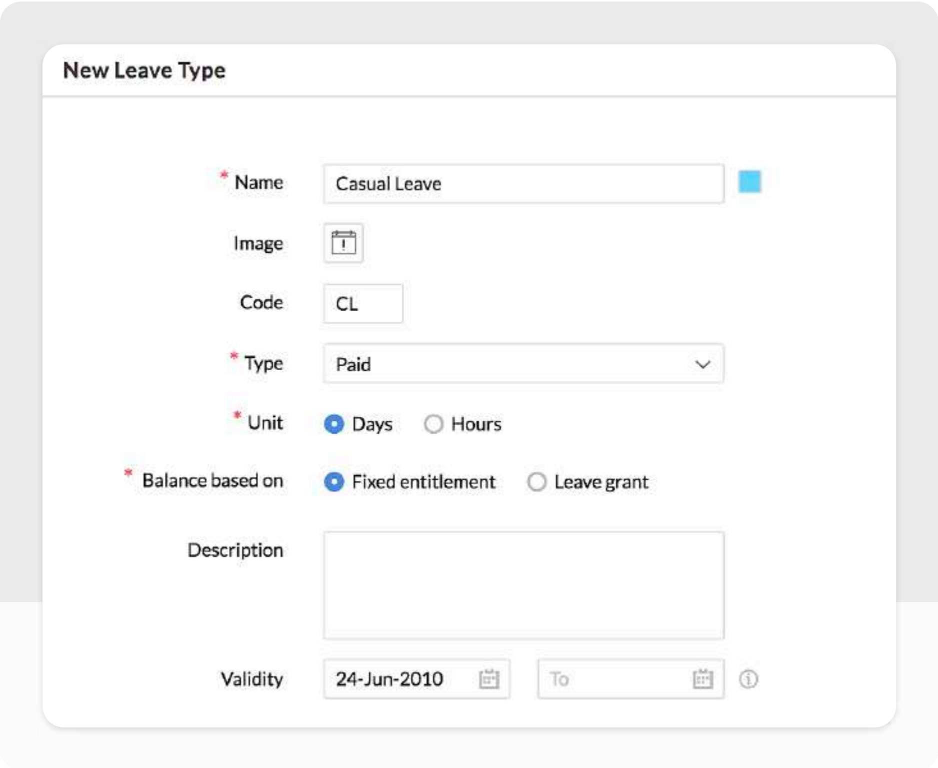
shift will be eligible for the holiday. If you do not select any location or shift here, then the added holiday will be applicable to everyone in the organization.

NOTE: *The created specific role can be directly assigned to any number of employees who could be under the same role. No need to create new roles everytime.*

Configuring Leave Policies

Zoho People's new leave type gives you an extensive platform to configure and customize various leave types to suit every organization's need. This new leave type comes with various advanced options such as Prorate Accrual and Reset, that can make your leave dynamic and flexible. A leave policy can even be customized exclusively to a specific employee. Let us look at the important features in configuring a new leave type.

Leave policy configuration

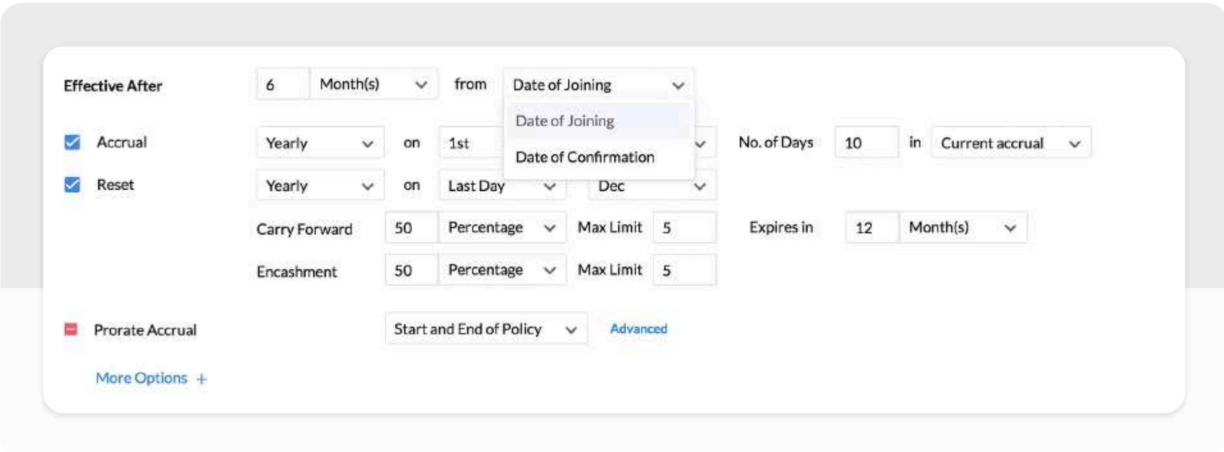


1. Go to **Leave > Settings > Leave Type > Add**
2. Give a Name, image and Code - Code is a unique reference for the leave type. For eg, the code for Casual Leave can be given for CL for easy identification
3. Under Type, select whether the leave should be Paid or Unpaid, On Duty or a Restricted Holiday

4. Under Unit, select Days or Hours and give a description. The unit given here will form the basis for all the leave calculations. For example, if Hours is chosen then all configurations and reports will be in Hours
5. Select *Fixed entitlement* under Balance based on
6. Validity refers to the period for which the leave type is valid. The From date is mandatory for any leave type. If you do not want the leave type to expire, the To date field can be left blank. Reports for the organization will be generated from this date

Entitlement

In this section, we define how much leave gets credited to an employee using various options such as accrual and reset. You can also use entitlement when you would like to differentiate the amount of leave for each employee based on their years of experience.



Accrual helps you set the intervals within which the leave will be credited to the employee. For example, if you select Monthly as the accrual period and enter the entitlement as one, then it means that the employee will be credited one day of leave every month under this leave type.

Reset can define whether the leave balance should be reset and also set the intervals for the reset to happen. If Reset is enabled, then it means that you would like the leave balance to lapse within the interval defined. If Reset is disabled, then the leave balance will accumulate and not lapse. When Reset is enabled, the unused balance can be carried forward and/or encashed.

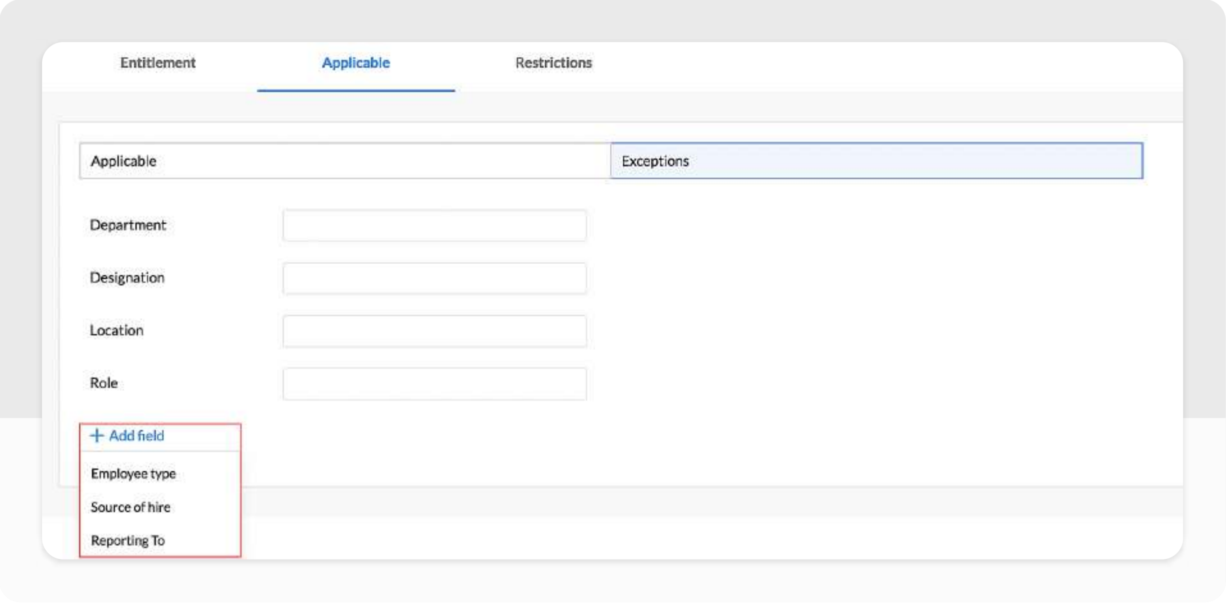
Carry Forward can be used to move leave from one interval to the other. There are two ways leave can be carried forward: as units or as percentages.

Encashment can be used to define monetary compensation for a number of unused leaves. As in carry forward, you can define it as units or percentages.

Prorate Accrual - Using Prorate Accrual, you are allowing leave to be credited whenever the employee enters the policy. Under prorate accrual, you can further specify how the entitled leave gets prorated for the first and last accrual cycle using many options.

Applicability

In this section, you can define who the leave is Applicable to. You have options like Gender, Marital Status, Department, Designation, Location, Role here. You also have an option to add specific employees to the leave type under Employee. This is useful in scenarios where you would like a specific employee from another region to be part of this leave type.

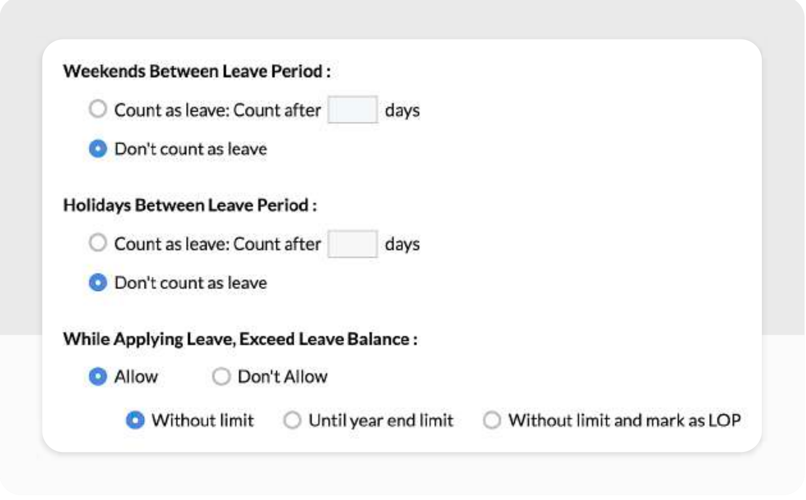


Exceptions - Set the exceptions based on options like Department, Designation, Location, and Role.

The **Add field** option is available in under Applicable and Exceptions where you can view drop-down and multi-select fields from the employee form. Choose the ones that you would like to include. This is useful in cases where you want to narrow down the leave type to a specific group of employees.

Restrictions

In this section, we can further refine the leave by imposing various restrictions. Below is a sample screenshot of some of the available restrictions.

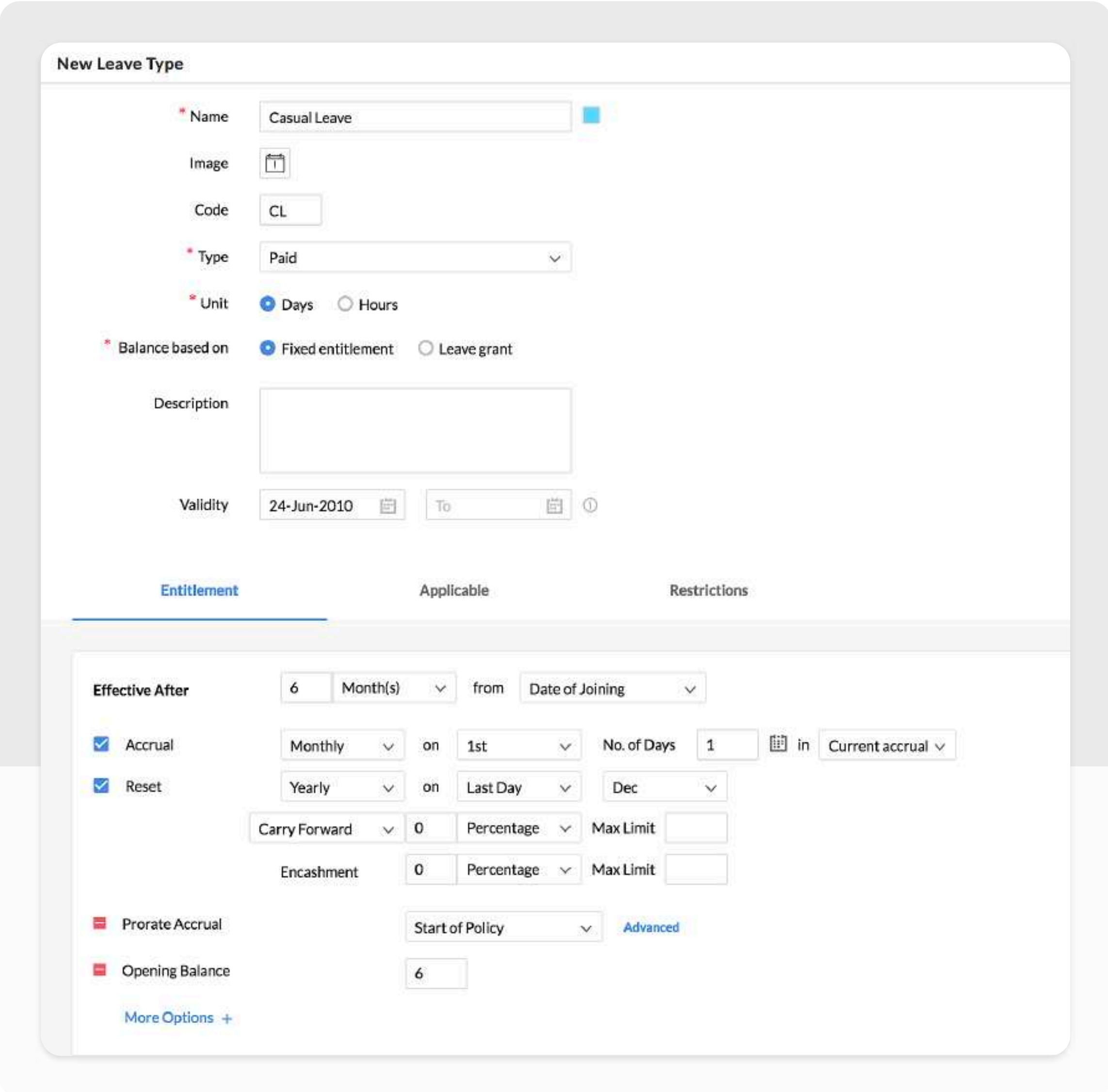


Use cases

Casual leave

Assume you would like to configure casual leave for your employees. The condition is that you would like employees to be eligible for one day of leave every month and for the leaves entitled for the first six months, they will be credited only in the seventh month.

This leave type can be configured in this manner:



Learn more about configuring advanced leave policies.

NOTE: *Contact support@zohopeople.com if you are using the basic leave configuration and want to upgrade to this advanced leave policy configuration.*

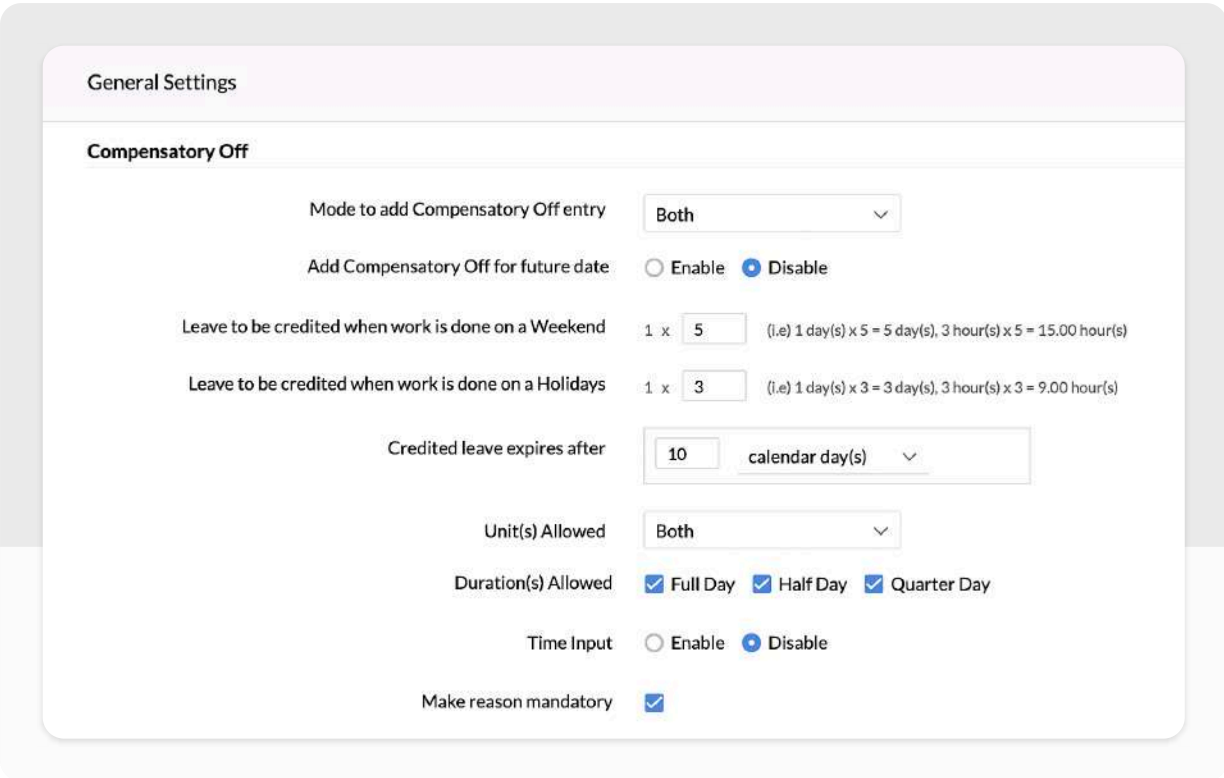
Compensatory Off

When employees work on a weekend or on holidays, they will be able to mark the days worked to be taken later as compensatory off, provided the organization allows it.

Compensatory Off Settings

These settings help you define how you want your employees to use compensatory off and configure the settings accordingly. These settings are found under the General Setting section.

To configure settings related to compensatory off, go to **Leave > Settings > General Settings > Compensatory Off.**



Compensatory Off Scheduler

The compensatory off scheduler records an employee's work done on a weekend or holiday automatically.

***NOTE:** The holidays and weekends will be considered here based on the holidays and weekends configured for the particular employee. In the case of shifts, shift-based holidays and weekends will be applicable.*

Learn more about Compensatory off.

Pay Period Settings

Creating a pay period can help you define set timelines for your payroll to be processed and for the payroll report to be generated in the set periodicity.

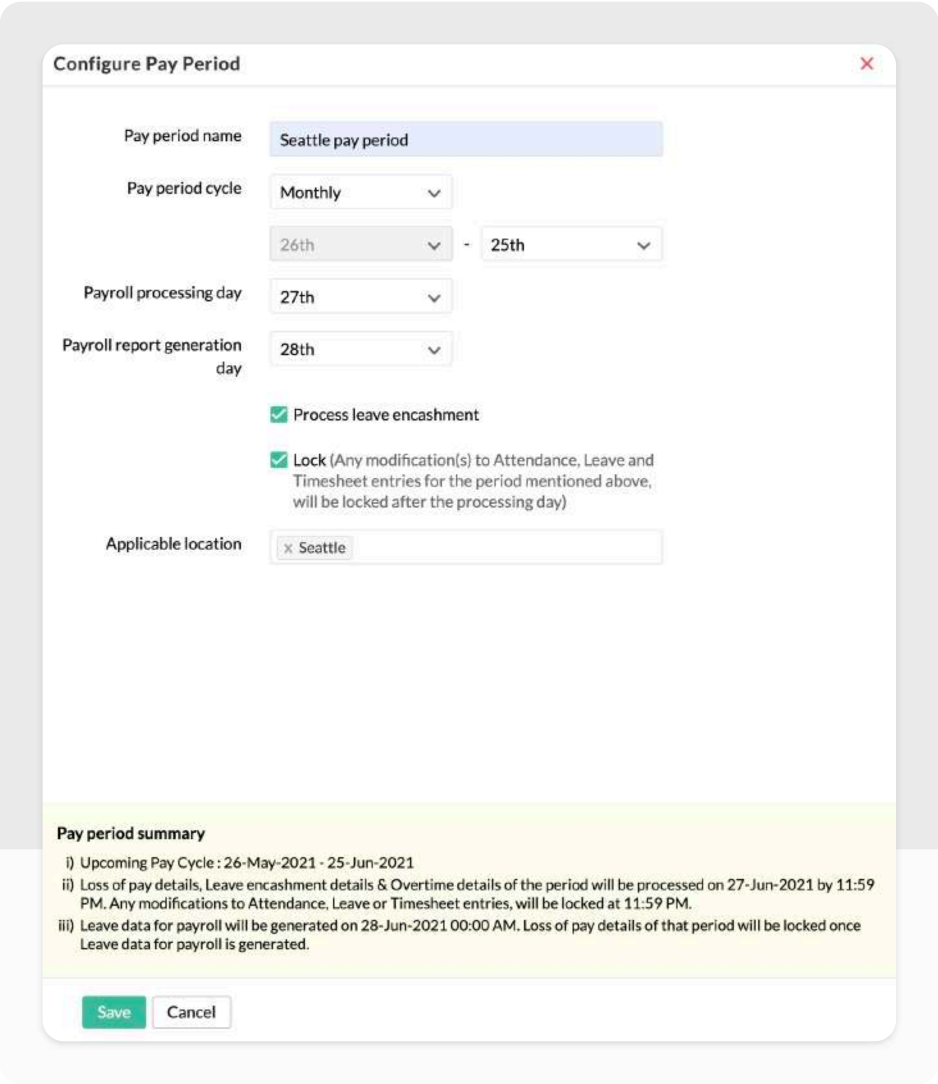
Follow the steps given below to configure a pay period.

1. From your home page, go to **Leave > Settings > Pay Period Settings**
2. Click **+ Configure Pay Period**
3. Give pay period name and select the cycle
4. Give an end day for the pay period

The start day will get populated automatically.

> ***NOTE:*** *The pay period will be dependant on the values you select here. For example, if you want to process payment for the month of July, with your pay period ending on the 25th of July, then you have to select 25 in the end day. This means that the salary processed will be from the 26th of the previous month until the 25th of the current month.*

5. Select the Payroll processing day - the LOP report and the Overtime report of the period will be processed on this day by 11:59 PM. Any modifications to the timesheet entries (leave and attendance entries) will be locked at 11:59 PM if Lock is enabled
6. Select the Payroll report generation day - the payroll report under Leave will be generated on this day at 00:00 AM. LOP report of the period will be locked once the payroll report is generated
7. Enable Process leave encashment if you want leave encashment to be processed for the applicable employees
8. Enable Lock if needed
9. Under *Applicable Location,* select the location for which the pay period is applicable

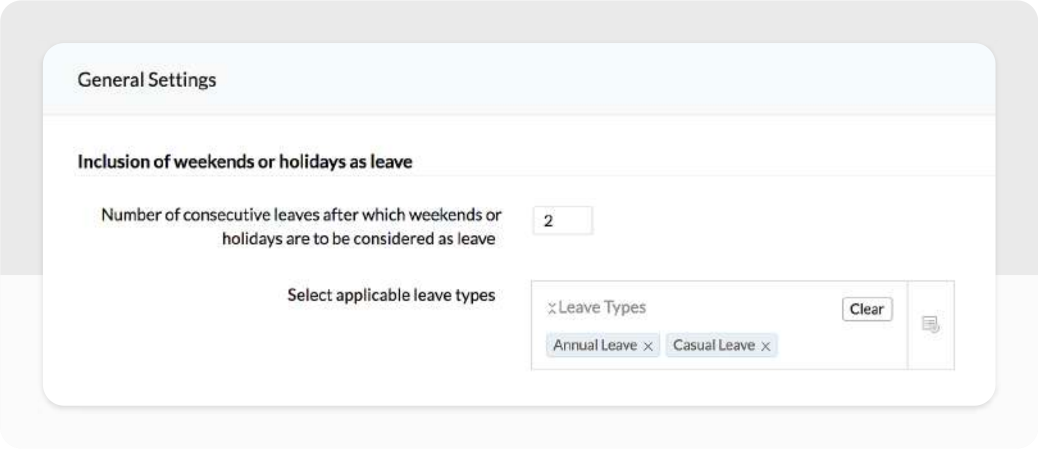


8. Click **Save**

NOTE: *Pay Period settings can be also configured under Attendance > Settings > Pay Period Settings and Timesheet > Settings> Pay Period Settings.*

General Settings for Leave

Inclusion of weekends or holidays as leave

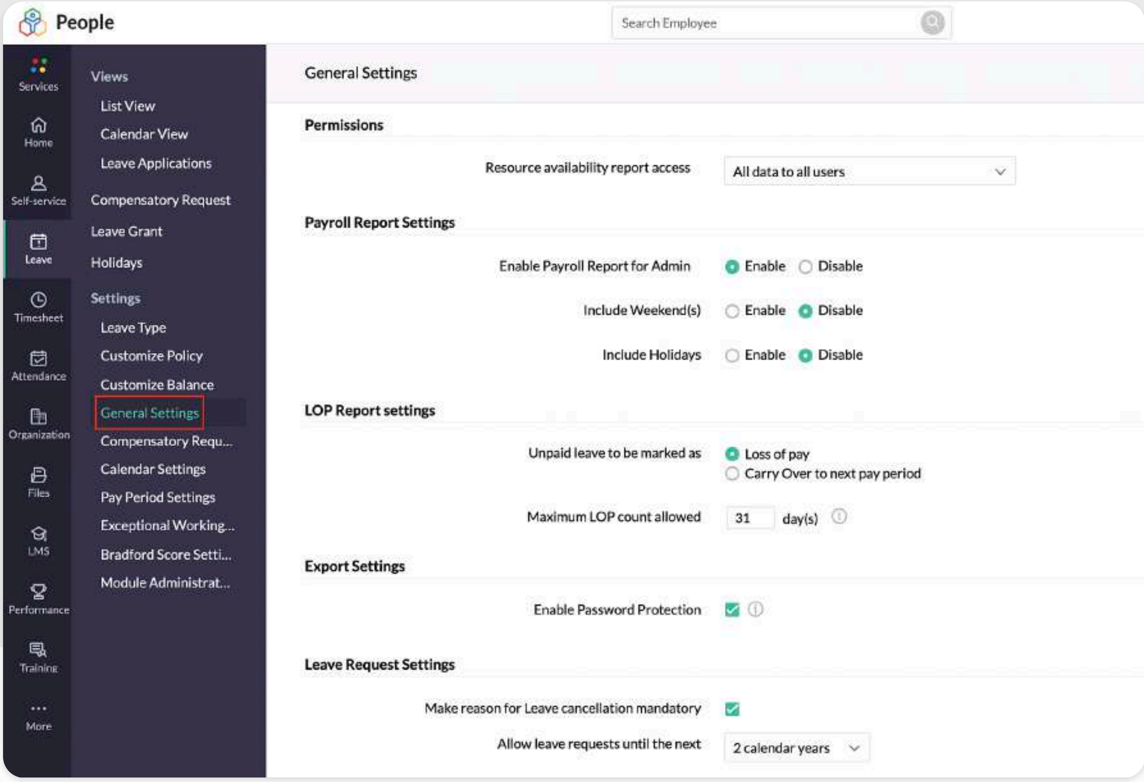


This option can be used to define the number of consecutive days after which, intervening holidays or weekends will also be considered as leave. This option is especially useful when you want to club more than one leave type for inclusion.

Compensatory off settings have been covered under the Compensatory off section of this guide.

Permissions

Define access of the user availability report here. Select the appropriate option from the drop-down.



Payroll Report Settings

Define if you want to enable the payroll report for the admin.

LOP Report Settings

Under LOP Report Settings, you can specify whether to mark unpaid leave as either Loss of Pay or Carry Over.

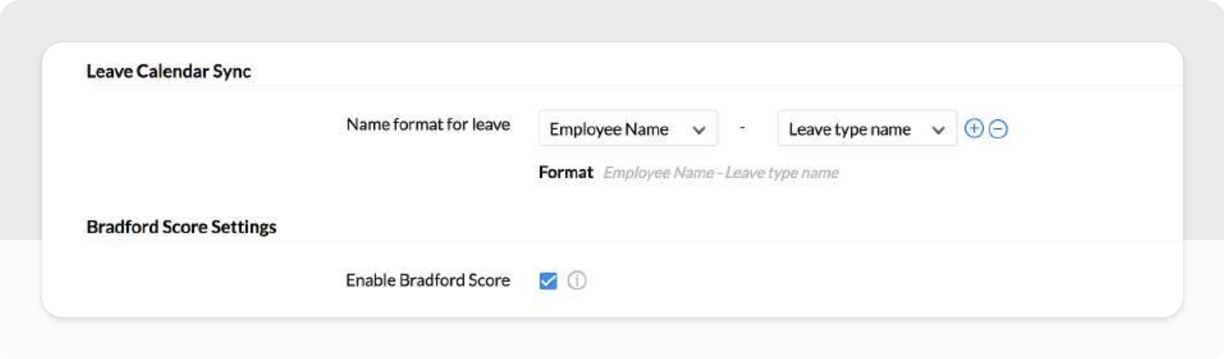
Export settings

Define if you want to password protect the data when you are exporting it. If enabled, a password will be sent to your mail, which must be entered to view the exported information.

Leave Request Settings

Make reason for leave cancellation mandatory: If you want to enforce the user to provide a reason when they are cancelling a leave request, enable this option. To define a specific number of calendar years up to which leave requests can be allowed, use Allow leave requests until the next and select from options 1 calendar year, 2 calendar years or 3 calendar years.

Leave Calendar sync



Select the format in which you want the leave that are synced to be displayed in Google and Office365 calendar.

Bradford Score settings

Bradford score feature helps organisations measure the impact of employee absence with a formula. Learn more.

Holiday Settings

Customize the holiday reminder email by clicking Customize email template.

ADDITIONAL FEATURES IN LEAVE MANAGEMENT

Sync and revoke Holiday and Leave calendar

Your leave and holiday calendar can be synced with either Google calendar or Office365 calendar. Learn more.

Leave Reports

Extensive reports are available to analyze various leave trends in your organization. Learn more.

Leave Grant

Leave grant is a special leave that employees can request. The organization can approve or reject the leave grant on a case-to-case basis. Learn more.

Bradford Score

Bradford Factor or Bradford Formula is a widely used absence management system aimed at reducing unplanned absences. Learn more.

Leave Module Administrator

To improve convenience and for focused management, a specifically assigned Module Admin can be used. A Leave Module Admin has special permission to view and edit leave entries for a selection of users tagged into "User Groups". In addition, Modules admins can also view leave reports of employees within their user groups. Learn more.

From automating simple email alerts to configuring complete workflows that trigger a series of automated actions, learn more about our automation features in Zoho People.

ATTENDANCE MANAGEMENT

A powerful attendance management system is vital to any organization looking to scale. Zoho People provides you with an accurate and user-friendly attendance management system that helps track your employees' time and attendance, in an efficient way.

General Settings in Attendance

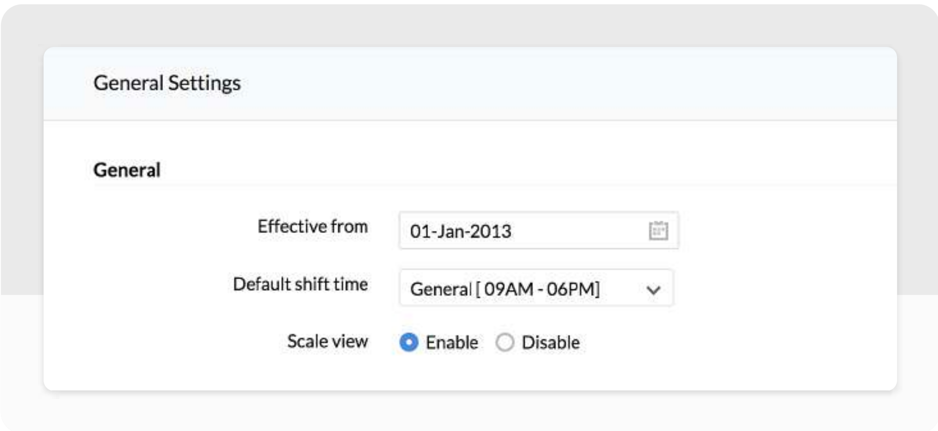
This section deals with topics on setting your company's general working hours, two prime modes of capturing attendance, paydays/hours settings, permissions and regularization.

General

You can define your default shift/work hours here.

To set your basic work hours,

1. From Home, go to **Attendance > Settings > General Settings**
2. Set the date on which you would like to make your work hours come into effect, under 'Effective From'. The attendance settings will be effective based on the date selected
3. Select the default shift timing for your organization



Zoho People offers two prime modes to capture attendance effectively. You can choose from 'Strict Mode' and 'Lenient Mode' as per your organizational requirements.

To set your mode of attendance,working hours are assigned according to the selected modes.

Lenient mode: It applies in a norm, where the organization doesn't have a rigid mode as the employee needs to mark his attendance at one fixed time everyday. 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.

Strict mode: This goes with the system, where an employee should have completed a fixed number of hours to be marked as present for half-day and full day. This is a preferred mode of attendance marking if the organization does not want flexible hours of work.

Working hours

Total Hours Calculation

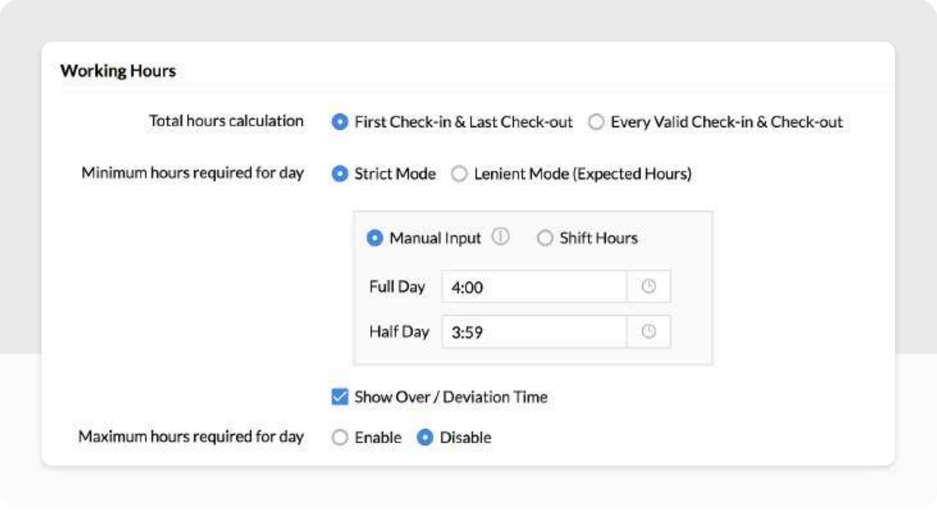
While calculating total working hours, you can either set First Check-in & Last Check-out mode or Every Valid Check-in & Check-out mode depending on your organization's working style.

First Check-in & Last Check-out

This option calculates the time you 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 & Check-out

This option calculates only the valid check-in & 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-11:00 AM) and will not calculate the hours from the time you check-out (11:00 AM-12:00 PM).



In both these modes, you can have the minimum hours calculated based on the manual input that you give or based on the duration of the shift. If you choose to have the minimum hours calculated based on the shift hours, then the entire duration of the shift will be taken as the input for a full day and half of the duration of the shift will be taken as the input for half a day.

Show Over/Deviation Time

You can select this check box to show employees' overtime and deviation time. In the Strict Mode, if you have fixed 4 hours as half- day and 8 hours as a full-day requirement, then if someone is present only for 7 hours, then the system will capture it as a half-day present and half-day absent, showing the 1 hour deficit under deviation time.

In the lenient mode, if you have fixed 8 hours as the minimum working hours required for a day, when an employee works for more than 8 hours, then it is calculated as overtime and anything less than 8 hours is calculated as a deviation.

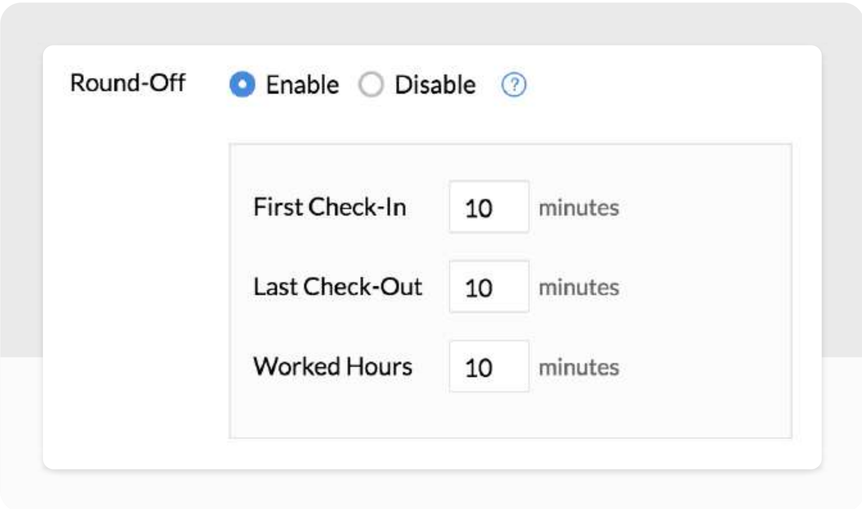
Maximum Hours required for a day

This is used to set maximum working hours for the employees. The maximum working hours can be fixed for both half and full working days. This option is very helpful when you need to set a limit for the working hours. By default, Maximum Hours is disabled. Click Enable to use this option.

NOTE: *If you have enabled over-time for your organization and also enabled Maximum working hours, then over-time exceeding the maximum working hours fixed, will not be considered as over-time.*

Round-off

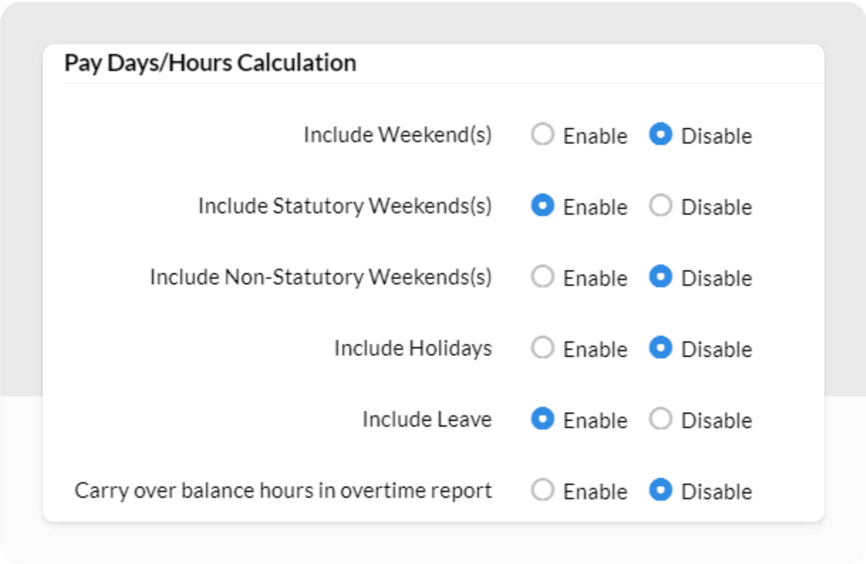
This setting enables you to round -off attendance check-in and check-out entries to simplify payroll calculations. It can also provide some flexibility for employees when arriving late to or leaving early from work.



Pay Days/Hours Calculation

This setting helps you define whether you would like to include Weekends/Holidays and Leave while calculating the Days/Hours for Pay calculation.

If you select to Include Weekends/Holidays/Leave, then the 'Payable Hours/Payable Days' will be inclusive of the Weekends, Holidays and Leave in the period.



Carry over balance hours in overtime report

If you want the overtime hours from the previous pay period to be reflected and added to the current pay period's overtime hours, then enable this option. The previous pay period's overtime hours will be reflected under the previous balance column in the current overtime report.

Late Night Work Hours Tracking

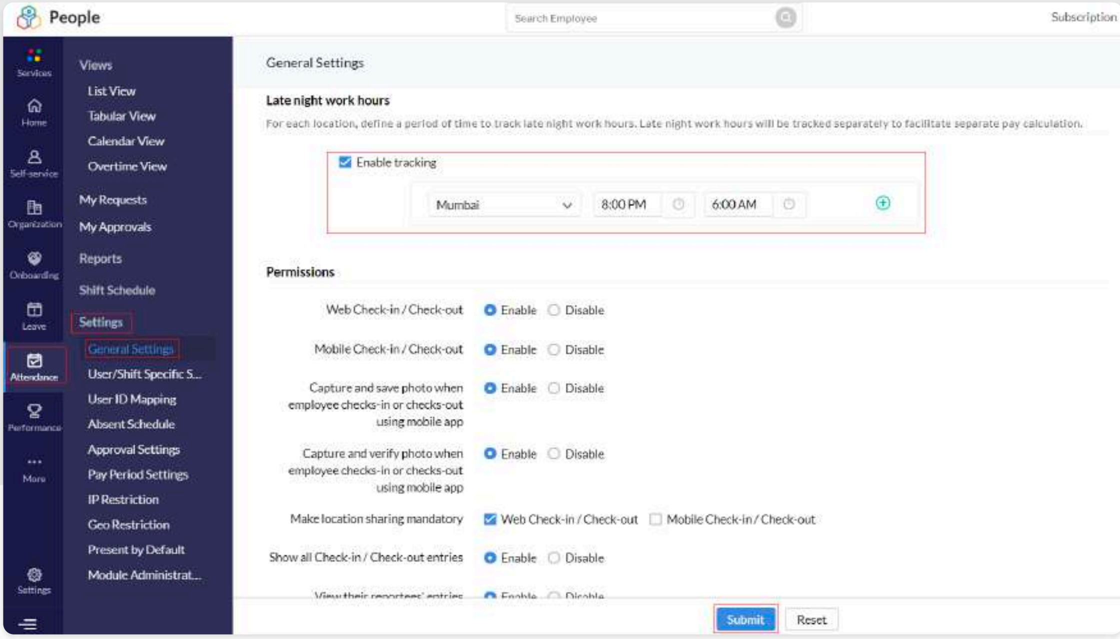
If your organization has employees that may also work through the night, exceeding regular work hours, it is essential that their work hours are logged.

To enable tracking late night work hours and to facilitate separate pay calculations for the same, the following option can be used.

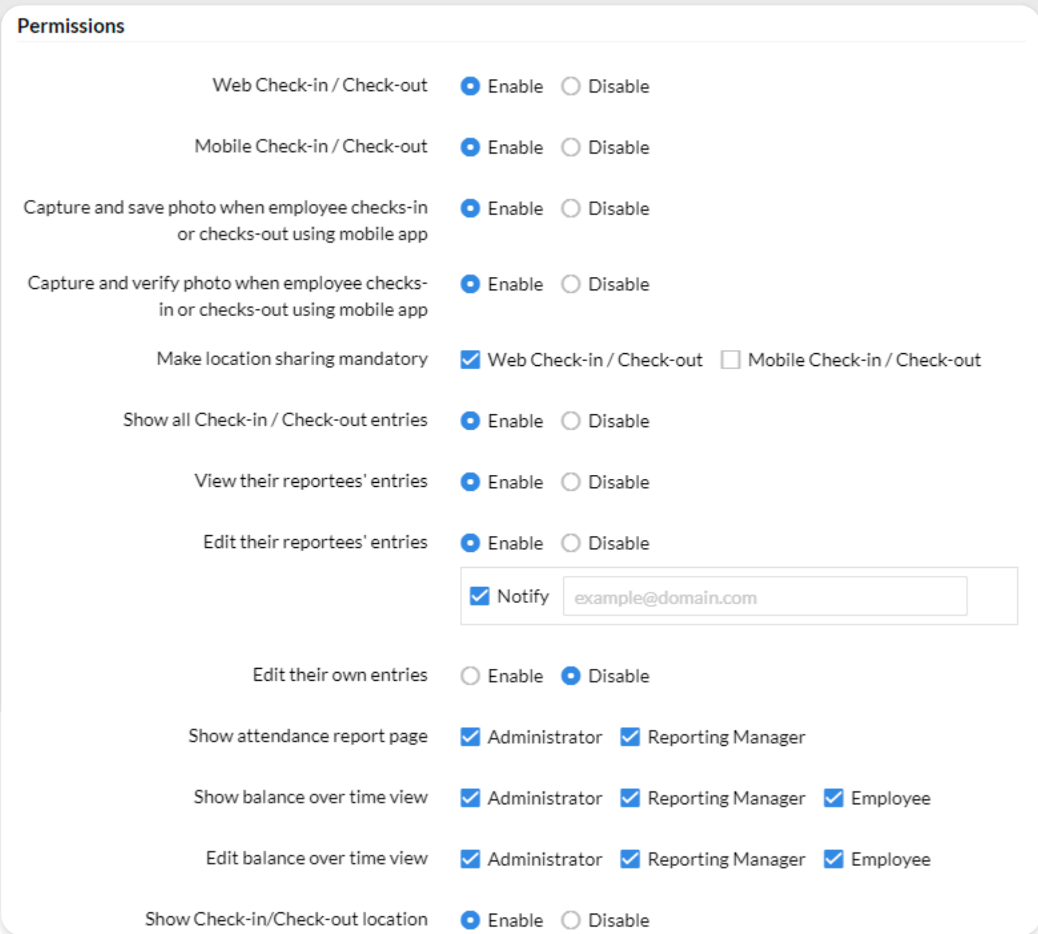
Navigate to **Attendance > Settings > General Settings** and check Enable Tracking option under Late night work hours.

Note that, for each location, a different time range can be configured. Any work hours logged between the mentioned time will be logged as late-night work hours.

ATTENDANCE MANAGEMENT



Permissions



Web Check-in/Check-out

You can make use of this option to enable or disable the option of check-in and check-out on the web.

Mobile Check-in/Check-out

You can make use of this option to enable or disable the option of check-in and check-out through mobile devices.

Capture and save photo when employee checks-in or checks-out using mobile app and ***Capture and verify photo when employee checks-in or checks-out using mobile app*** Enabling this feature lets you capture user image to validate user identity while checking-in or out.

Make location sharing mandatory

Enabling this option allows employees to check-in or check-out only after they allow access to their location. You can enable this option for mobile,web or both.

Edit their reportees' entries

Enabling this option helps managers to view and edit the attendance entries of their reportees. If you click 'Notify', you can also add someone who needs to be notified when reportee entries are edited.

Edit own entries

By enabling this, you give access to your employees to edit their own entries. The Reporting Manager can be sent a notification if you check the 'Notify reporting manager' option. Anyone else who should be notified can be added by checking the 'Notify' option. Apart from this, you can also have an approval configured when attendance entries are edited.

Show attendance report page

Here, if you select the 'Reporting Manager' option, then managers can access all the attendance reports.

Show balance overtime view

Select who should have access to see the balance over time - Admin, Reporting Manager , Employee.

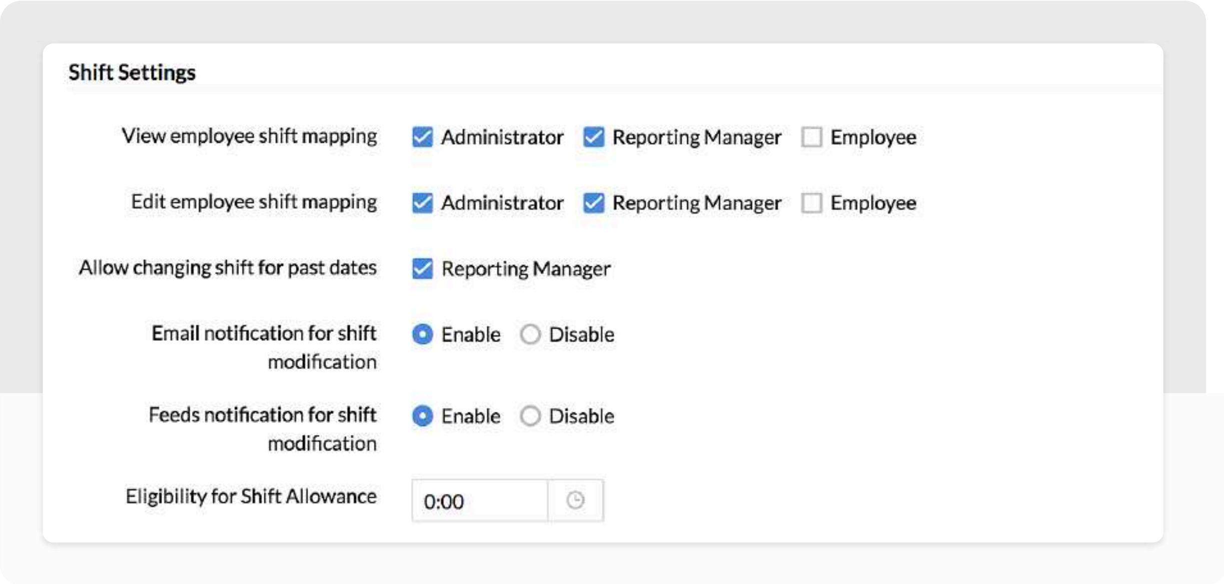
Edit balance overtime view

The permissions to edit the balance overtime can be set here for Admin, Reporting Manager and Employee.

Show Check-in/Check-out location

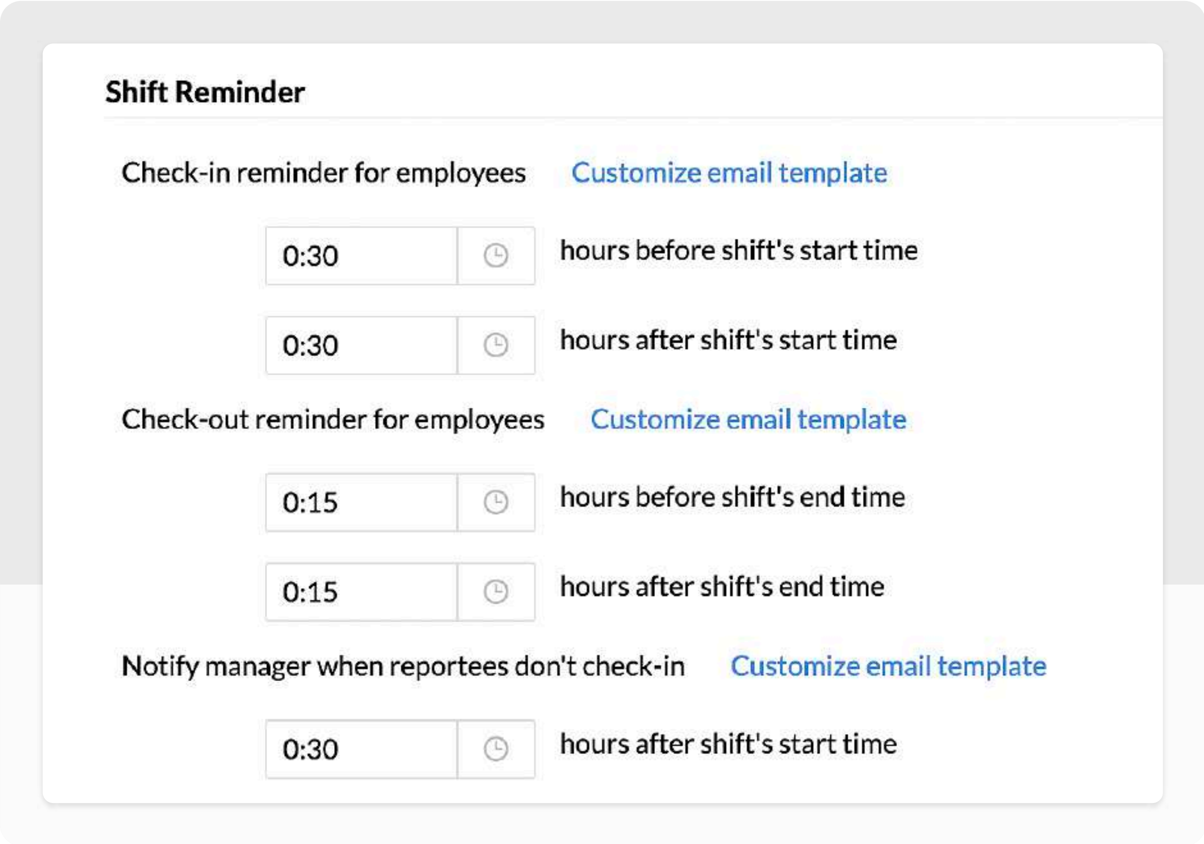
By enabling this you can view the check-in/check-out location details of the user.

Shift Settings and Notifications



- **View employee Shift mapping:** Here you can set as to who needs to view employee shift mapping.
- **Edit employee Shift Mapping:** Permissions to edit employee shift mapping can be set here.
- **Allow changing shift for past dates:** You can define who can change the shifts for past dates.
- **Email notification for shift modification:** You can decide whether to enable or disable the email notification that will be sent to employees.
- **Feeds notification for shift modification:** Here, you can set whether to enable or disable feeds notification sent to employees about any modifications to their shifts.
- **Eligibility for Shift Allowance:** Here, you can specify the minimum hours that an employee should have clocked-in for the day to be eligible for shift allowance.

Shift Reminders



- Set check-in, check-out reminders for employees to remind them before and after the shift starts and ends. Click Customize email template to edit the default email template.
- A notification can also be sent to the reporting manager when an employee fails to check-in at their shift timing. Click Customize email template to edit the default email template.
- The time zones in which the reminders will be sent will be based on the time zones mapped to the locations or the organization's default time zone.

NOTE: *To turn off any reminder, ensure there is no input given. Even 0:00 is considered as an input.*

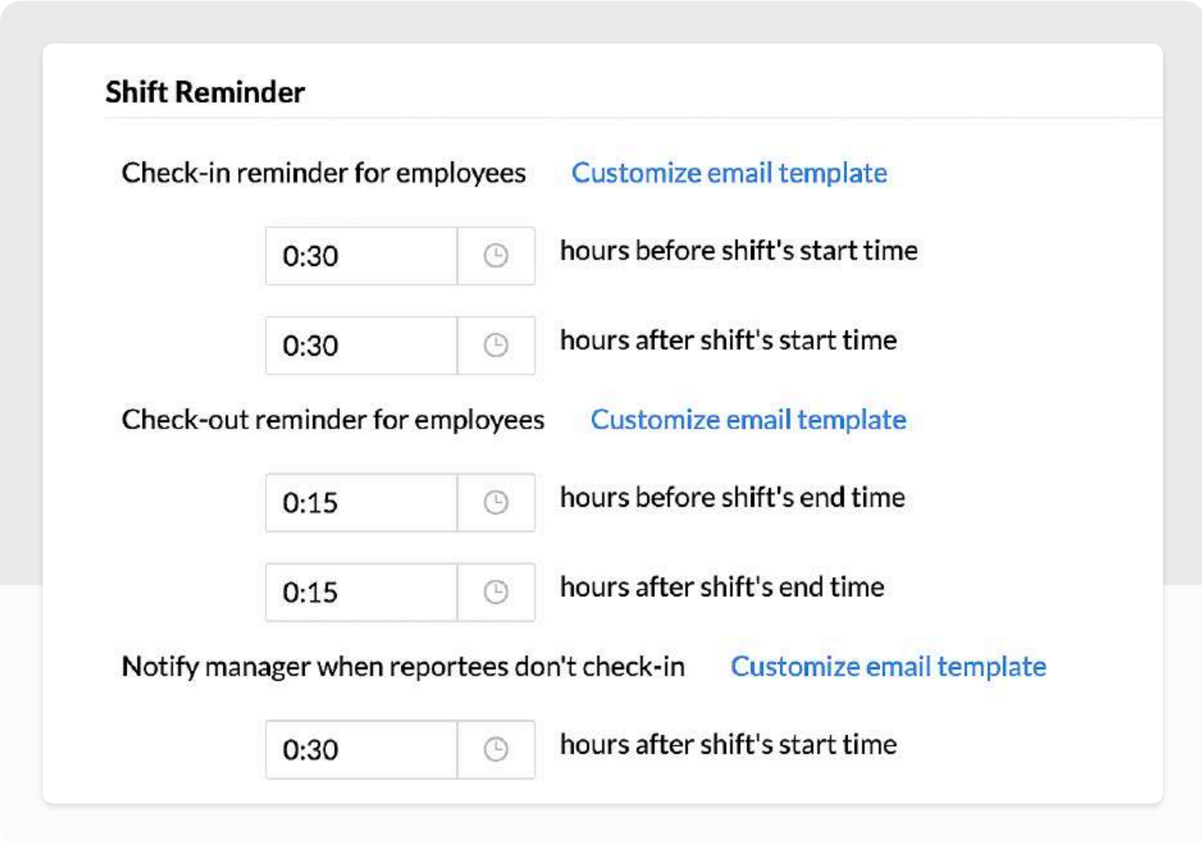
Regularization

Regularization for future dates - Here you can enable or disable regularization for future dates.

Regularization can be raised (x) day(s) from the date to be regularized.
Regularization can be raised (x) day(s) a week/month/pay period.

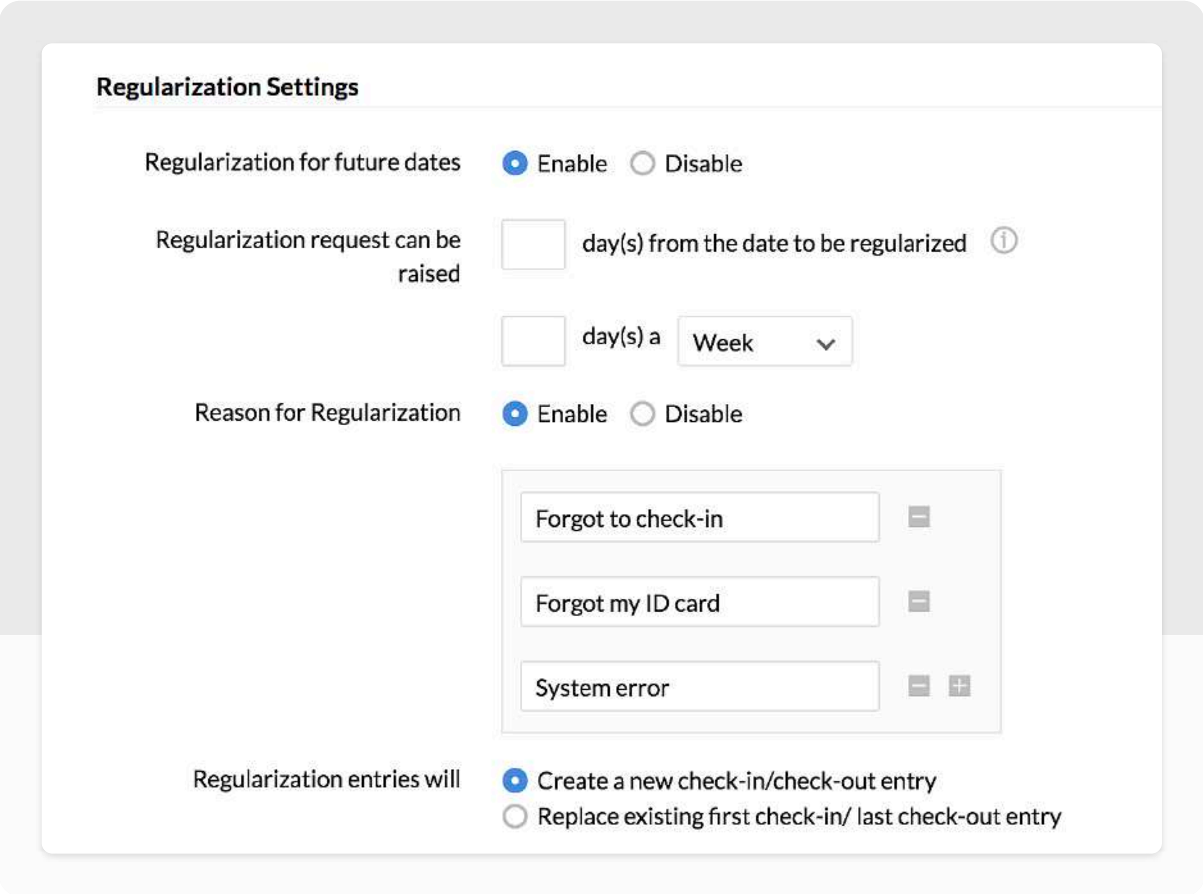
In this setting, there are two restrictions:

Shift Reminders



- The number of days within which the regularization request can be raised from the date to be regularized is specified here. For example, let us assume that the number of days is specified as three. If a request needs to be raised for regularizing the entry on the 1st of September, then the request is to be raised on or before the 4th of September.
- The number of days that the regularization request (within the time period chosen) can be raised can be specified. For example, you can set the time period as 'Week' and the days as '2'. This will mean that a maximum of two days can be raised in a week. This restriction does not apply while Admins are making regularizations.

NOTE: *The drop-down for time period will only be enabled when a value is entered in the preceding (x) number of times field. If value entered is 0, this will block any regularization requests from being raised. If Pay Period is chosen as the time period, but no Pay Period settings have been configured, then the restrictions set will not apply.*



Reason for Regularization - Configure default reasons for regularization from which the user can choose one. The user is therefore restricted to use one of the available options during regularization.

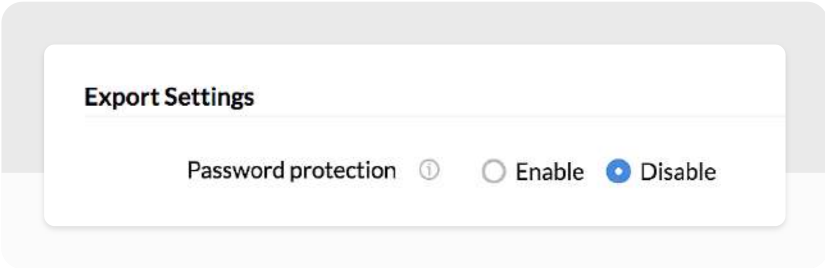
Regularization entries will :

- **Create a new check-in/check entry:** When raising a request, the system will allow the user to add a new check-in and check-out entry. The existing entry and the regularized entry will be shown in attendance.

- **Replace existing first check-in/ check-out entry:** When raising a request, the system will allow the user to edit the existing attendance entries.The regularized updated entry alone will be shown in attendance.

Export Settings

While exporting attendance data, if you want the information to be password protected, you can enable it here.



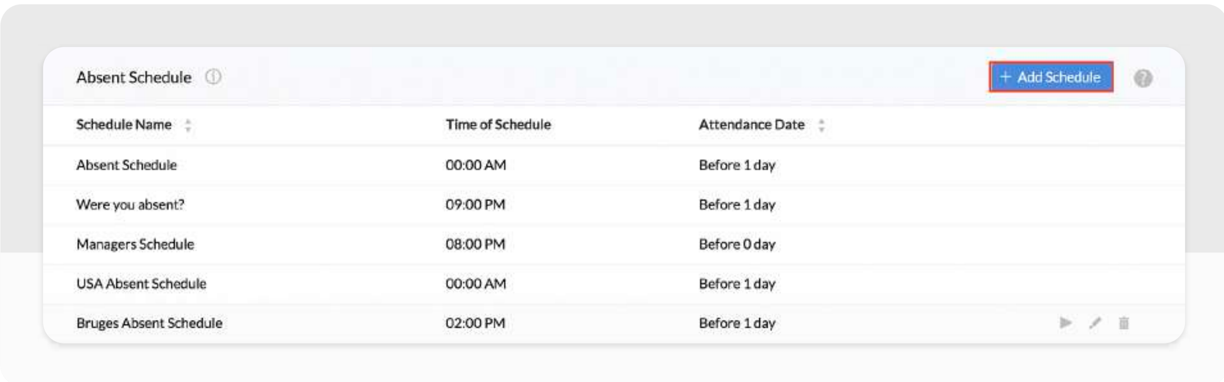
Zoho People offers intuitive customizations so you can have settings confined to specific users and shifts as per your organizational needs. Learn more about User Specific Settings.

Absent Schedule

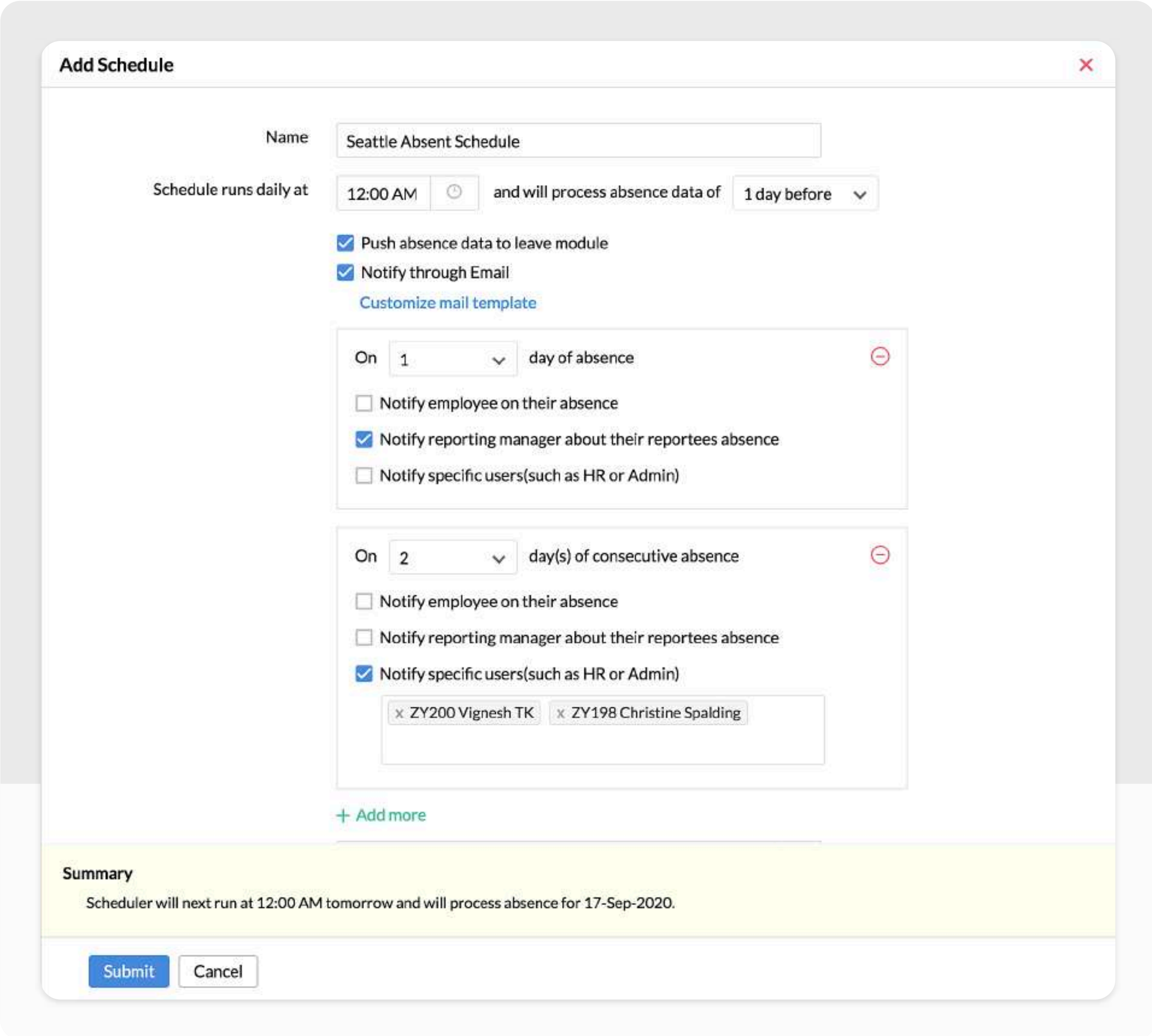
When an employee does not mark attendance for a particular day, it is captured as Absent with the help of the Absent Schedule. This will show under a leave type called Absent for the employee in the leave - list view. The employee can then convert this to leave (under any of the leave types) by clicking on **Convert to leave**. This way, you can ensure that each absence of check-in is tracked.

To add an Absent Schedule:

1. From your home page, go to **Attendance > Settings > Absent Schedule > Add Schedule**



2. Enter details like Schedule Name and the time of the schedule



3. Select when the schedule runs daily and when the absence data will be processed
4. Enable *Push absence data* to leave module if you want the absent entries to be pushed to leave module
5. Enable *Notify through email* if you want to notify the employee, reporting manager or specific employees. You can create up to 10 notifications for up to 10 consecutive days of absence
6. Under *Applicable For*, select the Roles, Department, Designation, etc for which the schedule should run
7. Click **Submit**

NOTE: *If you do not select anything here, then the schedule will be applicable to the entire organization.*

Now, the schedule will capture the absence and show it under a leave type called 'Absent' which can be converted either as leave or as 'On-duty', based on the organization's needs.

To edit the schedule:

1. Click on the edit button and edit the details
2. Click **Submit**

To delete the schedule, click on the delete button of the schedule.

Some organizations do not wish to use the absent schedule on a regular basis. However, they might want to use it for just some cases alone. In such scenarios, you can run the schedule even for a single day.

To use the schedule for a past date
In some scenarios, you might have started using the absent schedule from a date. However, you may want to run the schedule just for a single day in the previous month or in any of the past months. In this case, you have the option to run the schedule only for that particular date.

1. Go to **Attendance > Settings > Absent Schedule**
2. Click on the play button of the schedule
3. Enter the attendance day and click **Submit**

The schedule will collate the attendance details for that day alone and push the entries to leave module or notify through email as per the option you have set.

Attendance Regularization

Attendance Regularization is an option given to employees to raise a request and rectify their incorrect attendance entries.Employees' attendance entries may be incorrect when they forgot to check-in or check-out or if there was an incorrect entry made due to a technical issue. Using attendance regularization, employees can raise a request and enter the correct attendance entry along with the reason for requesting regularization.

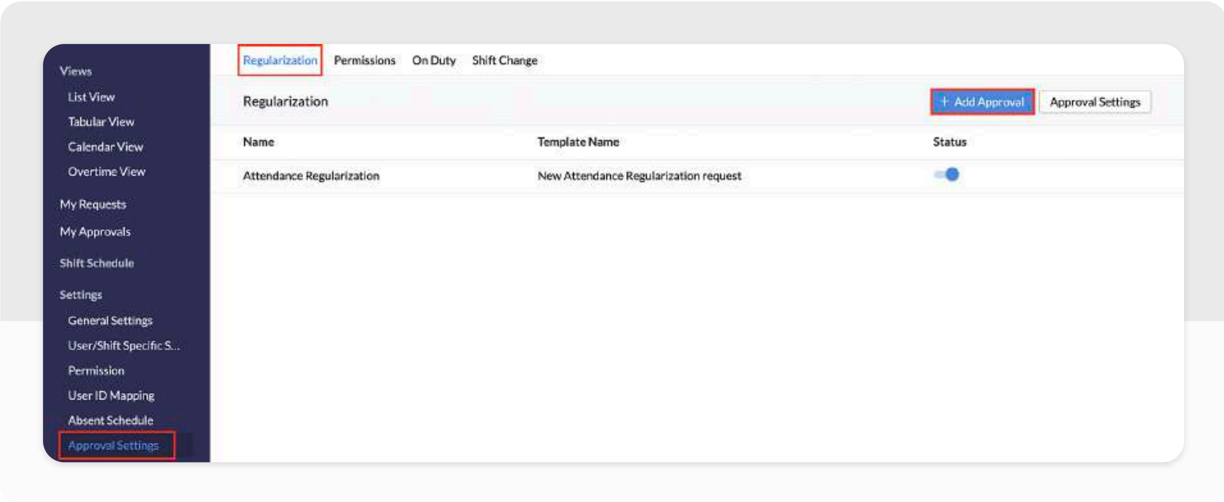
Regularization Settings

Attendance regularization is automatically enabled when an approval is configured for it. Regularization settings have been covered under the General Settings section of Attendance in this guide.

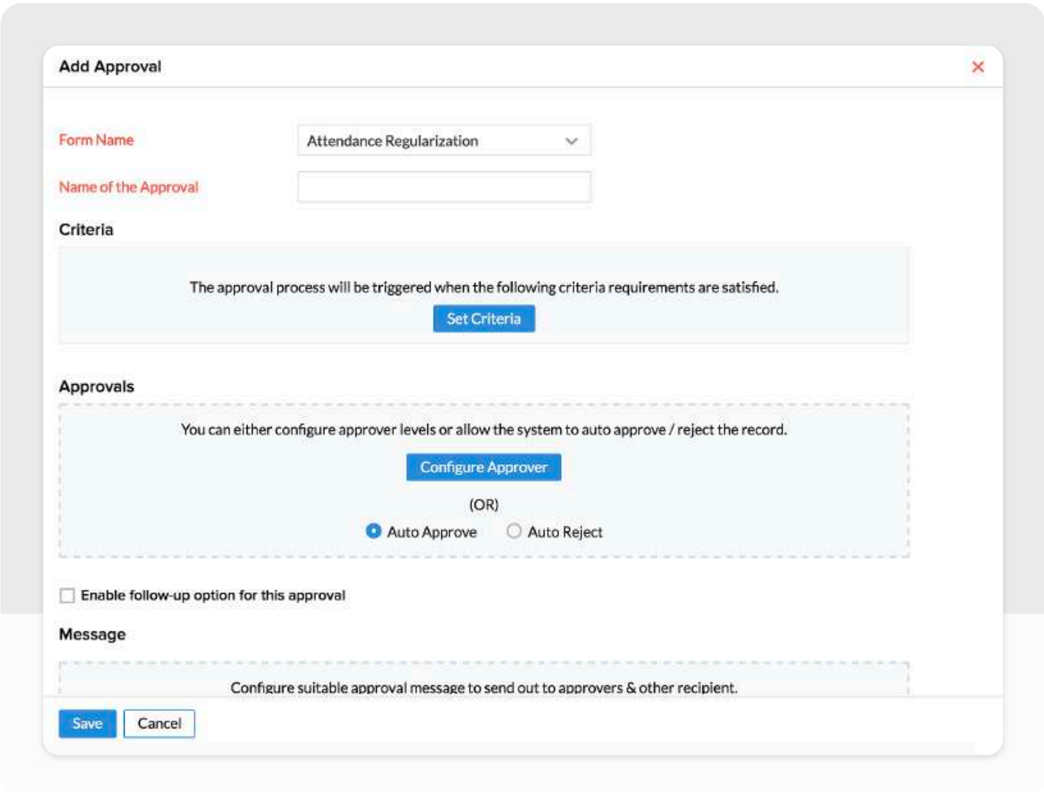
Configuring Approvals

Here are the steps to configure approval for a regularization request.

1. From home go to **Attendance > Settings > Approval Settings**



2. Go to the Regularization tab
3. Click **+ Add Approval**
4. Enter Name of the Approval



5. Set a Criteria if needed. You can also set more than one criteria by using the **Add new** icon (add icon)
6. You can either *Configure Approver* or allow the system to auto approve or auto reject the record based on the criteria requirements
7. Configure a mail notification if needed
8. Click **Save**

Attendance Device Integration

An attendance management tool is a positive strategy to magnify productivity in any organization. Zoho People offers attendance device integrations that aid in accurate attendance management.

You can integrate your attendance device with Zoho People by making use of APIs. In order to sync your device's attendance entries with your employee's attendance records in Zoho People, you need to have a common format between your device and your Zoho People account.

Zoho people offers integration between the biometric device and Zoho People and thus helps manage the attendance data.

Integration using API method

Using this API, the data can directly be pushed to Zoho People from the biometric device. Configuration of the same has to be done by the biometric vendor.

Please note that *the Attendance Bulk Import API has threshold limitations*: 1 call/5 minutes.

Plugin integration

Another way of integrating the biometric device with Zoho People is through the configuration of a plugin using Tomcat server. The following are the prerequisites required to do the integration.

Integration can be done with any of these databases: MS SQL Server, MS Access and MY SQL. The data from the biometric should be automatically downloaded into the database. Query has to be generated in the following format to fetch data from the database.

Select employeeID, eventTime, isCheckin, downloadDate from Attendance

employeeID	Should be the same as the employee-Id in Zoho People
eventTime	Attendance In-punch and Out-punch
ischeckin	1/0 (1 denotes check-in and 0 denotes check-out)
downloadDate	Date and time at which the attendance data got pushed to database.

~vs6B6B.sql - BUSI...er (zpeople (51))*

```
/****** Script for SelectTopNRows command from SSMS  ******/
SELECT TOP 1000 [userId] as employeeId
      ,[eventTime]
      ,[isCheckin]
      ,[downloadDate]
  FROM [ZAttendance].[dbo].[Attendance]
```

Results | Messages

	employeeId	eventTime	isCheckin	downloadDate
1	Emp1	2017-02-20 09:00:00	1	2017-02-20 09:01:00
2	Emp1	2017-02-20 18:00:00	0	2017-02-20 18:26:00
3	Emp1	2017-02-21 11:00:00	1	2017-02-21 12:03:00
4	Emp1	2017-02-21 17:31:00	0	2017-02-21 17:31:00
5	Emp2	2017-02-20 09:38:00	1	2017-02-20 09:41:00
6	Emp2	2017-02-20 21:00:00	0	2017-02-20 21:26:00
7	Emp2	2017-02-21 08:00:00	1	2017-02-21 09:03:00

Date-Time format sample for EventTime and DownloadTime: yyyy-MM-dd HH:mm:ss (2020-12-29 15:30:06)

Software installation

The following software have to be installed if not already.

- Java
  1. Go to https://java.com/en/download/manual.jsp
  2. Click next on every pop-up and then click on Install
- Apache Tomcat
  1. Go to https://tomcat.apache.org/download-80.cgi
  2. Click on 32-bit/64-bit Windows Service Installer Under Core
  3. Change port numbers(HTTP/1.1 Connector port and Server shut down) during installation to avoid conflicts with any other applications

4. Once Tomcat is installed, go to Start > View Local Services/Services > select Apache Tomcat 8.5 > Right Click > Properties > change Startup type to Automatic

If Apache Tomcat is already installed:

Go to Program Files/Program Files(x86) > Apache Software Foundation > Tomcat 8.5 > Conf folder > open server.xml file > note the connector port of the protocol HTTP/1.1

```
<Listener className="org.apache.catalina.core.AprLifecycleListener" SSLEngine="on" />
  <!-- Prevent memory leaks due to use of particular java/javax APIs-->
<Listener className="org.apache.catalina.core.JreMemoryLeakPreventionListener"/>
<Listener className="org.apache.catalina.mbeans.GlobalResourcesLifecycleListener"/>
<Listener className="org.apache.catalina.core.ThreadLocalLeakPreventionListener"/>
  <!-- Global JNDI resources Documentation at /docs/jndi-resources-howto.html -->
- <GlobalNamingResources>
    <!-- Editable user database that can also be used by UserDatabaseRealm to authenticate users -->
  <Resource pathname="conf/tomcat-users.xml" factory="org.apache.catalina.users.MemoryUserDatabaseFactory" description="User database that can be updated and
    saved" type="org.apache.catalina.UserDatabase" auth="Container" name="UserDatabase"/>
</GlobalNamingResources>
  <!-- A "Service" is a collection of one or more "Connectors" that share a single "Container" Note: A "Service" is not itself a "Container", so you may not define subcomponents such as
  "Valves" at this level. Documentation at /docs/config/service.html -->
- <Service name="Catalina">
    <!--The connectors can use a shared executor, you can define one or more named thread pools-->
    <!-- <Executor name="tomcatThreadPool" namePrefix="catalina-exec-" maxThreads="150" minSpareThreads="4"/> -->
    <!-- A "Connector" represents an endpoint by which requests are received and responses are returned. Documentation at : Java HTTP Connector: /docs/config/http.html Java AJP
    Connector: /docs/config/ajp.html APR (HTTP/AJP) Connector: /docs/apr.html Define a non-SSL/TLS HTTP/1.1 Connector on port 8080 -->
  <Connector port="8080" redirectPort="8443" connectionTimeout="20000" protocol="HTTP/1.1"/>
    <!-- A "Connector" using the shared thread pool-->
    <!-- <Connector executor="tomcatThreadPool" port="8080" protocol="HTTP/1.1" connectionTimeout="20000" redirectPort="8443" /> -->
    <!-- Define an SSL/TLS HTTP/1.1 Connector on port 8443 This connector uses the NIO implementation. The default SSLImplementation will depend on the presence of the
    APR/native library and the useOpenSSL attribute of the AprLifecycleListener. Either JSSE or OpenSSL style configuration may be used regardless of the SSLImplementation
    selected. JSSE style configuration is used below. -->
    <!-- <Connector port="8443" protocol="org.apache.coyote.http11.Http11NioProtocol" maxThreads="150" SSLEnabled="true"> <SSLHostConfig> <Certificate
    certificateKeystoreFile="conf/localhost-rsa.jks" type="RSA" /> </SSLHostConfig> </Connector> -->
    <!-- Define an SSL/TLS HTTP/1.1 Connector on port 8443 with HTTP/2 This connector uses the APR/native implementation which always uses OpenSSL for TLS. Either JSSE or
    OpenSSL style configuration may be used. OpenSSL style configuration is used below. -->
    <!-- <Connector port="8443" protocol="org.apache.coyote.http11.Http11AprProtocol" maxThreads="150" SSLEnabled="true" > <UpgradeProtocol
    className="org.apache.coyote.http2.Http2Protocol" /> <SSLHostConfig> <Certificate certificateKeyFile="conf/localhost-rsa-key.pem" certificateFile="conf/localhost-rsa-cert.pem"
    certificateChainFile="conf/localhost-rsa-chain.pem" type="RSA" /> </SSLHostConfig> </Connector> -->
    <!-- Define an AJP 1.3 Connector on port 8009 -->
```

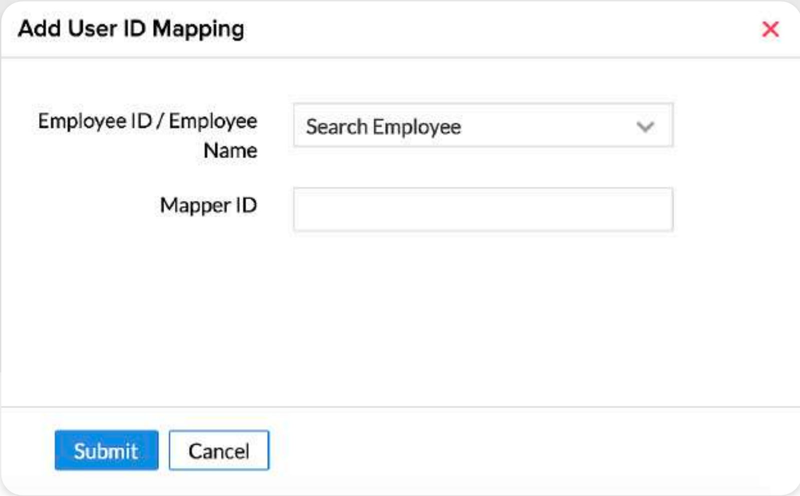
Mappings to be done before the integration

UserID Mapping

The Employee ID in Zoho People and in the database must be the same. In case of mismatch between the ID, userID mapping has to be done.

1. Go to **Attendance > Settings > User ID mapping**
2. Select the Employee and then enter the Mapper ID (ID as in the database)

Import can also be done by clicking on the ellipsis icon and in the format as specified.

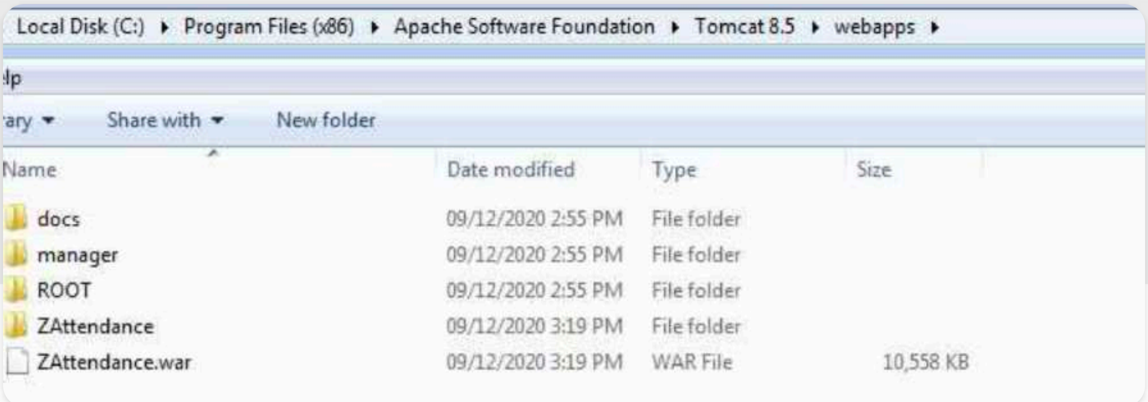


Shift Mapping

In case of multiple shifts, employees must be mapped to their corresponding shifts under **Attendance > Shift Schedule > Employee Shift mapping**.

War File Deployment

Once Tomcat is installed, copy the ZAttendance.war file and paste it in the tomcat > webapps folder and a folder in the same name will be extracted.



Steps to configure the Plugin:

1. Go to the browser of the server system which has the database
2. Type localhost:tomcatportnumber/ZAttendance and press Enter
3. Click on Configure on the right top of the plugin page

4. Fill in the configuration details:

   - Select the database type
   - Connection Url:

     If MS Access → copy the sample path mentioned below the Connection URL and replace the path with the actual path of the database and replace '\' with '//' and at the end enter the access file name followed by its extension.
     If MS SQL → Open SQL Configuration Manager (C > Windows > SystemWOW64 > SQL configuration manager)

     Select > SQL Server Network Configuration > Protocols >TCP/IP - Enable, then click on TCP/IP, pop-up will be opened, Click on IP address, scroll down at the end change the port number if it is 0, else copy the port number and paste it in connection url. At the end of the url after the port number, the database name has to be entered.

     MS SQL - Default port number -1433

     My SQL- Default port number - 3306

> ***NOTE:** For MS Access, database should be available in the local system. For MS SQL and MY SQL, if database is located in the remote system, enter the IP of the remote system in place of localhost in the connection url.*

If localhost is called from some other system using ip:portno, then in the config.properties folder under Tomcat server update the IP address of the current system.

5. Username and password:

   - **MSAcess** - default username - Admin, no password
   - **MSSQL**- user name and password should be there. Also should not use windows authentication, need SQL authenticated login.
   - **MY SQL** - default username - root, no password

6. Delay Time:

   If downloadDate column is present in the database - minimum of 2 mins can be set. Delay time refers to the time at which the timer should be running in the plugin page and it is the time till the sync happens from the Last Updated Time in the plugin page.

7. Query:

   Enter the corresponding query to fetch the details from the database. Sample queries will be available below the query editor. Query can be modified as required to fetch the data in the required format.

   Sample Basic Queries

   In the case of Dynamic table format, table names have to be given in this format: #DeviceLogs_%M_%Y# where the %M will be replaced by the current month and %Y with the current year automatically.

   Scenario 1:

   SQL database - Has IsCheckin column with String value:
   select [Id] as employeeId, case [Checkin] when 'IN' then 1 when 'OUT' then 0 end as isCheckin ,[CheckedTime] as eventTime ,[DownloadDate] FROM [ZAttendance].[dbo].[Att-checkin] where DownloadDate>=$1 and DownloadDate<$2

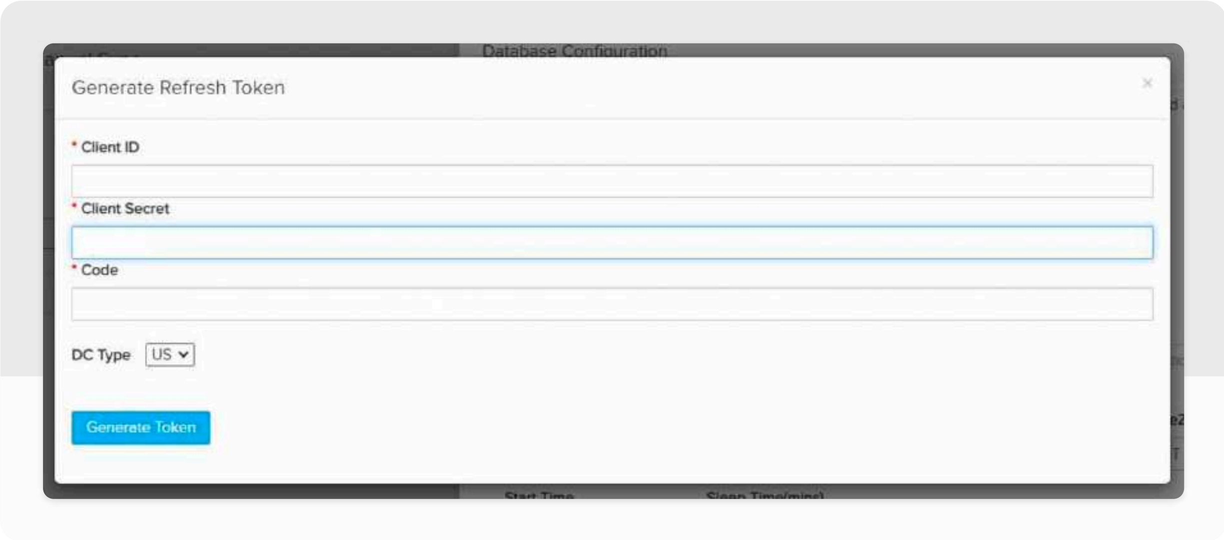
   Scenario 2:

   No IsCheckin Column:
   select [empid] as employeeId, '1' as isCheckin, [eventtime] as eventTime, [downloaddate] FROM [ZAttendance].[dbo].[Att_noCheck] where DownloadDate>=$1 and DownloadDate<$2 UNION select [empid] as employeeId, '0' as isCheckin, [eventtime] as eventTime, [downloaddate] FROM [ZAttendance].[dbo].[Att_noCheck] where DownloadDate>=$1 and DownloadDate<$2

***NOTE:** If no checkin/checkout differentiation is available in the database, as in the query above each punch will be pushed to Zoho People Attendance as both checkin and checkout. In this case, the Total Hour Calculation(Attendance > Settings > General Settings > Working Hours) can only be First checkin & Last checkout.*

8. Authentication

   1. Go to https://api-console.zoho.com/ from the Zoho People admin account browser
   2. Click Add Client > Self Client > Copy > Create > Copy Client ID and Client secret in the plugin page
   3. Click on Generate Code > Scope: ZohoPeople.Attendance.ALL > Time duration: 5 minutes > Give scope description > Click create > copy the code
   4. In the plugin configuration, paste the client ID and client secret and then click on 'Generate' next to Refresh token and then paste, client ID, client secret, code and select the DC. Click on Generate token to generate the Refresh token and paste the same Refresh token



9. Timezone: Admin and all employees should be in the same time zone

10. Sleep time:If downloadDate column is present in the database - minimum of 5 mins can be set. Sleep time refers to the periodicity at which the sync in the plugin configuration will happen

11. If proxy is configured on the system then enter the proxy details

12. Bookmark the plugin page for future reference

13. After entering the details, save the configuration. Once the integration is tested, click on 'Resume Sync' button to start the automatic sync

Testing the integration

Manual pushing of the data has to be done by selecting the date range and then by clicking on fetch and upload for the data to be pushed to Attendance. Status code 200 refers to the successful sending of the data. In order to check the detailed response, open Tomcat > Logs > Current date Catalina file > see the response.

Configuration change

If people domain is other than .com (.in or .eu), update the domain in config.properties in tomcat folder for both targetURL and acesstokenURL.

Common Issues and fixes

- Sync not happening - Need to check for the running of Tomcat under Services.

- Configuration page is empty and both 'Resume Sync' and 'Stop Sync' button available in the plugin page: mostly occurs in case of forced shutdown, need to enter the configuration details again.

- Java socket connection error - occurs in case of MS SQL database, check if SQL is running, the port number and if TCP/IP port is enabled in SQL configuration.
- Java heap space out of memory issue: mostly occurs in case of MS Access database. Go to Tomcat folders > bin folder > open tomcatw.exe > Java tab > Increase initial memory pool and maximum memory pool.
- Getting status 200 and entries not updated in People. Check logs for the current day under the logs folder in Tomcat, if the response is {"message":"To add entry in Attendance, log time for any of your jobs"}, then go to Timesheet > Setting > General Setting > disable Push Timer entries to the Attendance option. Either of the Attendance punches or the Timer entries can be pushed to Attendance.
- Skipped employee info: If the employee id is found inside SkippedEmployeeInfo in logs, the employee ID in Zoho and in the database are not the same and User ID mapping is not done.
- The time difference in Attendance for all employees - The time zone of the admin and all the employees should be the same and the time zone specified in the plugin configuration.
- Error 'Date range provided is more than 31 days' in logs, the data that is being pushed in a particular sync from the plugin has date range of more than 31 days as mentioned in the error. Only data of date range within a month is to be downloaded into the database.
- Login failed the exception in logs, username and password of the MS SQL database is incorrect in the plugin configuration.
- When the data is not synced for a few employees, check for the attendance data availability in the database. Only if the data is present in the database, it can be fetched and pushed to Zoho People Attendance.
- In the configuration page, error 'Error occurred, data count more than 20000 records', check as to why more than 20000 records were downloaded into the database at a particular time. In order to resolve the same, stop the sync by clicking the 'Stop Sync' button in the plugin page. Push the data manually by using manual sync for the dates for which it is needed by selecting the dates and with eventTime in the where condition instead of downloadDate. This will push the data as per the eventTime. Then change the query back to pushing the data based on downloadDate. Click on the 'Resume Sync' button.
- If Java is updated, Tomcat service would stop running which in turn would stop the sync. Refer this link.
- Unknown Host Exception - Unknown host exception - system not connected to the internet. people.zoho.com domain could have been blocked as well. host name: people.zoho.com and the port number: 8443 have to be whitelisted.
- When the sync happens, the current timer time in the plugin is to be updated in the Last Updated Time, if not, open the record file in the Tomcat folders. If found to be empty, insert {} and then click on Save.

- If javax.net.ssl.SSLHandshakeException: sun.security.validator.ValidatorException: PKIX path building failed: sun.security.provider.certpath.SunCertPathBuilderException error found in logs, Authentication has failed, when trying to connect from tomcat server to java client. Refer this link. Follow the steps at 161 in stack overflow.

Steps to follow

1. Download sslhandshake certificate from https website in same browser(load https site →on the top left corner there is lock icon→click on that →go to details→copy to file→save it in some specific folder
2. Go to cmd by running it as administrator , type the following commands
    - cd Program Files/Java/jre1.8.0_211/bin
    - "keytool -list -keystore ..\lib\security\cacerts\" The above cmd asks for pwd,default pwd is "changeit"
    - keytool -import -alias ca(alias name) -file "C:\Users\Administrator\Desktop\ssl.cer"(path to downloaded ssl certificate) -keystore ..\lib\security\cacerts -storepass changeit
    - Type "yes"

Certificate will get added into cacerts. Once all above said is done, restart Tomcat.

NOTE: *Plugin should be carefully configured. Once the configuration is done, the integration has to be tested for an employee or two before automating the sync for all users.If needed, all the attendance punches have to be deleted. It would include the web, mobile, regularized punches and attendance punches as well. Once the data is pushed to Zoho People Attendance, if the biometric punches of only a few employees are to be deleted, the same would not be possible.*

FTP Plugin

The File Transfer Protocol is a standard communication protocol used for the transfer of computer files from a server to a client on a computer network. FTP is built on a client–server model architecture using separate control and data connections between the client and the server.

Why is it useful?

In Zoho People, we help you transfer your files with attendance data in a secure way without having to install a service in the host's data server.

FTP Server Benefits:

- Offers a great level of security
- FTP server gives the user a great level of control.
- Lets user to send big files at once.
- Resumption facility allows the transfer of files even after a break-in connection occurs.
- Security of transferring data without installing any service in host's server.

Zoho People supports four types of plugins:

- **FTP** - File Transfer Protocol
- **FTPS** - File Transfer Over Explicit TSL/SSL
- **FTPS** - File Transfer Over Implicit TSL/SSL
- **SFTP** - SSH File Transfer Protocol

Here are some features of these plugins. You can select the type of plugin that best suits the needs of your organization.

FTP	FTPS	SFTP
FTP exchanges data using two separate channels - the command channel and data channel.	FTPS adds a security layer to the FTP protocol.	SFTP (SSH File Transfer Protocol) is a secure FTP protocol that sends files over secure shell (SSH), providing a high level of protection for file transfers.
In FTP, both channels are unencrypted.	In FTPS, data channel is encrypted.	SFTP needs only a single port number for all SFTP communications, making it easy to secure.
Data sent over these channels is vulnerable to being intercepted and read.	FTPS uses multiple port numbers. The first port for the command channel is used for authentication and passing commands. However, every time a file transfer request or directory listing request is made, another port number needs to be opened for the data channel.Therefore we will have to open a range of ports in your firewalls to allow for FTPS connections.	

Configuring FTP Plugin

Only administrators and attendance settings administrators can configure this plugin.

Click here to know how to configure FTP plugin.

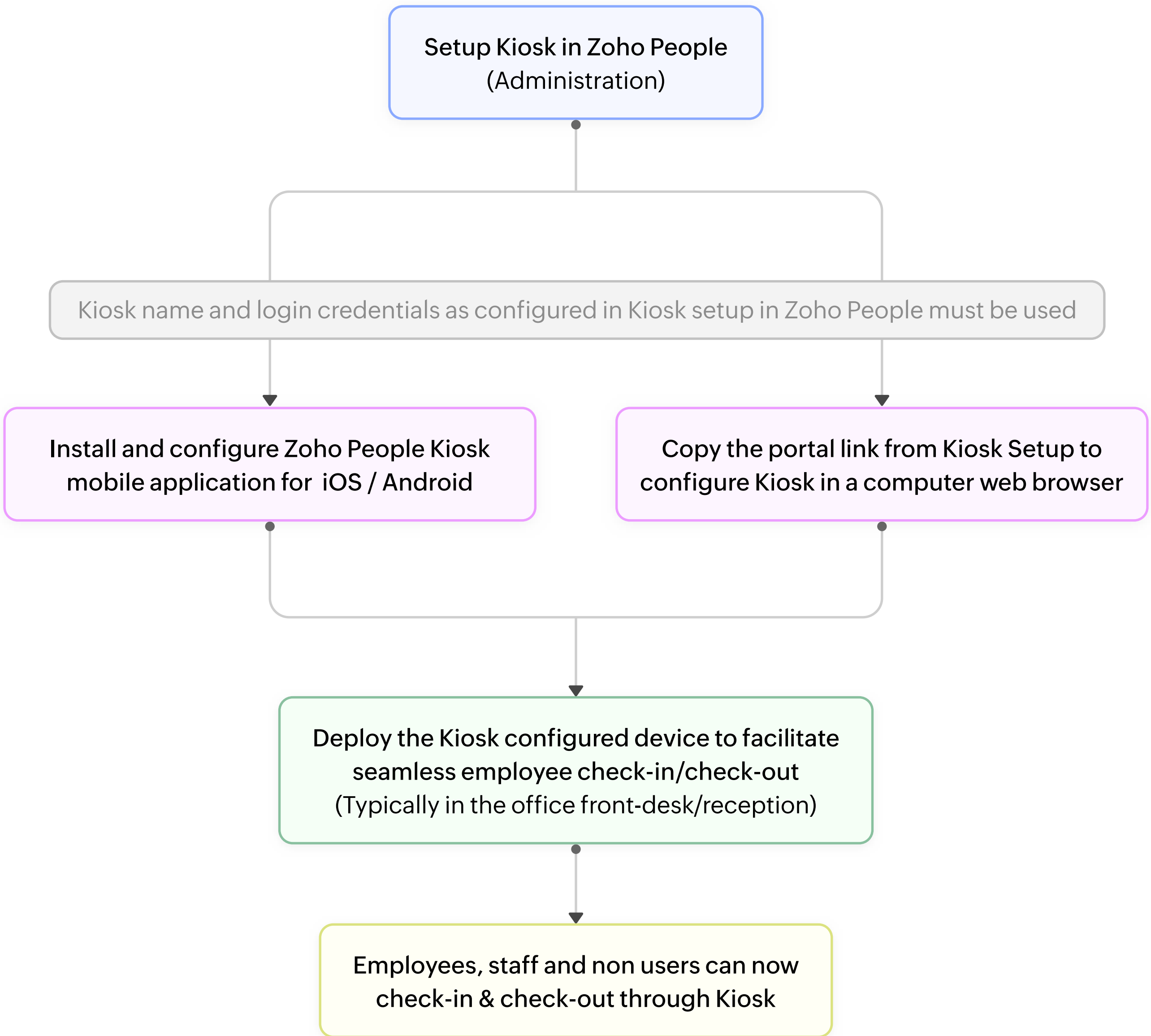
Zoho People Kiosk

It is a kiosk that allows employees to check-in and check-out through a quick photo capture based on facial recognition. The setup is simple and can be typically used in a front desk or office reception. Zoho People Kiosk could be a perfect fit for onsite employee attendance management in remote offices, warehouses and similar office situations.

Let us start with the pre-requisites:

- Zoho People account
- Kiosk Setup in Zoho People
- An Internet-enabled device
- Profile picture in Zoho People for AI photo-match

When an employee walks into an office space, an internet enabled tablet, mobile phone or computer will be used for employee check-in/out through AI face recognition. The captured image will be matched and verified against all employee images stored in the database.



NOTE: *The captured employee image is matched against all profile pictures in the Zoho People database of your organization. In case of no match or when there is no profile picture for a particular employee, the employee will have to do a mobile/web check-in or check-in by other conventional methods used in the organization. Furthermore, images from Zoho Accounts or other Zoho Applications are not taken into account here. Zoho People Kiosk operates through the Zoho People profile picture only.*

Why is Zoho People Kiosk useful?

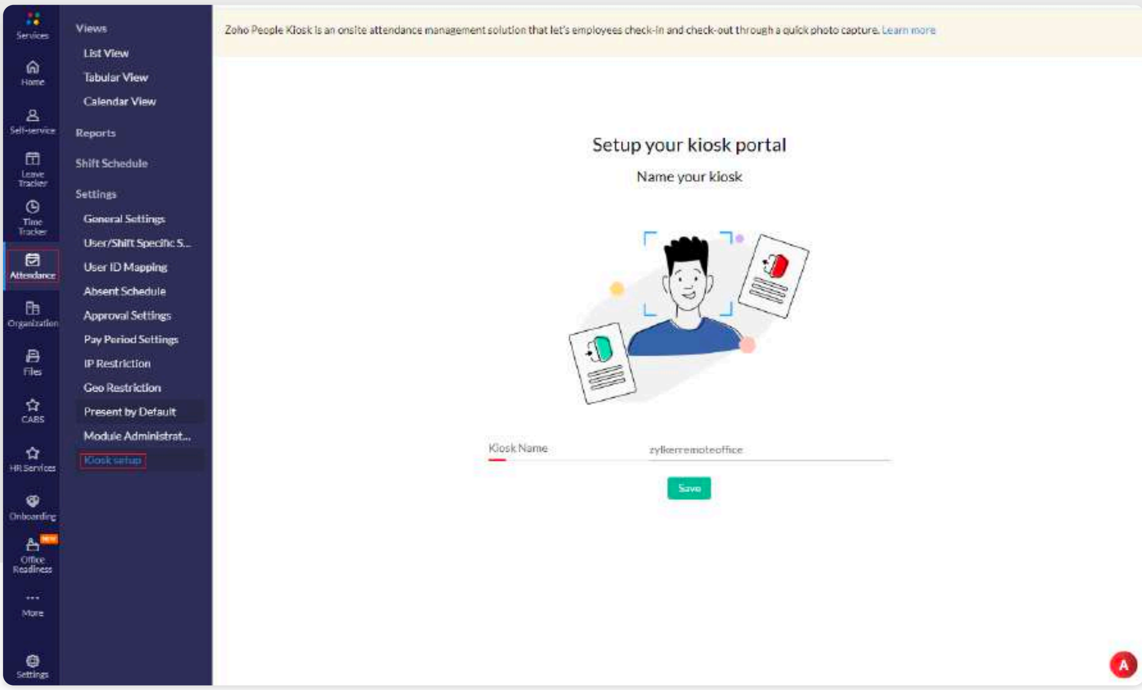
- Easy setup process with minimal hardware requirements.
- Simplifies check-in and check-out for offices with multiple remote offices, on-site locations, warehouses and construction sites.
- Provides a quick and cost effective upgrade to a digital punch-clock like solution.
- Employees can check-in without a physical ID card.
- Can also be used for non-users (employee profiles) or contract role employees who may not have an ID card or Zoho People account.
- Brings all the advantages, especially the additional layer of security that facial recognition enlists.
- Ensures that employee identity is never compromised.

Setting up Kiosk

The setup process can be done on the Zoho People web application by an administrator, location administrator or attendance module administrator. This is a one-time process.

Follow the steps below to proceed with the setup process:

1. To get started, navigate to **Attendance > Settings > Kiosk setup**
2. Enter a name for your kiosk and click Save

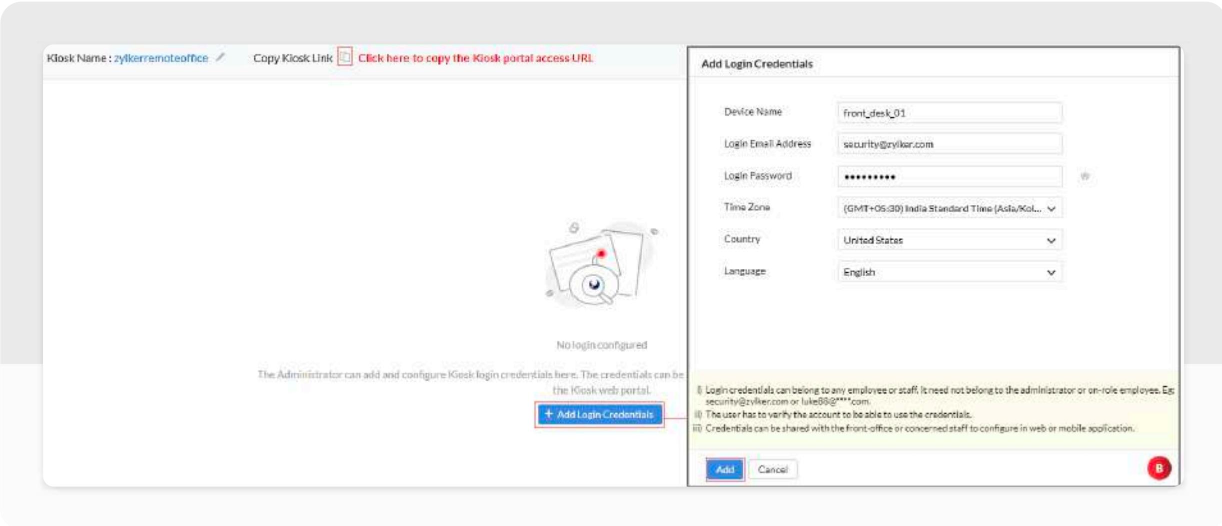


3. Now click on **+Add Login Credential**. Add a name for the device that is to be used to capture employee's attendance. It can be for any internet-enabled device

4. Add the Login email address and password. This email address can be any verifiable account. The email address can belong to any employee or staff, it need not be the administrator or an on-role employee. For example: frontdesk@zylker.com or arthur95@gmail.com

***NOTE:** When an email address is added, a verification email will be sent to the email address. The user will need to confirm their account. Once confirmed, the email address can then be used to login to configure the Kiosk mobile application or when setting up Kiosk using the portal link. Setup steps are given further below.*

5. Based on the operating location, choose the corresponding Time Zone, Country and Language



6. Click **Add**. The setup is now completed in Zoho People

With Zoho People Kiosk setup now completed, it is possible to implement this feature using the Zoho People Kiosk mobile application or through a computer web browser using the portal link access URL. (refer screenshot B).Typically, once the administrator has to set up the Kiosk account, the login credentials can be shared with the front-office. They will in turn either download the app or access it through the portal link to be used on a daily basis.

NOTE:

- *IP/Geo restrictions are not considered for check-in/out from Zoho People Kiosk. However city data tagged to IP address will be included as part of check-in/out data.*
- *Web check-in & Mobile check-in can still be used by Employees. (as per Organization's settings)*
- *Zoho People Kiosk is available from Zoho People professional plan and above.*
- *Photos captured using Kiosk will not be stored. Only the check-in/check-our action will be logged.*

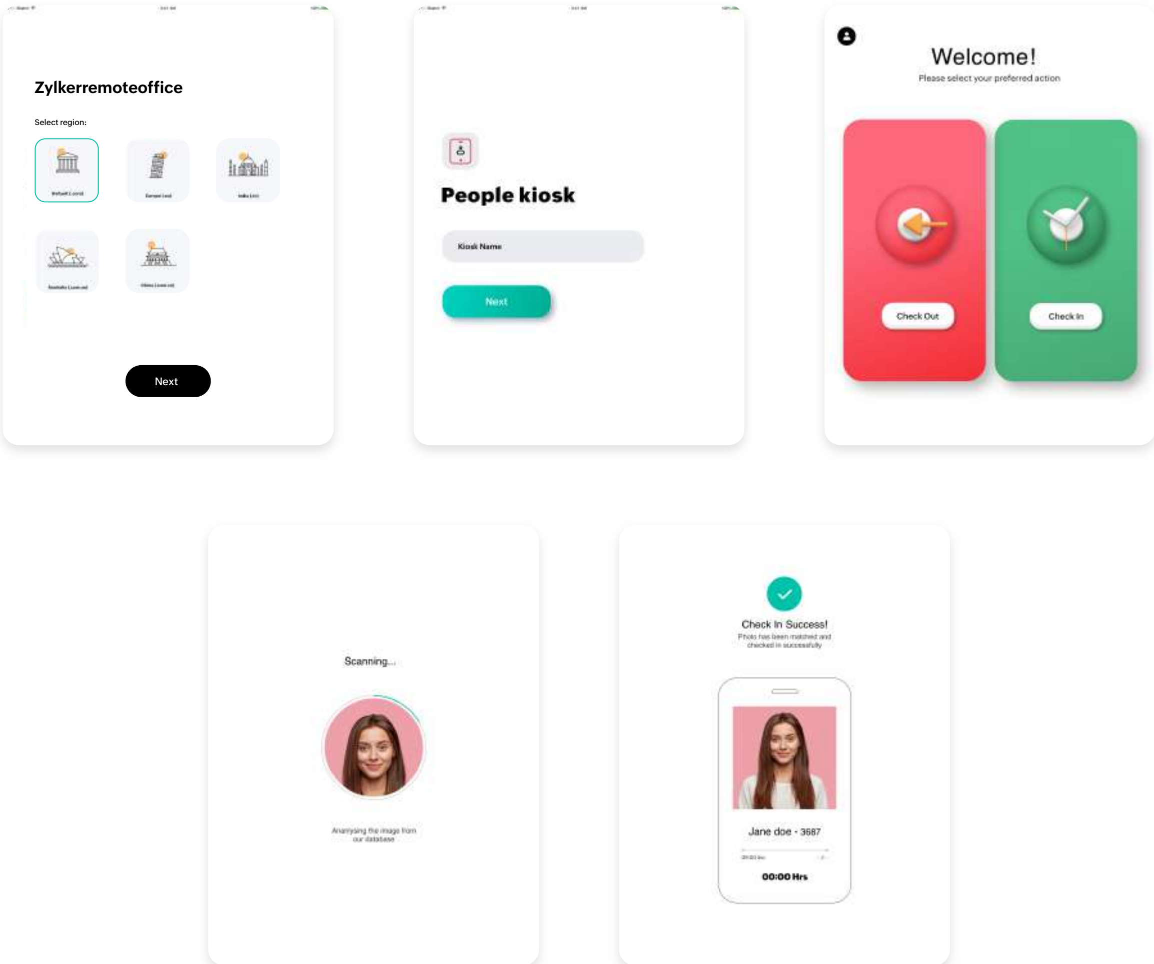
Setting up Zoho People Kiosk Mobile Application

Use any smart phone (Android or iOS) to set up Zoho People Kiosk mobile application. This will make it possible for employees to check-in and out using the configured device. The device can be deployed in the front-desk or reception area.

Note that the Administrator must provide the login credentials and kiosk name (refer to screenshot B) to the concerned staff, employee or staff, it need not be the administrator or an on-role employee.

Follow these steps to set up the Zoho People Kiosk Mobile Application:

1. To set up kiosk from an Android or iOS mobile/tablet device, install the People Kiosk app from Google Playstore or the Apple App store
2. Select your operating location region and enter the kiosk name (as configured in Kiosk Setup - refer screenshot B) and login using the same login credentials
3. Ensure that the camera access permissions are allowed



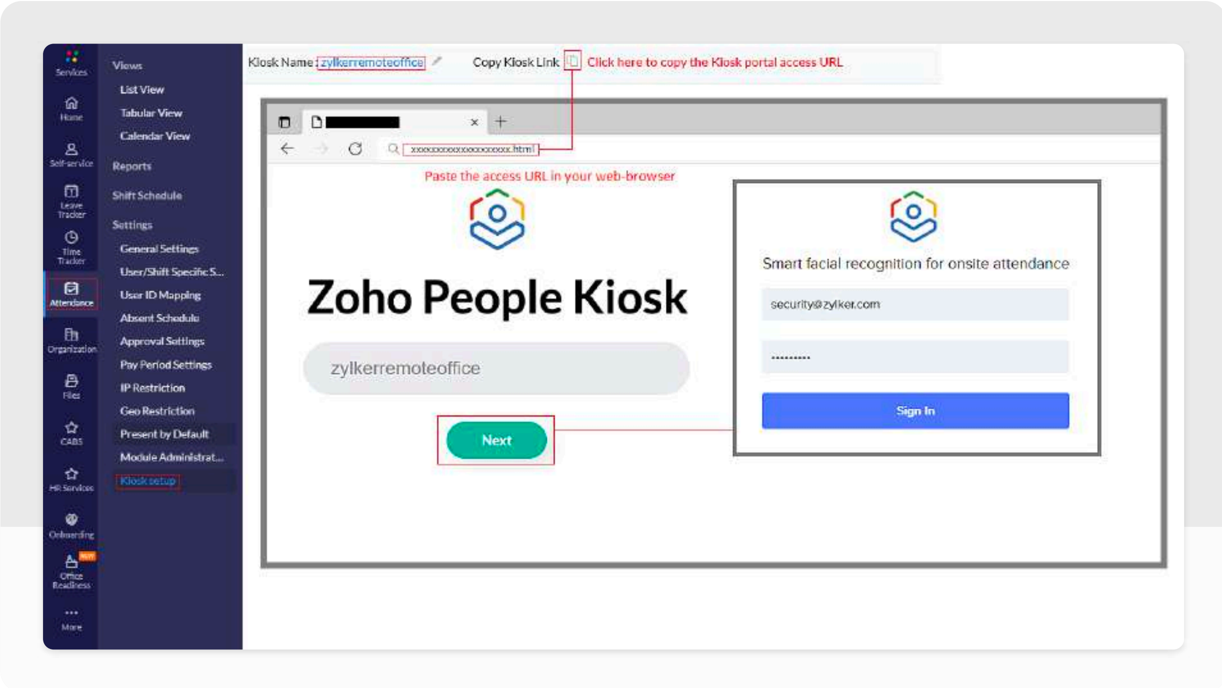
4. Now that the web portal and mobile device setup is completed, employees can check-in/out using this configured device. Typically, this can be deployed in your office front-desk or reception area to capture employee attendance

Using Zoho People Kiosk Using a Web Browser

Zoho People Kiosk can be implemented through any internet-enabled computer. Use the portal access link obtained during the Kiosk Setup process in Zoho People. (refer to screenshot B)
Note that the Administrator must provide the login credentials and kiosk name (refer to screenshot B) to the concerned staff, employee or staff, it need not be the administrator or an on-role employee.

1. Go to your computer web browser and access the link. The access link can be obtained by clicking the copy icon from the Kiosk setup screen

2. Login using the same Kiosk Name and credentials used in Kiosk setup (refer to screenshot B)



3. That is it! Now employees can check-in and check-out using the corresponding action buttons. Ensure that webcam access is allowed in your web browser to be able to use this feature

How can employees check-in/out using Kiosk mobile app or web-portal?

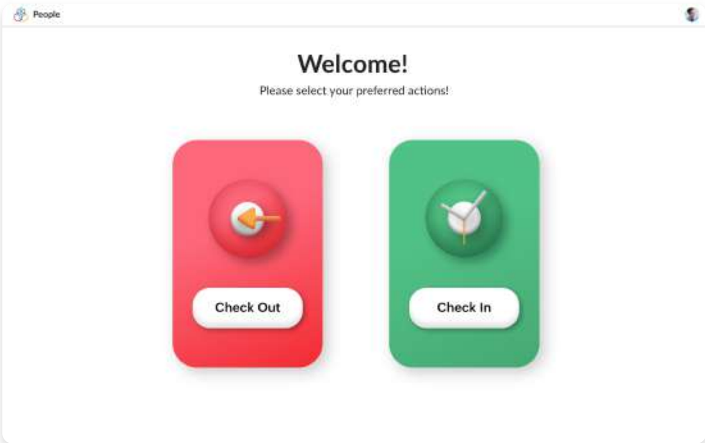
1. Any employee can check-in/out by using one of the configured devices. (typically the organization may use it in the reception, front-desk)

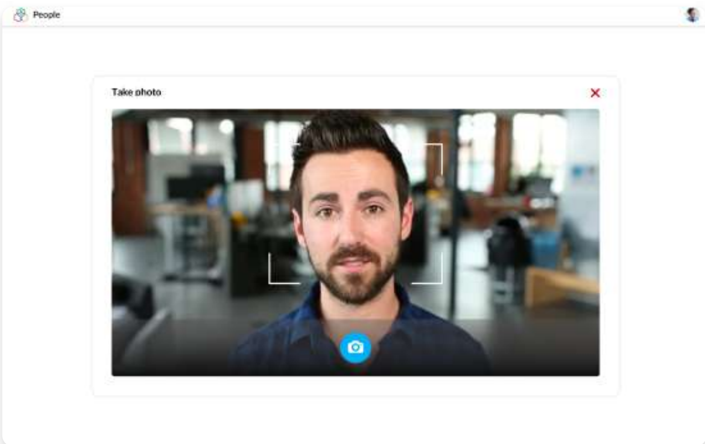
2. On clicking the action button (Check-in or Check-out), the user will be prompted to take a photo

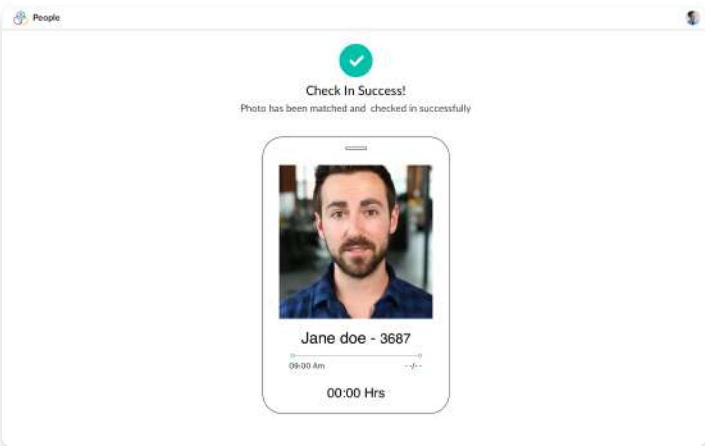
3. Once the photo is clicked, the image will be matched against all profile picture images in your organization's Zoho People database

4. If the image has a successful match, the employee will be automatically checked-in

5. If the image does not match, then they will be prompted to try again







ADDITIONAL FEATURES IN ATTENDANCE MANAGEMENT

Present by Default

Present by Default in Zoho People is an option that enables organizations to mark users as 'Present' automatically. This option will be useful to employees who are not able to mark attendance such as on-site employees, or senior management who do not have the time to check-in and check-out everyday. Learn more.

Attendance Module Administrator

To improve convenience and for focused management, a specifically assigned Module Admin can be used. An Attendance Module Admin has special permission to view and edit attendance entries and assign and monitor shift for a selection of users tagged into "User Groups". In addition, Modules admins can also view user reports of employees within their user groups. Learn more.

Permissions

Permissions lets organizations define boundaries and track the short periods of time away from work that employees request, during working hours without having to make them apply for leave. It gives organizations a way to clearly define and specify the permission duration and other related criteria. This way, these short absences from work are recorded and tracked separately, and restricted to a reasonable level according to the needs of the organization. Learn more.

On Duty

On Duty is used to mark the presence of an employee who is working away from their office location such as a work site, client location or working from home.Organizations that want their employees' on duty time to be marked as 'Present' under Attendance can use this feature.

Moreover, employees have the advantage of applying for On Duty ahead of time, especially when they are going to work from remote locations that don't have internet access. Learn more.

Facial Recognition

Facial Recognition feature in Zoho People is used to capture user images to validate user identity while checking-in or out. Facial Recognition works through the Zoho People website and mobile application. Learn more.

From automating simple email alerts to configuring complete workflows that trigger a series of automated actions, learn more about our automation features in Zoho People.

TIMESHEET MANAGEMENT

Timesheet is a simple and efficient time management software that allows you to record and keep track of the time you spend working on various jobs. You can record your daily and weekly time logs, generate timesheets, configure multi-level approval for timesheets, generate bills and can get customized accurate reports for timesheets, payroll, and jobs. With this intuitive time tracking tool, you can track your employees' time regularly and manage your business productivity without any hassles.

Generally, jobs are associated with Projects which are in turn associated with Clients of the organization. Having said that, it is also possible to add a job without associating it with a project.

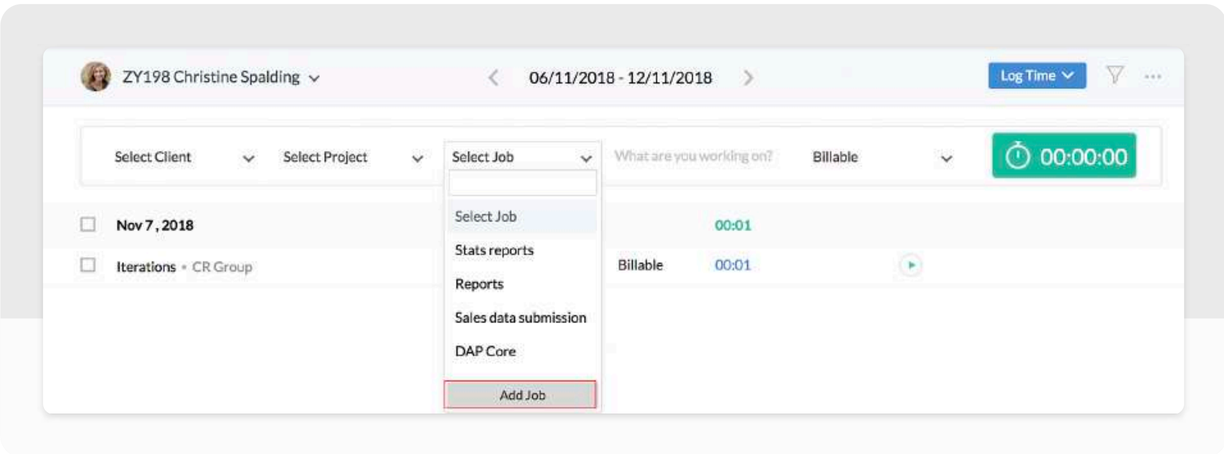
Jobs

Adding Jobs

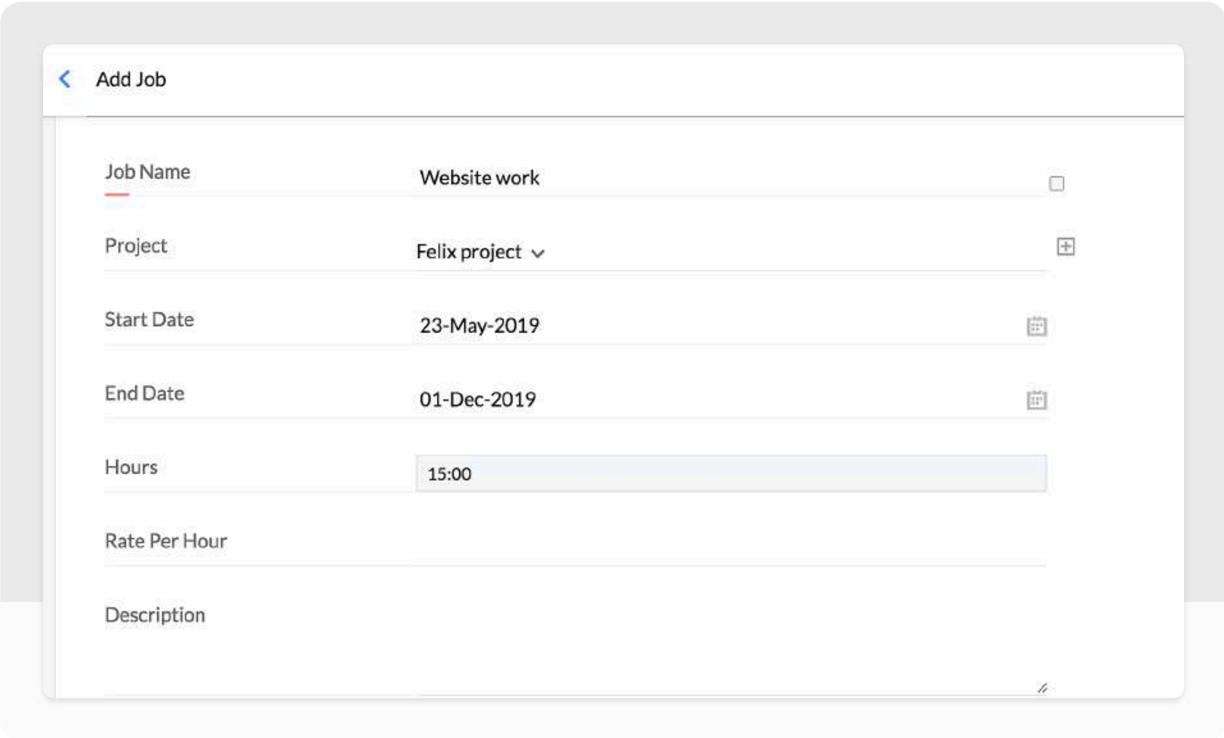
In order to log time, jobs should be added in the first place.

Given below are the steps to add a job.

1. From your home page, go to **Timesheet > Projects/Jobs > Jobs**



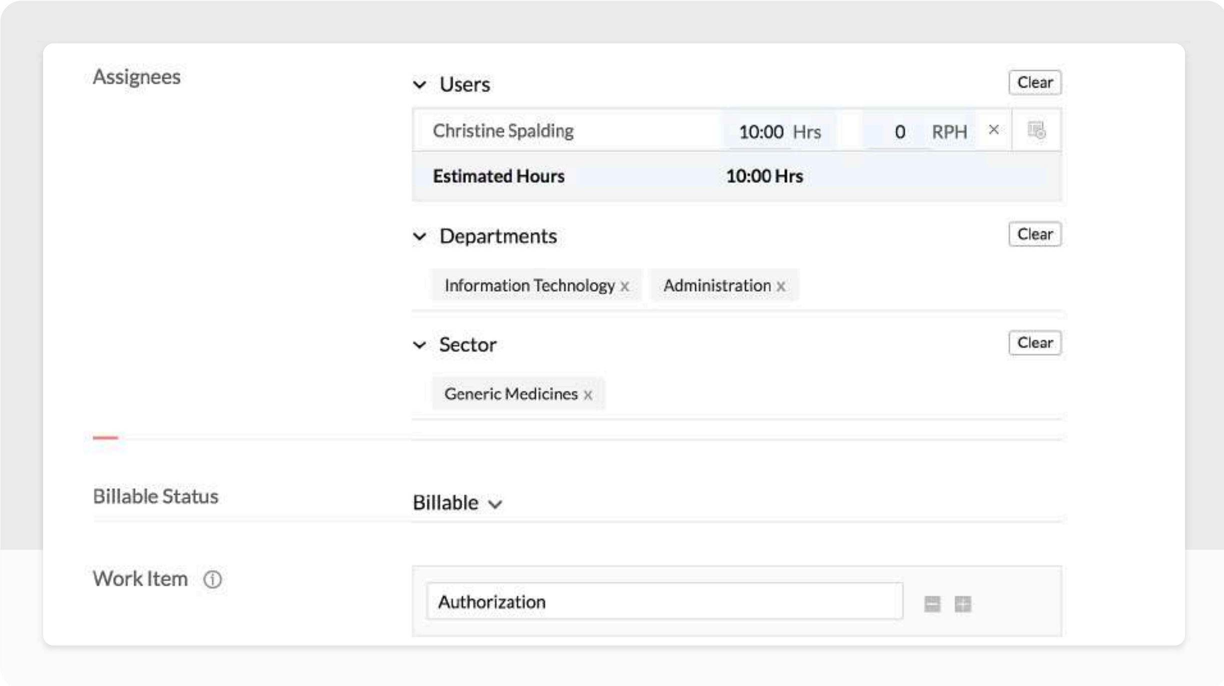
2. Click **Add Job**
3. Enter the job name
4. Select a project if required
5. Give a start date and end date for the job



6. Under *Assignees*, select the assignees for the particular job
7. Enter the hours in Hours and the Rate per hour (RPH) in Rate that appears against the assignee
8. Under *Hours*, you will be able to see the total number of hours getting populated automatically

***NOTE:** Hours is the sum of the individual estimated hours that you have given for each assignee.*

9. Give a Rate per hour
10. Attach any files that you would like to add about the job. You can either add a file from your desktop or from the cloud
11. Check the Reminder box, if you would like a reminder to be set for the job

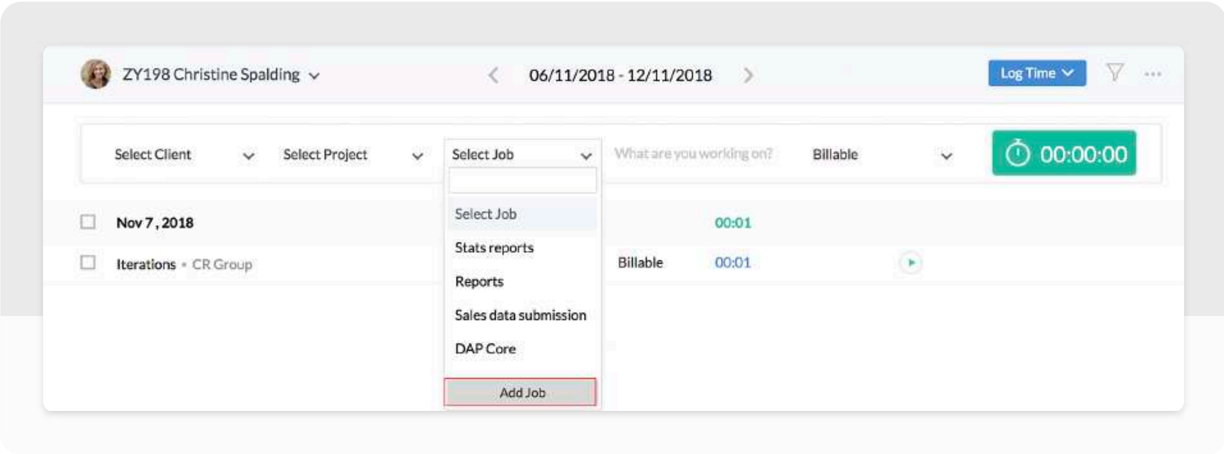


6. Under *Billable status*, select Billable or Non-Billable depending on the nature of the job
7. Enter work items. These will be listed as drop down options while logging time for this job. Default work items will be listed along with these work items
8. Click **Submit**

If you have not created your job on the system, you can also add jobs straight away, while time logging is done.

To add jobs while logging time,

1. From your home page, go to **Timesheet > Time Logs**
2. Select the project from the drop-down
3. From the Select Job drop-down, click on **Add Jobs**
4. Enter the job name and other details



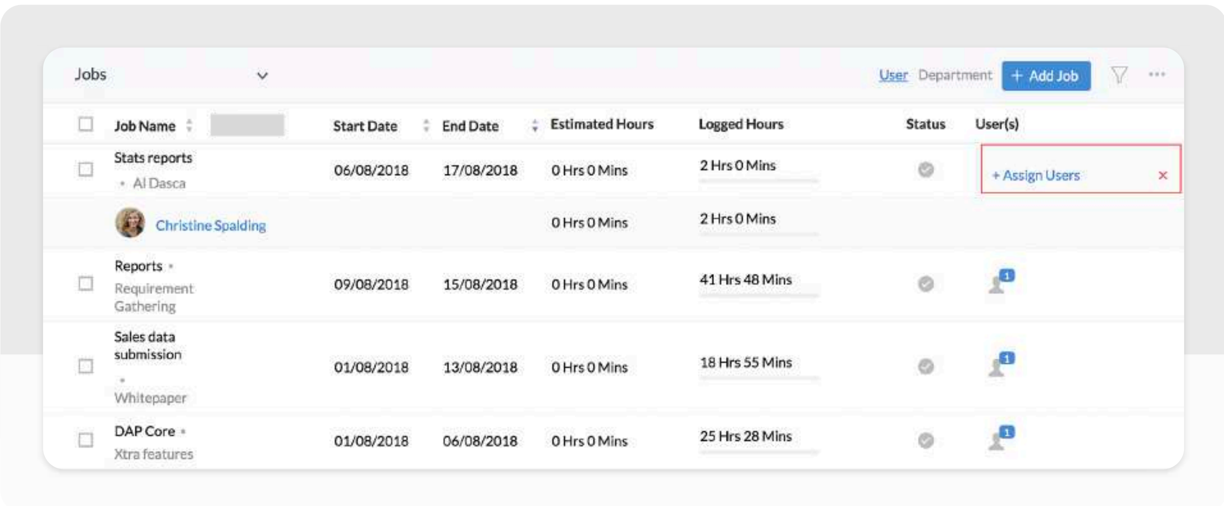
Jobs can also be added without being associated to any project.

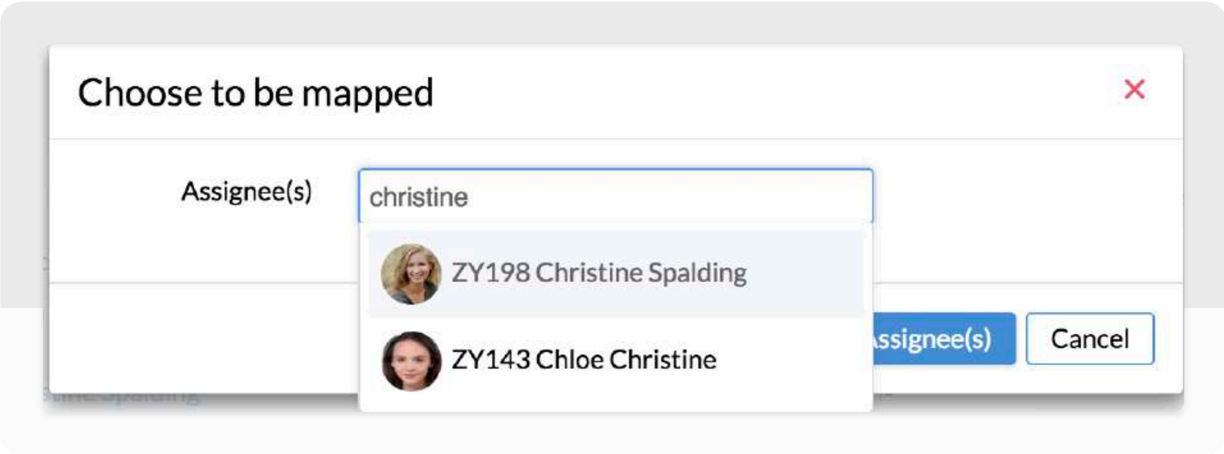
Assigning Jobs

While adding a job, under Assignees, you can select more than one employee using the checkbox. After a job is added, you may have the necessity to assign more users to that job. In this scenario, you can assign jobs to multiple assignees.

Here, you can search for employees and map them to the job

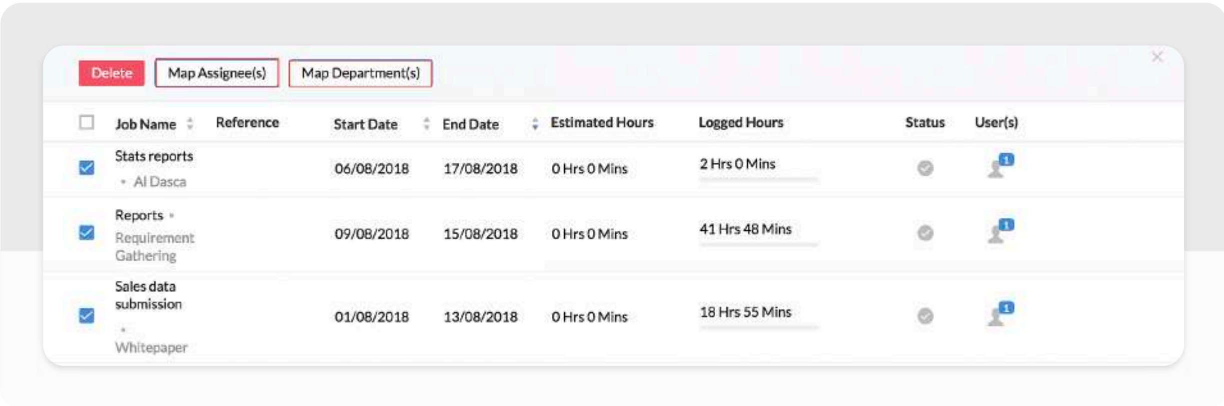
1. From your home page, go to **Timesheet > Projects/Jobs**
2. Check the job that you would like to assign
3. Click the **Users** icon of the job for which you want to assign more users
4. Click **Assign Users**
5. Use the search option to add the users and click **Map**





This option also works when you would like to map more than one job to one or more assignees.

Check the jobs that need to be mapped and click on **Map Assignees**.



You can also create a job and assign it to a particular department to get work done with order and efficiency.

To assign a job to a department,

1. From your home page, go to **Timesheet > Projects/Jobs > Job**
2. Click **Add Job**
3. Under *Assignees*, go to users and select the Users and under Department, select the Department
4. Enter other details like Rate per hour, Billable Status, if needed
5. Click **Submit**

Now the job has been assigned to the Department. Anyone who is tagged to the department will be able to log time for this job and the ones who log time for the job will become assignees for that job.

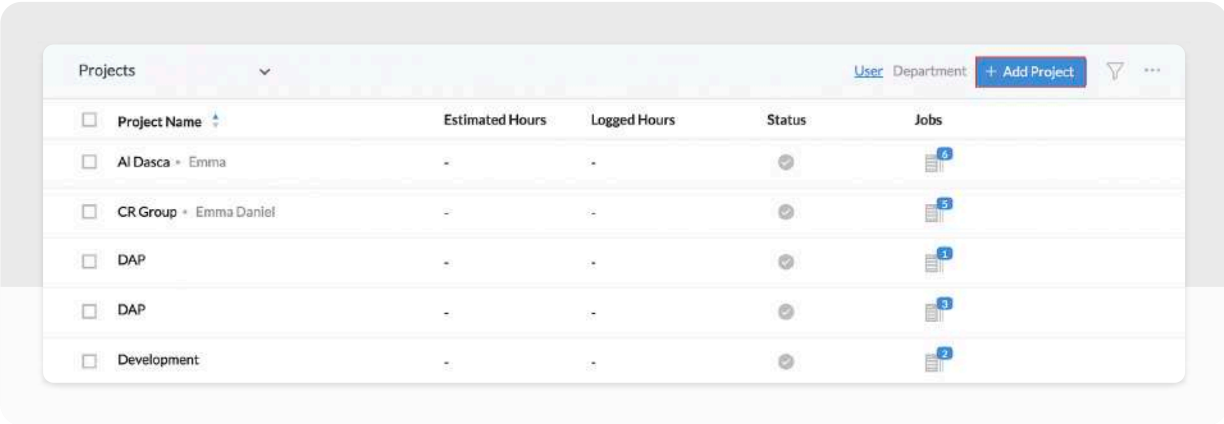
Learn more about Jobs.

Projects

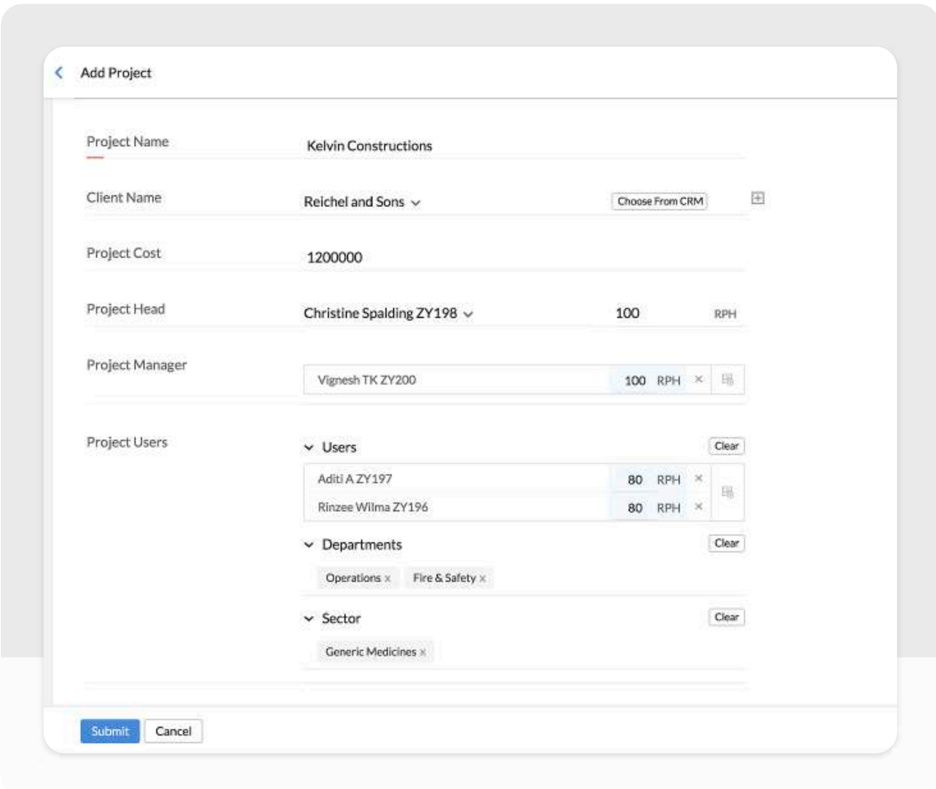
Creating Projects

Projects are assignments that employees work on. Follow the steps given below to create a Project.

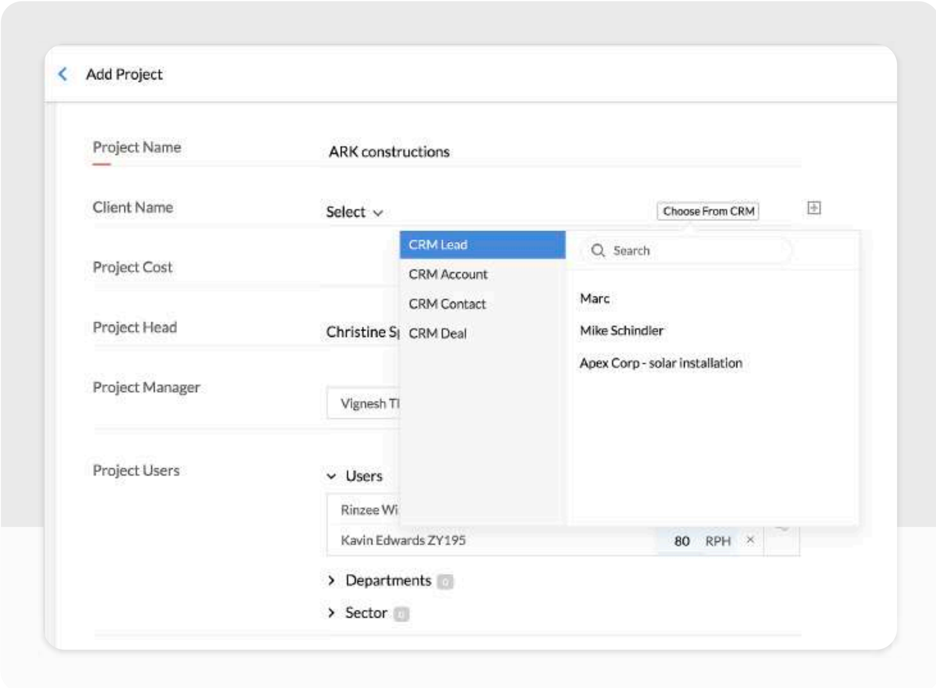
1. From your home page, go to **Timesheet > Projects/Jobs > Projects**



2. Click **Add Project**
3. Enter Project name
4. Select the Client name from the dropdown



5. Click Choose from CRM if you would like to pick a client from your list of clients in CRM
6. If you are picking a client from CRM, select from the options like Lead, Accounts, Contact, and Deal
7. Select Project Users and define their Rate Per Hour (RPH)
8. Enter other details as required



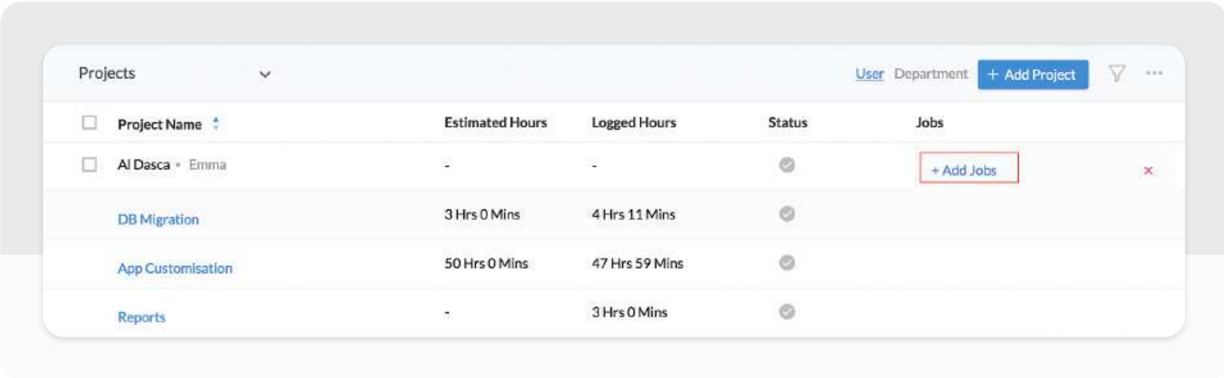
8. Click **Submit**

Associating Projects

To associate a job to a project directly,

You can associate a Project to a job directly from the Projects tab.

1. From your home page, go to **Timesheet > Projects/Jobs > Projects**
2. Under *Jobs* click **Add Jobs**



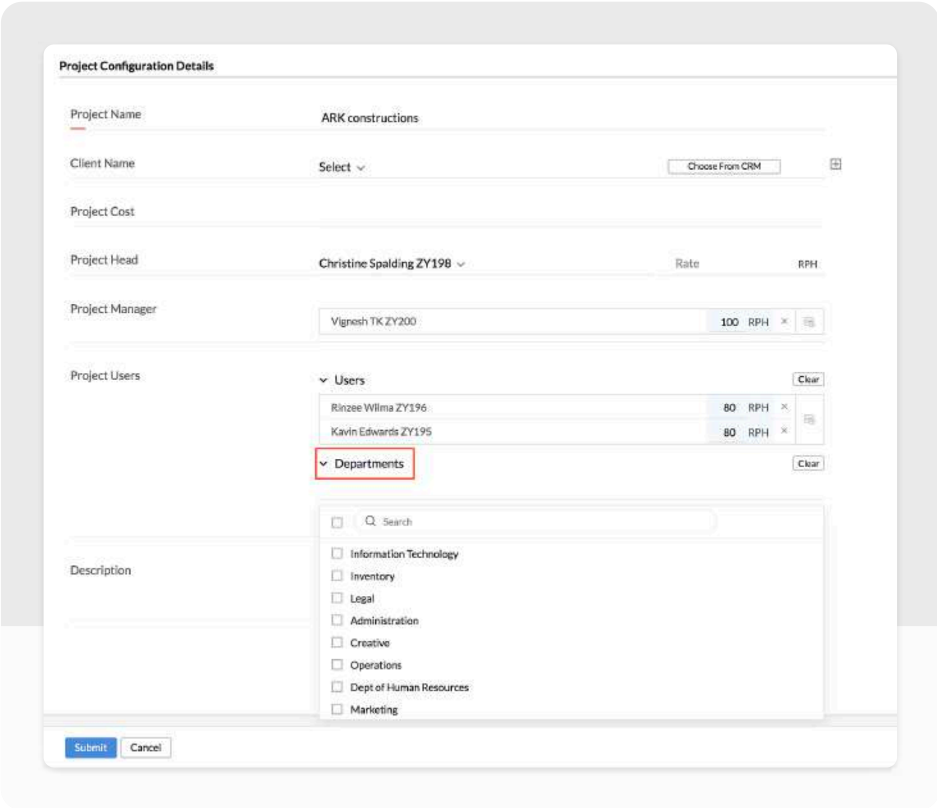
3. Enter the details and click **Save**

NOTE: *If there are no jobs associated with this project already, you will be able to see a + icon. Clicking on this icon will provide you the 'Add Job' option, using which you can add a job to the project.*

Assigning a project to a department

To assign a Project to a Department,

1. From your home page, go to **Timesheet > Projects/Jobs > Projects**
2. Click **Add Project**
3. Under *Project Users*, go to Users, select the Project Users and under Department, select the Departments



4. Enter other details as required and click **Submit**

If there are jobs mapped with projects, then the Users and Departments that are mapped to the project will only be shown as assignees for the jobs, from which you can make the selection if needed.

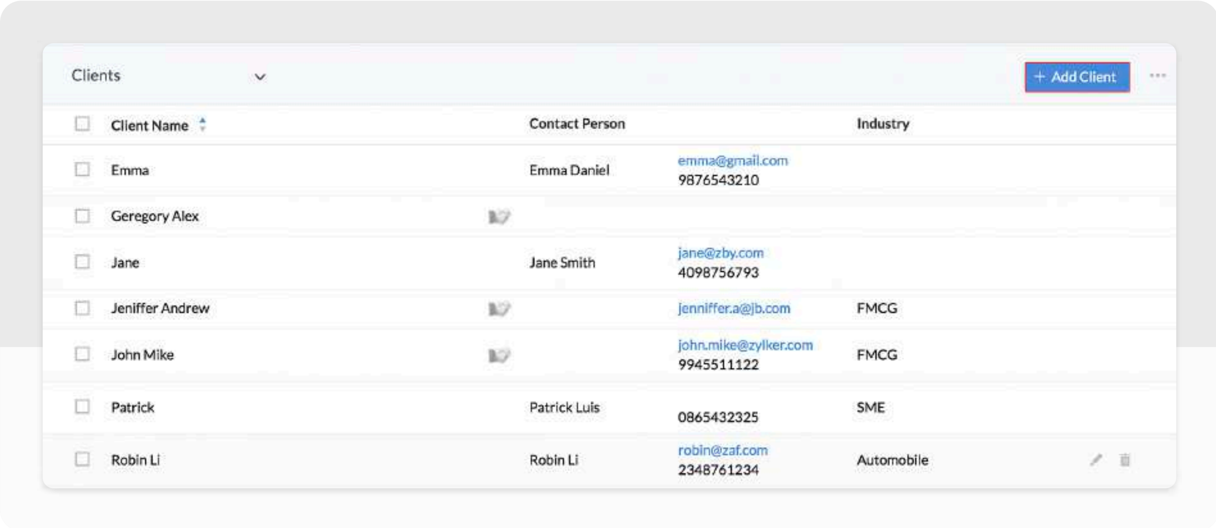
Learn more about Projects.

Clients

Adding a Client

If an organization wants to track time for work done for their clients, Timesheet is the best option. In Timesheet, Jobs are done for Projects which are associated with Clients. So, getting Clients added into the system is very important. Follow the steps given below to add a Client to your system.

1. From your home page, go to **Timesheet > Projects/Jobs > Clients**



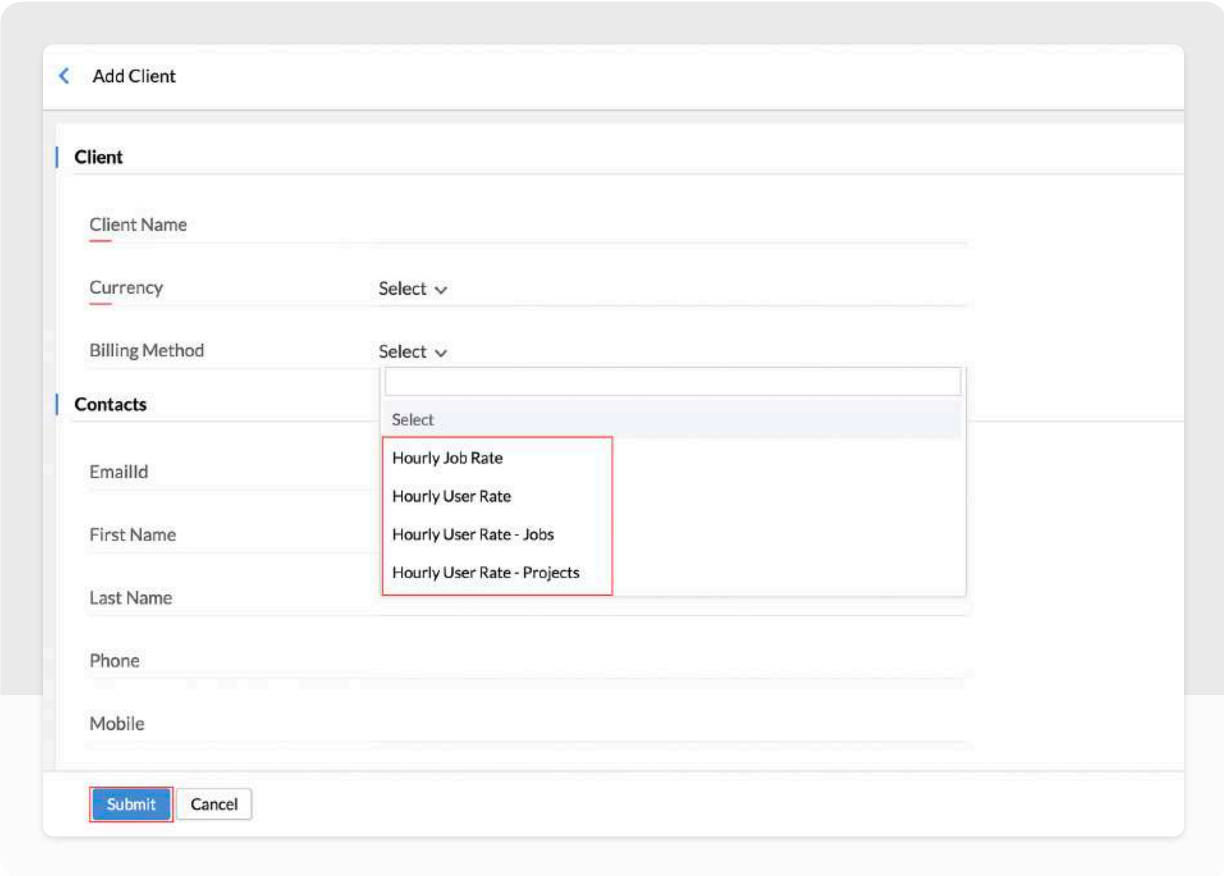
2. Click **Add Client**

3. Enter values for the mandatory fields like Client Name, Currency etc

4. Under *Billing Method*, select Hourly Job Rate, Hourly User Rate, Hourly User Rate - Jobs or Hourly User Rate - Projects

NOTE:

- If you select Hourly Job Rate, then the bill will be generated based on the Rate per hour that you define in Job(Timesheet > Project/Jobs > Add /Edit Job > Rate Per Hour).
- If you select Hourly User Rate - Jobs, then the bill will be generated based on the Rate per hour you define for each Assignee in Job (Timesheet>Projects/Jobs > Add /Edit Job> Assignees > RPH).
- If you select Hourly User Rate - Projects, then the bill will be generated based on the Rate per hour that you define for each Project User in Project. (Timesheet > Projects/Jobs > Add Project > Project Users > RPH)
- If you select Hourly User Rate, then the bill will be generated based on the Rate you define for the user under Payroll settings (Time Tracker > Settings > Payroll Settings > Add Employee Rate)



5. Click **Submit**

The client is now created on your system and Projects can be associated with this client. Learn more about Clients.

Time Logs

Methods to Log Time

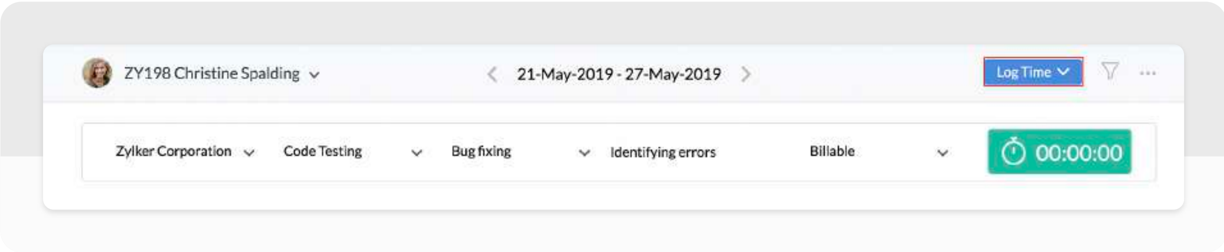
There are two ways in which time can be logged.

Manual Method:

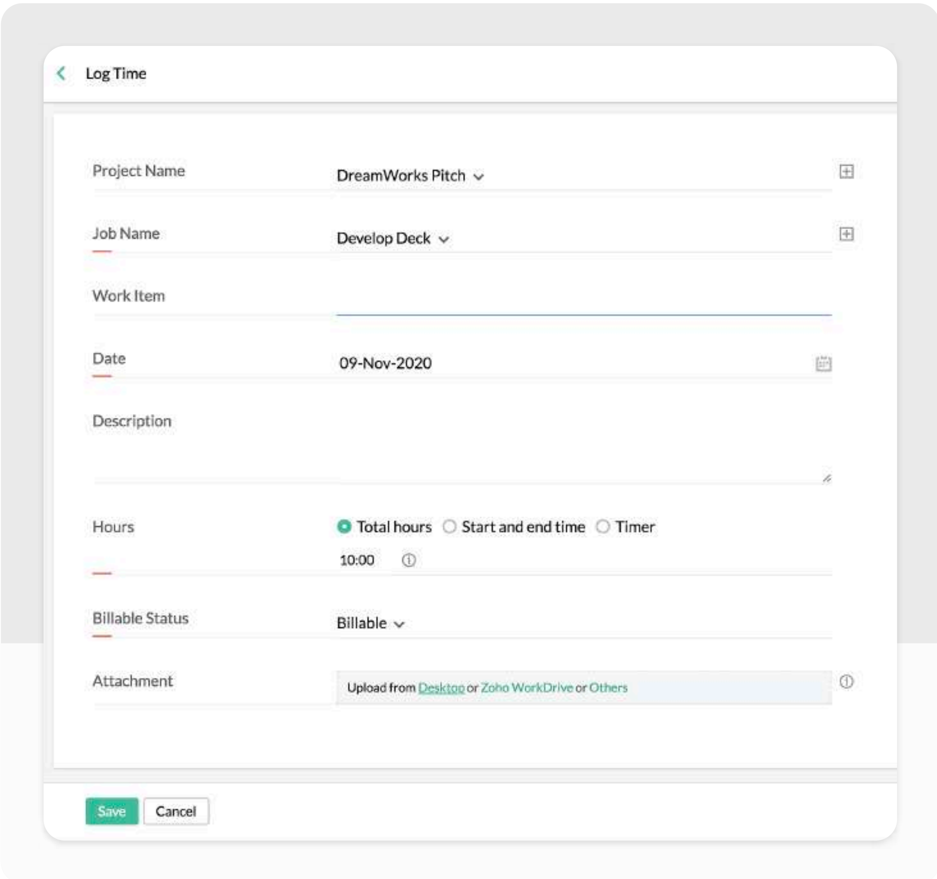
There are three ways of logging time manually.

Using Log Time option

1. From your Home page, go to **Time Logs** > **List View** > **Log Time**



2. Select Job Name
3. Select the date as required
4. Under Hours, you can either select Hours and enter the number of hours or select Start & End and enter the time there
5. Click **Save**

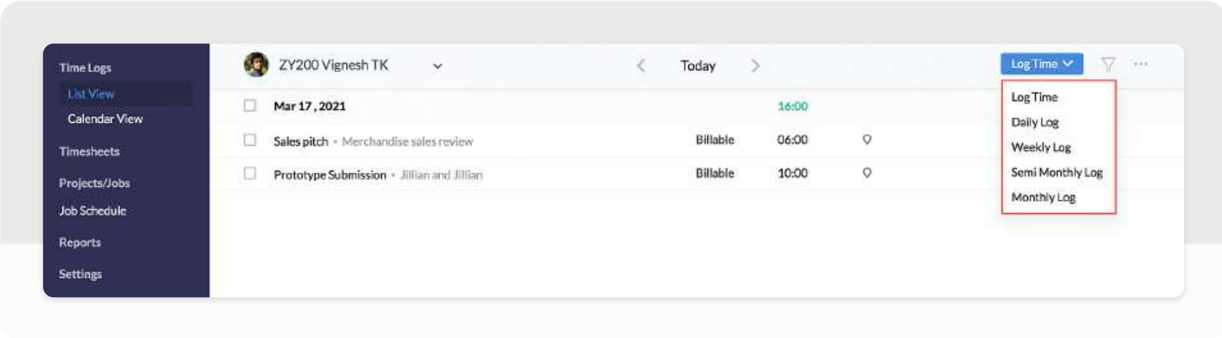


The next method of logging time manually is by entering time in the Daily, Weekly, Semi monthly, and Monthly time logs.

Using the daily/weekly/semi monthly/monthly log, you can log time manually. This helps in scenarios where you need to log more than one time log per day or when you want to log many time logs in a week.

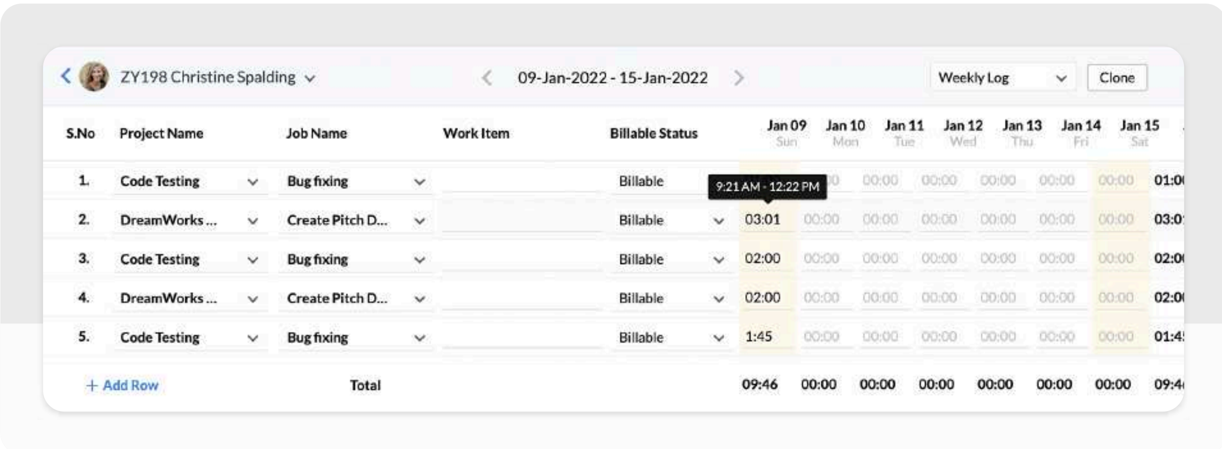
1. From your home page, go to **Timesheet > Time Logs**

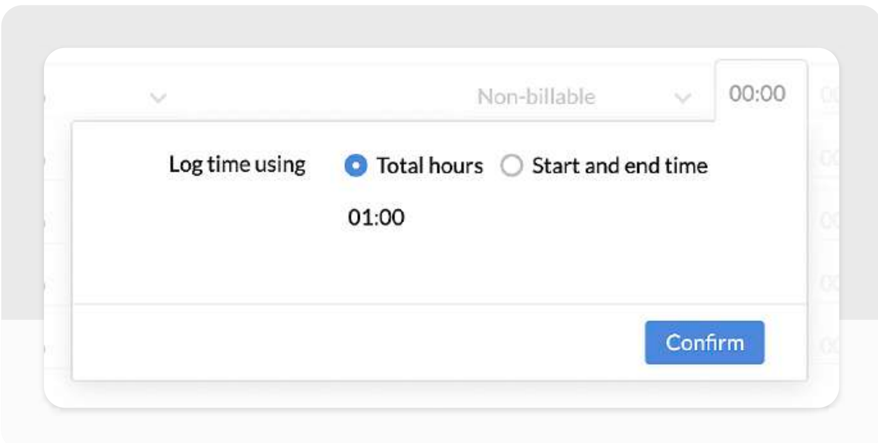
2. Click the **Log Time dropdown**



3. Select daily / weekly / semi monthly / monthly log
4. Use the drop down to make your selection
5. Enter the number of hours and click **Submit**

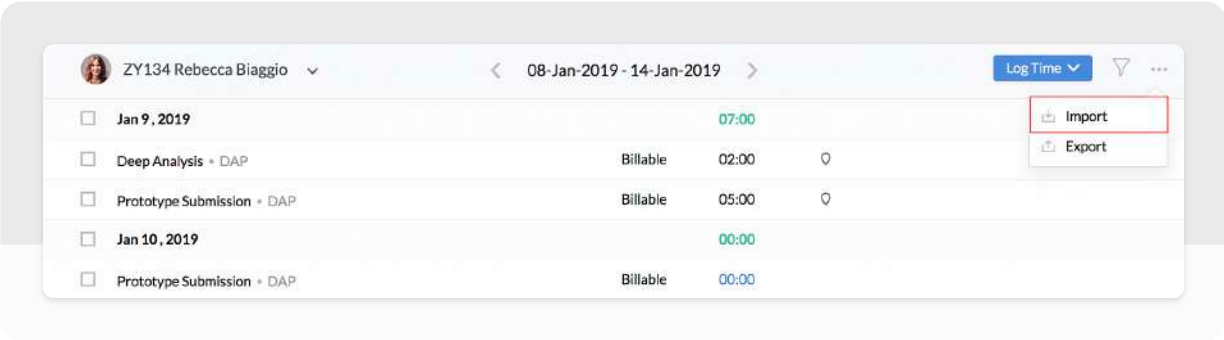
Depending on the selection made under general settings, bulk logging options available to the employee will vary. If both start and end time and total hours options are enabled, then when an employee tries to enter their time, a popup will appear prompting them to select the how they are going to log time and make their entry.





If only total hours or start and end time are only allowed,then entries can be made directly.

The third method of logging time manually is by importing time logs.

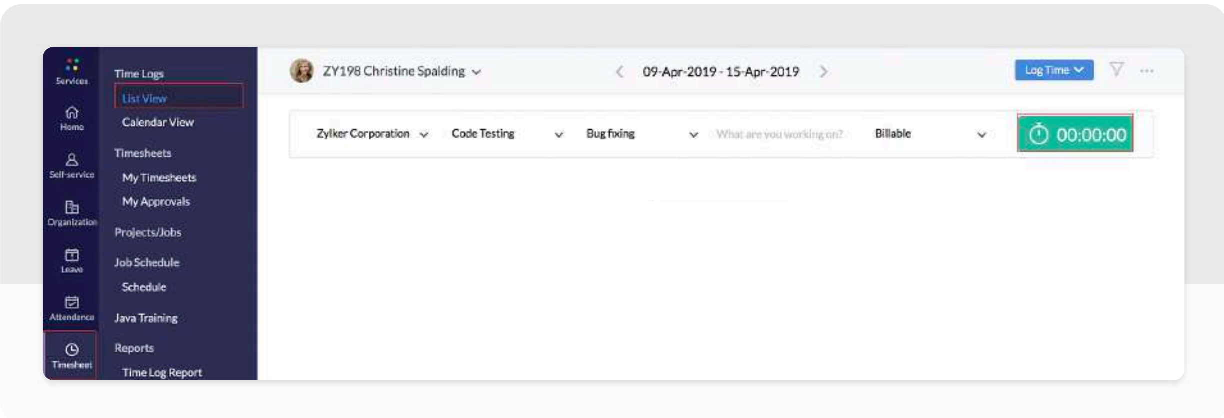


Automatic method Using Timer

Timers can also be used to log time. You can use the Timer in two ways.

Given below are the steps for the first method.

1. From your home page, go to **Timesheet > Time Logs**
2. Select the job for which you need to log time
3. Enter other details as required
4. Click on the Timer to start recording time
5. Click **Save**



You can also pause the timer and resume it when you continue to work on the same job.

The second method of using Timers is explained below.

1. From your home page, go to **Timesheet > Time Logs**
2. Click **Log Time**
3. Select details as required
4. Click **Start Timer**
5. Click **Save**

Time logging will get started for this job and you can see the Timer running in the List View.

NOTE FOR TIMER:

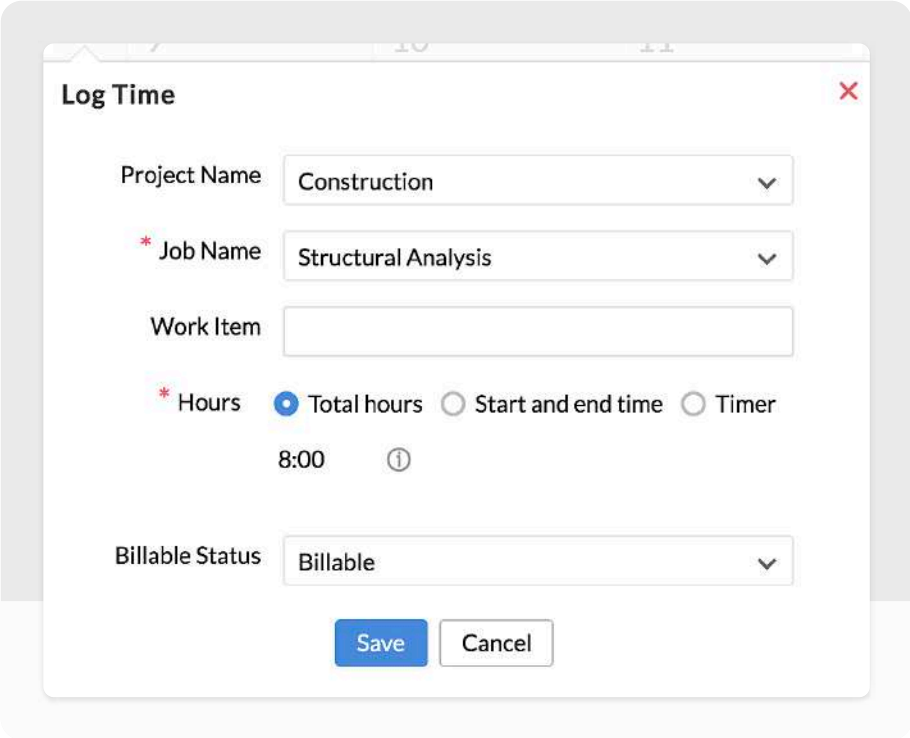
- You can add notes while the Timer is running by clicking on the Notes icon. This cannot be done after the Timer is stopped.
- You can use the Timer only when you log time for the current date. Similarly, you can resume or pause the timer only for the current day.

NOTE FOR TIME LOGGING:

- Though there are two methods to log time, the method of logging depends on the Settings configured under Timesheet > Settings > General Settings > Time Log Type. Time Logging can be done only based on the option chosen here.
- The Billing Status of the job depends on the status chosen under Timesheet > General Settings > Default Billing Status

You can also log time from Calendar View. Follow the steps given below.

1. From your home page, go to **Timesheet > Time Logs > Calendar View**
2. Hover your mouse over the date to see the + icon at the left corner



NOTE: *Timer can be started only for the current date.*

3. Select the job and the time logging type (*Hours/Start& End time/Timer*)
4. Select the Billable status of the job
5. Click **Submit**

You can view the time logs for a particular day by clicking the ellipsis icon which is on the right bottom corner of the date.

Learn more about Time Logs.

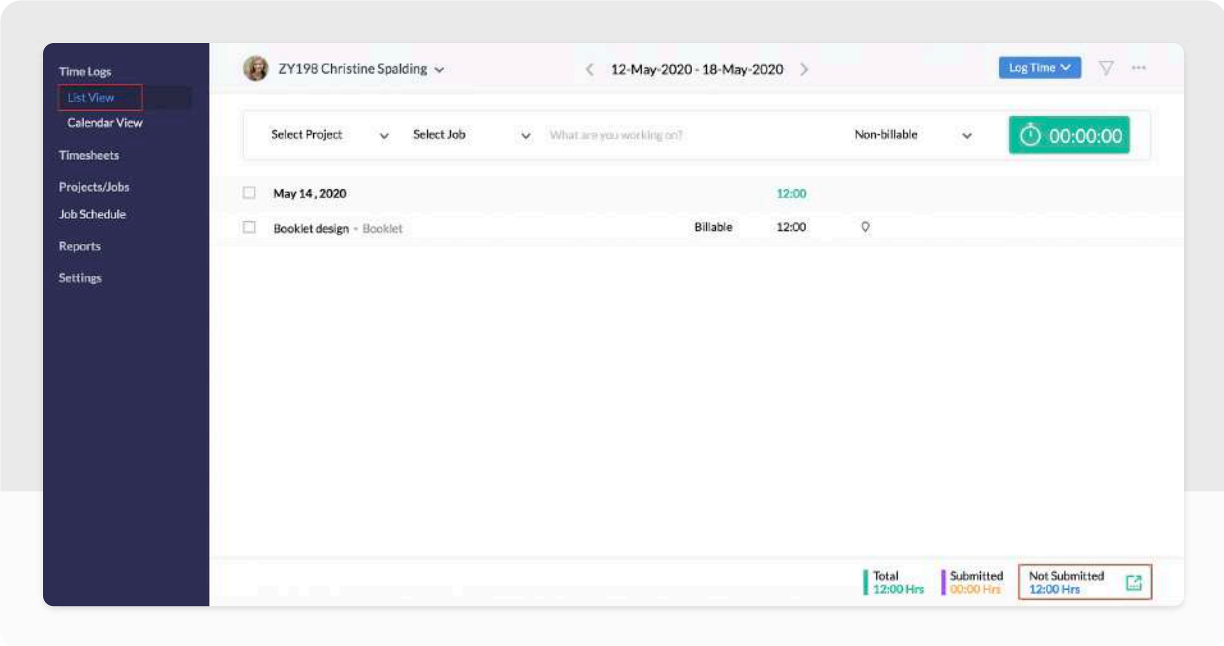
Timesheets

Creating a Timesheet

A timesheet is a collection of one or more time logs. As a first step to create a timesheet, you need to have time logs created.

There are two ways in which you can create a timesheet. Given below are the steps to submit a timesheet.

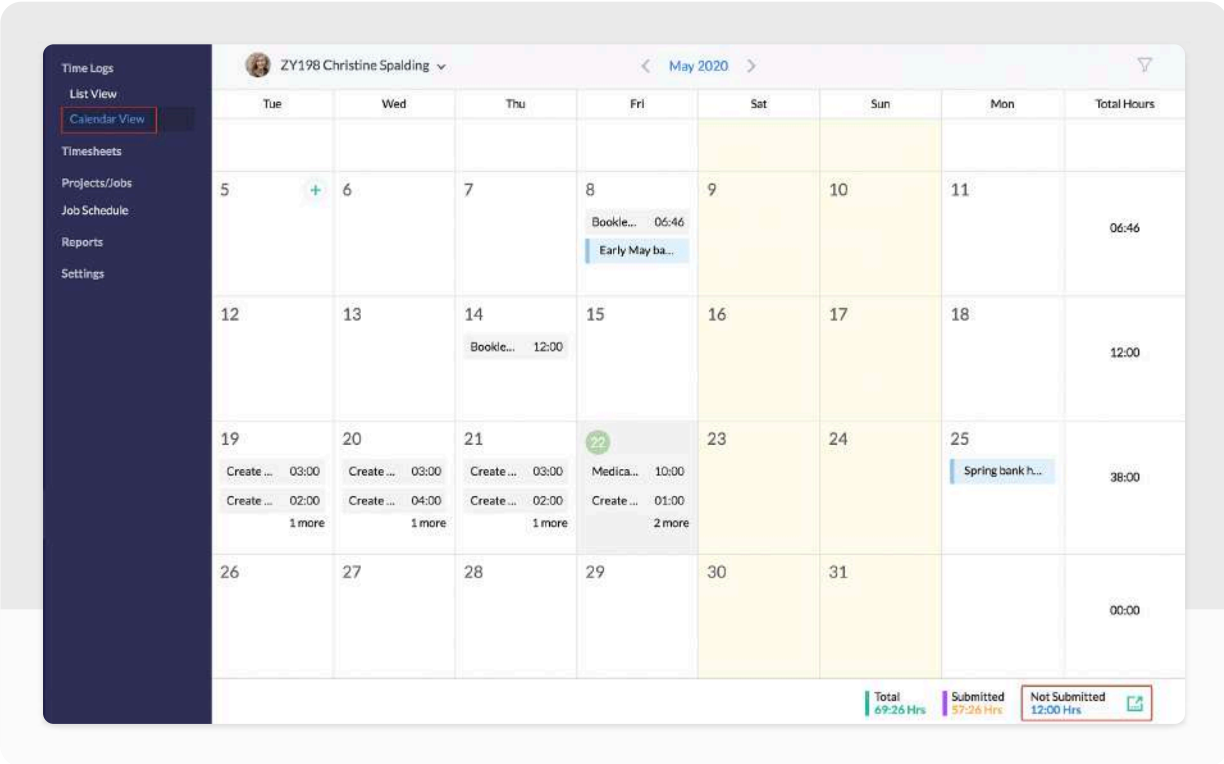
1. In the List View and Calendar View of your Timesheet, at the right bottom corner, click **Not Submitted**



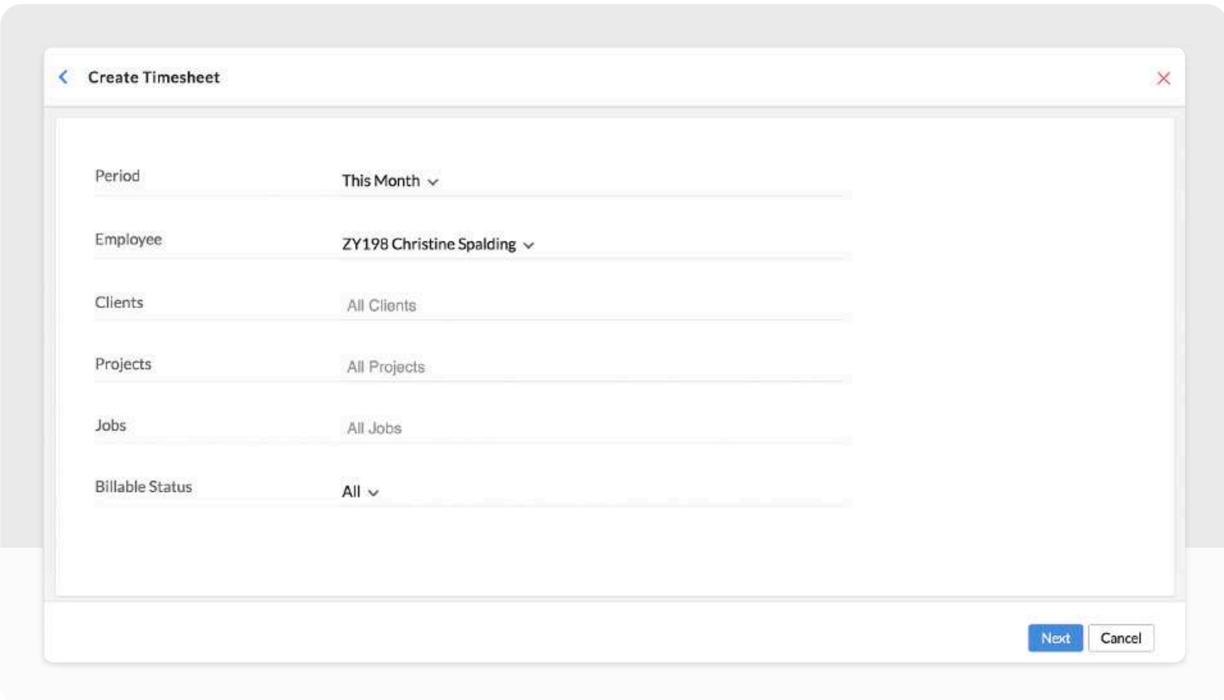
2. This has the list of time logs that are not submitted for approval. When you click on this, you will be able to see the timesheet creation page

3. If you go from the list view page, your timesheet creation page will display the logs of the current day or current week as per what you have defined in the Settings page *(Timesheet > Settings > General Settings > Time Log Settings > Time Log view)*

4. If you go from the Calendar View page, your timesheet will display the logs of the entire month



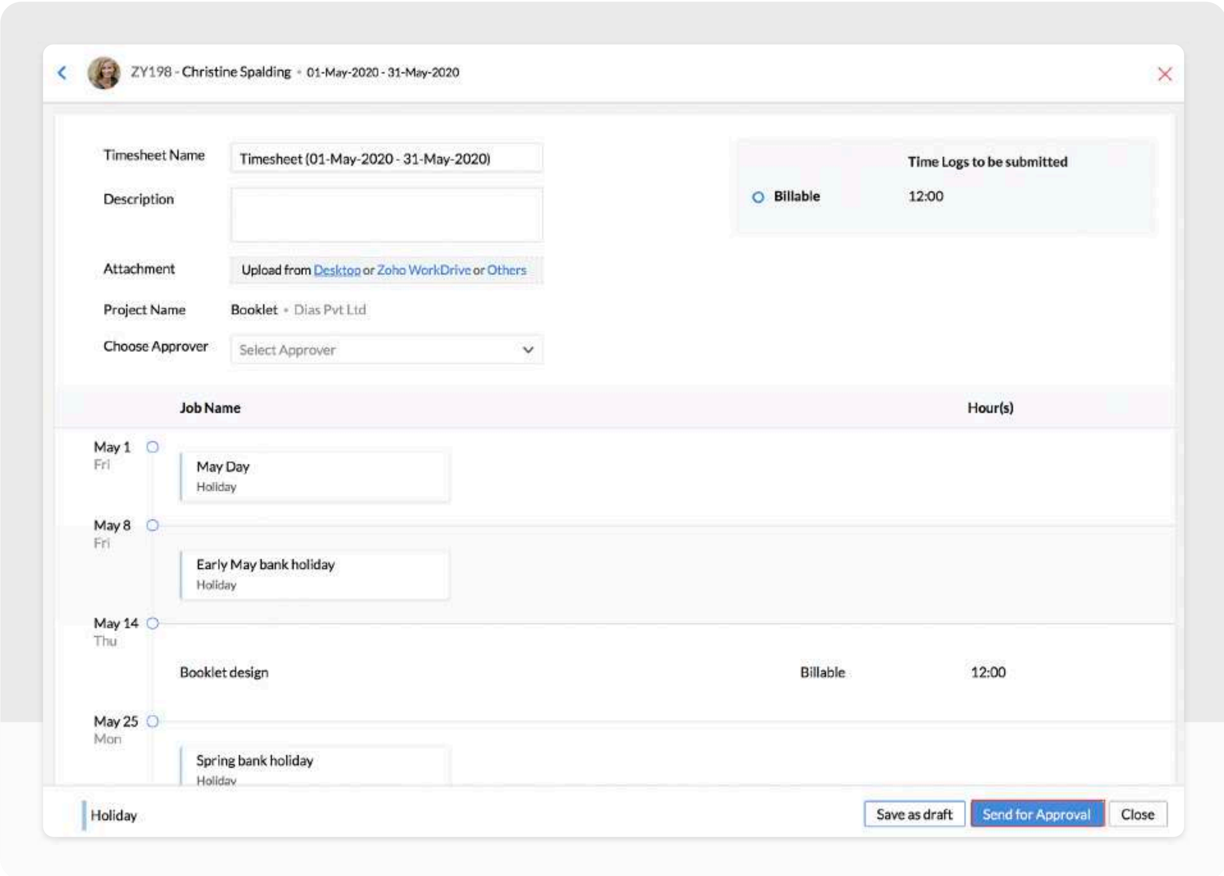
You can also choose to create a timesheet by clicking on **Timesheet > Timesheets > Create Timesheet**



1. Select the Period from the drop-down
2. Select the Employee

3. Select the specific Clients, Jobs and Projects if needed
4. Select the Billable Status
5. Click **Next**

You will be able to see all the time logs collated as per the criteria you have selected above.



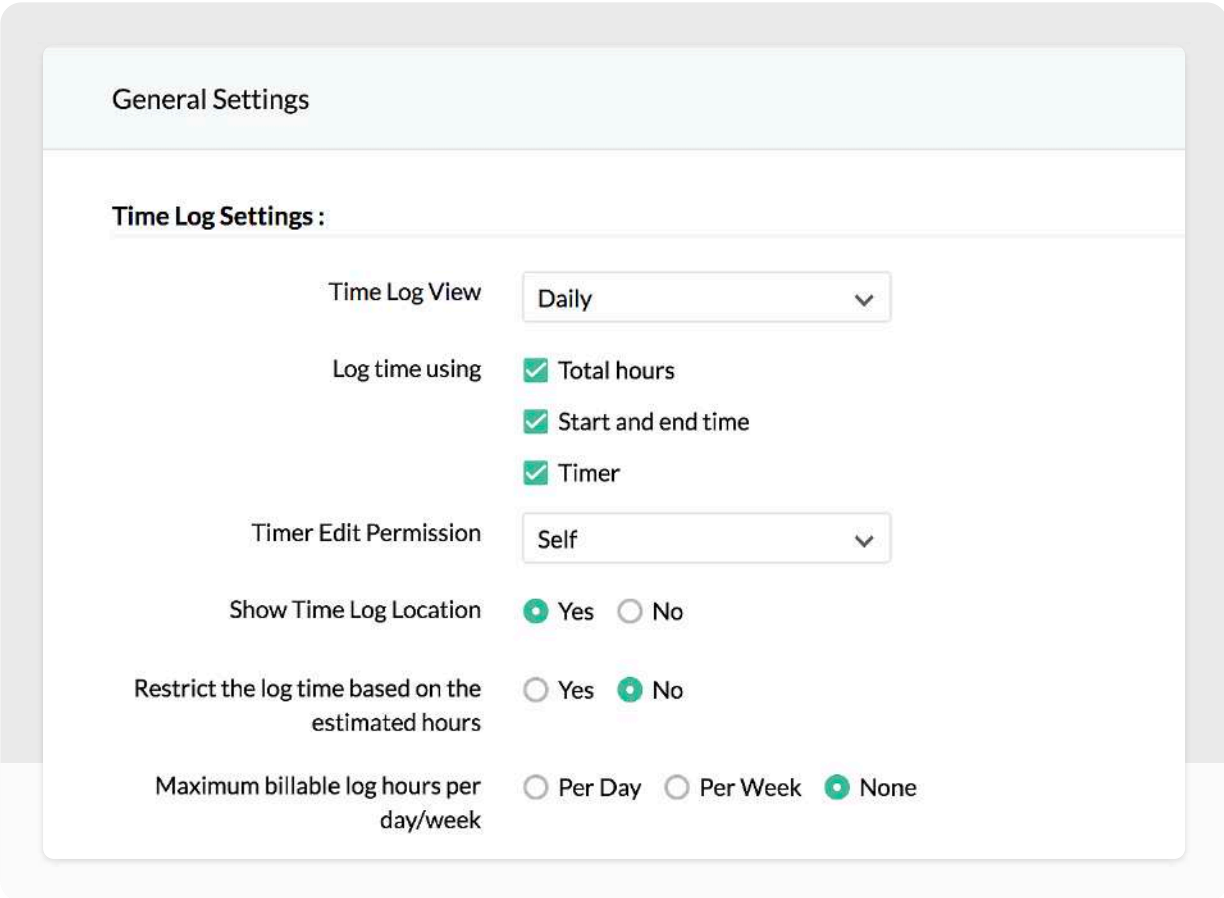
If approvals are configured, you can send the timesheet for approval.

Using the scheduler, timesheets can be sent for approval automatically.

Learn more about Timesheets.

General Settings for Timesheet

Time Log Settings



Time Log View

You can set a Time Log view for the employee of your organization to see their daily, weekly or monthly logs as required.

Log time using

This setting lets you define how you want your employees to log their time. You can choose from the following options – Total hours, Start and end time, Timer. More than one option can be selected.

Timer Edit Permission

You can configure settings for your employees to edit his/her own Timer entry or allow the timer entries to be edited only by the Reporting Manager or the Admin.

Now your users will be able to edit their own timer entries.

Show Time Log Location

In this setting, by choosing 'Yes' the location from where the time was logged by the user will be shown.

Restrict the log time based on the estimated hours

This would restrict the user's time logged for any job, based on the estimated hours set, while adding the job. Enabling this will prevent the User from logging more time for a job, than what is

Maximum billable log hours per day/week

In order to maintain consistency in the number of hours worked, you may need to have a fixed time defined for work done on each day. This setting lets you define a maximum count for the billable time that is logged in a day or week.

Similarly, you can include and exclude weekend(s) and holiday(s) from being considered as overtime.

Restrict time logs within attendance hours

When enabled, the user will be able to create time logs only within their attendance hours for any given day. For example, if an employee has been present from 9 AM to 11 AM (2 hours), then the time logs for that day should also be for 2 hours or less.

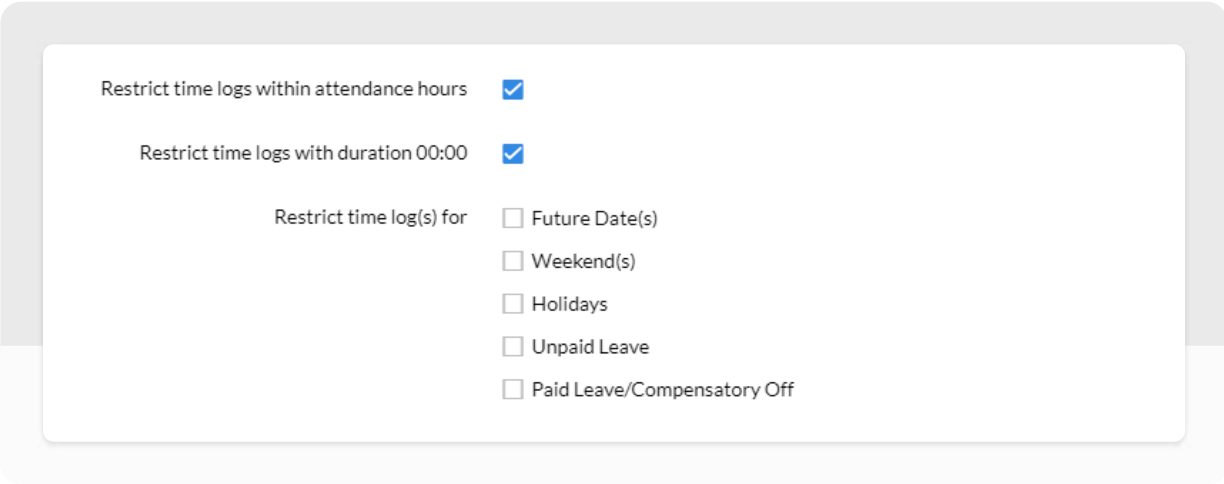
Restrict time logs

The Restrict time logs within attendance hours option prevents time logs that exceed work hours duration. For instance, employees working on 9 hour shifts , will not be able to add time log for 10 hours. Or if a user has checked-in at 10:00AM for a shift that starts at 9:00 AM, and tries to add a time log for 2 hours at 11:00AM, then they will be restricted from doing so as their actual worked time is only 1 hour.

The Restrict time logs with duration 00:00 option disallows any negligible time log entries that are less than a minute long.

The Restrict time logs for option lets you restricts your employees to log time for Future dates, Weekend(s), Unpaid leave, Paid leave/Compensatory Off and on holidays and weekends.

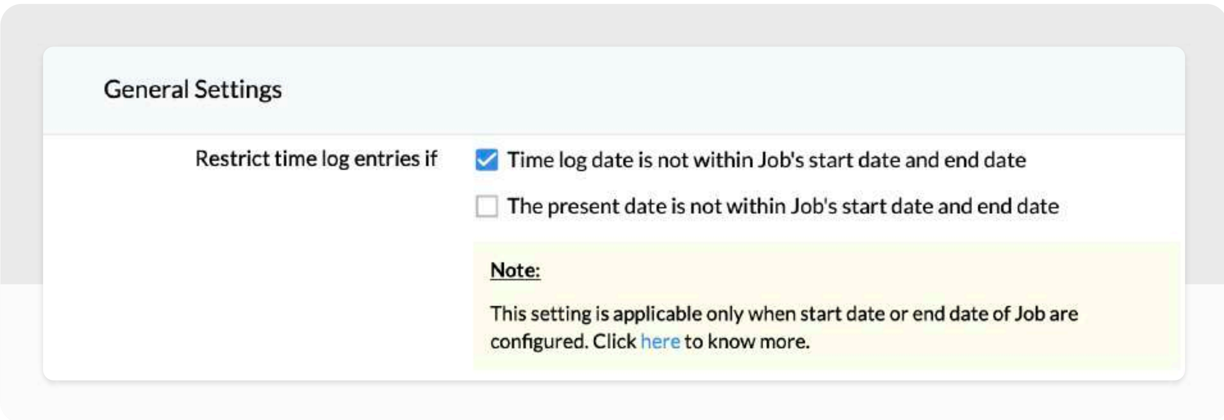
Additionally, in scenarios where you would like to have specific settings set to any User who is a manager in your organization for creating manual logs, then you can have it configured here.



Restrict time Logs within job's period

Based on your organization's requirements time log restrictions can be further fine-tuned to prevent employees from adding time logs outside a job's assigned time frame.

The following options can be used:



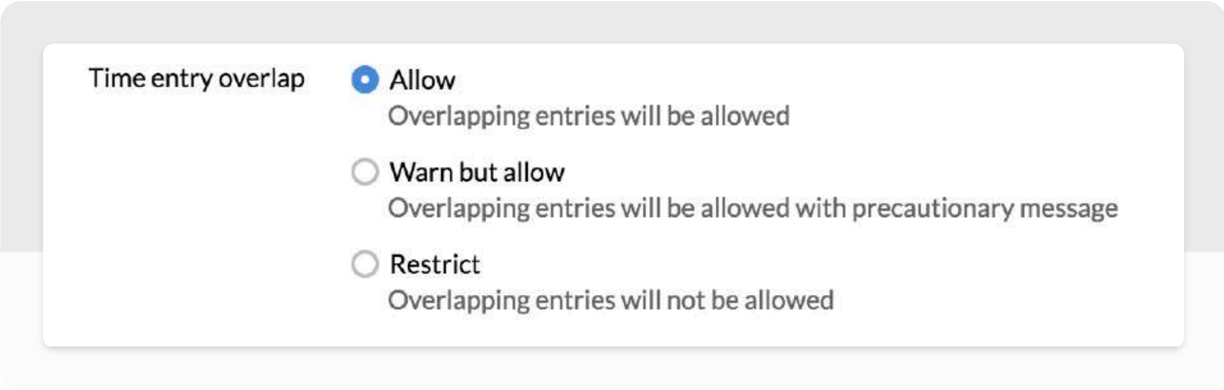
1. Time log date is not within the job's start and end date.

   When this restriction is enabled, employees cannot log time if the date selected for logging time is not within the job's start and end date

2. The present date is not within the job's start and end date.

   When this restriction is enabled, employees cannot log time if the present date is not within the job's start and end date

Time entry overlap



This setting can be used to restrict or warn employees when they log time that overlaps with the time entries of other time logs of the same date.
Typically, employees may work more than one job at work. In such cases, there may be an overlap of time entries.

During such a scenario, organizations can select from one of these options:

1. **Allow:** employees will be able to log time even if time entries overlap

2. **Warn but allow:** employees will be warned when they log time that overlaps with time entries of other time logs on the same date. They can choose to cancel or allow the time logs to be saved

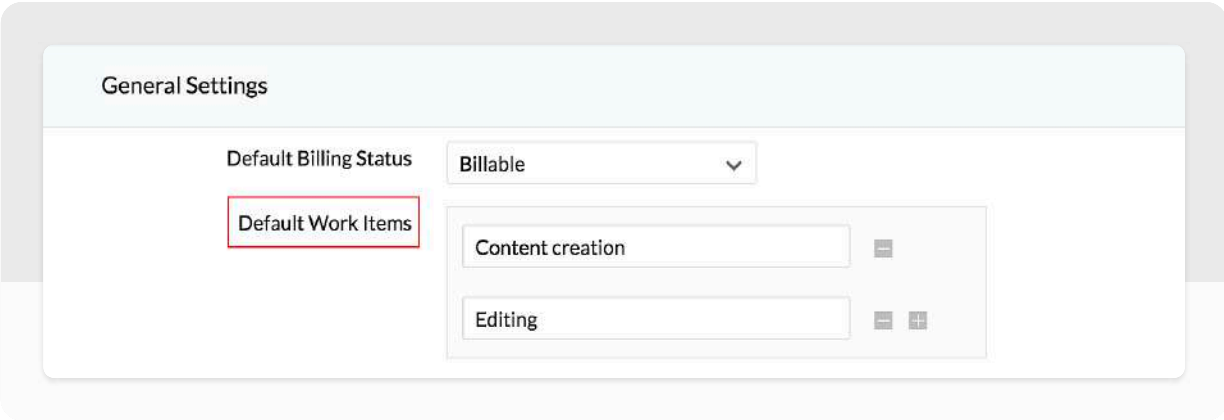
3. **Restrict:** employees will not be able to log time if time entry overlaps with entries of other time logs on the same date

Default Billing Status

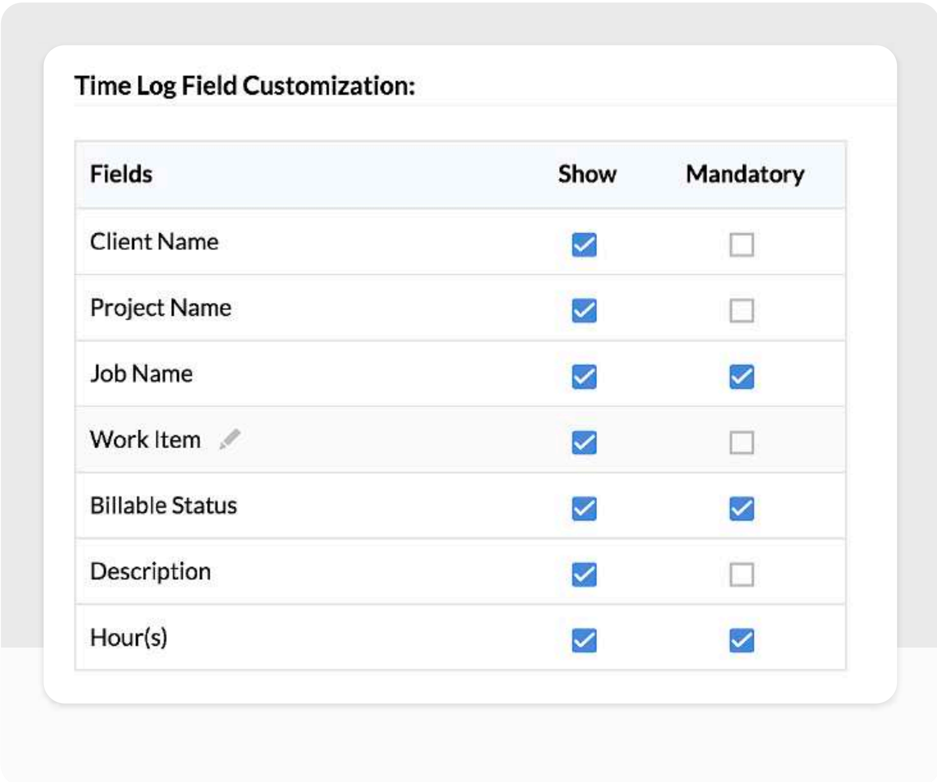
For any Job of the User for which the user logs time, the billing status set here will be the default status.

Default Work Items

You can configure default work items here. These will be shown as drop-down options for work items while logging time.



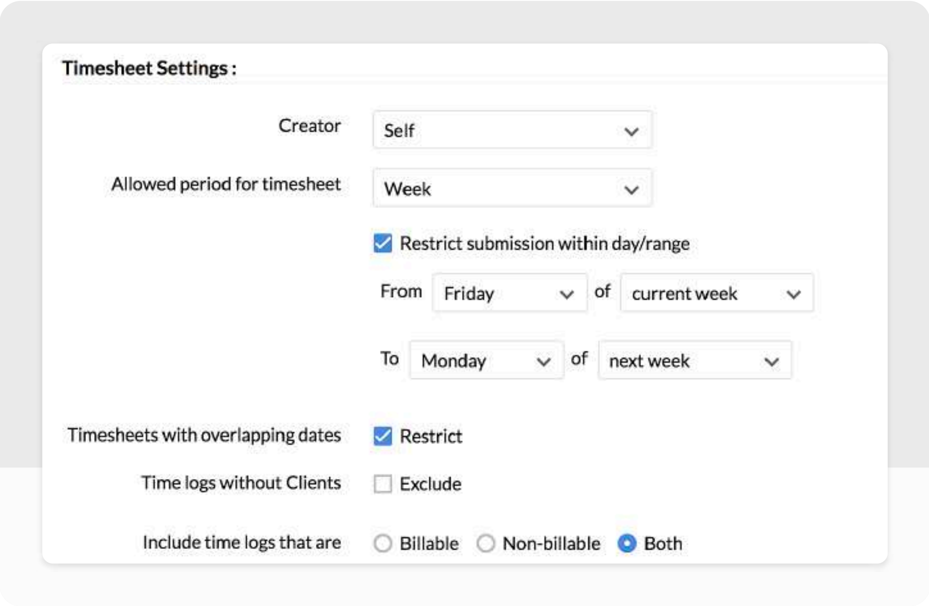
Time Log Field Customization



This setting allows you to perform the following actions:

- Select the fields you want to include in a time log entry. Check the box next to the field name you want to include, under Show. Uncheck fields you want to hide.
- Select the fields you want to make mandatory, in a time log. Check the box next to the field name you want to include,under Mandatory.
- Rename time log field names for Work Item and Description. Click the edit icon next to the field name to change it.
- Change the show/hide status for Billing Status

Timesheet Settings



Creator

According to your organizational needs, you can define who will be the one who can create the timesheet - Self, Admin or Reporting Manager.

Allowed period for timesheet

This setting lets you restrict your timesheet submissions to a specified period – day, week, or month. Any period will be the default option which allows timesheets to be submitted at any time.
If the week or month options are chosen, you can further define the interval to specific days.

Timesheets with overlapping dates

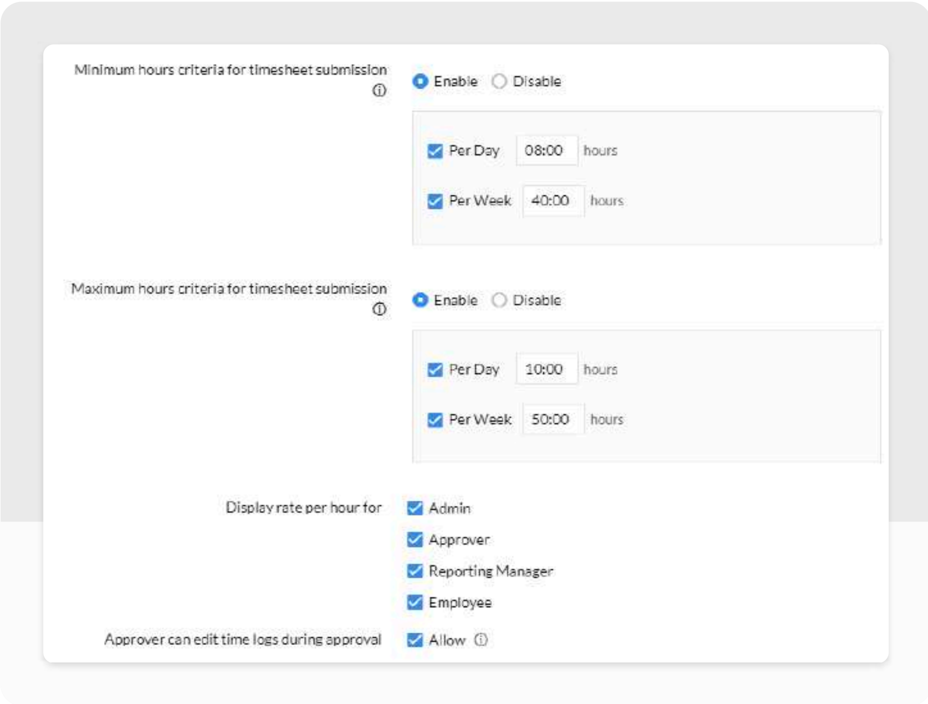
This setting lets you restrict employees from submitting timesheets with same day or range.

Time logs without Clients

This setting comes to use when you do not want jobs that are not associated with clients to be included in the Timesheet creation. Typically jobs and time logs can be created without being associated with a client. However, when these logs are collated to create a Timesheet, you have the option to exclude jobs that are not mapped to any Clients.

Include time logs that are

When time is logged, you can decide if you want only the Billable logs to be sent for approval. This will help in scenarios where you have both billable and non-billable logs but need only billable logs to be approved.



Minimum hours criteria for timesheet submission

This setting lets you include a minimum hours criteria for a user submitting a timesheet. This criteria lets you set minimum hours for time logged for a day and for a week.

Maximum hours criteria for timesheet submission

This setting lets you include a maximum hours criteria for a user submitting a timesheet. This criteria lets you set maximum hours for time logged for a day and for a week.

Display rate per hour for

Use this option to hide an employee's rate per hour to be visible to the employee.

Approver can edit time logs during approval

Typically, while approving or rejecting a timesheet, approvers will not be given the option to edit the timesheet. The timesheet will be rejected and the employee will have to resubmit it. This option gives the flexibility to the approver to make modifications to the billable status and the hours of the time logs during approval of the timesheet, thereby speeding up the process.

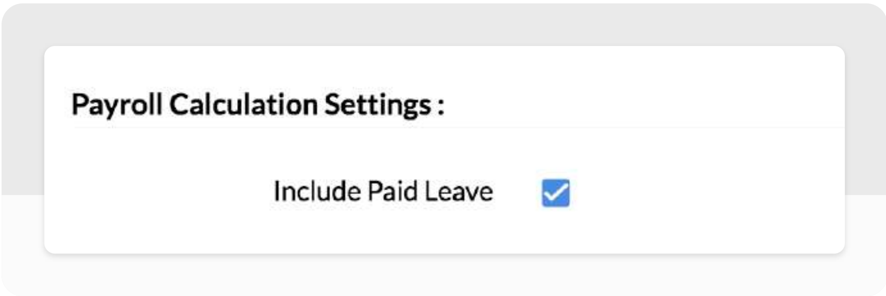
Customize mail template for timesheet approval

This option opens the possibility of customizing the timesheet approval email message that is automatically triggered.

Payroll Calculation Settings

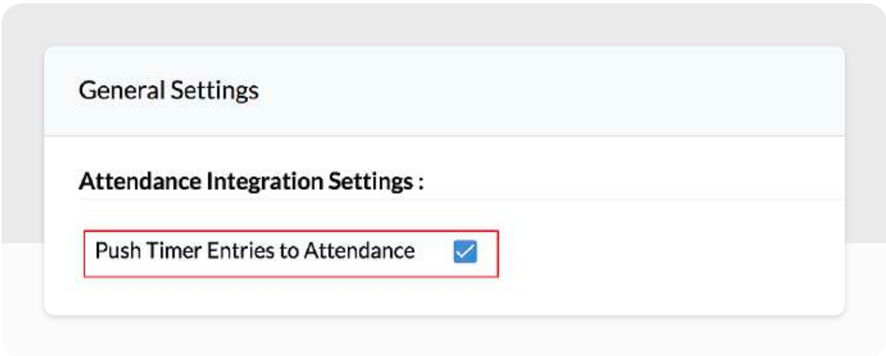
Include Paid Leave

You can enable Include Paid Leave to include paid leave as part of your payroll calculations. Once 'Include Paid Leave' is enabled, paid leave will be reflected in the payroll report.



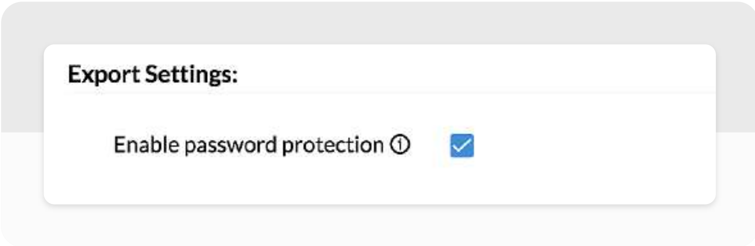
Attendance Integration Settings

Hours logged in Timesheet can be converted as attendance entries for the day with this setting, This means that the presence of your employees is notified when they start tracking time for any of the jobs that have been added for them. This eliminates the step of doing a web check-in because, when the employee starts tracking time for a job, it means that the employees have checked-in for the day.



Export Settings

Certain files contain sensitive information that needs to stay private when they get exported. Such files can be encrypted with a password. The exported file will be accessible only with the password sent to your mail ID and hence ensures a secure export.



Learn more about other settings in Timesheet.

ADDITIONAL FEATURES IN TIMESHEET

Timesheet Reports

Timesheet reports represent a variety of data analysis from reports about jobs, projects, time logs and more. Learn more.

Job Scheduling

Job Scheduling is used for managing jobs and assigning them to employees in the form of schedules, to ensure that a job is done on a specific days and within a specific period. For any given day, you can add multiple schedules and also ensure that the schedules do not clash with each other. Learn more.

Timesheet Module Administrator

To improve convenience and for focused management, a specifically assigned Module Admin can be used. A Timesheet Module Admin has special permission to view and edit Timesheet entries, that includes time-logs, projects, jobs, clients for a selection of users tagged into "User Groups". In addition, Modules admins can also view user reports of employees within their user groups. Learn more.

From automating simple email alerts to configuring complete workflows that trigger a series of automated actions, learn more about our automation features in Zoho People.

ONBOARDING

Onboarding is a process of orienting new employees with the culture and practices of the organization. It is also referred to as orientation or induction in many countries.

The onboarding module in Zoho People features two types of onboarding:

- Candidate onboarding
- Employee onboarding

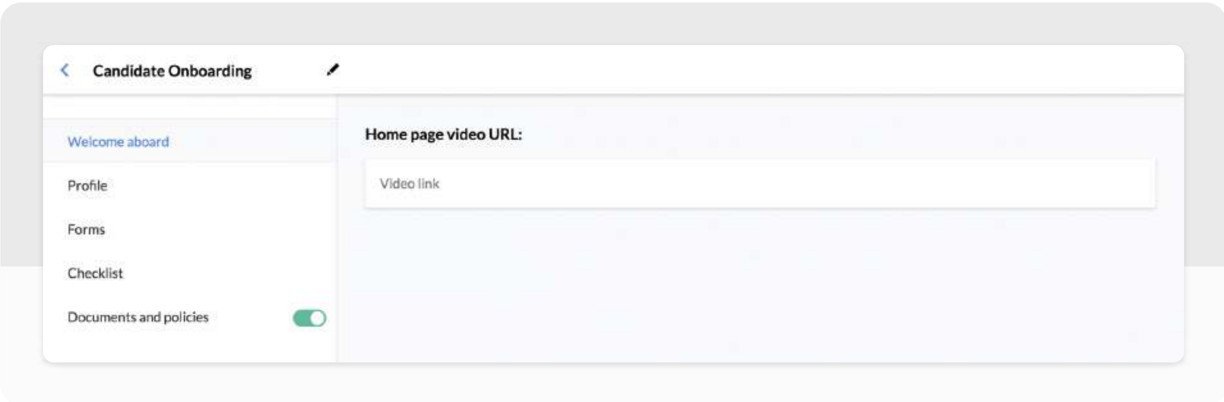
These can further be customized according to the needs of your organization.

Candidate onboarding

A Candidate Onboarding Flow can be created to apply the onboarding process to candidates. It covers the basic details that need to be filled in by the candidate. The name of the flow can be edited by clicking the edit icon.

To view and edit the default tabs in the onboarding module, click **Customize**.

These tabs can be enabled, disabled, and reordered according to their applicability. The description for each page can also be edited according to the organization's style.



Welcome aboard: This is the first page that will be visible to the candidate. You can add an introductory video of the company under the Home page video URL. This can be embedded and made viewable to the candidate.

Profile: This is the space where the candidates will need to fill in their personal and professional details.

Forms: Any additional information needed from the candidate can be given here. Any relevant forms can also be included. You can drag and reorder forms also mark the important forms as mandatory to ensure it is not skipped.

Checklist: Checklists to complete a series of tasks after the candidate has completed onboarding can be created here. Existing checklists can also be tagged here.

Documents and Policies: This is where you will share the documents that the candidate will need to read and sign.

Under Documents to be Accepted, you will need to upload the documents using the Mail Merge Template. Documents can be signed using the e-sign option as well.

Under Documents to be Read, you can choose files and company policies that you would like the candidate to read up on.

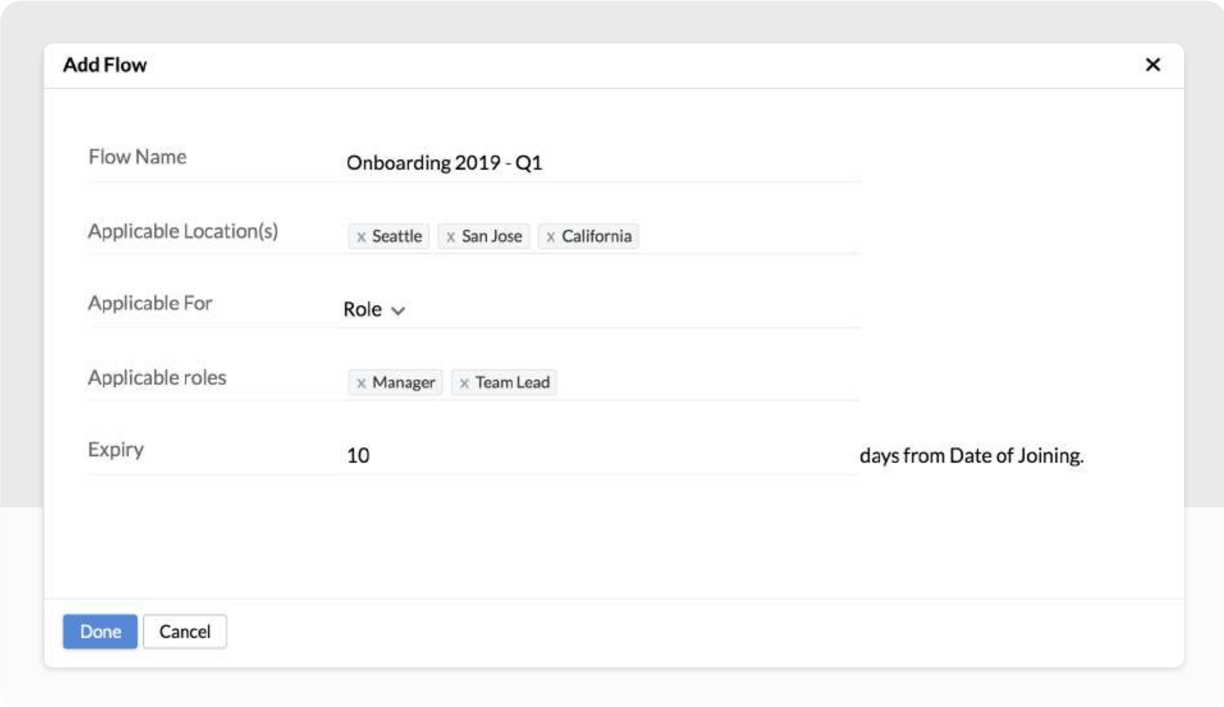
NOTE: *The onboarding portal name and the copy portal link will be visible on the candidate page and the candidate onboarding page.*

Employee onboarding flows

Employee Onboarding Flows can be created to apply the onboarding process to a specific set of employees. It covers the basic details that need to be filled in by the employees and also gives them information about the organization, their team, and their role.

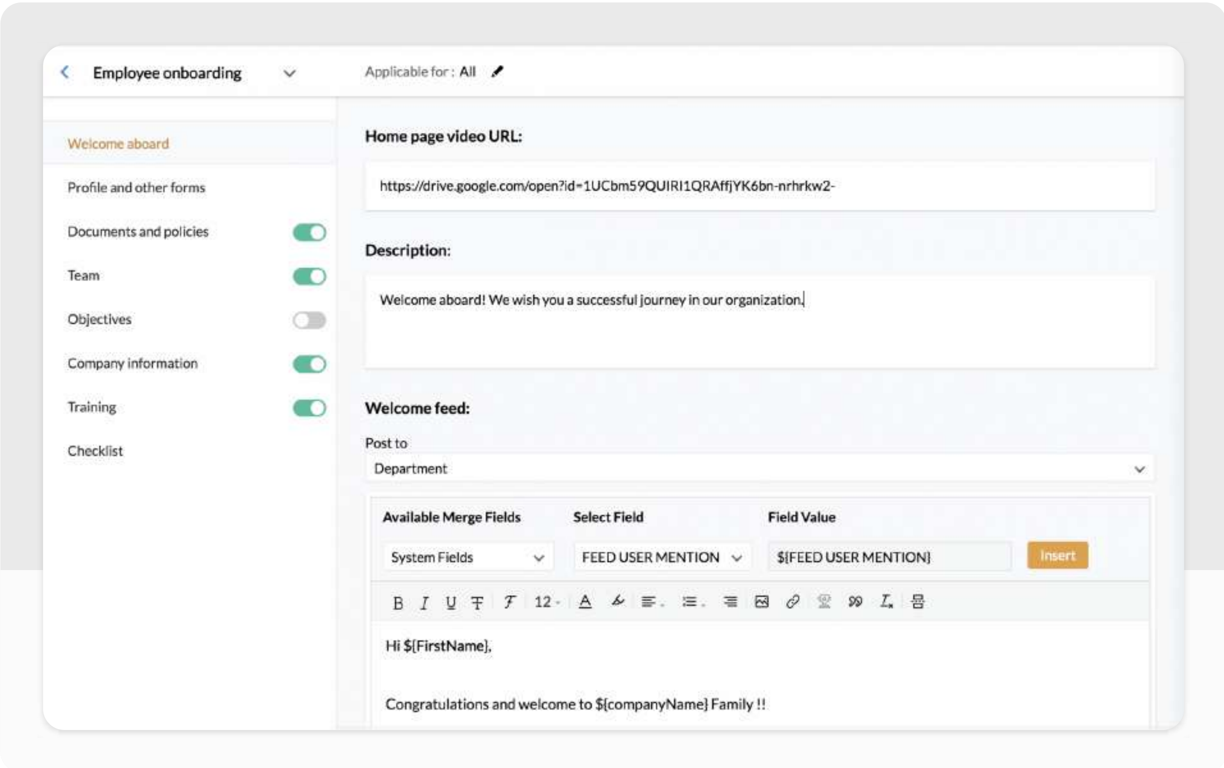
To create a flow for the employee onboarding,

1. Navigate to **Onboarding Flows**, then **Employee Onboarding**
2. Click **+ Add New Flow**
3. Enter the Flow name
4. Select the applicable locations
5. Select the applicable roles or designations under *Applicable for*
6. Select the expiration date, if needed



7. Click **Done**

Click **Customize**, to view the default tabs in the onboarding module or to enable/disable each section. The description can also be edited.



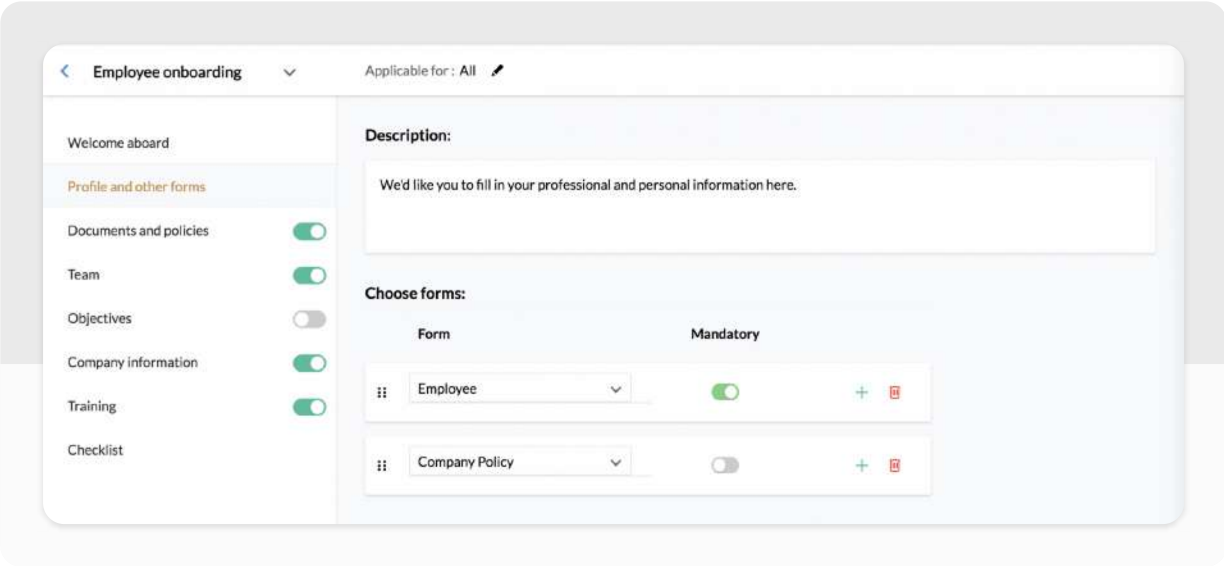
Welcome aboard: This is the first page that will be visible to the employee. It contains an introductory video of the company that can be embedded and made viewable to the employee.

The Welcome Feed will be posted to the new joinee (user) or all department members based on the option selected in the Post To dropdown.

The welcome feed message can be edited in the space given below. Text Fields can be inserted too if required. To view a preview of the welcome screen click on the **Click to preview** button.

Select the *HR Contact* whom the employees can get in touch with for any queries.

Profile and other forms: This is the space where the employee will fill in all their personal and professional details.



Under Choose Forms, embed the relevant forms that you would like your employee to fill out. You can drag and reorder the forms also mark forms as mandatory if you don't want the employee to skip it.

Documents and Policies: This is where you will share the documents that the employee will need to read and sign.

Under Documents to be Accepted, you will need to upload the documents using the Mail Merge Template. Documents can be signed using the e-sign option as well.

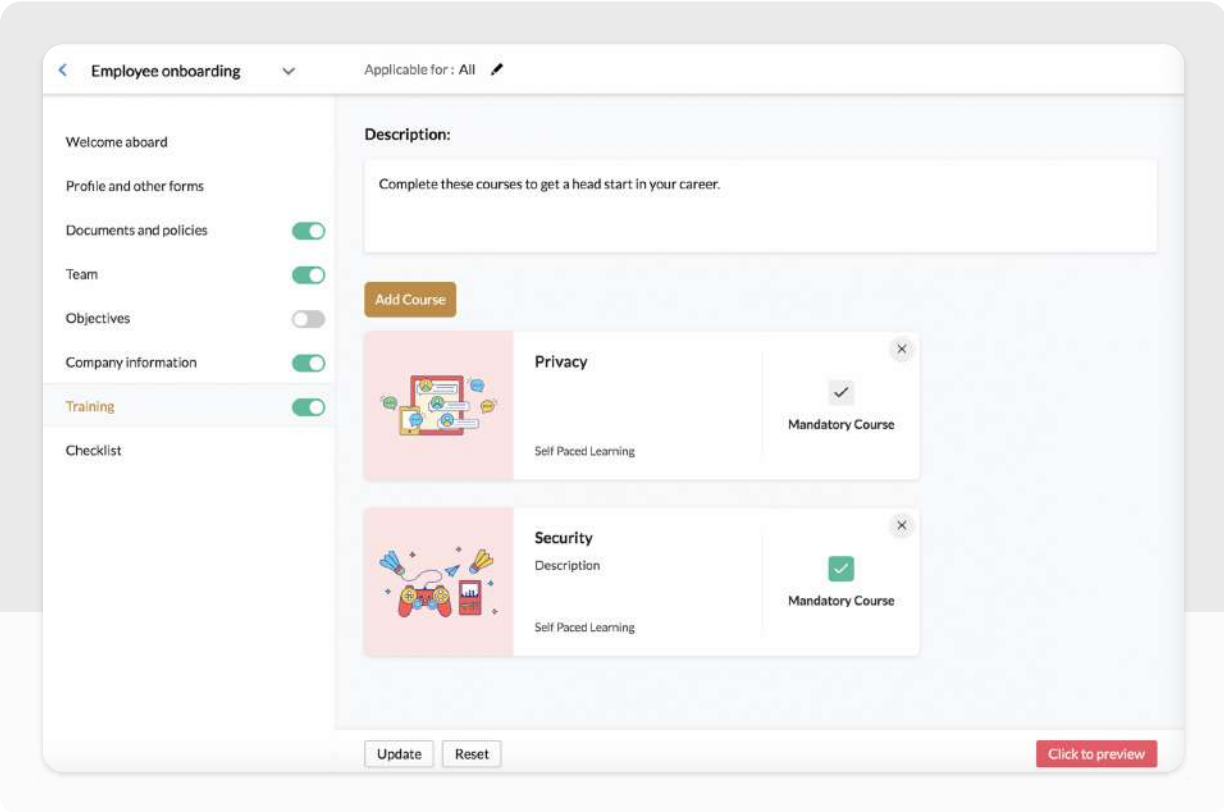
Under Documents to be Read, you can choose the various company policies that you would like the new employee to read up on.

Team: All the details about the team members of the employee will be shared here. The employee can also access their basic information and seating location.

Objectives: In this page, the employee will be informed about their goals and objectives. Key Result Areas (KRAs) can be tagged to the employee's location, designation, department, or both.

Company Information: In this page, the employee gets to view more information about the organization by giving access to the company website in the form of an embedded URL.

Training: In this tab, you can add self-paced courses that you want your employees to complete as part of their onboarding. You can check the ones you want to make mandatory.



NOTE: *You can preview the employee view of any page by clicking* ***Click to Preview****.*

Onboarding Process

In this section, we will cover the process of onboarding for candidates and employees along with a view on how the process appears.

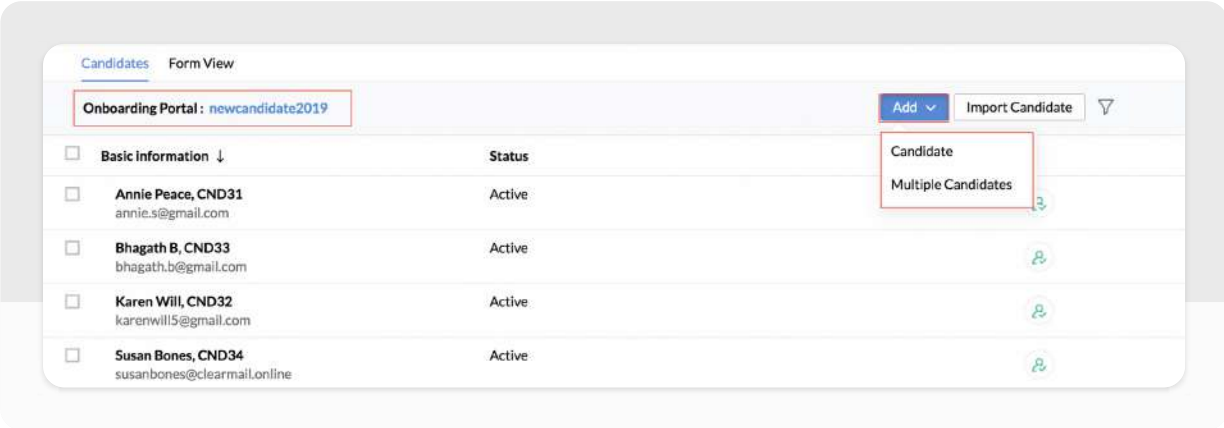
Candidates onboarding process

Candidate onboarding is facilitated through a portal. The process of candidate onboarding begins with creating this portal. You need to give an appropriate name to this portal.

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

This portal is independent of the rest of the product. When a candidate is added and onboarding is triggered, the portal becomes accessible to them. Once a candidate completes the onboarding process, they can no longer access this portal.

To add new candidates, click **Add** and select **Candidate** if you want to add a single candidate or click **Multiple Candidates** if you want to add more than one candidate.



Candidates can also be imported by clicking **Import Candidate**.

Once a candidate has been added, click **Trigger Onboarding** to start the process of onboarding.

The candidate's form will be available under the form view sub tab. Candidates can be added here as well. Once added, the onboarding process can also be triggered from here by clicking **Trigger onboarding**.

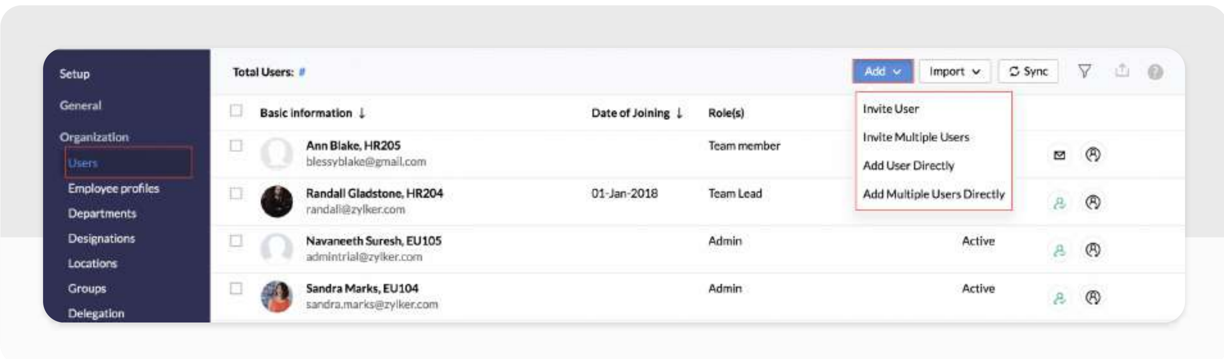
Candidate's view of the onboarding process

Candidates view of the onboarding process can be viewed using the **Click to Preview** option.

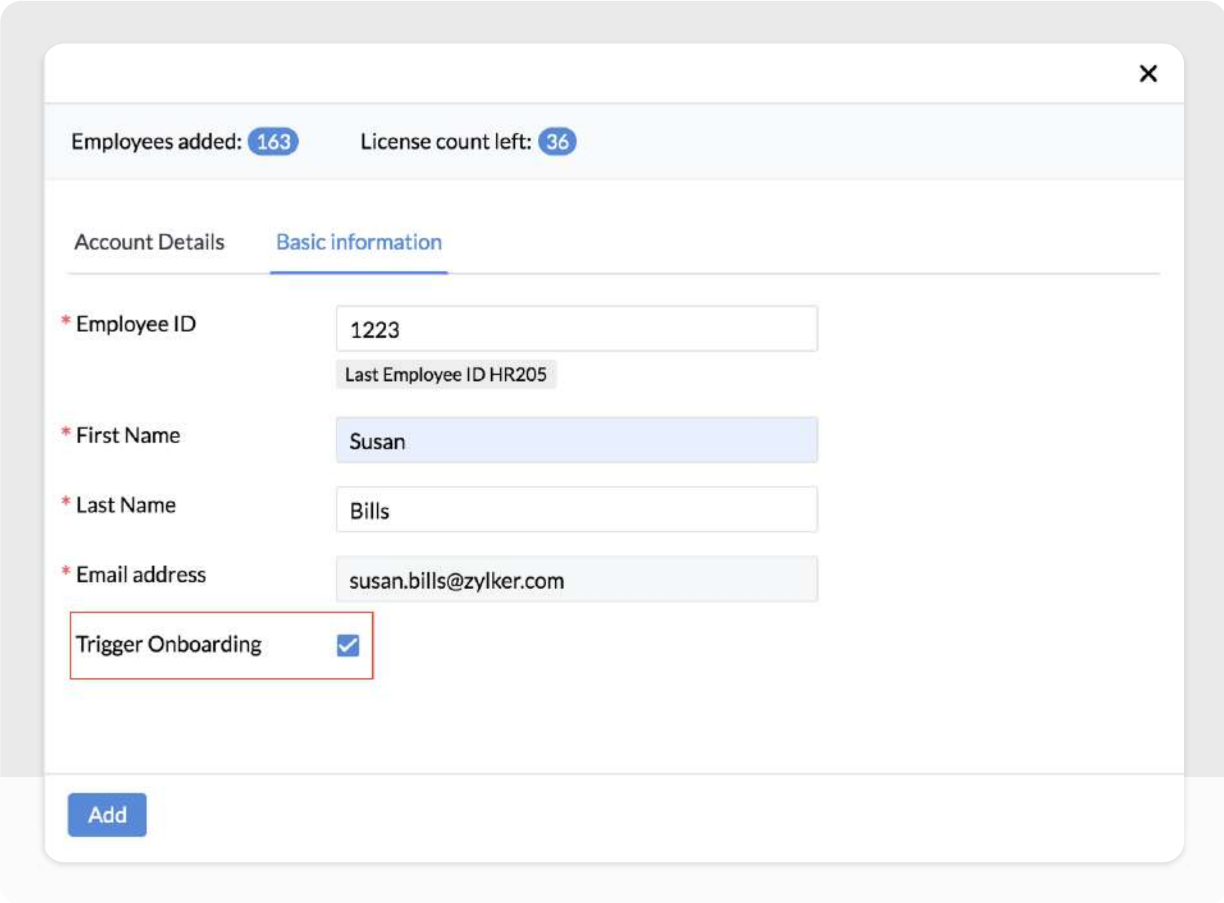
Employee onboarding process

The onboarding process for new users can be initiated at the end of the user addition. Follow these steps to start the onboarding process for new users:

1. Go to **Settings > Users**
2. Select the method through which you want to add the users



3. At the end of the process, enable the Trigger Onboarding option



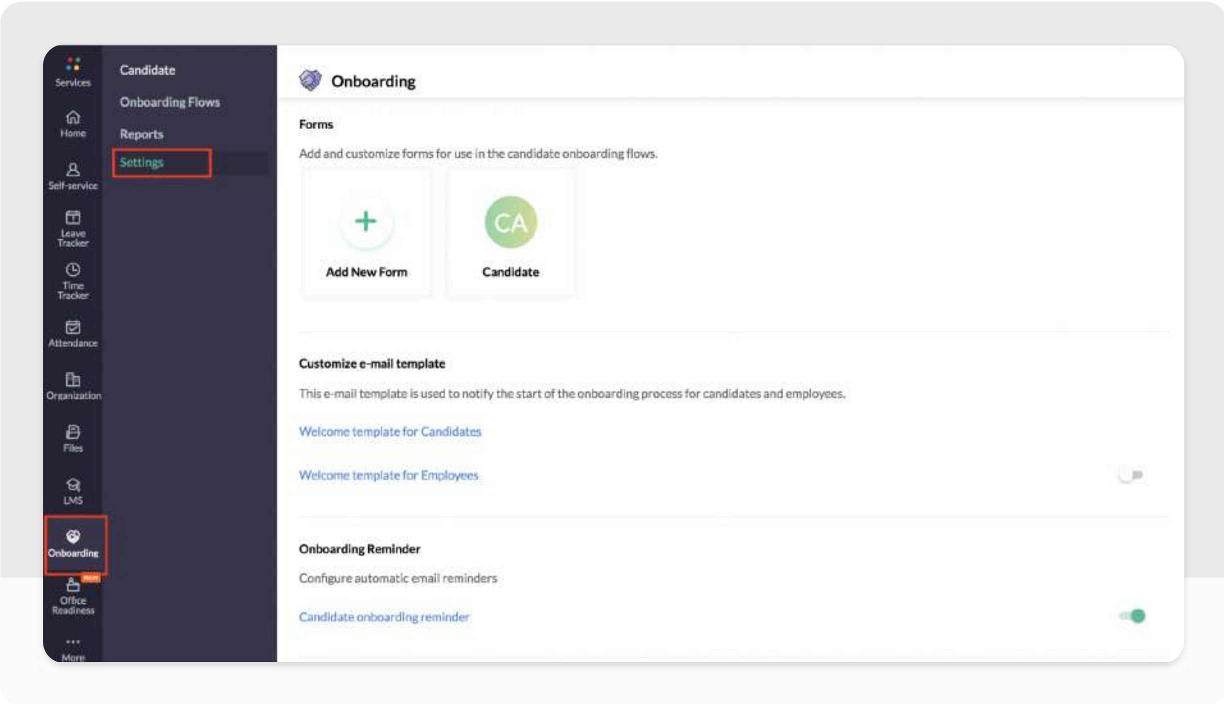
Employee's view of the onboarding process

Employee's view of the onboarding process can be viewed using the **Click to Preview** option.

Onboarding Settings

Use the onboarding settings to customize the way you want to conduct the employee and candidate onboarding process in your organization.

To configure the settings related to onboarding, go to **Onboarding > Settings**.



Forms

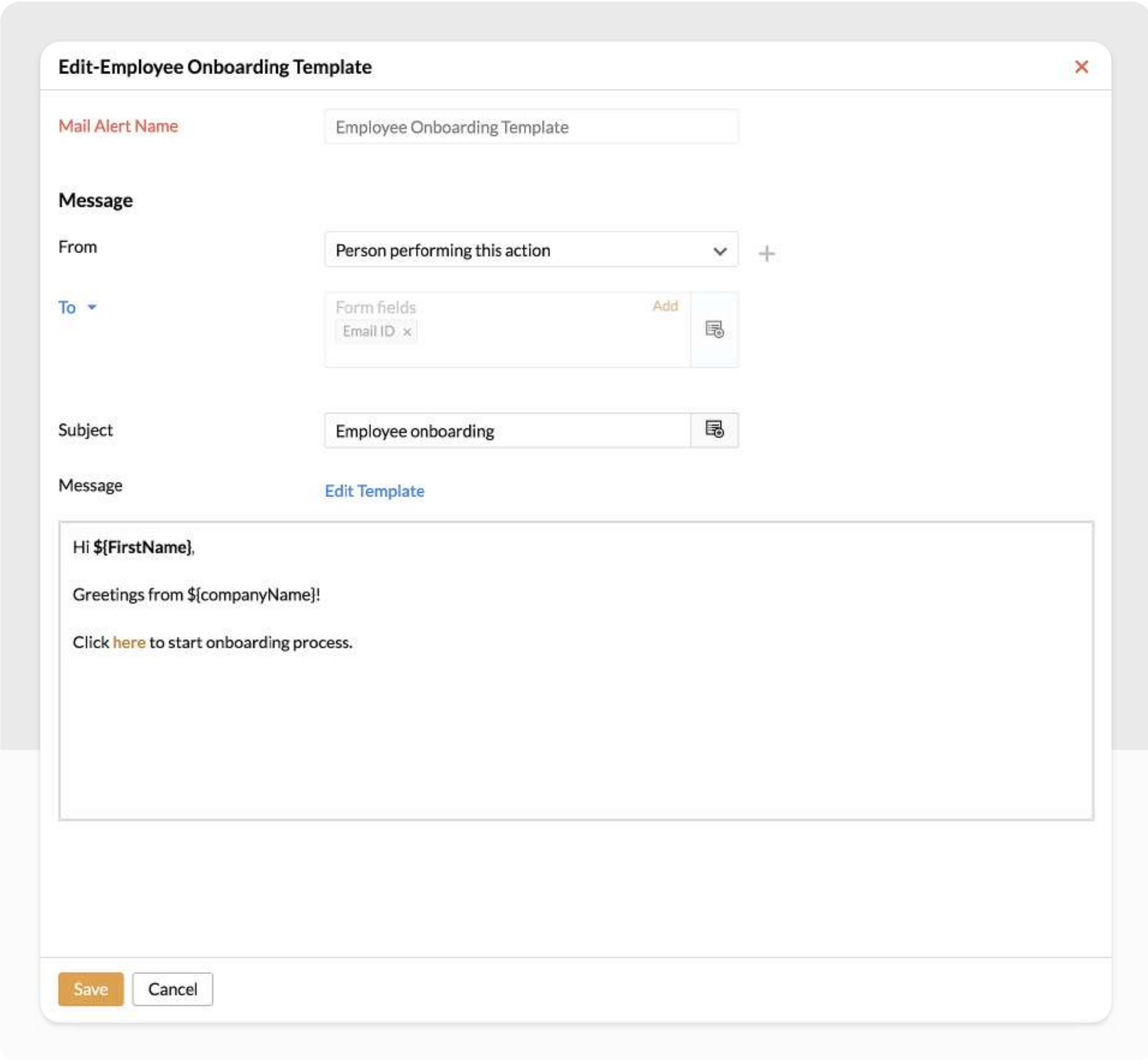
Forms are used to collect important information from the candidate during the onboarding process.
These forms can be embedded as part of the onboarding flow. You can add these forms in this section. Added forms will be listed here. To add a new form, click **+ Add New Form**

Customize email templates

You can customize email templates for welcoming candidates and employees.

To customize the candidate email template:

1. Click Welcome template for Candidates



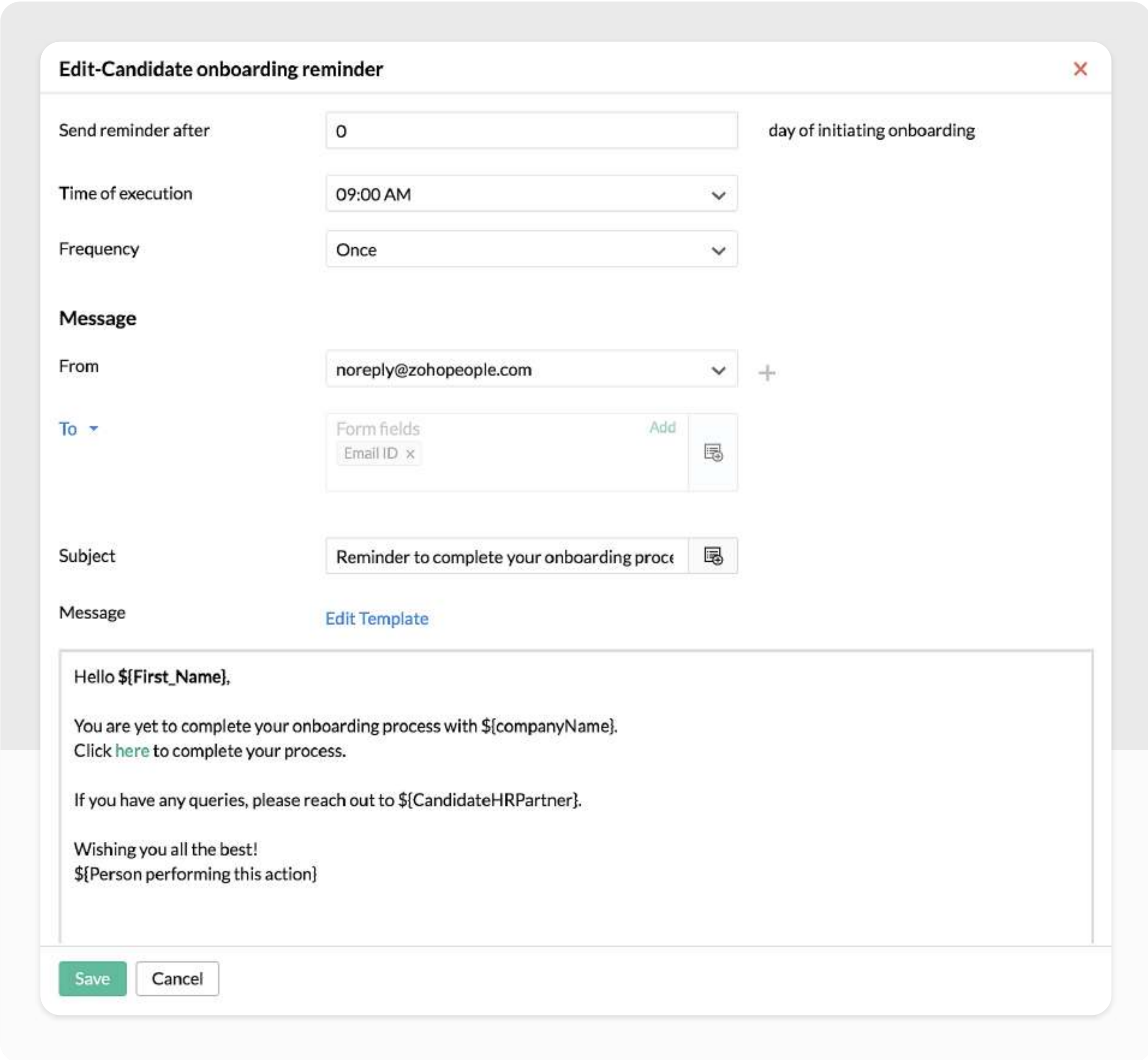
2. Edit the From field if required
3. Edit the subject of the email if required
4. Click **Edit Template** and make the necessary changes to the email template

Similarly, to customize the employee email template, click Welcome template for Employees.

Onboarding Reminder

Using this setting, you can automate reminders to be sent to candidates to complete their onboarding process.

Enable the setting and click on Candidate onboarding reminder to customize the email template.



Trigger Employee onboarding automatically

Using this option, you can trigger employee onboarding automatically on the employee's date of joining. Onboarding will be triggered for employees who have joined on or after the date on which this option is enabled. Once this is enabled, you need not trigger onboarding for employees manually.

Restrict access to Services

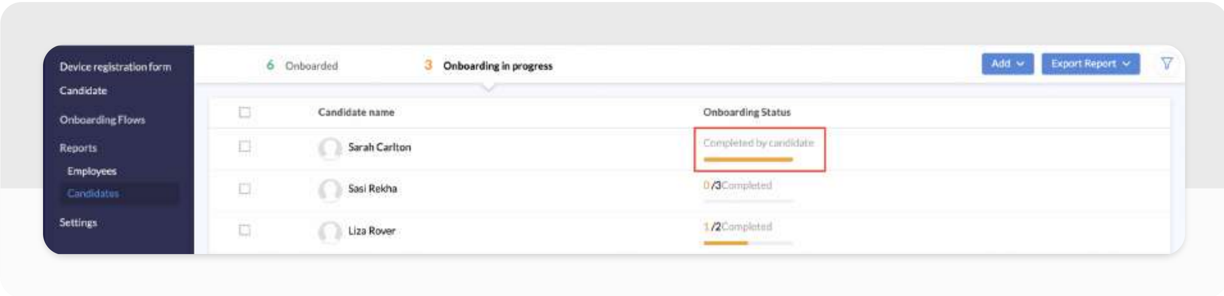
Once this option is enabled, employees will only be able to access other services in their Zoho People account after they have completed the onboarding process. Employees will not be able to skip the onboarding process and access their accounts.

Enable admins to mark onboarding process as completed

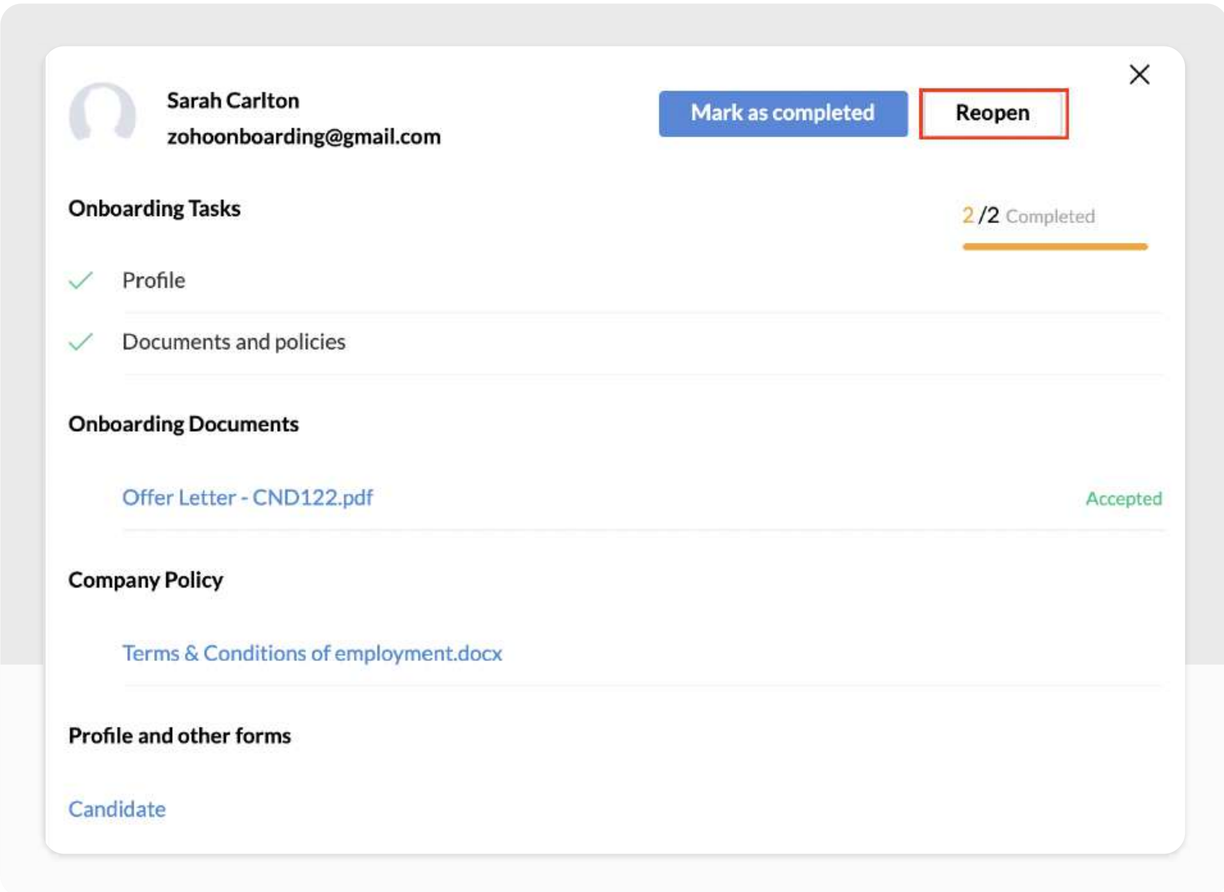
Typically, the onboarding process is marked completed when the candidate at the end of the onboarding process clicks Complete Onboarding. Once this action is done, the candidate will not be able to access the portal again in case they have missed filling any required information. Enabling this setting allows the admin to reopen the onboarding for such candidates and gives the admin alone the option to mark the onboarding process as completed.

Let's look at the step-by-step process of this scenario: (the setting must have been enabled)

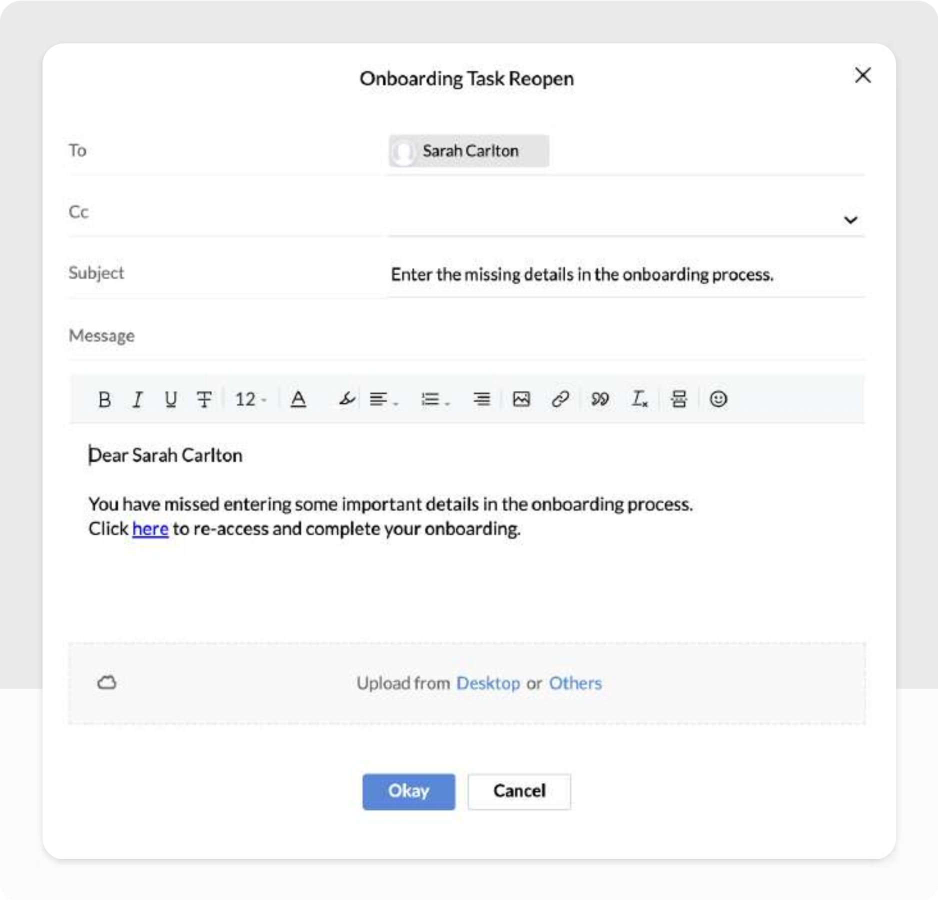
1. Click on the name of the candidate for whom you want to reopen candidate onboarding



2. Click **Reopen** at the top right corner of the popup screen



3. You will see this popup in which you can customize the email to be sent to the candidate



4. Click **Okay**

Now the status will be changed to Reopened by admin.

The candidate can now re-login and fill in the missing details and finally when all details are filled the admin can mark the process as completed.

Tentative date of joining entered by candidate

This option can be used to enter a minimum interval, in days, between the date of onboarding completion and the tentative date of joining entered by the candidate. Additionally you can also specify a time limit in case the entered date of joining matches the minimum interval set.

Let's say 10 days under minimum interval and 5 pm as time limit is entered by an organization.

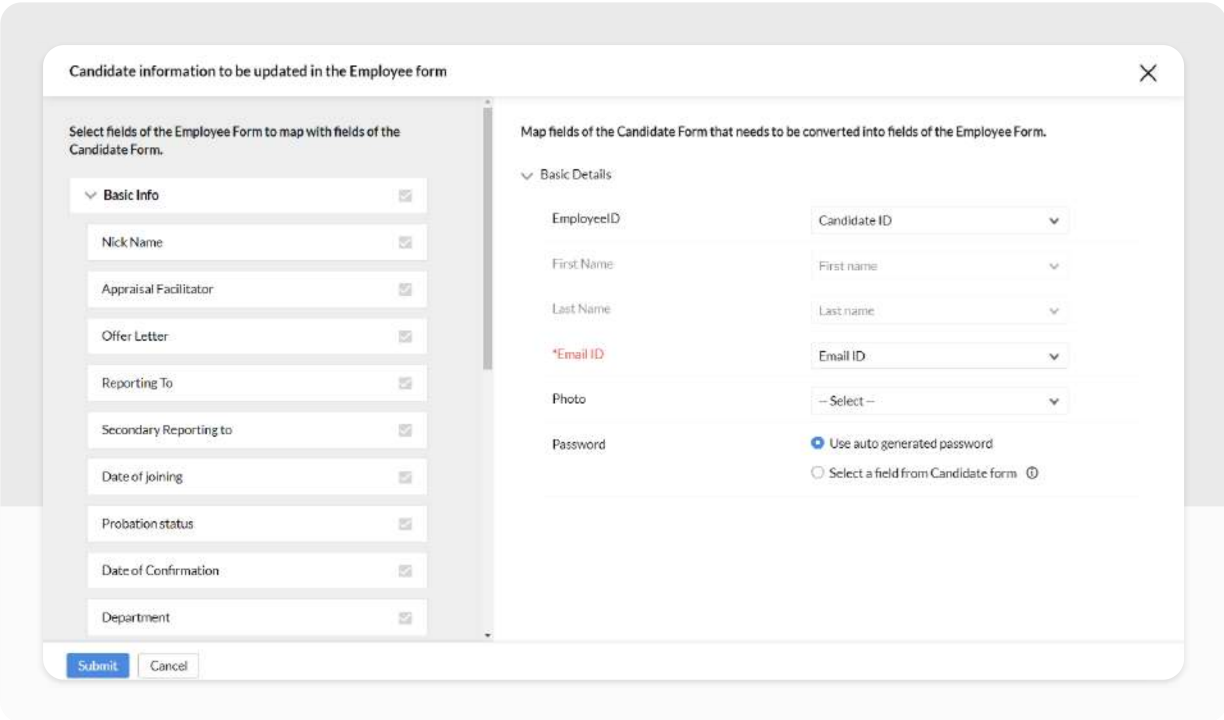
A candidate is in the process of completing their onboarding on 1st March and they have entered their tentative date of joining as the 10th of March. Since the entered date matches the minimum interval of 10 days, the candidate needs to complete their onboarding process on 1st March by 5 pm for 10th March to be accepted as their date of joining. In case the candidate completes their onboarding after 5 pm, they will be alerted to alter their date.

Candidate information to be updated in the employee form

In this section, you can select the information from your candidate form that you want to update in the employee form when they are converted from a candidate to an employee. To achieve this, select the fields in your employee form, map the corresponding fields in the candidate form, and save this configuration. This way, when you convert a candidate to an employee, all the details in the selected fields will be updated automatically in the employee form.

To map the fields,

1. Click **Customization** button



2. Select the fields in your employee form that you want to map with the fields in the candidate form
3. Map the fields in the candidate form to the selected fields in the employee form
4. Click **Submit** to save your configuration

ADDITIONAL FEATURES IN ONBOARDING

E-Sign for documents:

Documents can be electronically signed during candidate onboarding and employee onboarding using Zoho Sign (Zoho Sign - Enterprise plan users), DocuSign and Adobe Sign. Learn more.

Converting candidates to users or employee profiles:

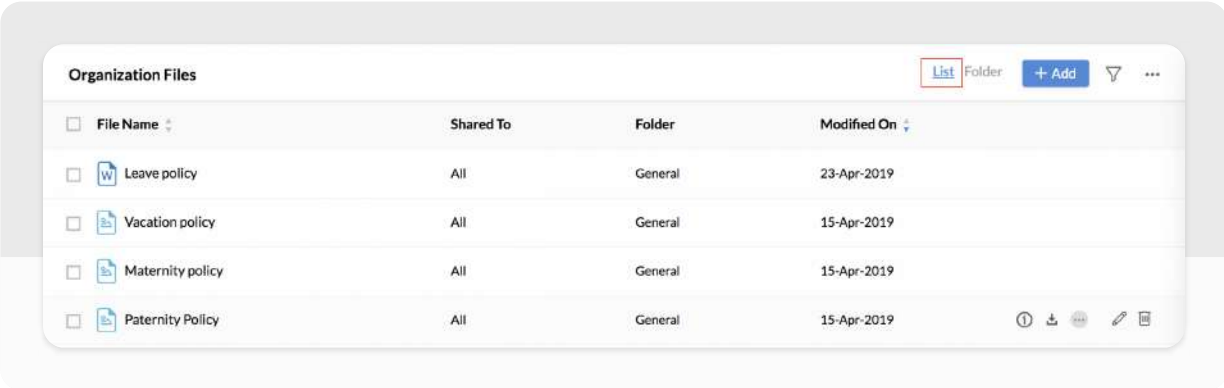
This feature helps to convert candidates who have completed onboarding to users or employee profiles. Click here to learn more. Learn more.

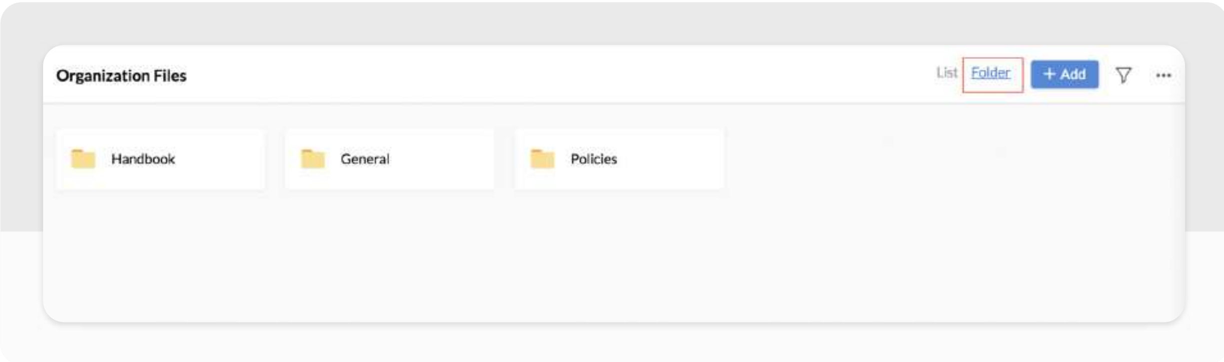
Onboarding reports:

Reports offer insight into onboarding related data. Learn more.

FILE MANAGEMENT

Zoho People features a centralized repository for storing and accessing files. The Files module aims to simplify document management in your organization. There are two views to view files stored in Zoho People, list and folder view.





Zoho People's Files are divided into Organization files, Employee files, and Personal Uploads for sorting your documents with clarity.

Organization Files: Generic documents like company handbooks, leave policies, and code of conduct folios can be stored in this general repository.

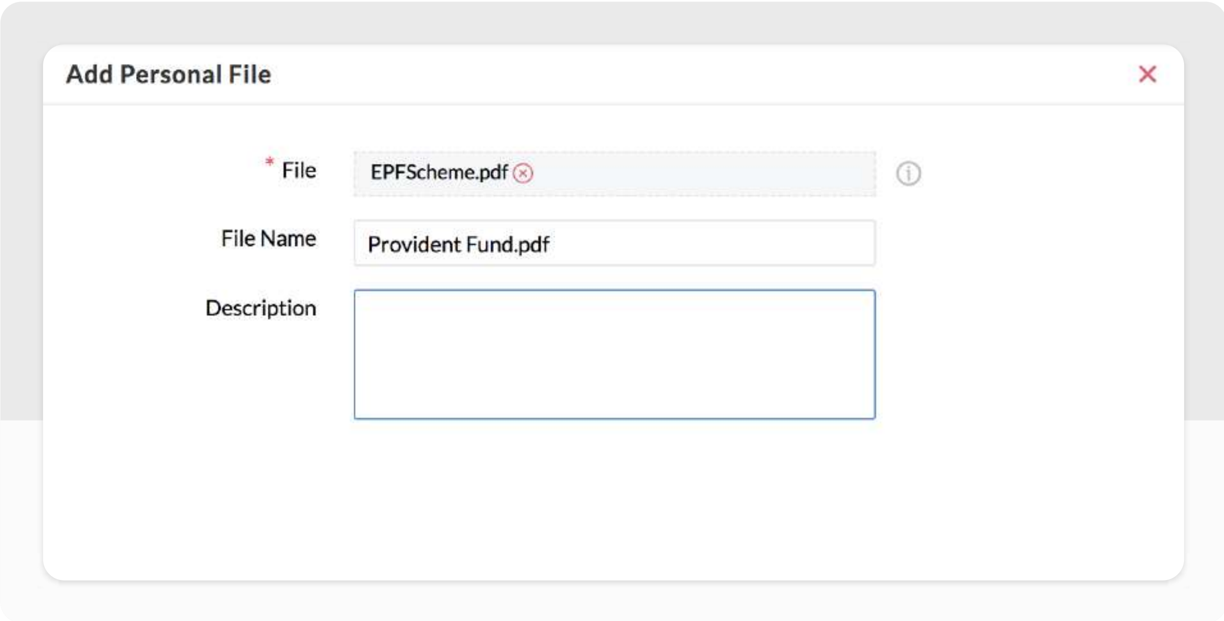
Employee Files: Documents containing sensitive information and files specific to employees can be stored under Employee Files with increased privacy.

Personal Uploads: This space is exclusively for employees' documents. The personal uploads can be accessed only by the employees. Even the administrators do not have access to anyone's personal files. Typically an organization is given 1 GB of personal uploads space. This space is divided amongst the employees who can store their personal documents and files like driver's license, passport copy, etc.

Adding a personal upload (enterprise edition)

1. Navigate to **Files**, and then **Personal Uploads**
2. Click **+ Add**

3. Upload the file
4. Give a name and description



5. Click **Submit**

Folders can be created too. Head to **Files > Settings > Folder > + Add Folder**

Files Settings

Creating a folder

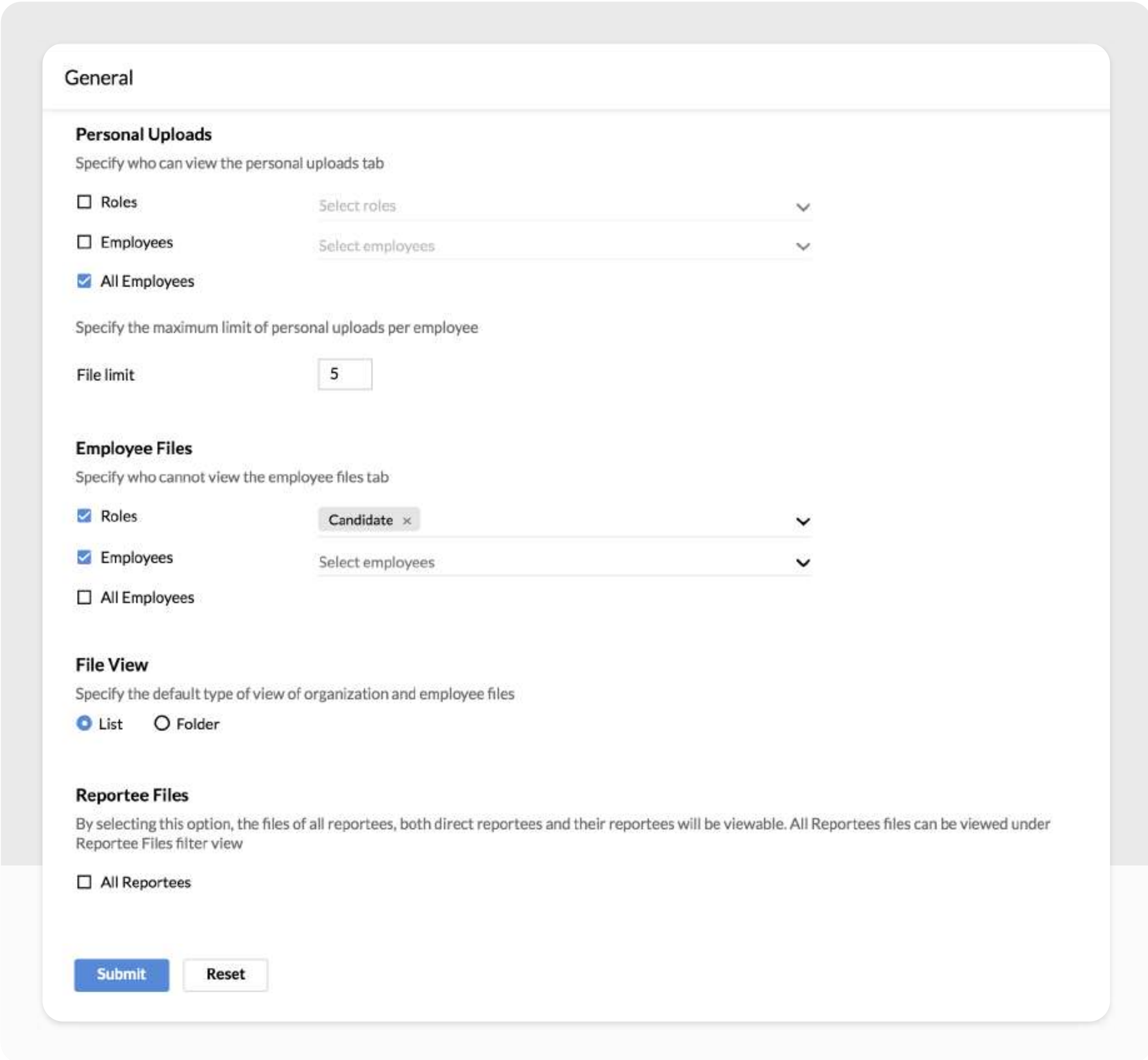
You can classify the files according to their purpose by using Folders. You can classify your files into different folders.

When you upload a file under Organization Files or Employee files, the folders will be listed. You can select the right folder to place your file under.

Go to **Files > Settings > Folder > + Add Folder**

General Settings

Under General, you can configure permissions for personal uploads and employee files.



ADDITIONAL FEATURES IN FILE MANAGEMENT

E-Signature for files:

Use electronic signature for your files. E-signature is beneficial for official documents that involve agreements, contracts, salary revision, job offers, etc. E-Signature templates can be configured and used too. Learn more.

Files reports:

The files module contains two reports, Personal uploads, and Acknowledgement receipts. Learn more.

Integrating with Zoho WorkDrive:

Attach files directly from Zoho WorkDrive. Learn more.

PERFORMANCE MANAGEMENT

Measuring performance is key when it comes to improving and assessing employee metrics. With the right feedback at the right time, employees can become more focused and motivated. Performance measurements help employees gauge their own performance and make adjustments where needed. Zoho People uses various modules like goals, skill sets, feedback, appraisal cycle, continuous review to measure performance.

Here is a short introduction to the various performance modules:

Goals:

Goals are measured ideals for achieving desired results. They serve as targets for performance and are essential for determining employee efforts. An ideal goal should be SMART - Specific, Measurable, Achievable, Realistic, and Time-based. These goals can also be linked to the jobs that you create in Timesheet.

Skill set:

Skillsets are particular abilities that help to perform the job. Examples of specific skill sets include accounting and computer languages. Skillsets can be mapped to various domains. This can be then mapped to employees to evaluate their performance.

KRA:

Your Key Result Areas are the activities that you must do to fulfill your responsibilities and achieve your business goals. Make sure your KRAs are clear, specific, and measurable. A good KRA includes the ongoing responsibilities of the position and the purpose and benefits of performing these responsibilities. Goals can also be mapped to KRAs and rated.

Competency:

This is a combination of knowledge, skills, abilities, and personal attributes that contribute to enhanced employee performance. Examples of competencies include analytical ability, networking, communication, and people management.

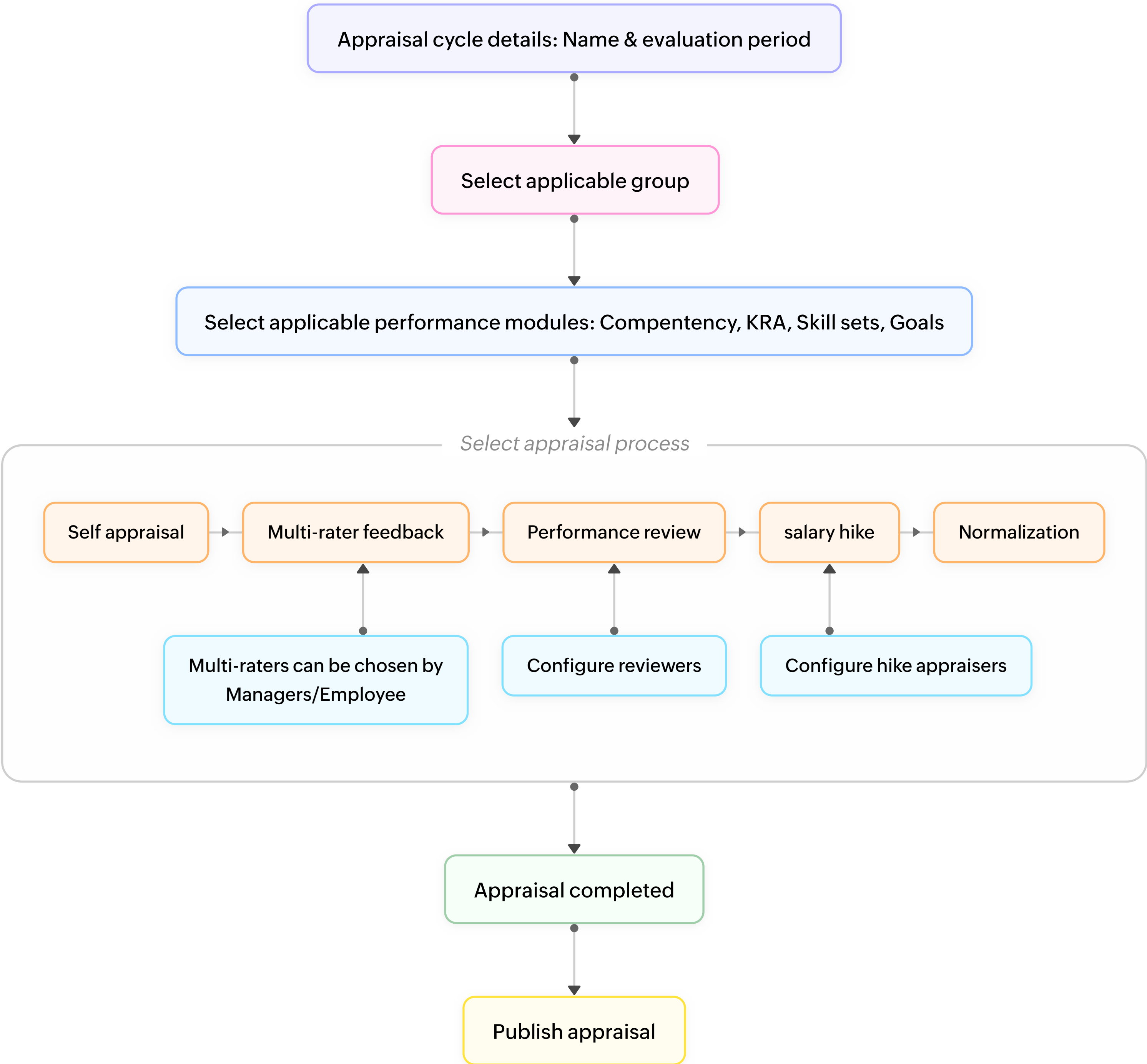
Feedback:

Giving and receiving feedback is essential for the growth of an organization. The Feedback module helps your employees give and take feedback through three methods - peer to peer, reporting to and 360 degree.

Summary:

Summary is a questionnaire that will guide a new manager and an existing manager towards a comprehensive idea about his reportees' performance.

Here is the general flow of performance management in Zoho People:



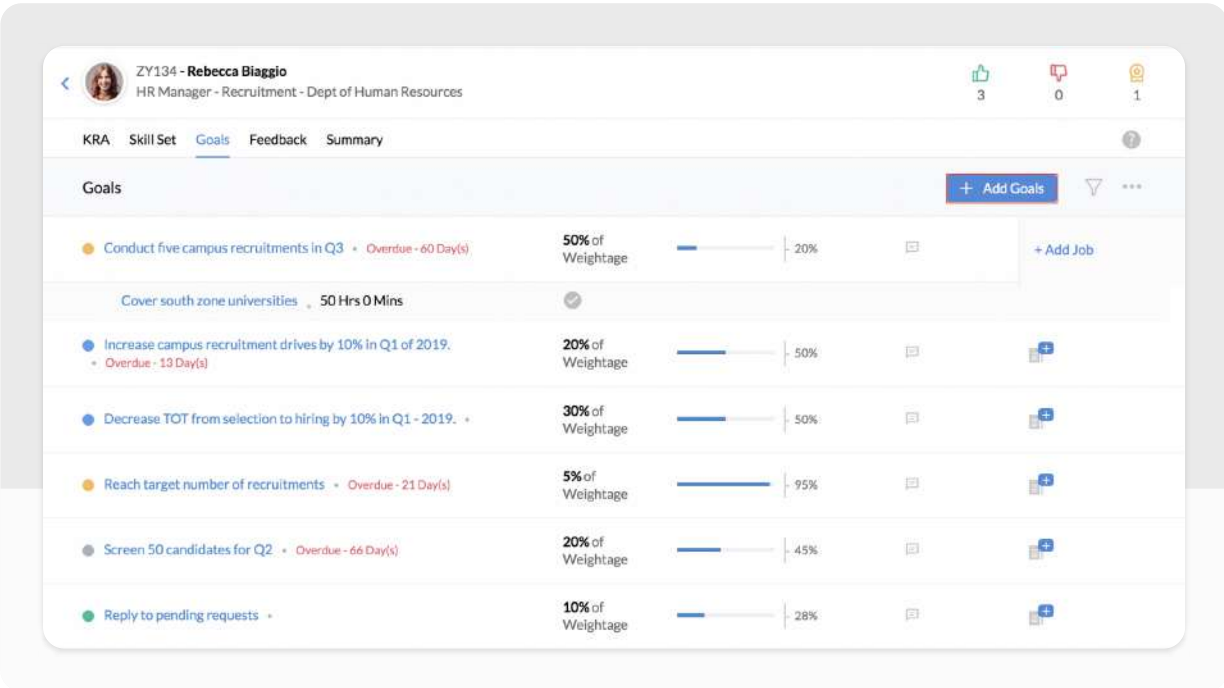
Performance Modules

Let us take a closer look at the various performance modules:

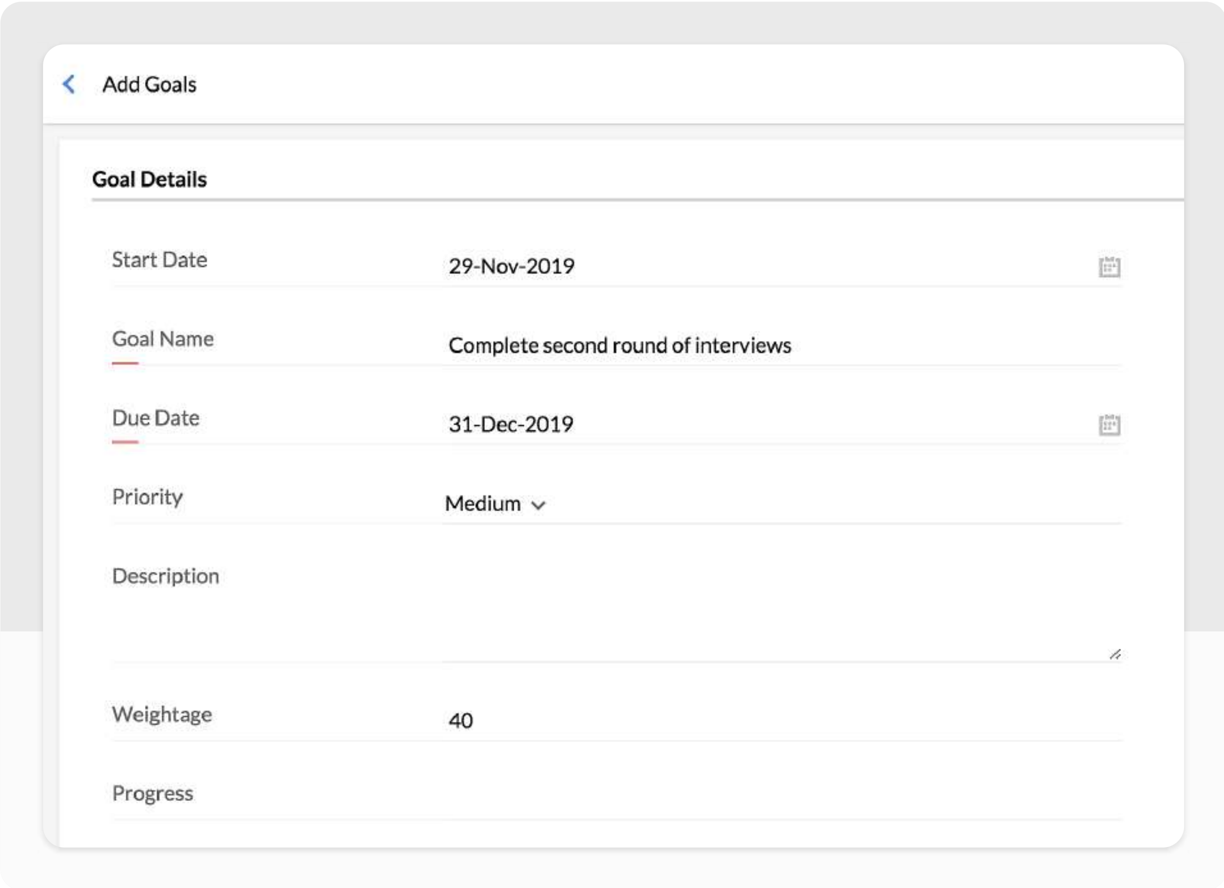
Goals

Adding goals

1. From your home page, go to **Performance > Team Mates**
2. Under *Peers* view, click the employee's name
3. Go to the **Goals** tab



4. Click **+ Add Goals**
5. Enter the required details



6. Click **Submit**

Comments can also be added to the goal. To edit or delete the goal, simply click the pencil or the trash icon respectively.

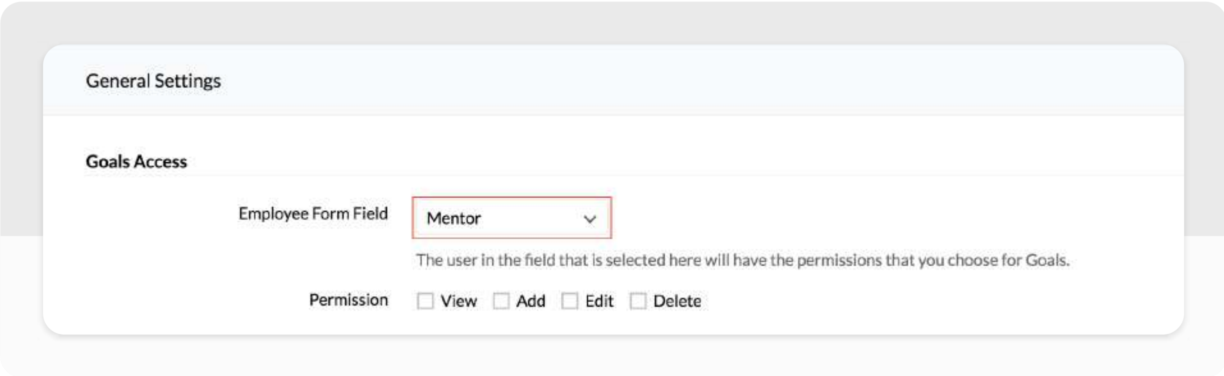
Goals can also be added by employees by going to **Self Service > Goals > + Add Goals**.

Accessing goals

Permissions are typically enabled for Reporting Managers to access the Goals of their reportees. If you want a mentor also to access the goals, you can assign special permissions for them. In your employee form you can create a lookup field called Mentor and assign permissions for this field. Follow the steps given below to do this.

1. From your home page, go to **Performance > Settings > General Settings**

2. Under Goals Access, select the form field that defines for whom you want to give access



The field Mentor shown above is a lookup field, which will have the values imported from the Employee form and the Employee ID field.

3. Under Permission, select the type of permission that you would like to give
4. Click **Submit**

NOTE: *In the Employee form of each employee, the field 'Mentor' should be filled with the respective Mentor's name.*

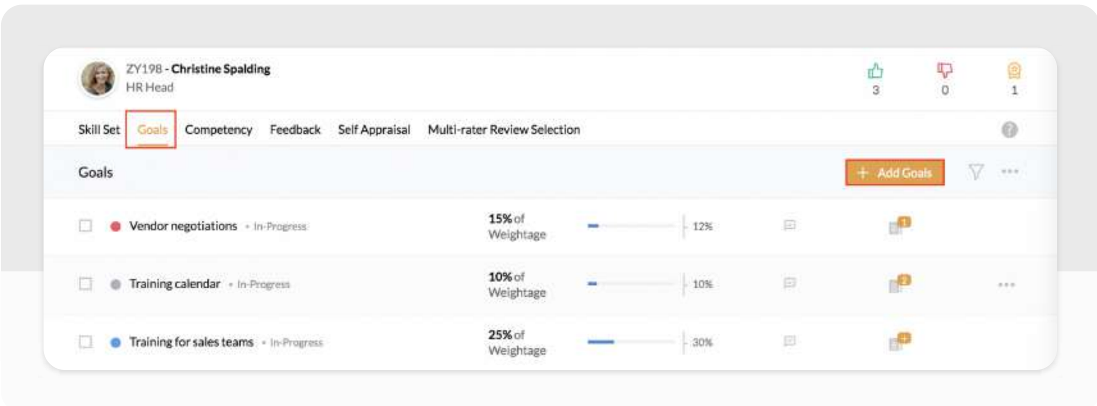
Depending on the permission that you have set, the Mentor who is chosen in the Employee form for each employee form will have access to the goals of the employee.

Associating jobs with goals

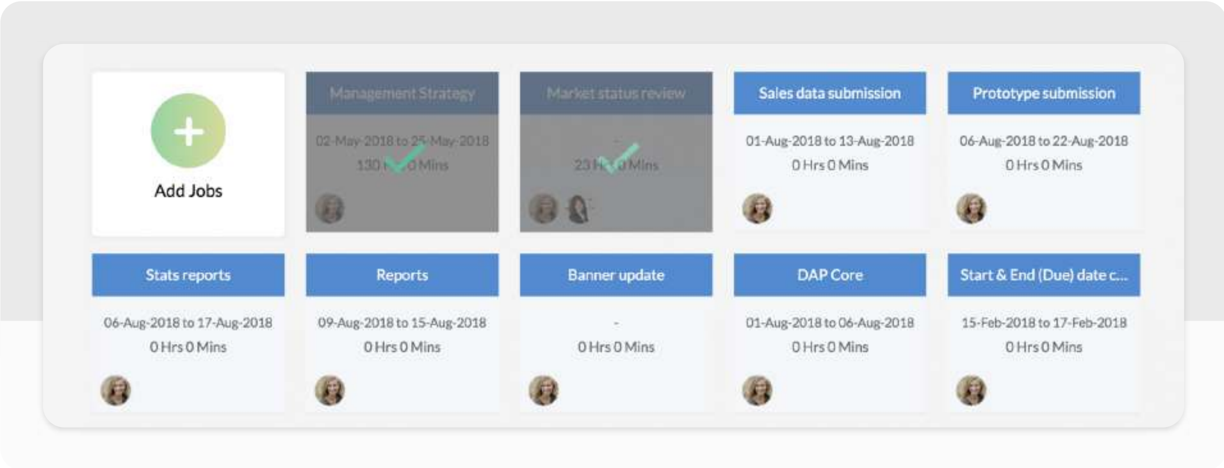
Both new jobs and existing jobs can be associated with goals.

To associate a job to a goal:

1. Go to the respective goal to which you want to associate a job
2. Click the **Add Jobs** icon

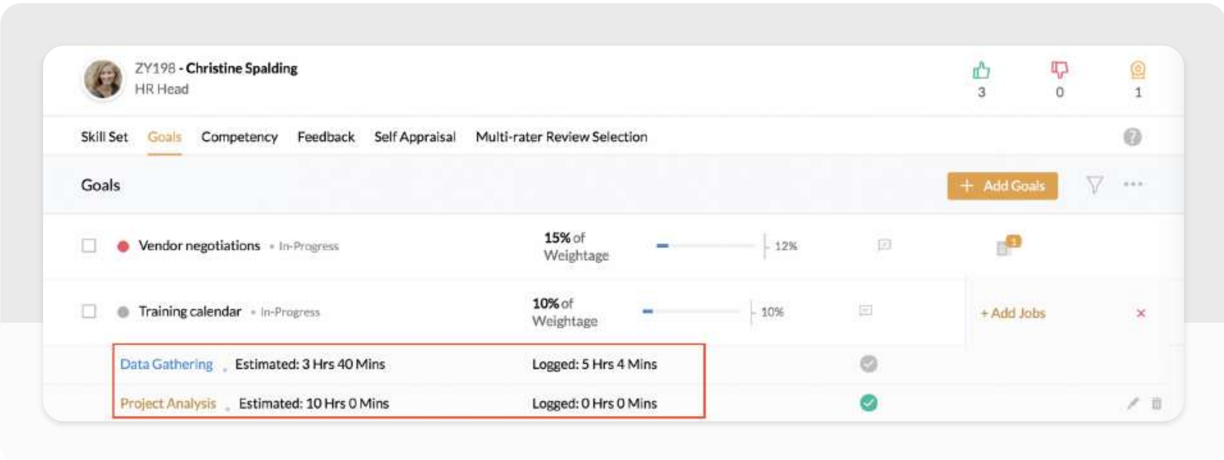


Click **Add Jobs** if you want to create a new job and associate it to the goal. Click on existing jobs to associate them to the goal.



By doing this, you can track the number of hours worked on each goal.

Once jobs have been added and associated with a goal, the job's estimated and logged hours will also be displayed below the job.

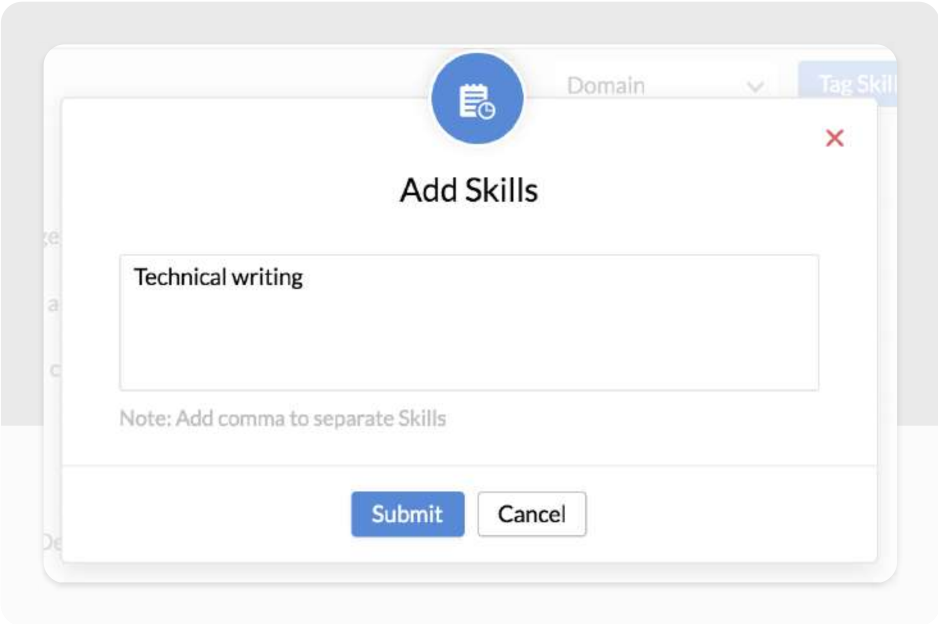


Additionally, goals can also be archived (made inactive) when not in need and unarchived later. Learn more.

Skill Set

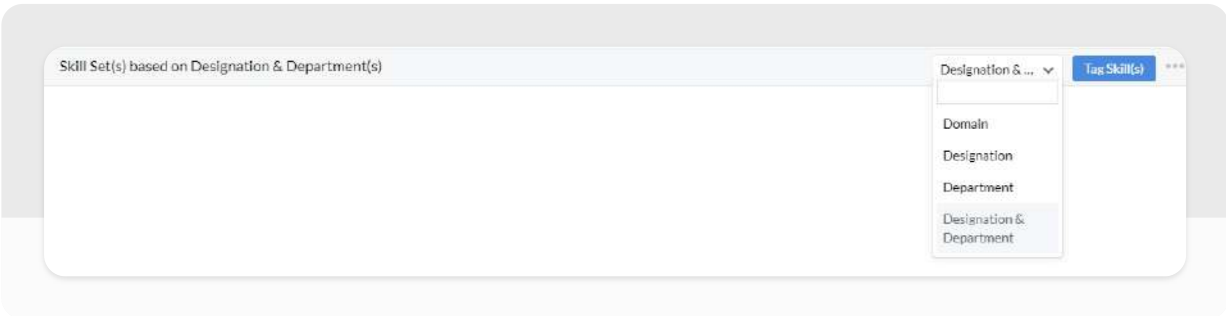
Adding and tagging skill sets

1. To add skill sets, go to **Performance > Settings > Skill Set > Add Skills**
2. Enter the skill



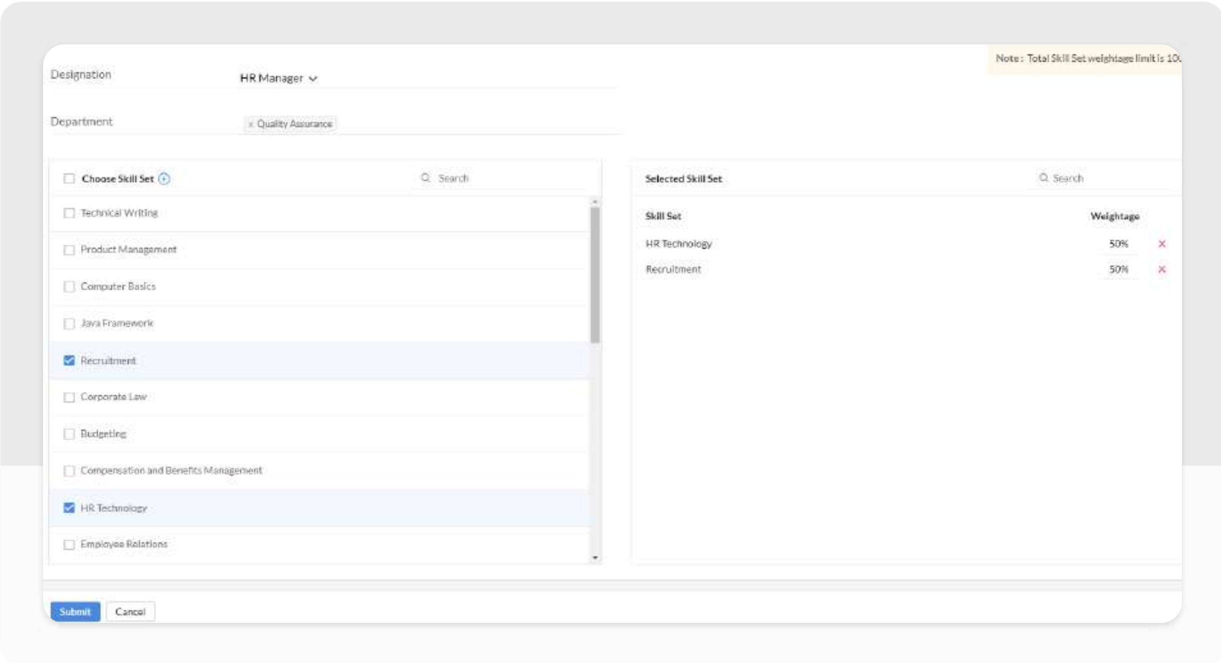
3. Click **Submit**. Now the skill has been added

4. To tag the skill, choose from Domain, Department or Designation, or Designation & Department and click Tag Skill



5. Select the Department or Designation. (Or enter the name if Domain is selected)

6. Select or add skills to be tagged and give a weightage for each. Ensure the total weightage of the selected skills does not exceed 100%

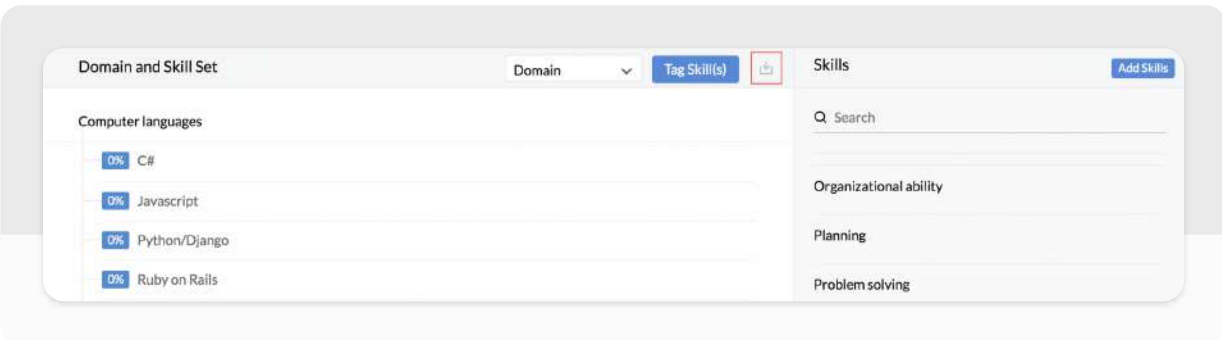


7. Click **Submit**

Importing skill set mapping

To import the skill set mapping:

1. Go to **Performance > Settings > Skill Set**
2. Click the **import** icon beside the Tag Skills icon



3. Import a file with a maximum size of 5 MB, in xls or csv format and click **Next**
4. Map the fields and click **Next**

Once the import is complete you will view a summary of import and errors, if any.

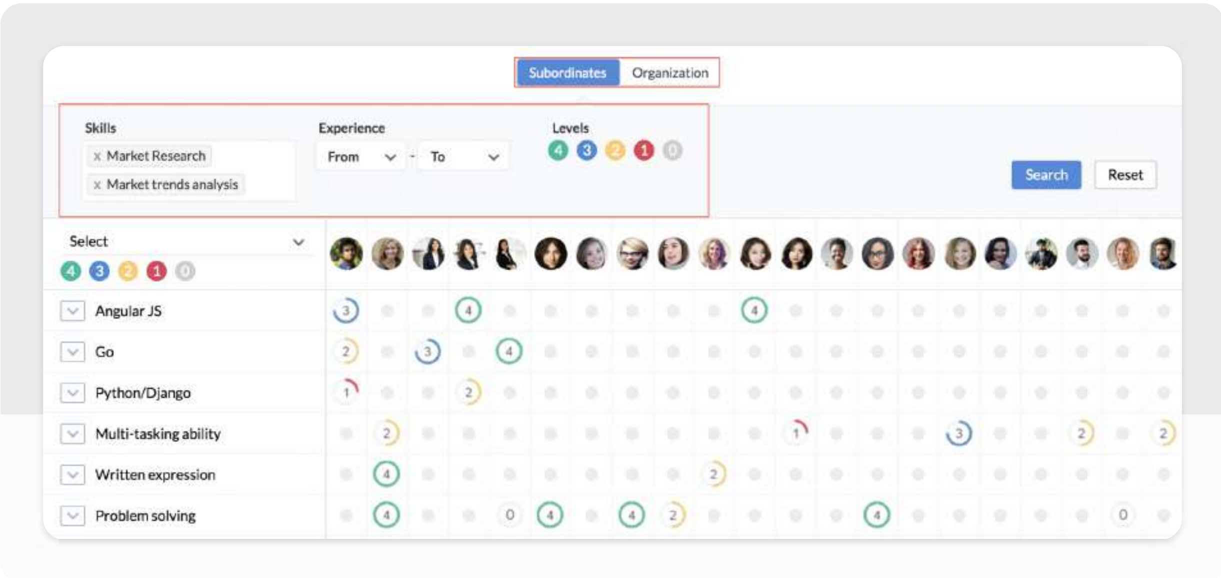
Skill Set Matrix

The skill set matrix gives you a bird's eye view of all employees and their skill sets. Filtering your employees based on their skill sets help you identify the number of employees in your organization under different skill sets. This also gives you an insight during recruitment on the skill sets under which you need to recruit more people.

There are subordinate (reportees) and organization views. Based on permissions configured for each role, the data that can be viewed will vary.

To access the skill set matrix,

1. Go to **Performance > Skill Set Matrix**
2. Under the *Subordinates* (reportees) view, search based on skills, experience, and potential level
3. Under the *organization* view search for a specific manager, skills, experience, and potential levels



4. Click **Search**

You will be able to see the list of employees who fall under the specified skill sets.

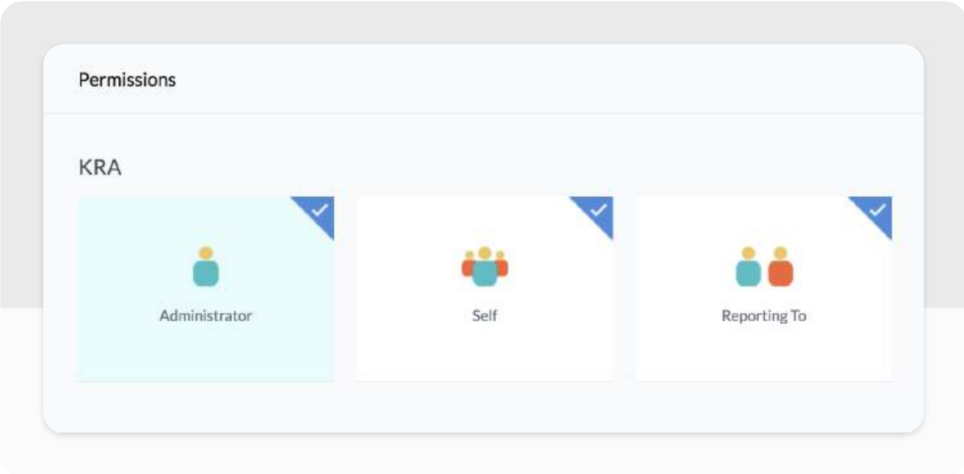
Key Result Area (KRA)

Defining KRA permissions

You can decide to whom you want to give permission to tag KRAs: Reporting Manager, Self. By default, it will be enabled for Administrators.

To do this,

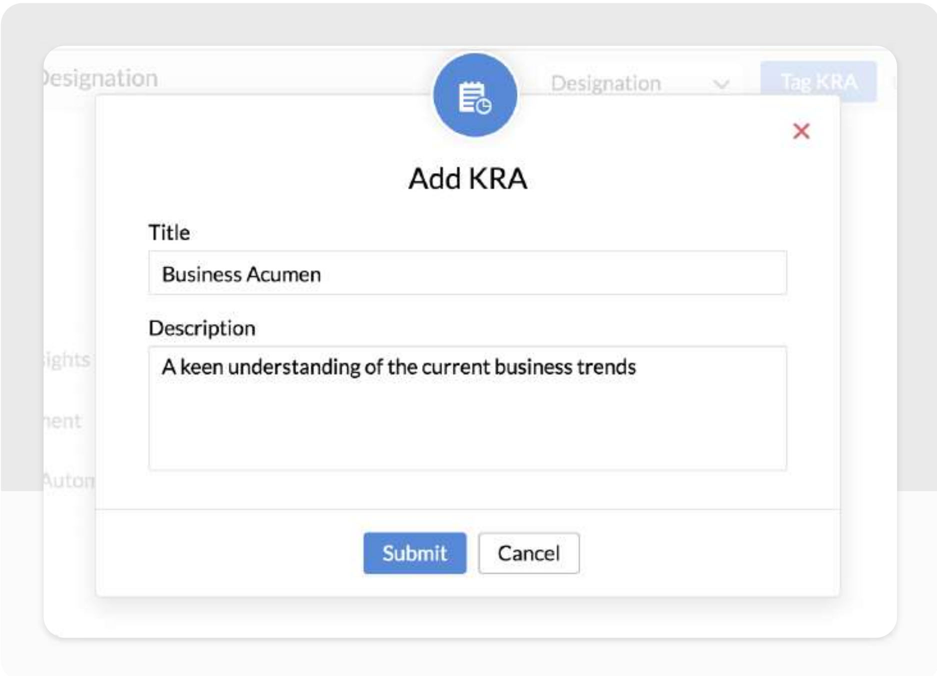
1. From your home page, go to **Performance > Settings > Permissions**
2. Under *KRA*, select the options you want to enable
3. Under the *organization* view search for a specific manager, skills, experience, and potential levels



Adding and tagging KRAs

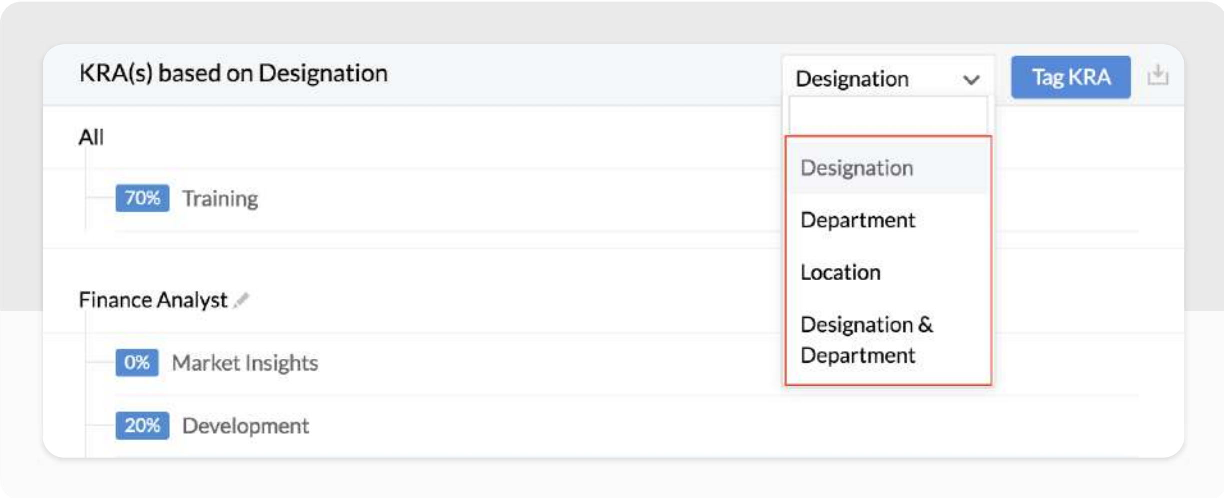
To add a KRA and map it to a Department or Designation:

1. From your home page, go to **Performance > Settings > KRA**
2. Click **Add KRA** and enter the KRA name and description, if required

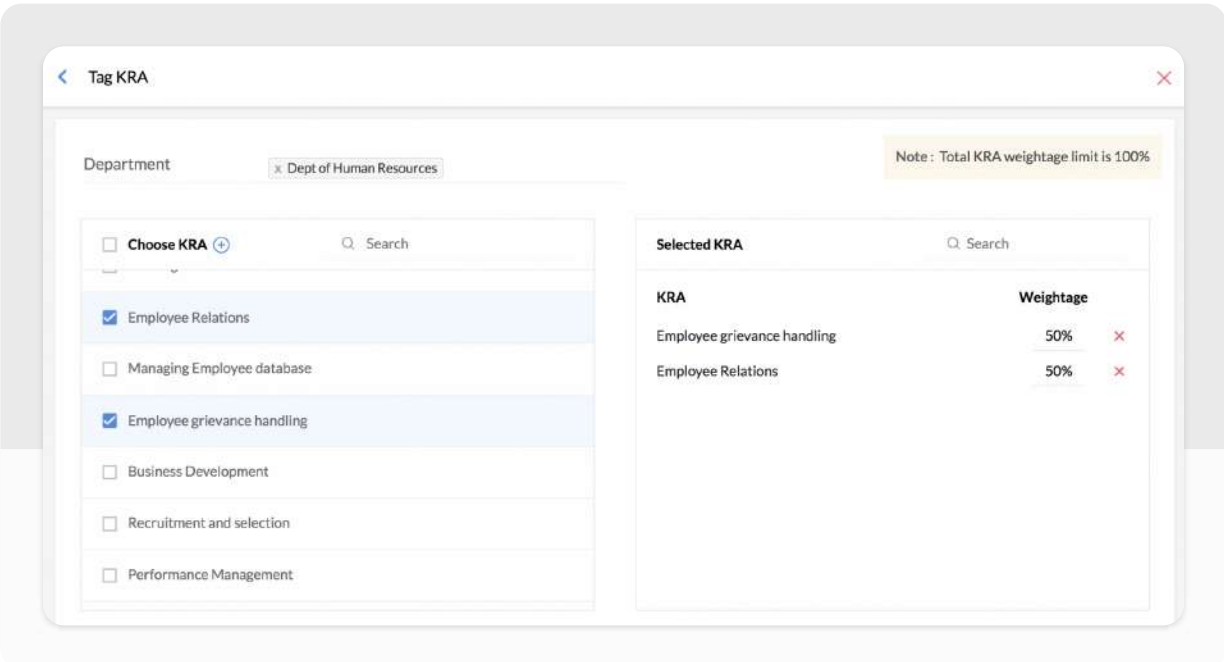


To tag the KRA to a Department, Designation, Department and Designation, or Location,

1. Select from one of the drop-down options
2. Click **Tag KRA**



3. Select the designation or department



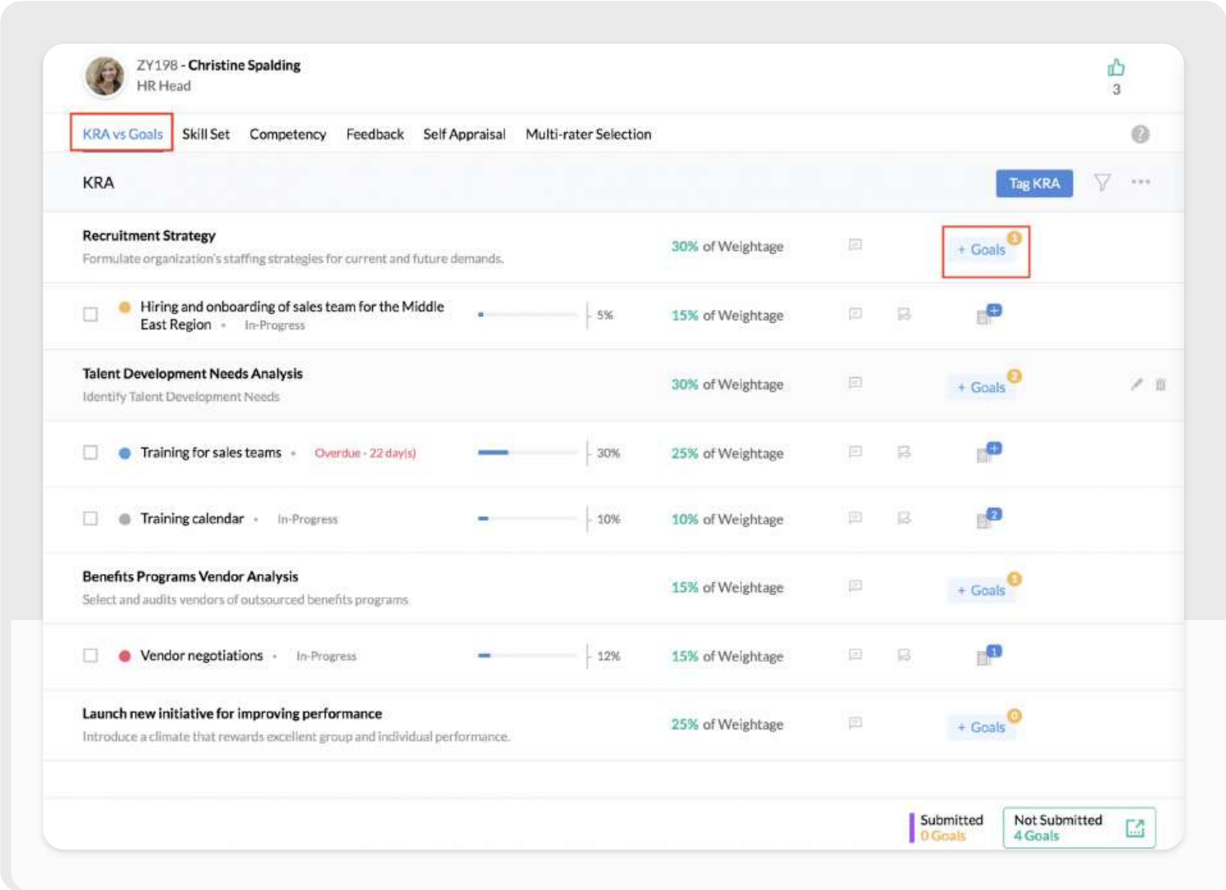
4. Select the KRA and give the corresponding weightage. Ensure the total weightage of the selected KRAs does not exceed 100%. Weightage can also be given in decimals. For example 22.2%

Now, a KRA has been added. If permission has been given, employees will also be able to see the KRAs available for them. They can tag themselves to corresponding KRAs

KRA vs Goals

You can either rate the KRAs individually or have Goals mapped to the KRAs and rate the Goals using **KRA vs Goals module**. You have the option to decide which method you would like to follow. The selected KRA will be listed under *My Review* tab.

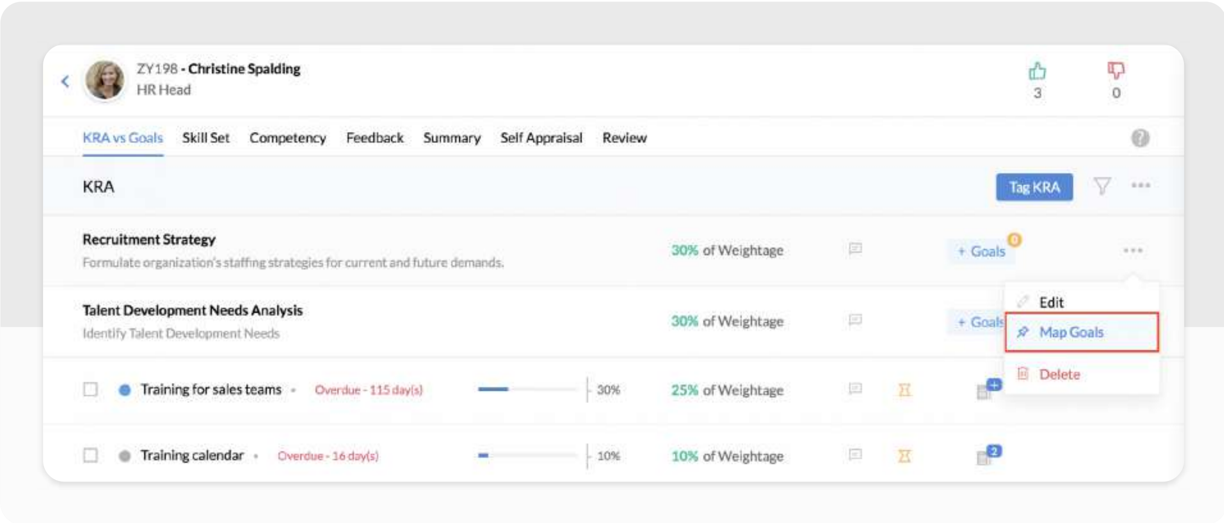
If *KRA vs Goals* is selected, users can add Goals to these KRAs by clicking on **Add Goals**.



You can also include KRA vs Goals as part of your appraisal cycle and use it as a tool to measure performance.

Mapping and unmapping goals

Goals can be unmapped from an existing KRA and be mapped again to a different KRA. Use the Map Goals and unmap Goals options in the ellipsis icon.



NOTE:** Ensure that you have enabled the respective modules under **Performance > Settings > Performance Modules

Importing KRAs and KRA mapping

KRAs can be imported from .xls or .csv files and they can be mapped easily. Learn more.

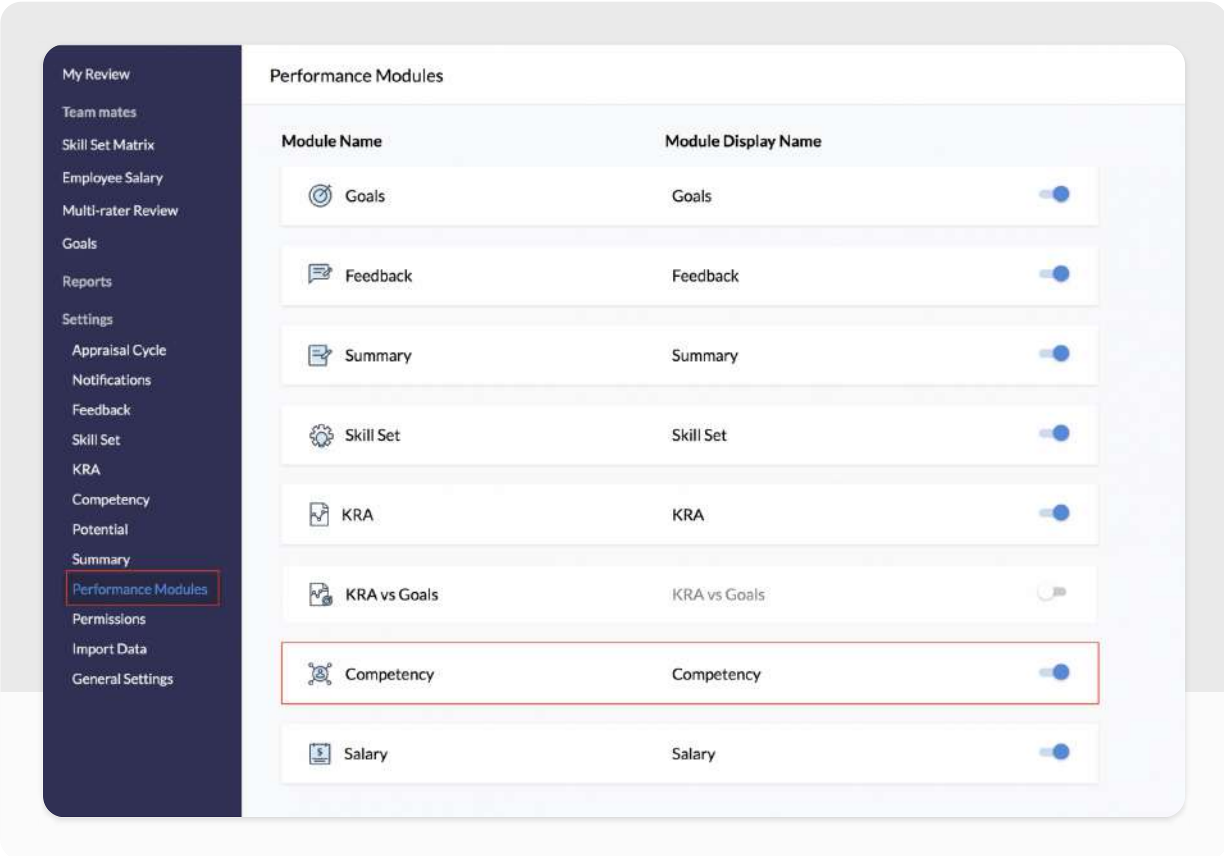
Competency

You can tag competencies to Departments or Designations or Roles. Once tagged, you can utilize it as one of the modules for evaluation of performance. Weightage can be given for Competencies, rating can be done and they can be included as part of an appraisal cycle.

Enabling competency

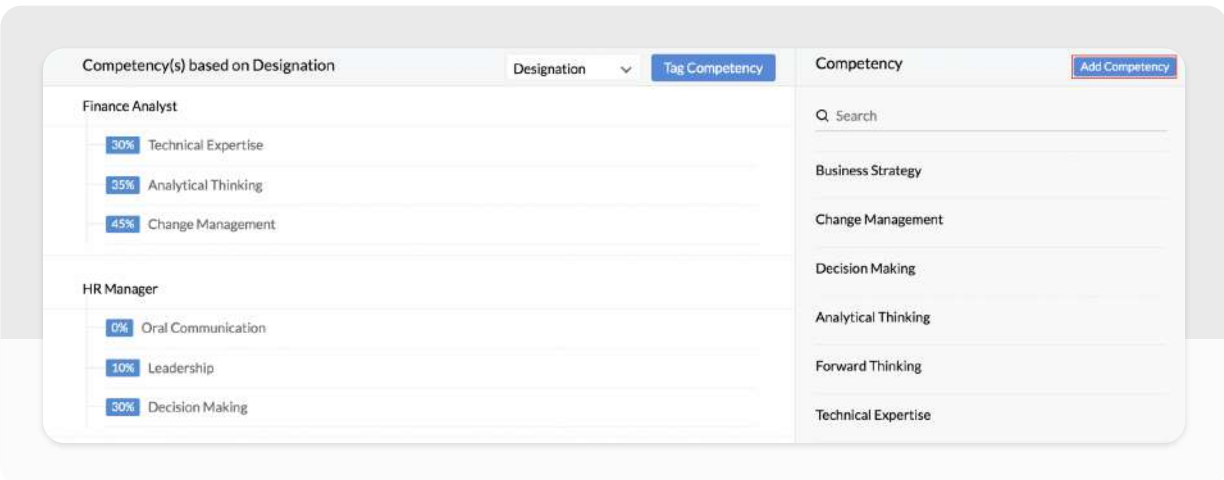
As the first step, you need to enable the module

From your home page, go to **Performance > Settings > Performance Modules** and Enable **Competency**



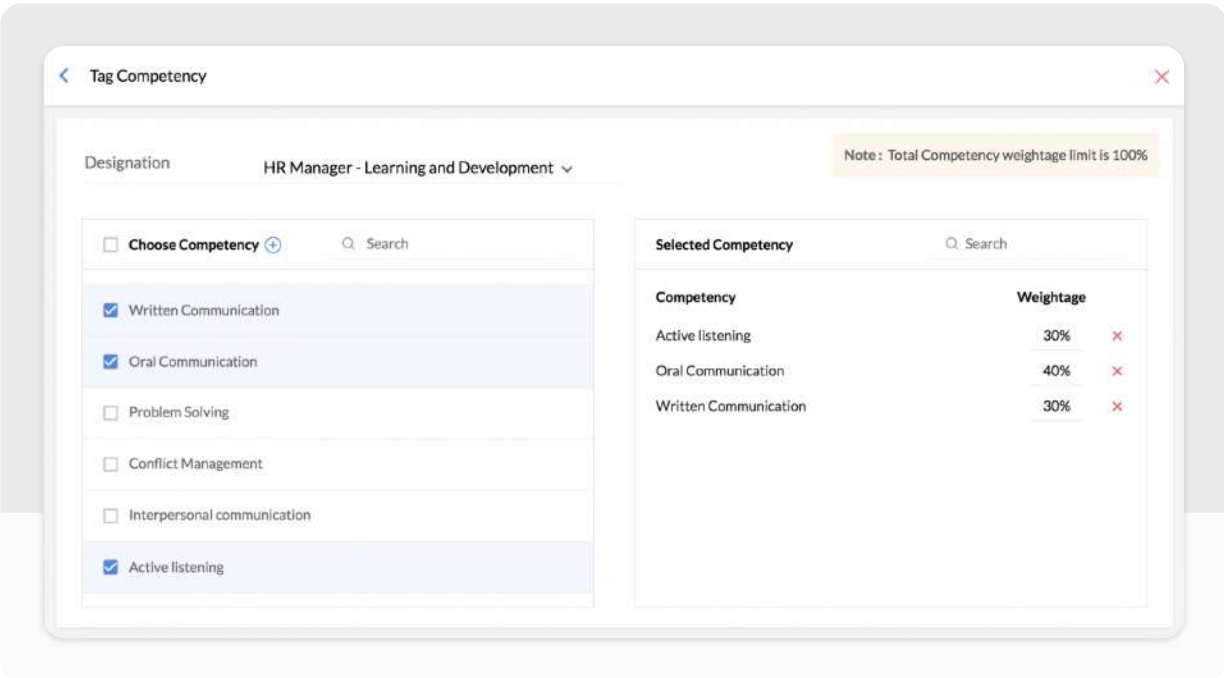
Adding Competencies

1. From your home page, go to **Performance > Settings > Competency**
2. Click **Add Competency**
3. Give a title and description
4. Click **Submit**



Tagging Competencies

1. From the drop-down, select whether the Competency should be tagged based on Department, Designation or Role
2. Click **Tag Competency**
3. Select the designation
4. Under the Competency List, click on the Competency and enter the weightage. Ensure that the total weightage of the selected competencies does not exceed 100%
5. Click **Submit**



Tag competencies to a specific employee

1. Go to **Performance > Teammates > Peers View**
2. Select the employee from the list
3. Go to the **Competency** tab

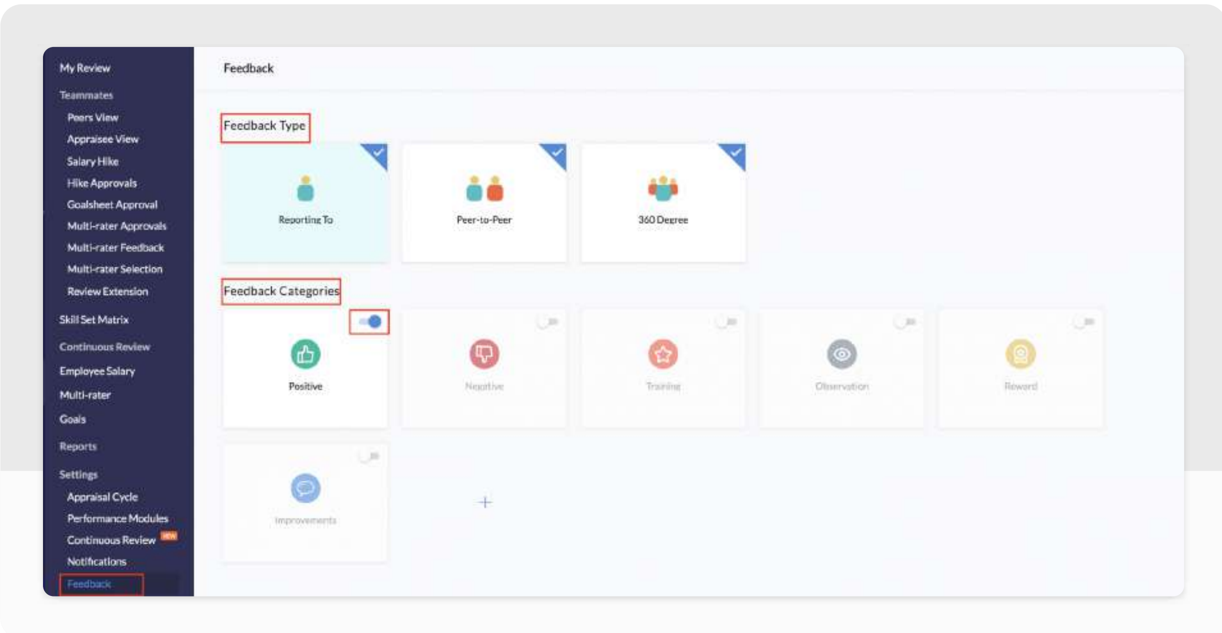
4. Click **Tag Competency**
5. Select the competency and enter the weightage in the popup
6. Click **Submit**

Competency can be included as part of the appraisal cycle. Learn more.

Feedback

Feedback types and feedback categories

There are three types of feedback that you can enable using Zoho People, for your organization.As an administrator, you will be able to enable the type of feedback that will suit your organization.



To enable the feedback types that you want to use go to **Performance > Settings > Feedback**
Here are the available feedback types:

Peer-to-Peer: In this type of feedback, an employee can give feedback to another employee of the same department or organization. Feedback can be given to anyone other than the Reporting manager.

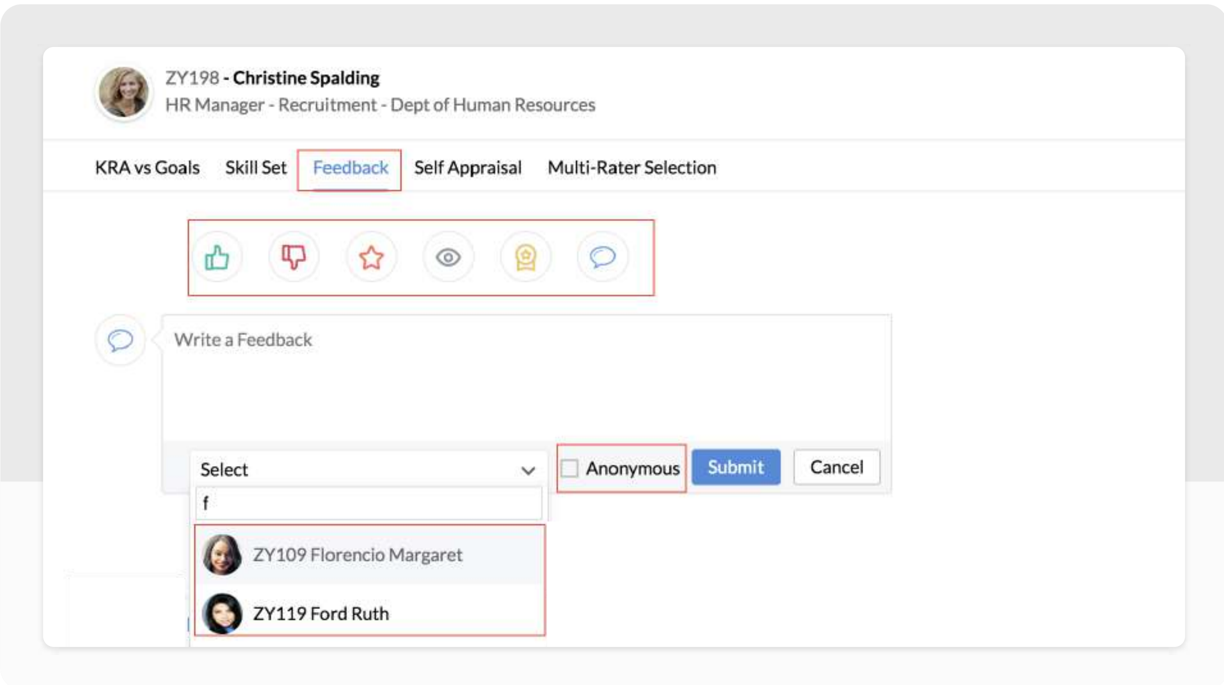
Reporting to: In this type of feedback, the manager gives feedback to the team members who are their direct reports.

360 Degree: Under 360-degree feedback, an employee can give feedback to everyone in the department or organization including the manager.

Whether feedback applies within the department or the organization depends on the settings configured under **Performance > Settings > General Settings > Feedback**.

Feedback categories can be used to classify the feedback given. There are some categories available by default and you can add new ones by clicking the + icon in this space. You can also enable or disable any of these categories as per your usage. However, at least one category must remain enabled.

To give your feedback, go to **My Review > Feedback tab**. Click here to learn more about settings for Feedback.



You can use the given categories to classify the type of feedback you are giving – Reward, Improvement, Positive, Negative and so on.

Select the person for whom you are giving the feedback by searching for them in the drop-down as indicated above.

A consolidated view of all feedback received can be viewed in the Feedback report.

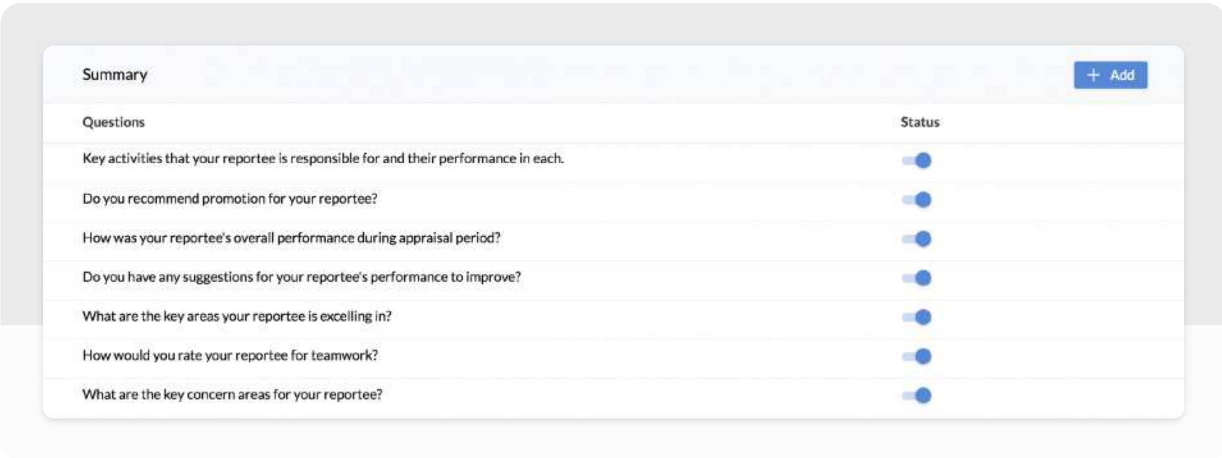
NOTE: *Feedback can be given at any point of the year irrespective of the appraisal cycle.*

Anonymous Feedback: It is possible to collect anonymous feedback in Zoho People. This helps in maintaining a more friendly feedback mechanism and ensures healthy relationship between members of the department. Learn more.

Summary

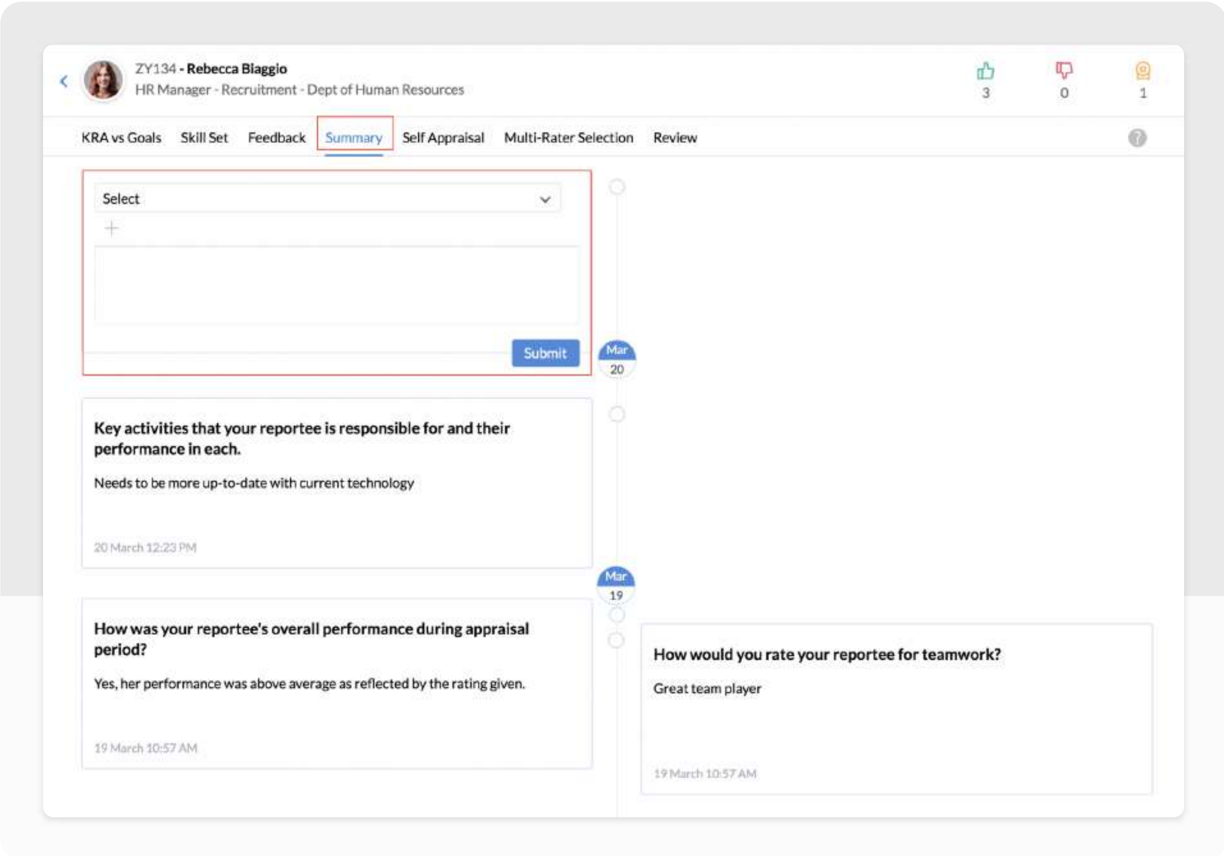
Configuring summary

By default, there are a set of questions available in the Summary module under **Performance > Settings > Summary**. These questions can be edited and more questions can be added as per your organization's need.



Accessing summary

An admin or manager can access the summary of an employee by going to the Summary tab under **Performance > Teammates > Appraisee View**

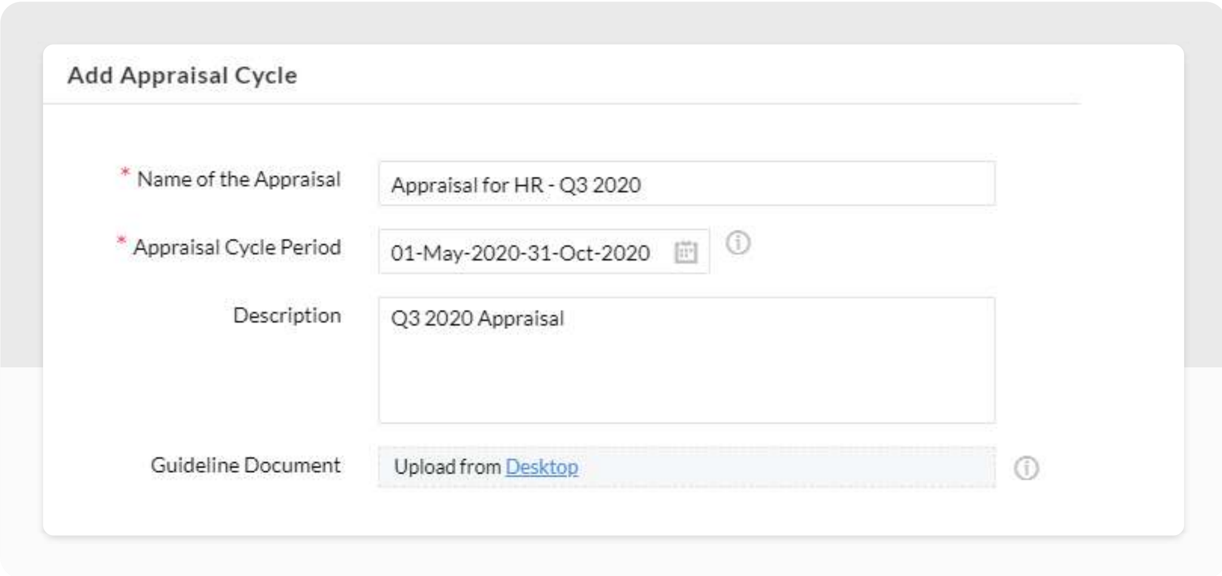


They can select the appropriate question from the drop-down and give in their response in the box below. When a new manager steps in, they will be able to get a good idea about the reportee's performance by viewing the summary questions and answers.

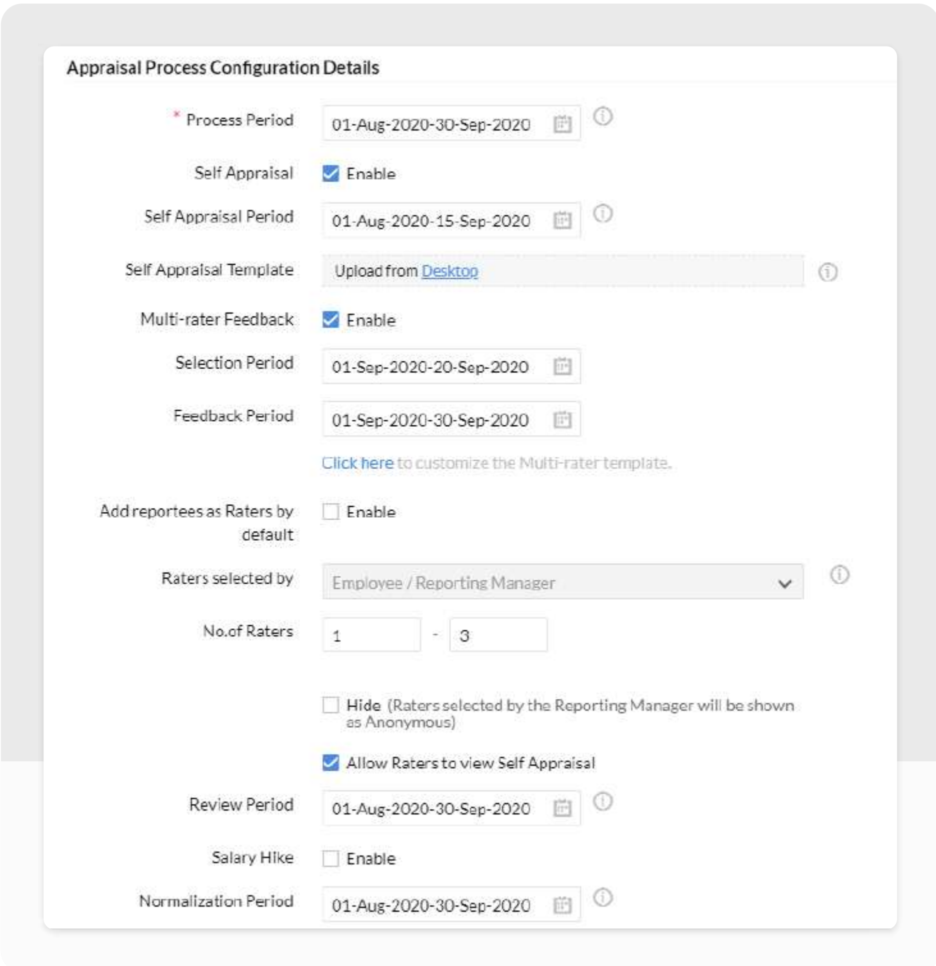
Appraisal process

Starting an appraisal process

1. To begin the appraisal cycle, go to **Performance > Settings > Appraisal Cycle > Add**
2. Give a name and enter the period for which the appraisal is applicable
3. Give a description if needed



4. Upload any guideline documents if necessary



5. Enter the process period

6. Enable *Self-appraisal* if required and enter self-appraisal period. A self-appraisal template can also be uploaded if needed

7. Enable *Multi-rater feedback* if required and enter the selection and feedback period for multi-rater feedback

8. Enable *Salary Hike* if you want it as part of the process

9. Enable *Add reportees* as Raters by default if you want to auto-populate all the reportees as multi-raters for the Multi-rater feedback. If you want to categorize the reportees under a multi-rater type, choose one under Select Multi-rater type for reportees

10. Select if the *Reporting Manager* and *Employee* or only the Reporting Manager can select the raters. Reviewers will be able to select multi raters by default

11. Select the minimum and maximum number of raters that can be selected for multi-rater feedback

12. If you want the raters selected by the reporting manager to be shown as anonymous, select Hide

13. If you want to raters to view the self appraisal of the employee they are rating, check *Allow Raters to view Self Appraisal*

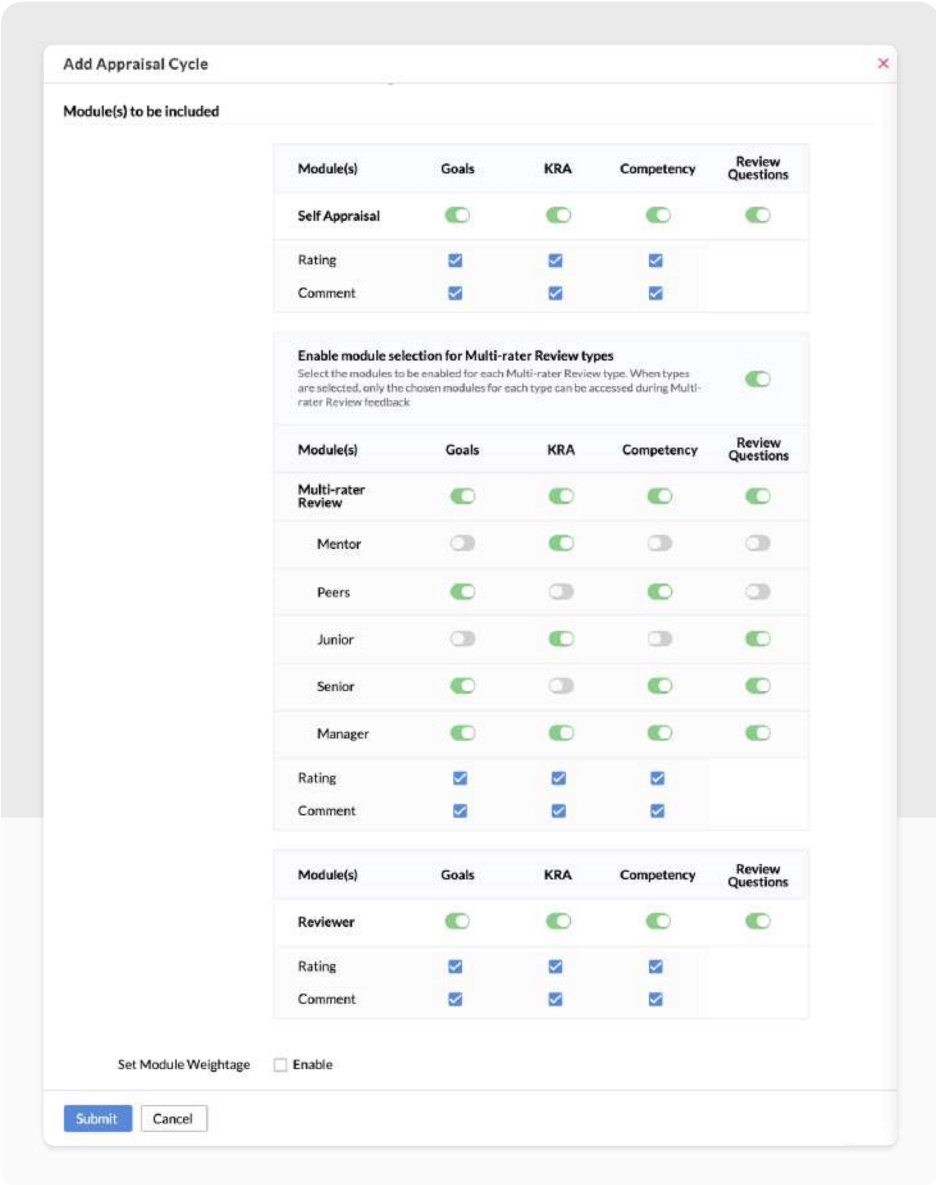
14. Enter the review and normalization period

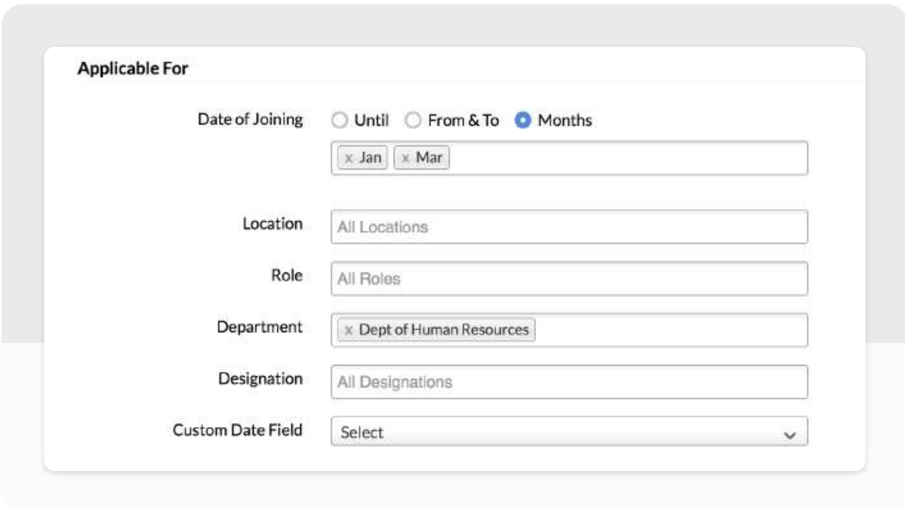
NOTE:

- Process period is the time taken for the appraisal cycle to get completed.
- Self-appraisal period is the time within which employees should complete their self-appraisal.
- Review Period is the time frame for the review to get completed.
- Normalization period refers to the period within which the feedback, summary etc should be collated.

15. *Enable module selection for multi-rater type*, if needed. Using this option, you can select modules for each multi-rater type and only those modules will be available to the assessors in that type during multi-rater feedback. This option can be used in addition to the module selection for multi-rater review to further refine the feedback you want to receive

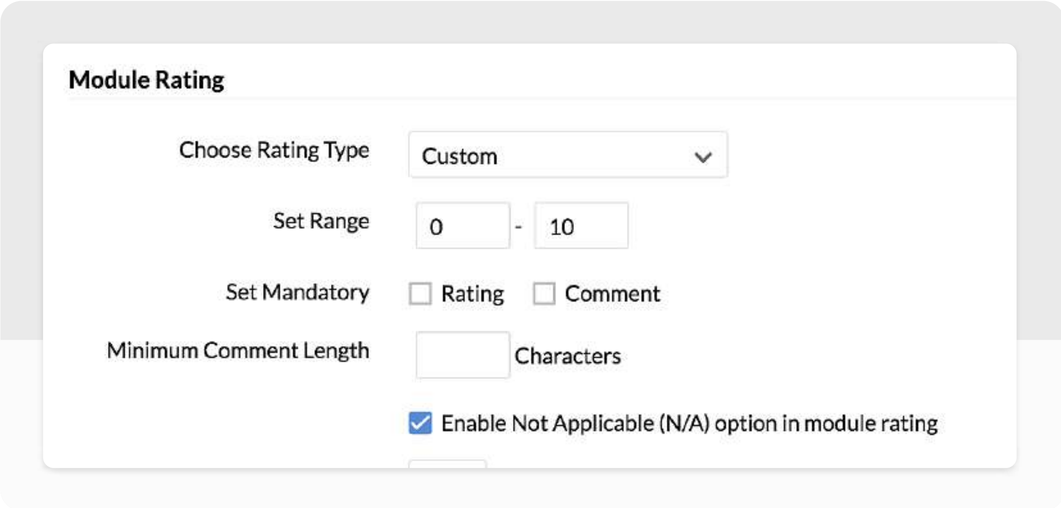
16. By default, reviewers can provide ratings and add their comments during review. However, if you do not wish to facilitate ratings and comments, disable the corresponding checkboxes within the respective review sections





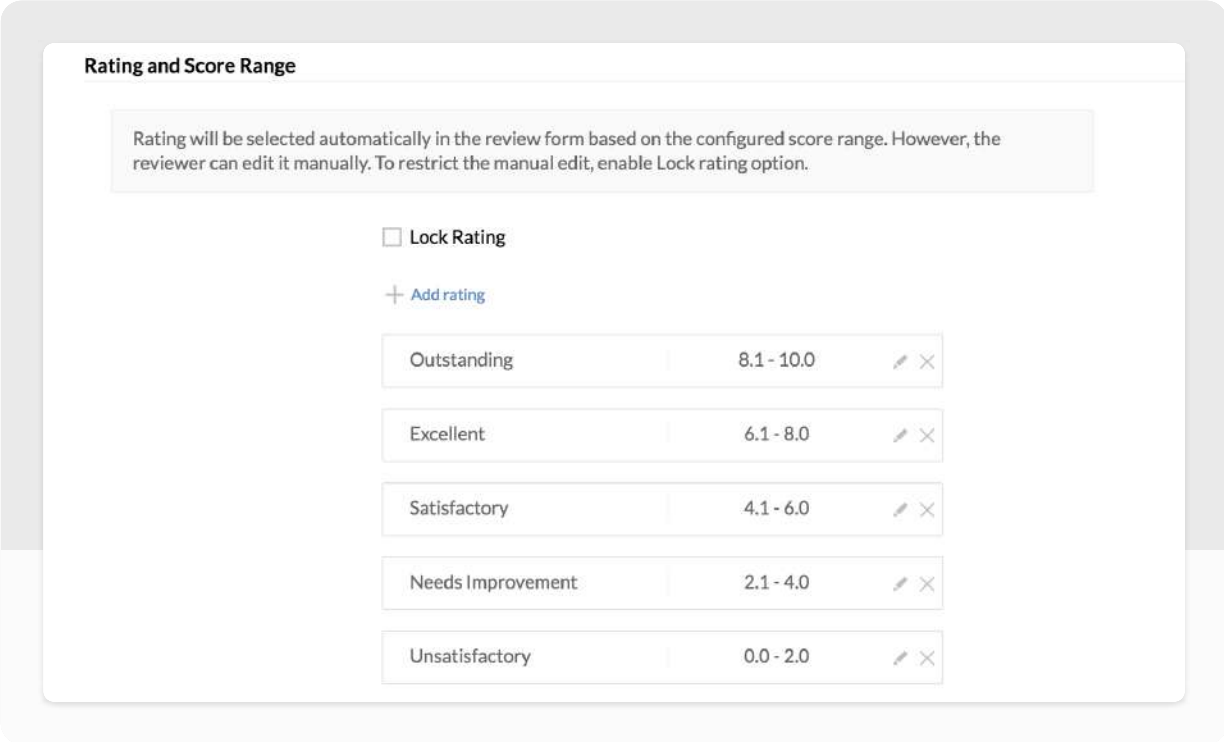
17. Define the target set of employees under *Applicable For* based on date of joining, location, role, designation or a custom date field

NOTE: *You can either do the performance review by the KRAs/Goals added or have Goals mapped to the KRAs and give a rating for them.*



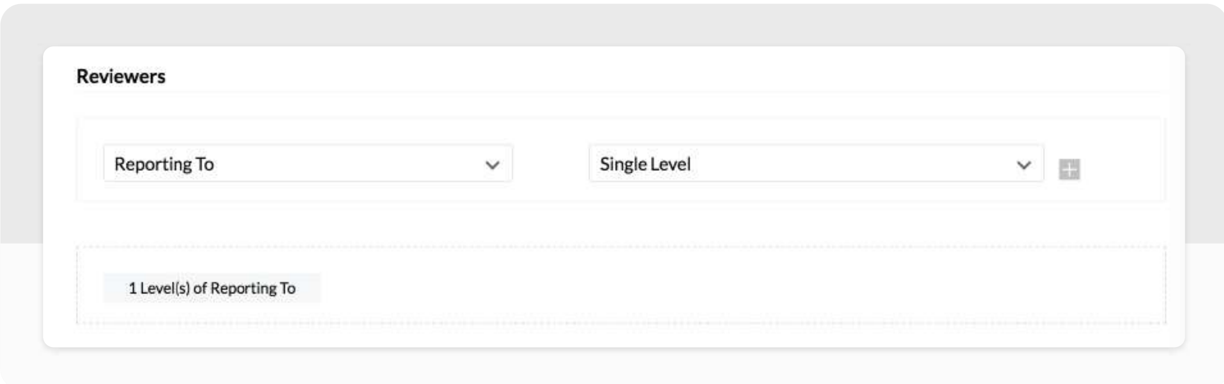
18. Under Module Rating you can set the following:

- Choose Rating type – select if you want the performance ratings to be given as Stars, Numbers, Text or Custom. If Custom is selected, enter the range you want to apply under Set Range.
- Set Mandatory – define if you want the ratings, comments or both to be mandatorily provided.
- Minimum Comment Length – if you want to impose a minimum comment length, enable the box and enter the minimum number of characters that must be entered during review.
- Enable Not Applicable (NA) option in module rating: if you want the reviewers to be able to give NA and not comment, then tick the box.
- Decimal points in score – define if you want the scores to be given with 1 or 2 decimal points. For example, if 2 is chosen, then the score would be shown as 2.24. If 1 is selected, it would be shown as 2.2.
- Final Score – define if you want the final score to be given as it is (Actual Score) or be rounded off (Round off score).
- Modules with no data will be considered for score calculation – Although some modules are included to be part of the review, some employees may not have some modules applied to them. For example, even if the Goals module is included as part of an appraisal cycle, an employee may not have any goals set. Check the setting to include, else uncheck it.

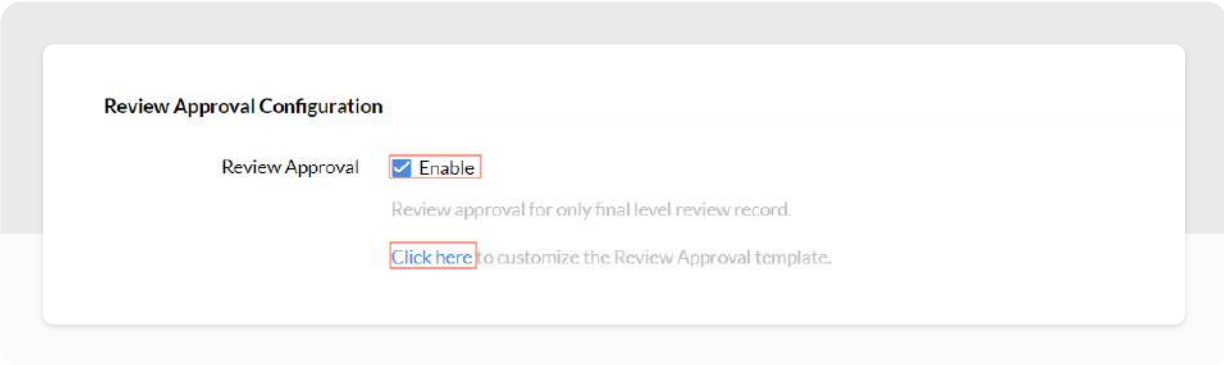


19. Enter and customize the rating field names and score range if required. Check *Lock Rating* if you do not want the reviewer to make manual changes to the ratings

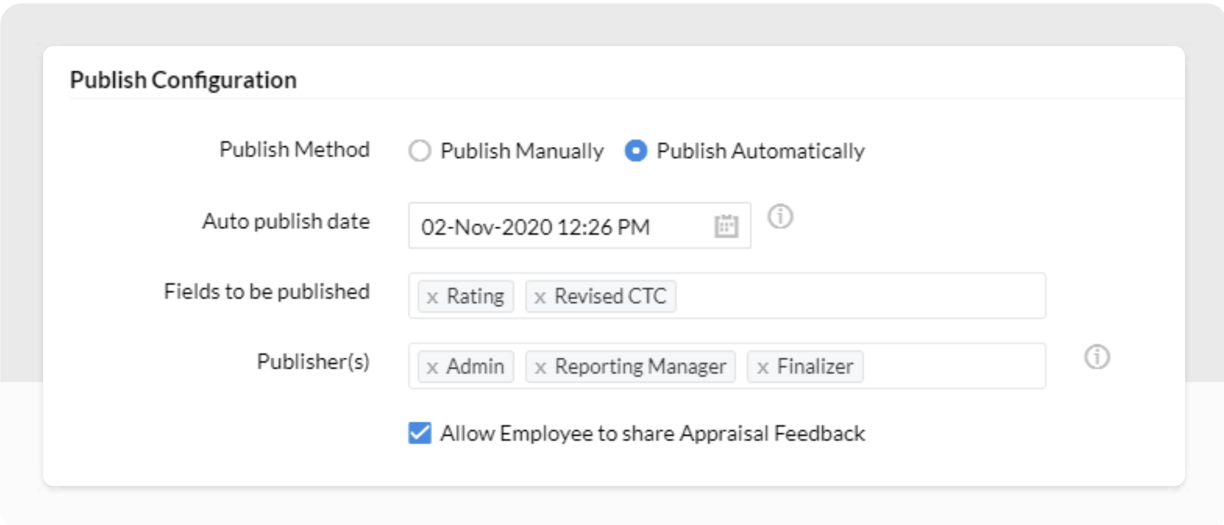
20. Select the reviewers and configure approvals as required



21. Under *Review approval configuration*, Enable Review Approval to enable approvals for final level review. When this option is enabled, on submitting the review, the approver will be notified to approve the submitted review. After the review is approved, the review is considered complete. The review approval template can be customized as well, with options for changing the approver, email, etc



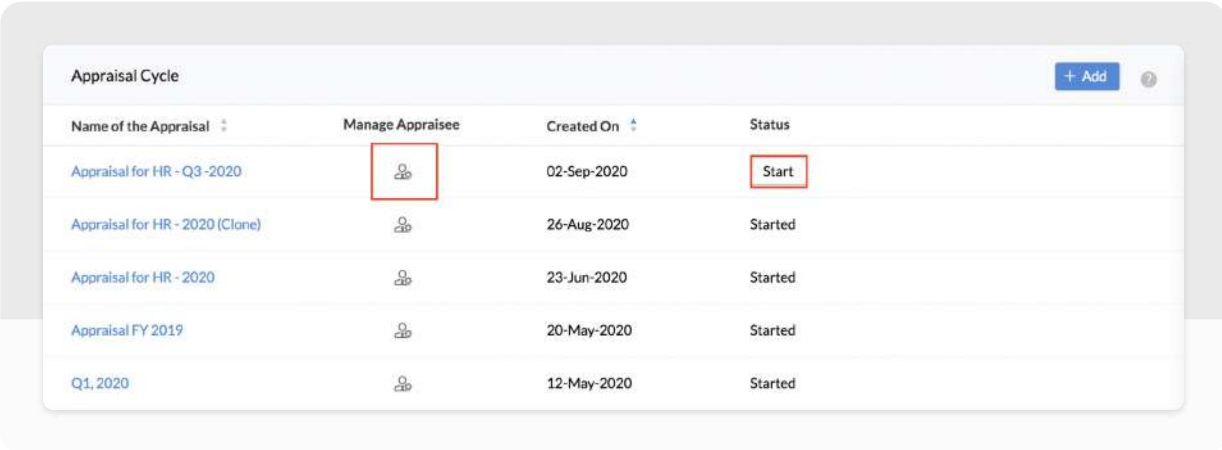
22. Under *Publish Configuration*, We can choose to either publish the review manually, or automatically on a specific date. When choosing to publish manually, a date range is to be provided.If no date range is configured then review can be published anytime once review is completed. Additionally, we can select the fields that are to be shared to the employee and also select publishers, only the selected publishers can publish the review results



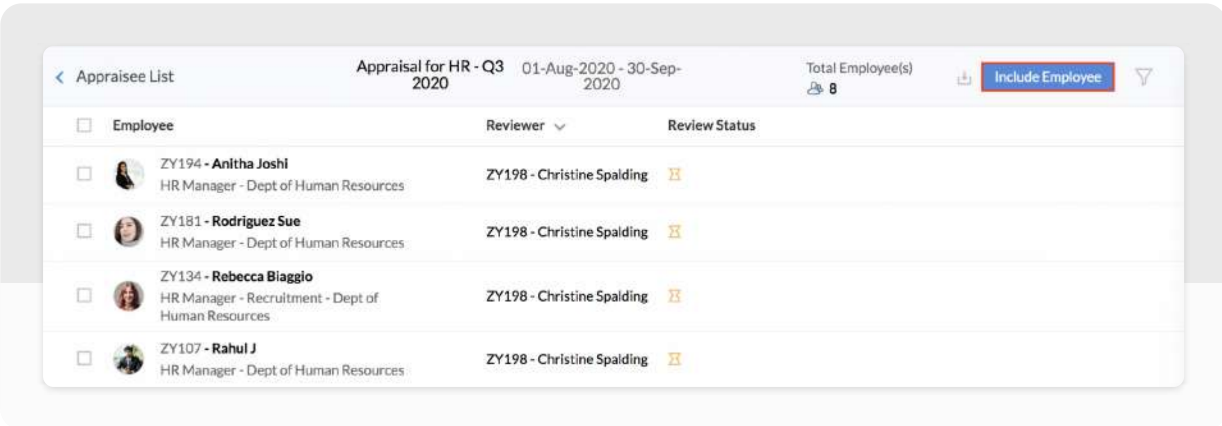
- Enable Allow Employee to share Appraisal Feedback if you want the employees to give feedback on the concluded appraisal cycle.

23. Click **Submit**

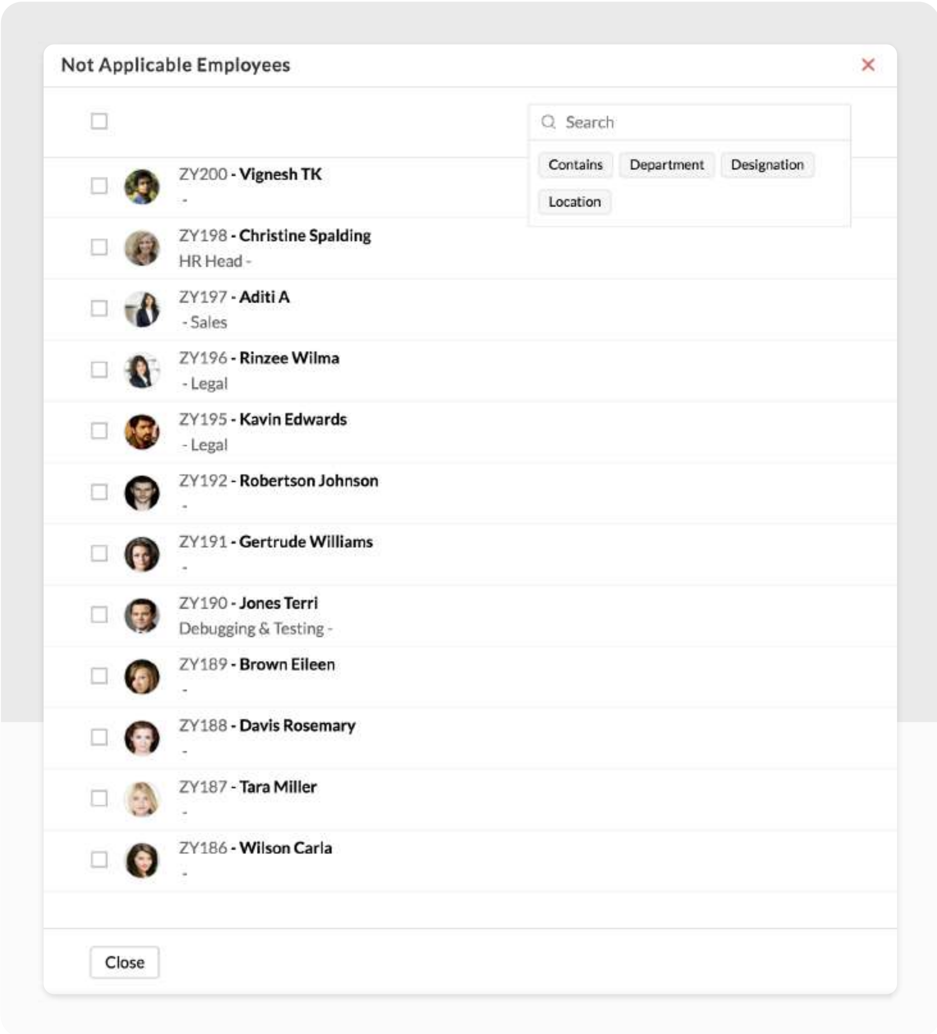
24. Click Start to begin the process. If you want to add or remove any specific employees from the appraisal process before the initiating the process, click Manage Appraisee in the list view



25. To include an employee outside of the applicable list of employees, click Include Employee on the top right corner

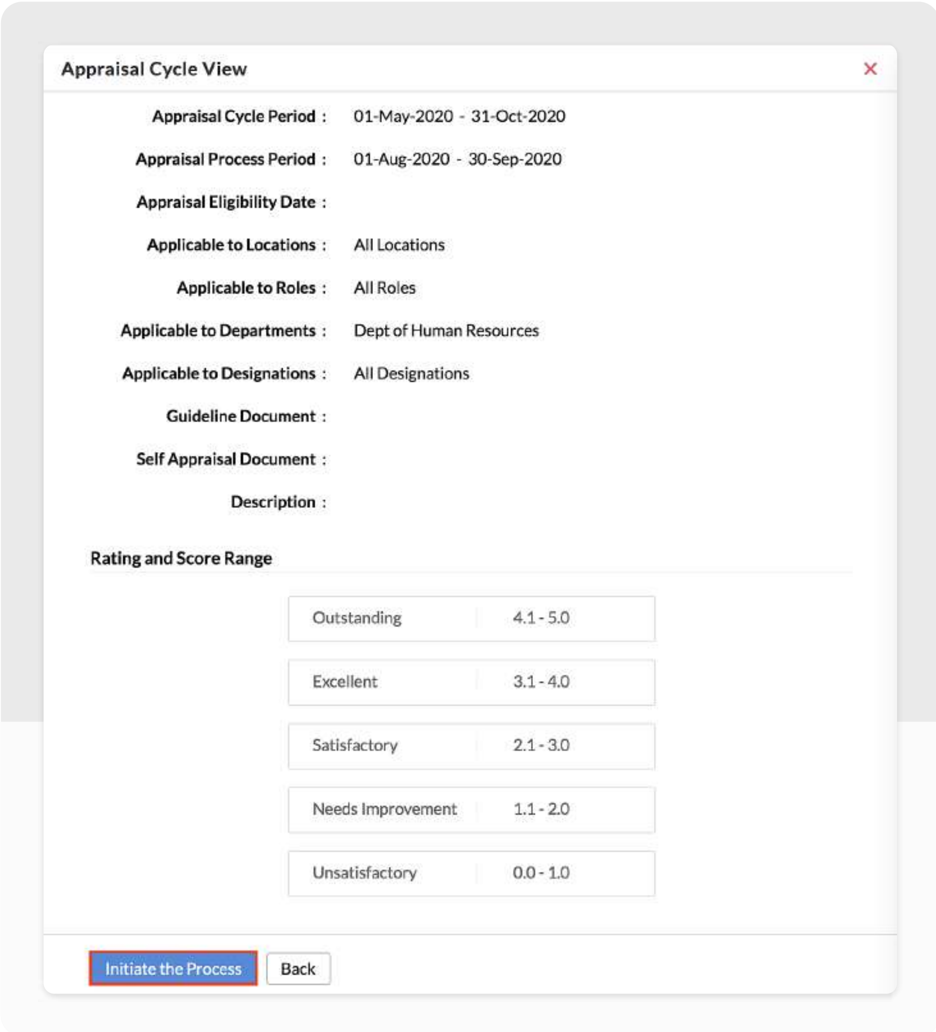


26. Select the employees you want to include from the Not Applicable Employees' list



27. Once you click **Start**, you will get to view your configuration a final time to ensure all settings are correct

28. Click **Initiate the process** as the final step to begin the appraisal cycle



There are some email alerts that are already configured to notify employees when the appraisal cycle starts, to remind reviewers to complete their review etc. You can customize these mail alerts or also add new email alerts as required **(Settings > Automation > Workflow)**.

Self Appraisal

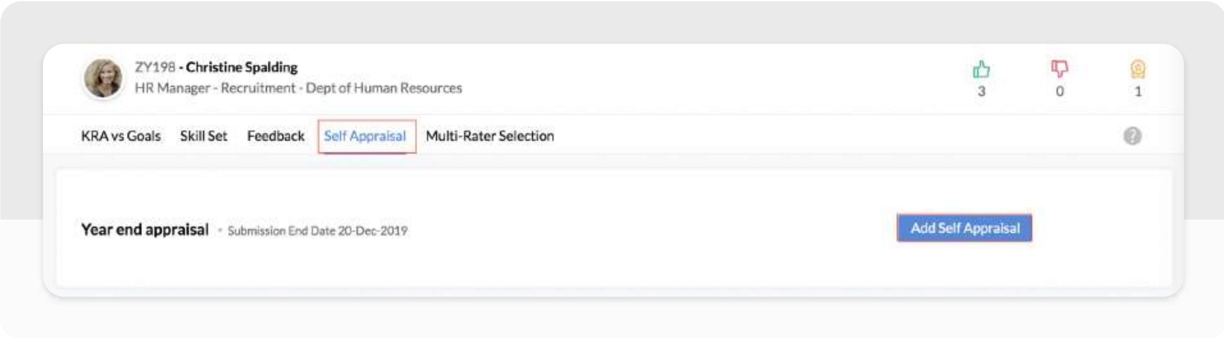
Self Appraisal is critical feedback of one's own performance. It is an opportunity for an employee to evaluate their own performance on the job. It also gives the manager a different perspective apart from their own evaluation of their reportees on the job.

Self Appraisal can be enabled while configuring an appraisal cycle.

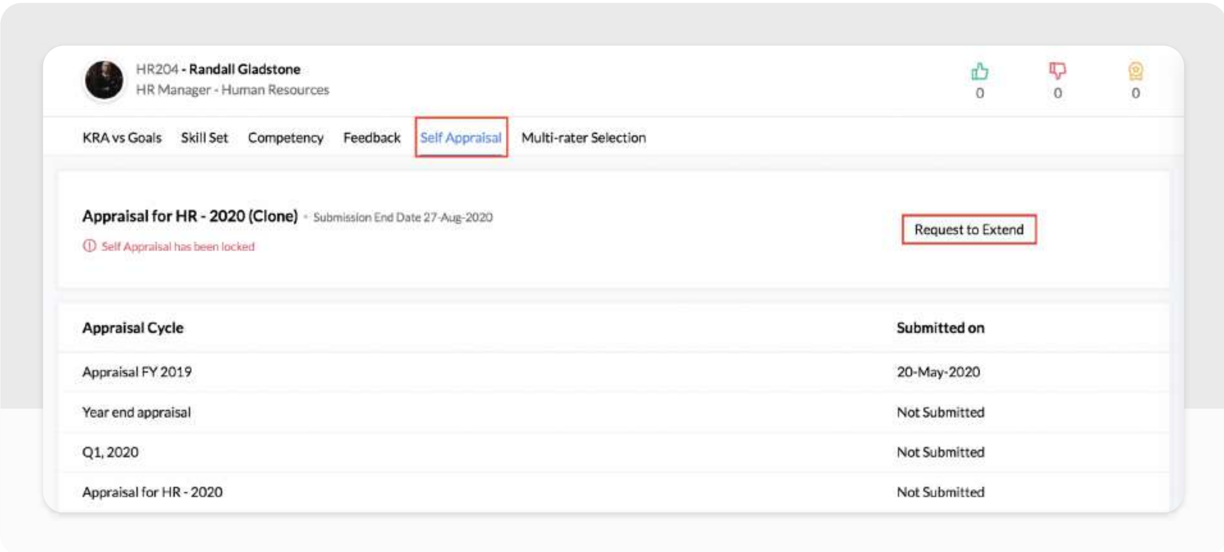
1. Go to **Settings > Appraisal Cycle > + Add**
2. Check *Self-Appraisal* under *Appraisal Process Configuration Details*
3. Give a time period within which the self-appraisal is to be completed

The period chosen must be within the overall appraisal process period. Click here to know more about self-appraisal settings while configuring an appraisal cycle.

Once self appraisal is enabled, an employee can go to **My Review** and submit their self-appraisal for the current appraisal cycle under the **Self Appraisal** tab



If an employee has missed the deadline for self appraisal submission, they can request to extend the review period, and if approved, can submit their self appraisal.



Multi-rater feedback

Multi-rater feedback is another useful method by which a manager can assess the performance of their reportees by considering feedback from other teams with whom their reportee has worked with. For example, if an employee is working on a project with some other employees, then their rating is taken for the multi-rater feedback.

The Multi-rater review is done by making use of a form. So, as the first step, you need to first enable the Multi-rater Review form. To do this

1. From your home page, go to **Settings > Customization > Forms**
2. Select **Performance** under *Service Name*
3. Ensure that the Multi-rater Review form is enabled

This form can be customized with fields as per your needs. In case you are not using KRA or Goals to assess performance, you can add some fields based on which you would like to have the feedback given by the Multi-raters. You can also use this in addition to the KRAs or Goals.

Once you have enabled this form, you will be able to see the Multi-rater feedback section in the Appraisal Cycle.

There are many ways of selecting Multi-raters.

1. Employees can select the multi-raters themselves. In this case, if Approvals are configured, then the Reporting Manager gets to approve/reject the multi-raters who are chosen by the employee.
2. Reporting Manager/Admin selects the multi-raters. in this case, it does not go for approval as the manager is making the selection directly.
3. Reviewers can select the multi raters by default.

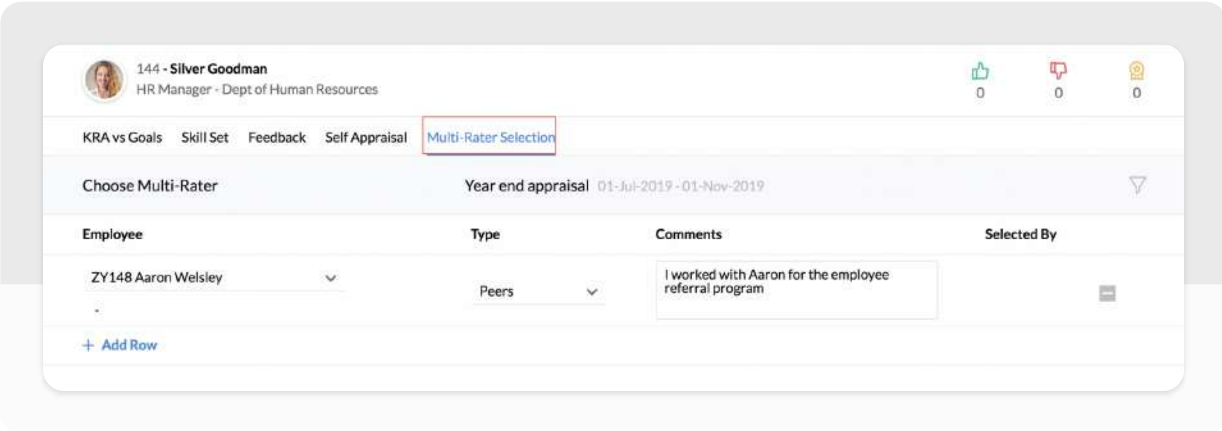
Multi-rater feedback can be enabled while configuring an appraisal cycle.

1. Go to **Settings > Appraisal Cycle > + Add**
2. Check Multi-rater under *Appraisal Process Configuration Details*
3. Give a time period within which the multi-rater feedback is to be completed
4. Define if the only the Reporting Manager or the Employee/Reporting Manager both select the Assessors
5. Define the minimum and maximum number of appraisers that can be selected

The period chosen must be within the overall appraisal process period. Click here to know more about multi-rater related settings while configuring an appraisal cycle.

Multi-rater feedback process:

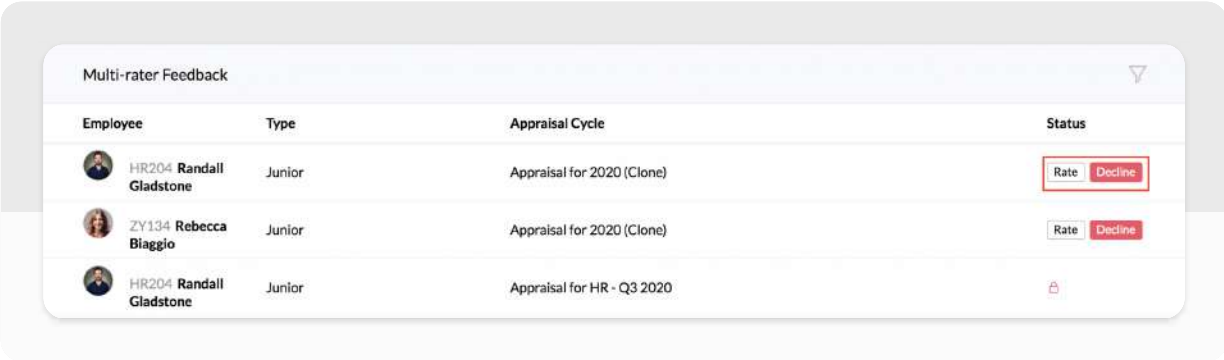
1. An employee must go to **Performance > My Reviews** and select their multi-raters under the Multi-Rater Selection tab. Once the employee selects, it will be sent for approval



- Admins, managers and reviewers can select Multi-raters by going to **Performance > Multi-Rater Selection**. Managers will be able to select multi-raters for their reportees alone.

2. Once an employee sends their selection for approval, the manager/admin can approve or reject under *Performance > Multi-Rater Approvals*

3. Once approved, the chosen multi-rater will be requested to give their rating under *Performance > Multi-Rater Feedback*

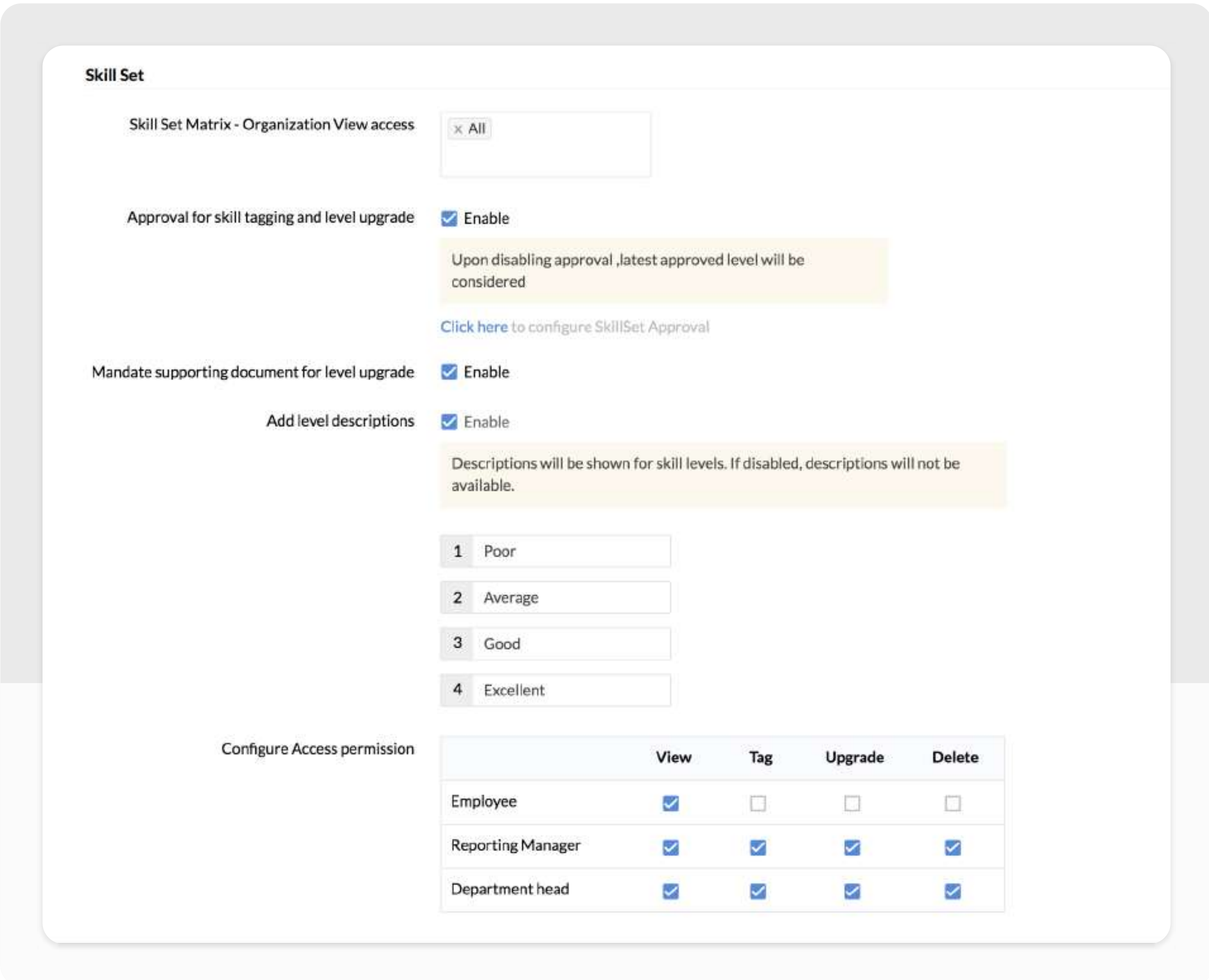


4. The approver can click **Rate** to give their feedback. If they do not want to give feedback, they can click **Decline**

When a manager is giving their review, they will be able to use the multi-rater feedback to make a more informed decision about the rating they are going to give their reportees.

Performance Settings

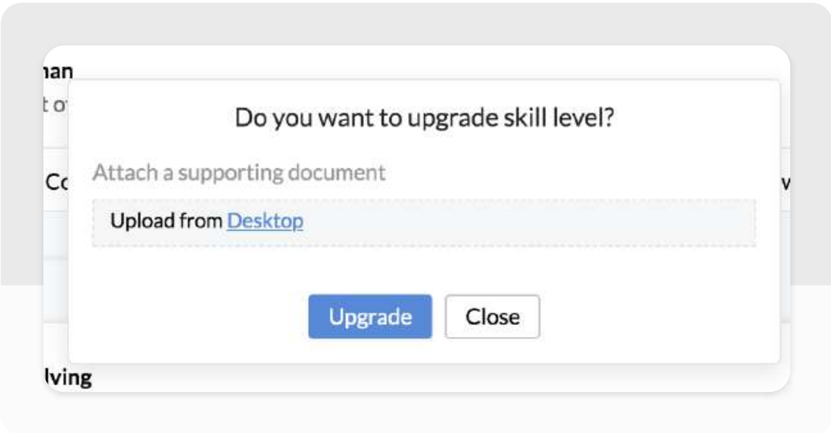
Skill Set Settings



Skill Set Matrix - Organization View Access: Define skill set matrix access by selecting the applicable roles. Only the users in these roles will have access to the skill set matrix.

Approval for skill tagging and level upgrade: When this option is enabled, an employee needs to get an approval before they can upgrade their own skill level.

Mandate supporting document for level upgrade: Once this option is enabled, when trying to upgrade the skill level you will get this popup message.



The level will be upgraded only after a supporting document is attached.

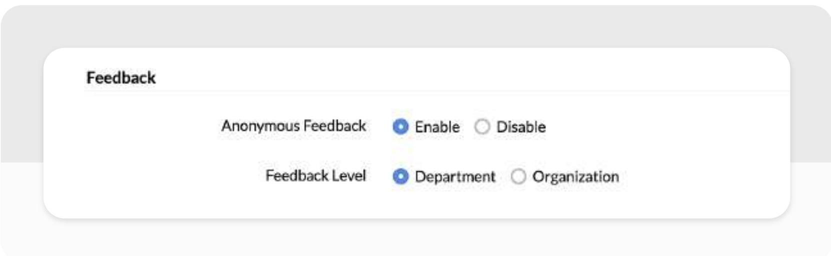
Add level descriptions: By default, the skill levels are 1,2,3 and 4. You can however choose to denote each number with a relevant description. By enabling this option, the level descriptions you add will be displayed at the bottom of the skill set page.

Configure Access permission: Define the actions that can be performed related to skill sets by the users in these roles. The actions include view, add, upgrade and delete.

***NOTE:** View access needs to be selected in order to enable tag, upgrade and delete access permissions.*

Feedback Settings

If you want to encourage employees to give their feedback without having to reveal their identity, you can Enable it for Anonymous feedback.



Feedback level defines to whom you will be able to give feedback. If Department is chosen, then you will be able to view and give feedback to all members within your department. If Organization is given, then you can give feedback to anyone in the organization.

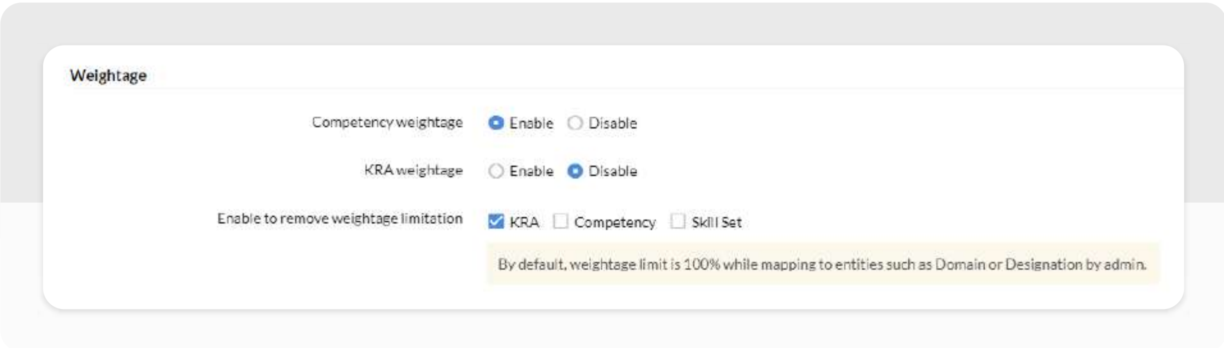
Additionally, let us understand how feedback level and the feedback modules interact.

Let's assume that feedback is enabled for the Department level and Peer-to-Peer feedback has also been selected. In such a case, an employee will be able to give feedback to all in their department, except to their direct line of reporting hierarchy.

In another configuration, let's say that feedback is enabled for the Organization level and 360-degree feedback has also been selected. In such a case, an employee will be able to give feedback to everyone in the organization.

Click here to learn more about the Feedback module.

Weightage settings



Competency Weightage: Enable to have a definable weightage value for Competencies. When disabled, you can only tag Competency, weightage value for Competencies cannot be defined.

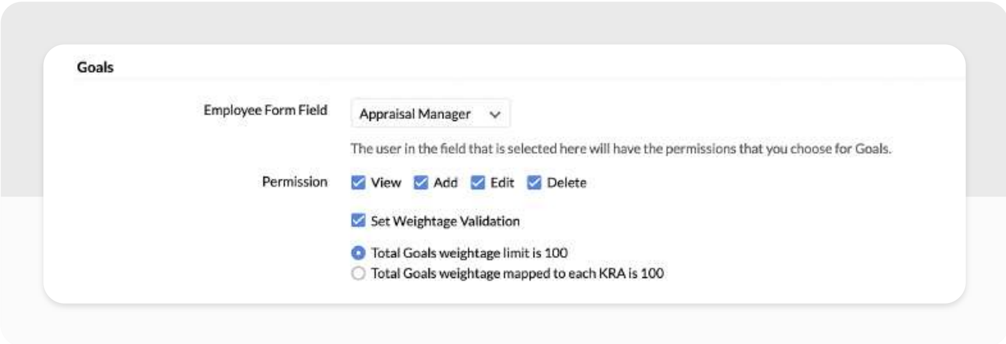
KRA weightage: When managers are tagging KRAs to their reportees, define if you want them to enter a weightage for KRA. When disabled, KRAs can only be tagged with no option to enter a weightage.

Enable to remove weightage limit: When an admin is mapping KRAs, Competencies, or Skill Sets to entities such as Domain, Designation or Department, the total weightage limit is, by default 100%. This settings helps you remove this restriction by selecting the modules for which you want to allow total weightage to exceed 100%.

When an admin is mapping KRAs, Competencies, or Skill Sets to entities such as Domain, Designation or Department, the total weightage limit is, by default 100%. This settings helps you remove this restriction by selecting the modules for which you want to allow total weightage to exceed 100%.

Goals settings

Using this setting, you can additionally give permissions to the other employees to access goals. Select the custom employee field for whom you want to give permission. Select from view, add, edit and delete permissions.



You can also enable weightage validation for goals - selecting either to limit total goals weightage to 100 or total goals mapped to KRA weightage limit to 100.

Additionally, there are settings categorized under Employee review feedback, Nine-box matrix- edit categories, Rename terminology, Customize section in review, Export settings, Multi-rater Types and more. Learn more.

ADDITIONAL FEATURES IN PERFORMANCE MANAGEMENT

Continuous Review:

Continuous Review is a performance management service that takes place throughout the year. This feature can function cohesively with the Goals feature or KRA vs Goals feature in Zoho People. Learn more.

Performance Reports:

Zoho People has detailed performance reports. Learn more.

Normalization:

Normalization is a process of adjusting employee ratings according to the overall defined ideal rating distribution in the organization. It is part of an appraisal cycle. Learn more.

Salary Hike:

Salary hikes are part of the appraisal cycle and can be configured through a series of steps. Learn more.

Performance Administrator:

Exclusive administrator access to an user to access performance data. Learn more.

LEARNING MANAGEMENT SYSTEM (LMS)

LMS is an intuitive, cloud-based learning management system that streamlines training across your organization, enabling faster and better e-learning experiences. LMS offers end-to-end course creation, customization to provide an engaging, integrated learning experience.

LMS includes two types of courses:

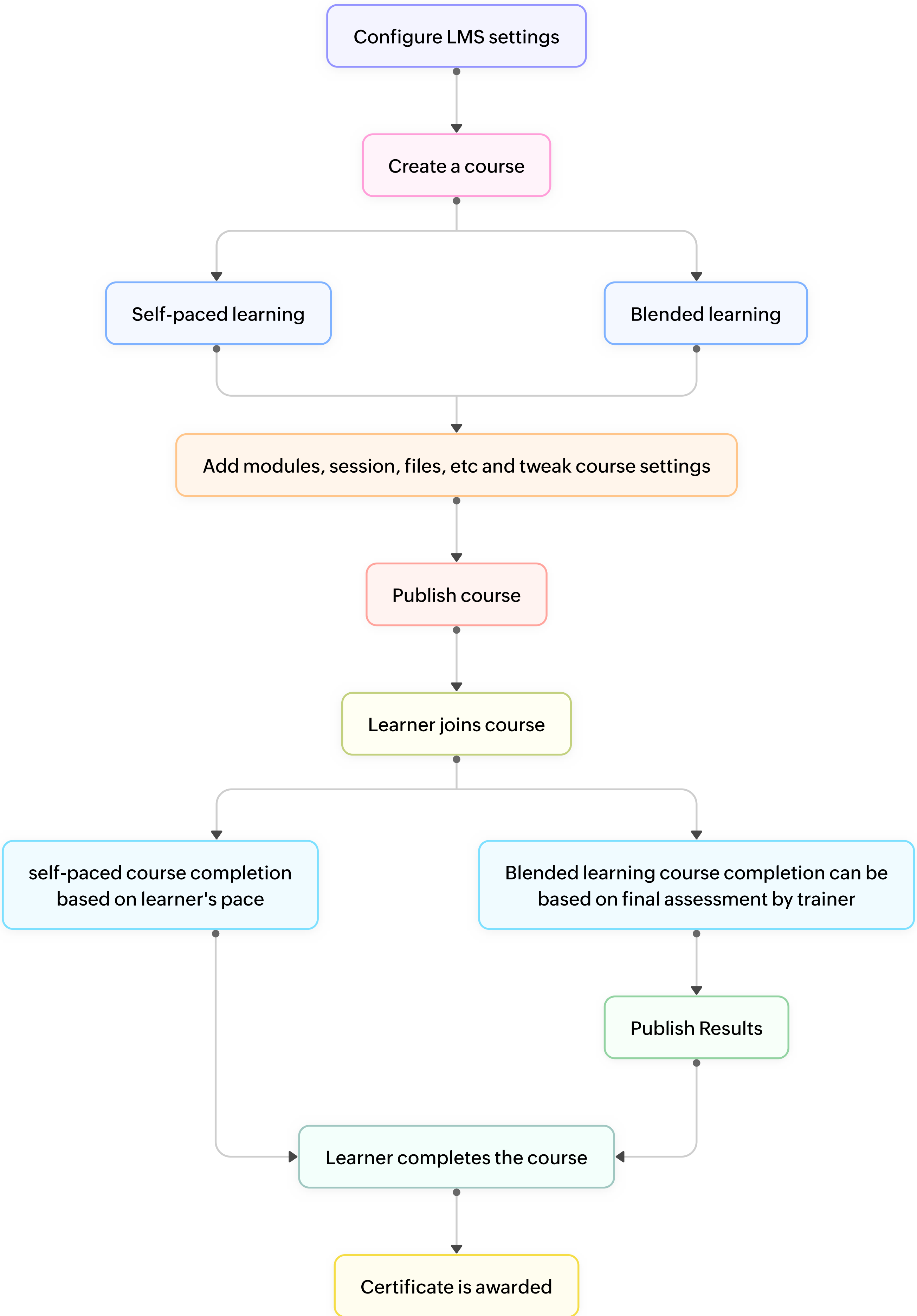
Self-paced learning courses: Type of learning where the learner moves from one subject to the next based on how much they have understood. The content can be any reading material or tutorials that do not involve a trainer.

Blended learning courses: A combination of classroom and self-paced online training facilitated by a trainer. Commonly concludes with an assessment.

E-Materials: Online Manuals or reference materials to instruct employees. It does not involve course completion and no trainer is required.

A learning plan can also be created, which can consist of several courses grouped into levels. handpicked for a specific designation, role or employee type.

This is the general flow of LMS


Configure LMS settings
Create a course
Self-paced learning
Blended learning
Add modules, session, files, etc and tweak course settings
Publish course
Learner joins course
self-paced course completion based on learner's pace
Blended learning course completion can be based on final assessment by trainer
Publish Results
Learner completes the course
Certificate is awarded

Based on the type of course (Self-paced / Blended) the available features are varied:

For self-paced courses:

- File
- Link
- Online Test
- Offline Test
- Content

For blended courses:

- File
- Link
- Session
- Assignment
- Online Test
- Offline Test
- Content

Here is a short introduction to the features mentioned above:

File: Add any file, that is a course related learning material that you want learners to go through or learn. Example: a pdf, ebook, flow-chart image file etc.

Link: Link is useful when you want learners to access a video/webpage form an external source, such as a youtube page or a Wikipedia page, etc.

Session: As the name suggests, sessions are like class room sessions in schools and universities. Single or multiple sessions can be conducted under each module. Each session will have a trainer, and the type of training can be either classroom or e-learning (or both). Sessions can be created only for Blended learning courses.

Assignment: Assignments can be used to help learners practice what they have learnt. An assignment topic/material is uploaded as a Resource file, which the learners can download and write offline. Assignments can also carry marks and can be included as part of a graded course.

Offline Test: An offline test is, in essence, involves taking up the test offline by downloading the attached question material. Since this test happens offline, Corrections or results calculation does not happen online like in an online test.

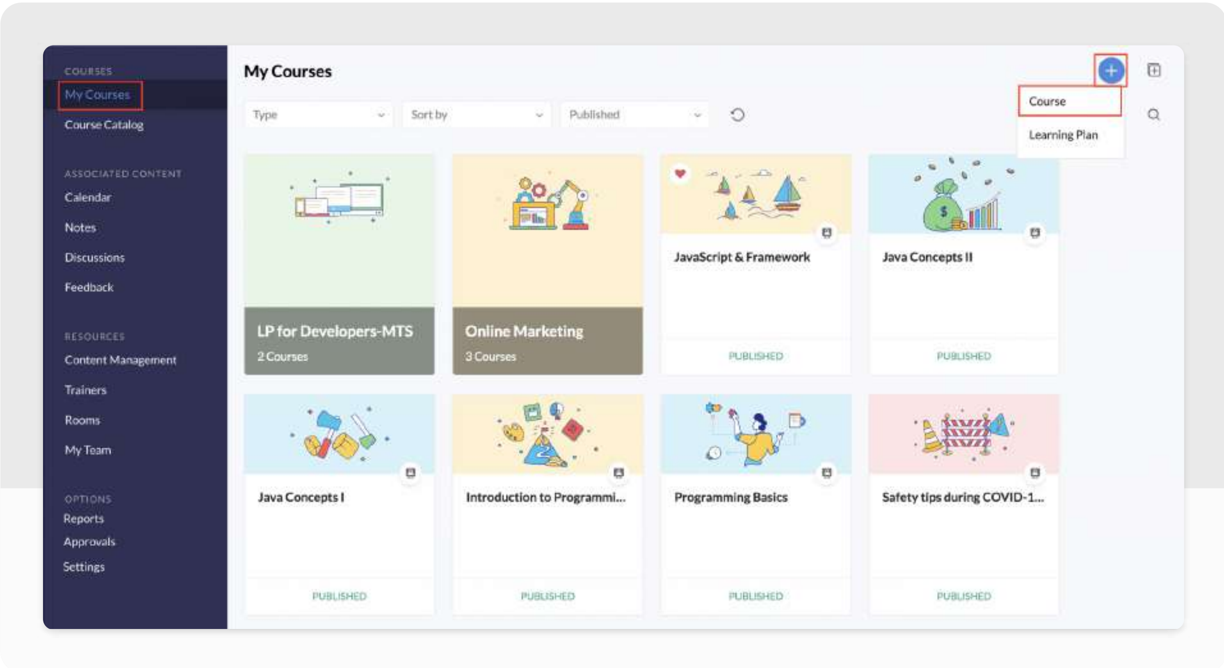
Online Test: Create a test that learners can take up online within the Zoho People interface accessible through a link, Offers multiple question types and allows easily adding questions from the question bank too.

Content: Content essentially provides a text space where you can type, format and edit using the content editor feature. Content lets you add your own custom content and make it part of the course.

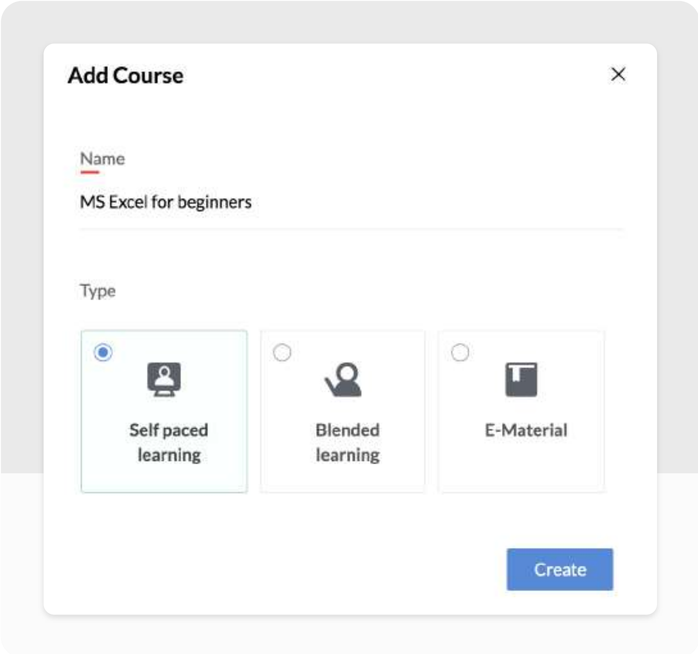
Creating a course

To create a course:

1. go to **LMS > My Courses**
2. Click the + icon and select **Course** from the dropdown



3. Enter a name and select the course type



4. Click **Create**

Now in the basics tab, the following info is covered:

Name: Give an appropriate name for the course that gives a clear notion about the subject covered.

Type: The selected type of course (Self-paced or Blended) will be auto-filled here.

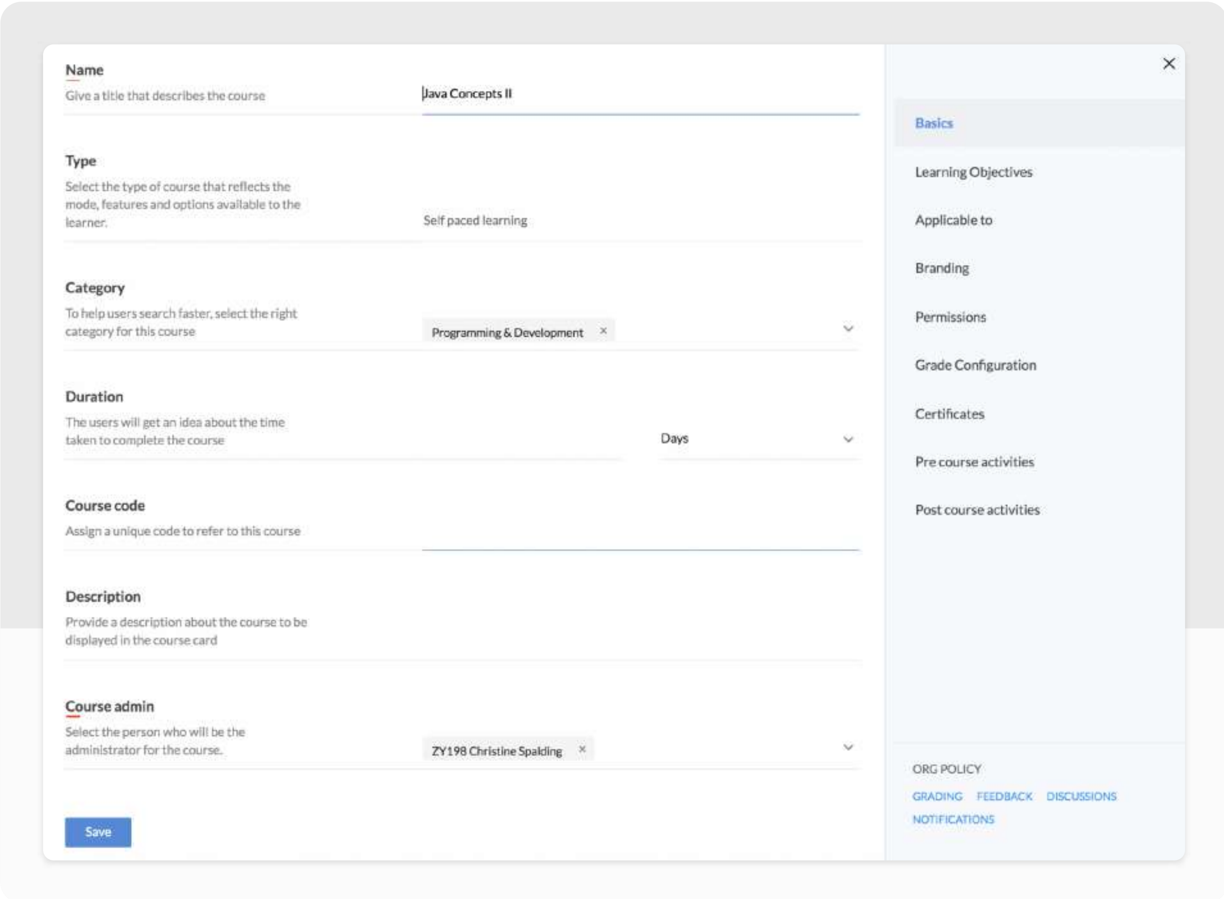
Category: Select a relevant category that will make it easy for the learner to search for the course.

Duration: Give the approximate time taken to complete the course.

Course code: Provide a unique code that is representative of the course.

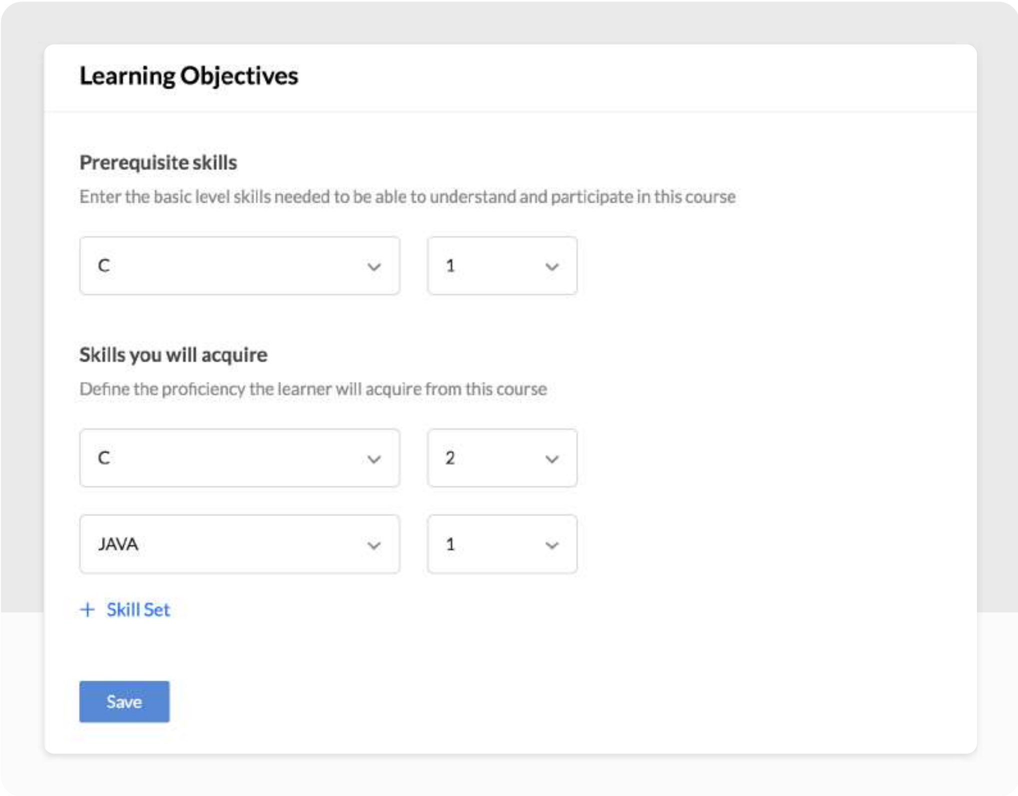
Description: Give details on the course, which will be displayed in the course card.

Course admin: Assign a course admin who will manage this course.



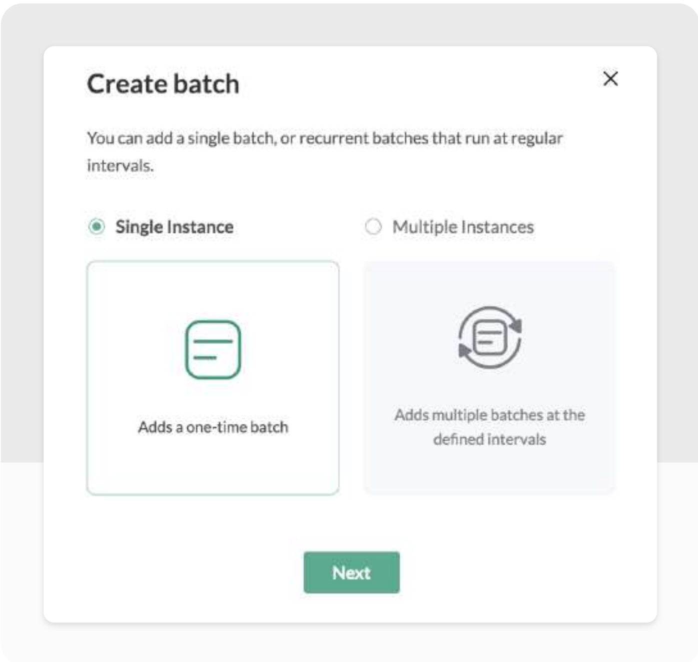
5. Learning Objectives:

These settings clarify at whom this course is aimed — the level at which the learner must be to enroll in the course (Prerequisite skills), the proficiency level that they will gain once they have completed the course (Skills you will acquire). More than one skill set can be added by clicking **+** Skill Set.

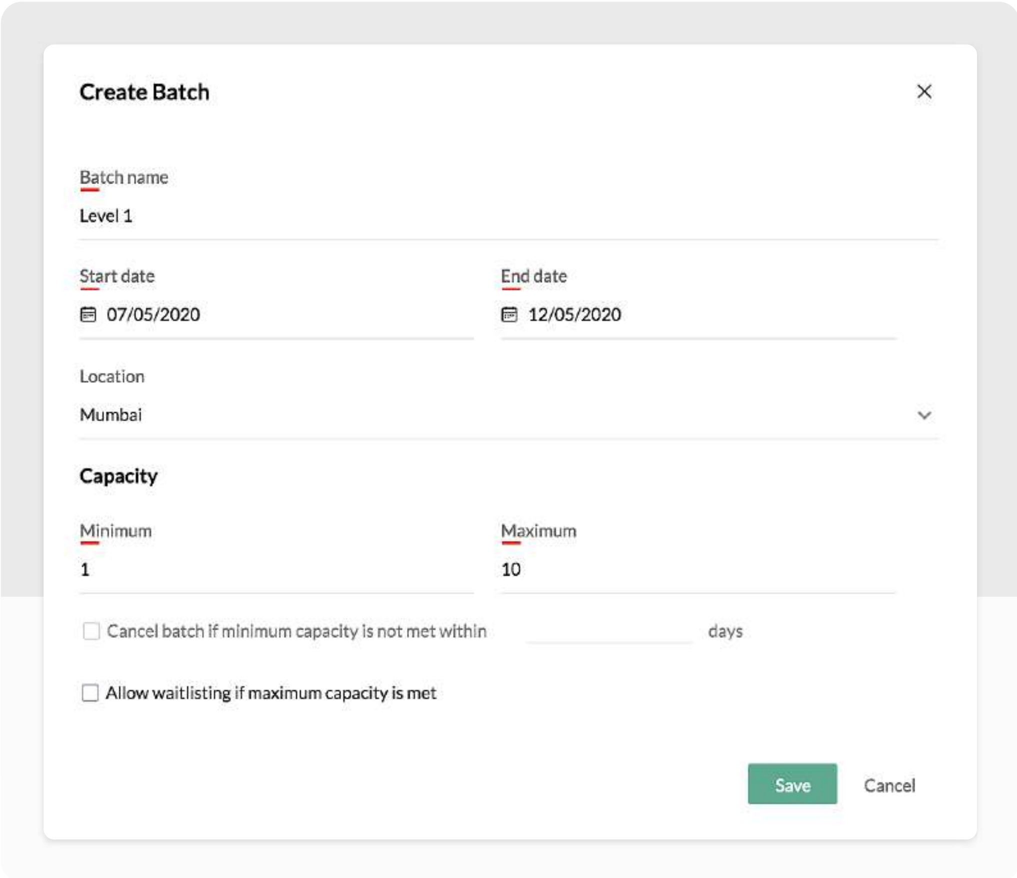


6. The Manage Batches section is for creating and configuring batches:

At least one batch must be created for a course to get published. You can create a batch that occurs once or create multiple batches using the batch scheduler.



If you want to create a one-time batch, select **Single Instance.**



i. Enter the name of the batch

ii. Select the start and end date of the batch

iii. Select the location

iv. Enter the minimum and maximum capacity of the batch

v. If you want to cancel the batch if the minimum capacity is not met within a certain number of days, enable the option and enter the number of days

vi. If you want to Allow wait-listing if maximum capacity is met, enable it

vii. Click **Save**

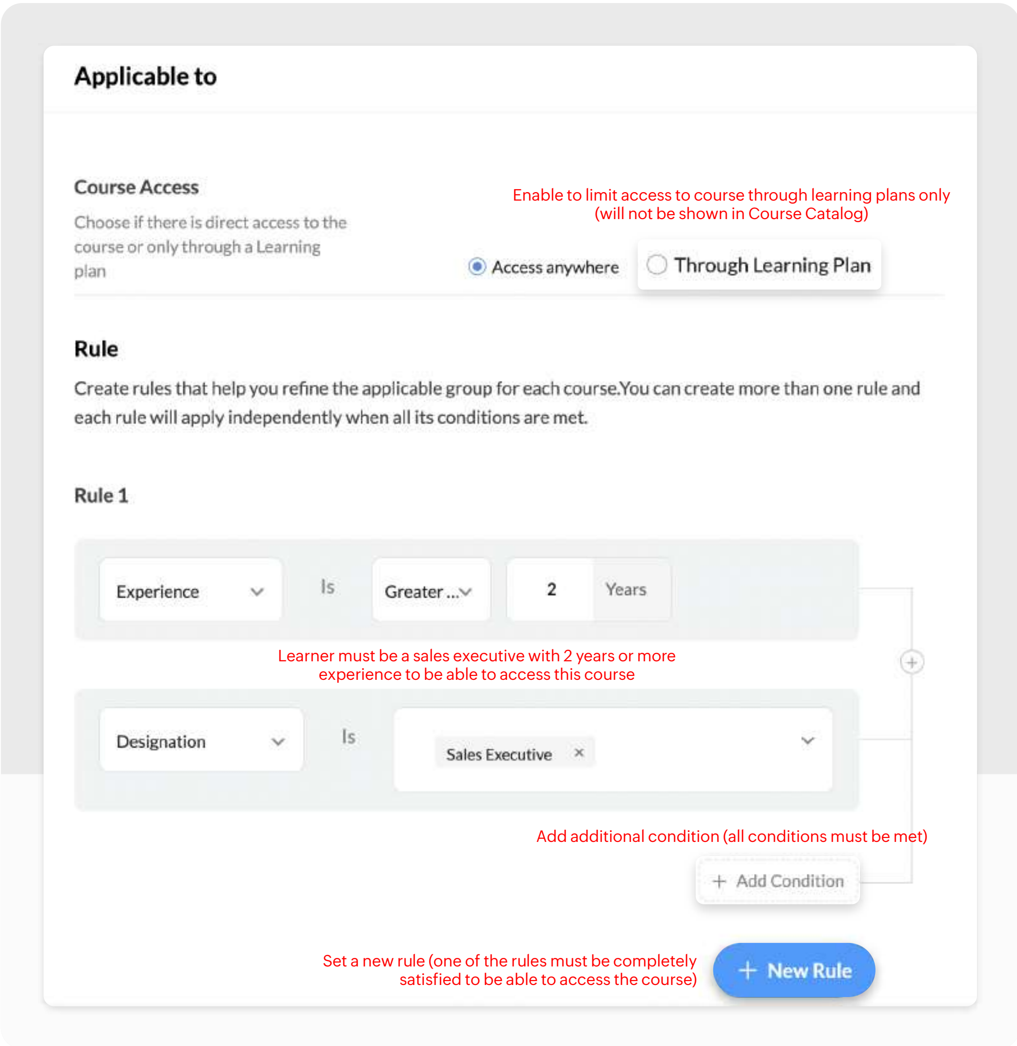
The Batch Scheduler can be used to create multiple batches that run at defined intervals. Learn more.

7. The Applicable to section lets you define who has access to the course:

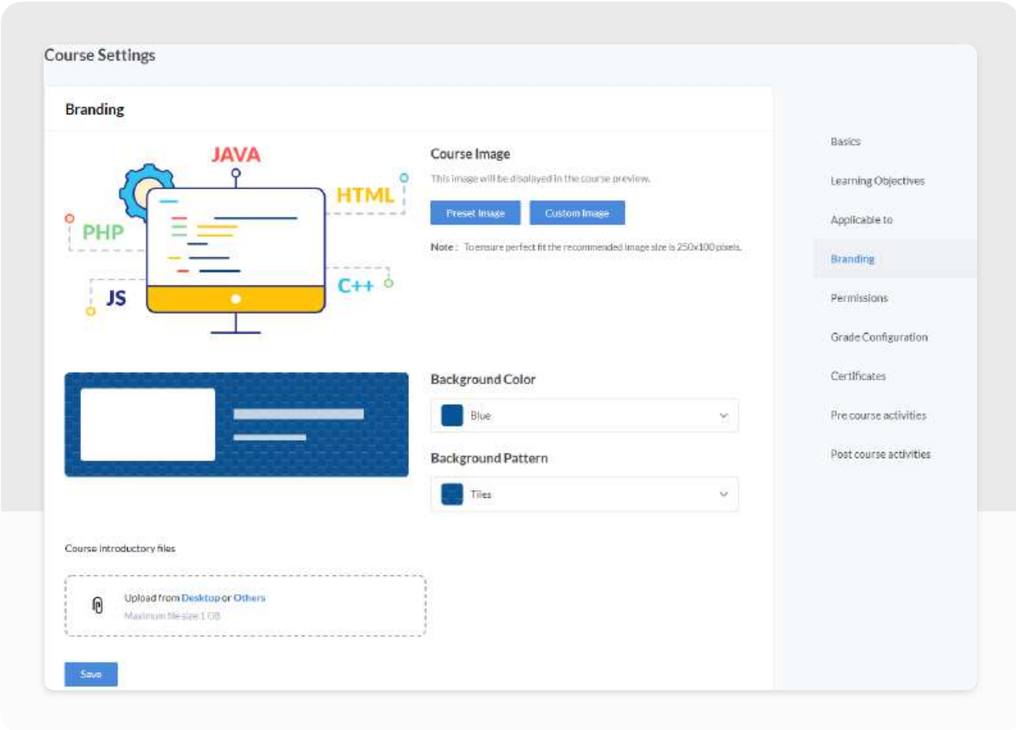
In this section, you can define who has access to a course. Access can be limited either using rules or by limiting course access through Learning Plans only. If *Through Learning* Plan option is enabled the courses will not be displayed in Course Catalog. Instead, access is only through the Learning Plan of which the course is a part of. Access *Anywhere* is enabled by default and allows access to the course through the Course Catalog.

Rules helps in fine-tuning access to courses. Learners who satisfy the requirements in a rule will be able to join the course. Having multiple conditions in the same rule would mean that all conditions have to be met. Having two or more rules configured would mean that learners have to satisfy all conditions in at least one rule to be eligible.

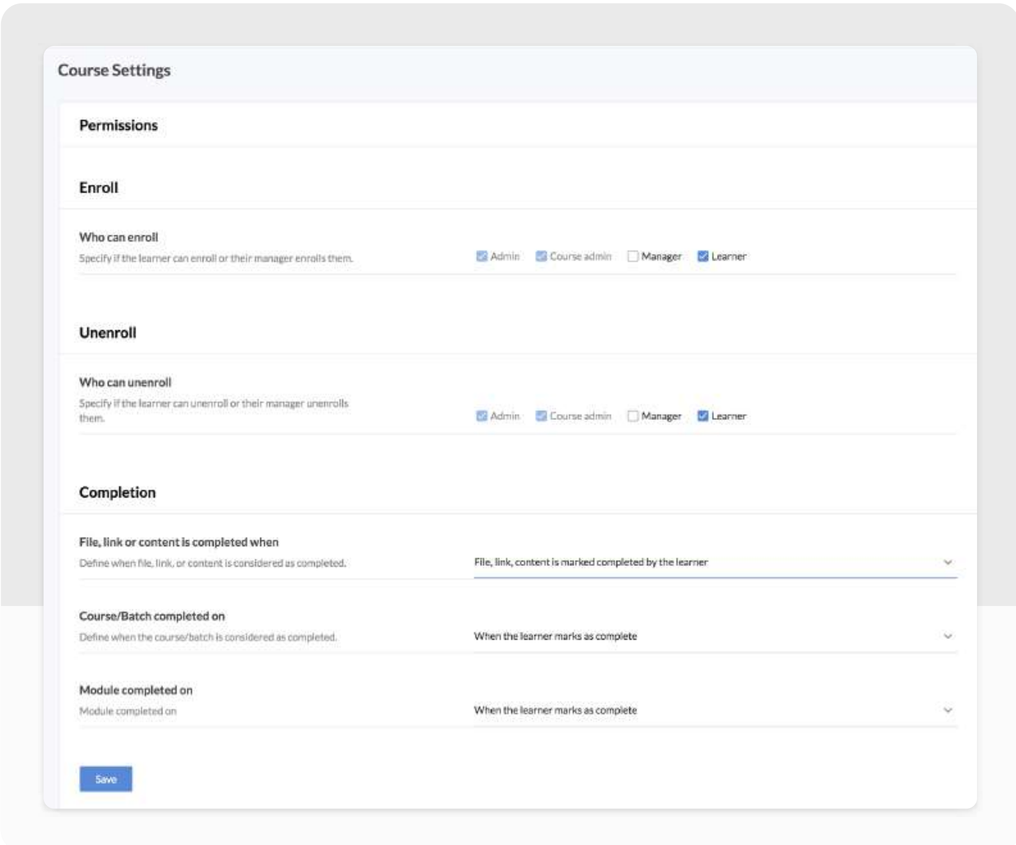
The applicable group can be defined based on the following criteria: Role, Location, Department, Designation, User, Group and Experience.



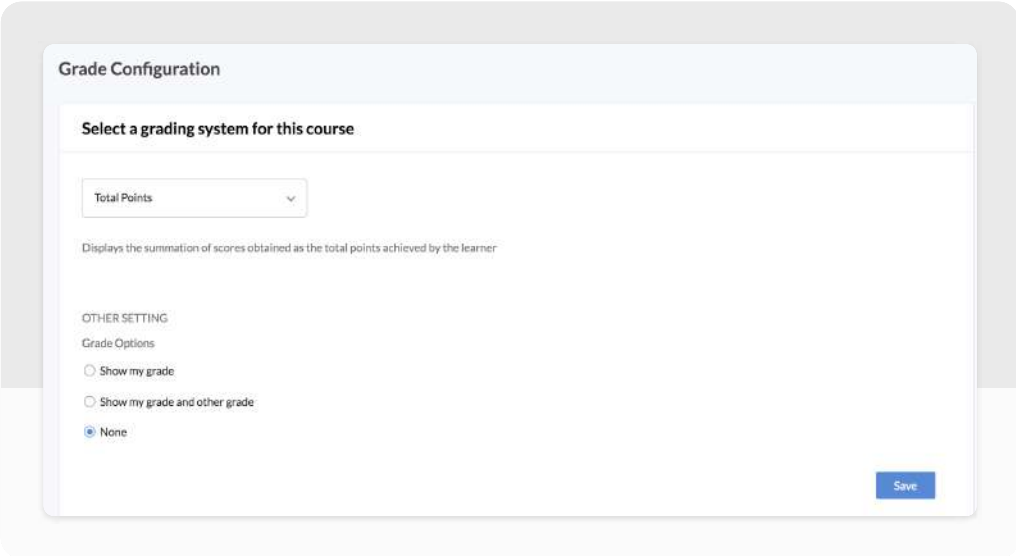
8. The Branding tab is to customize course image, banner background color and background pattern. Additionally you can upload related introductory files here



9. *Permissions* tab lets you set the required permissions for enrollment, un enrollment and for completion



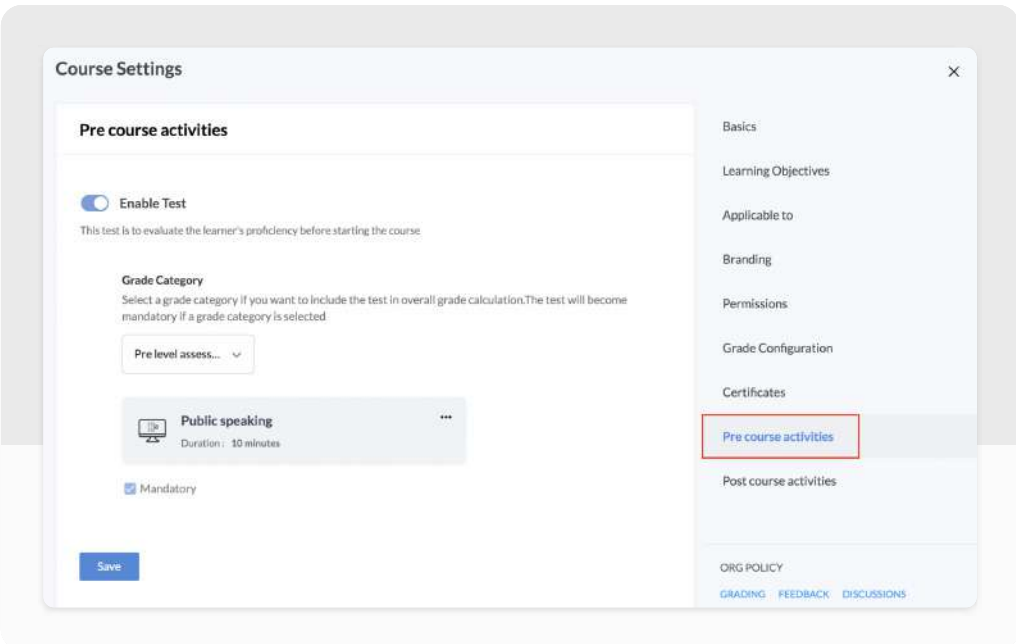
10. *Grade Configuration tab,* lets you select the grading system you want to use for this course



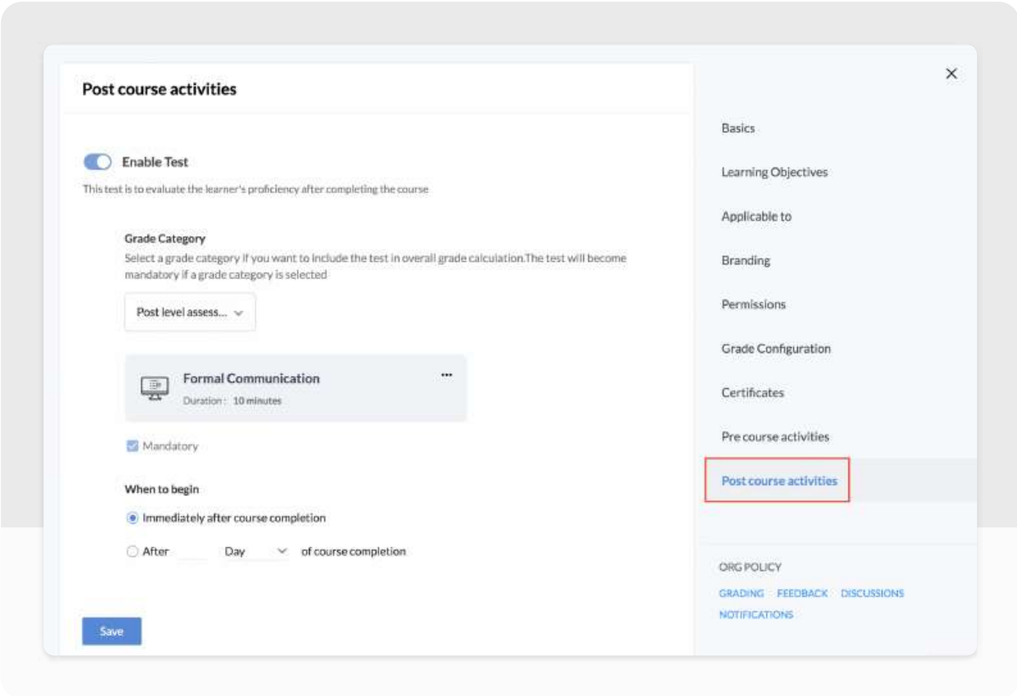
11. Use the *Certificates tab* to reward learners who complete a course by providing customized certificates. Learn more.

12. *Pre course and Post course activities:*

    Pre course activities: These are a set of activities that are given to the learner before beginning a course.



Post course activities: These are a set of activities that are given to the learner after completing a course.



Now that the course is set up, you can proceed with adding modules, sessions, files, tests etc.

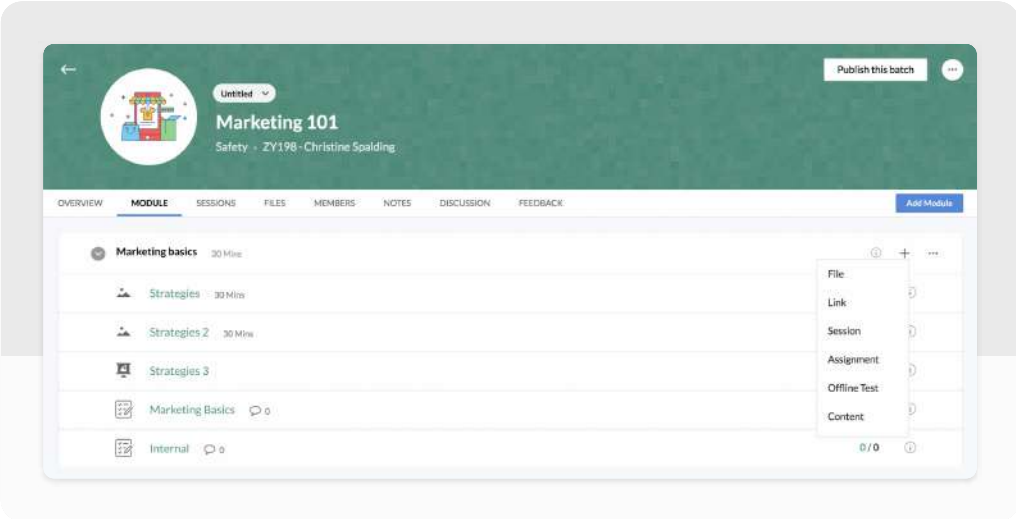
Course Cost: Using the Course Cost feature, we can add the various expenses associated with a course such as training expenses, program expenses, etc. To do this go to **Cost** tab and click **Add Expense**. Select a Currency and begin adding expenses based on expense category. Total will be calculated and displayed at the bottom section.

Feedback: Feedback as the name suggests is used to collect feedback and the learner's rating of a particular course. The collected feedback can then be used to improve the course or to understand the learner's perspective in order to create better courses in the future.

To configure feedback for a course, open a course and go to **More (ellipses icon) > Settings > Feedback**. You can use the default feedback template or create a custom feedback template to collate feedback. Click here to know more.

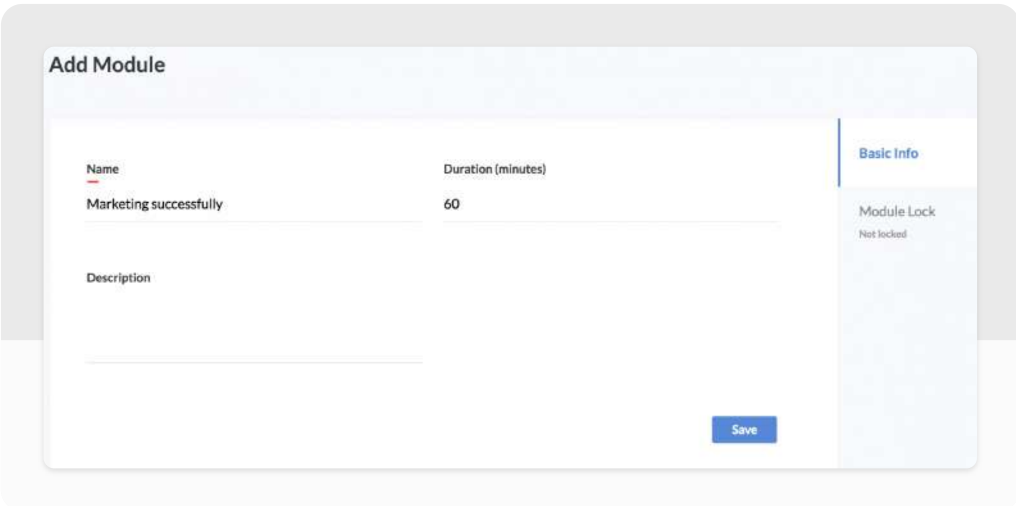
Adding a module

Once a batch or multiple batches have been created, it is imperative to create a module for your course or import modules from another course

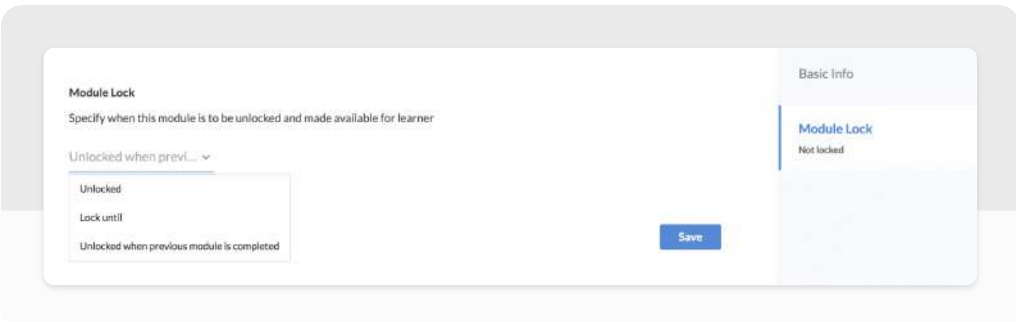


Follow the steps below to add a new module for a Blended learning course:

1. Click **Add Module**
2. Give a name and duration



3. Select the Module Lock settings



4. You can also add relevant files, links, sessions, assignments, and tests by clicking the **+** icon. All the files uploaded for the courses can be viewed under the *Files* tab

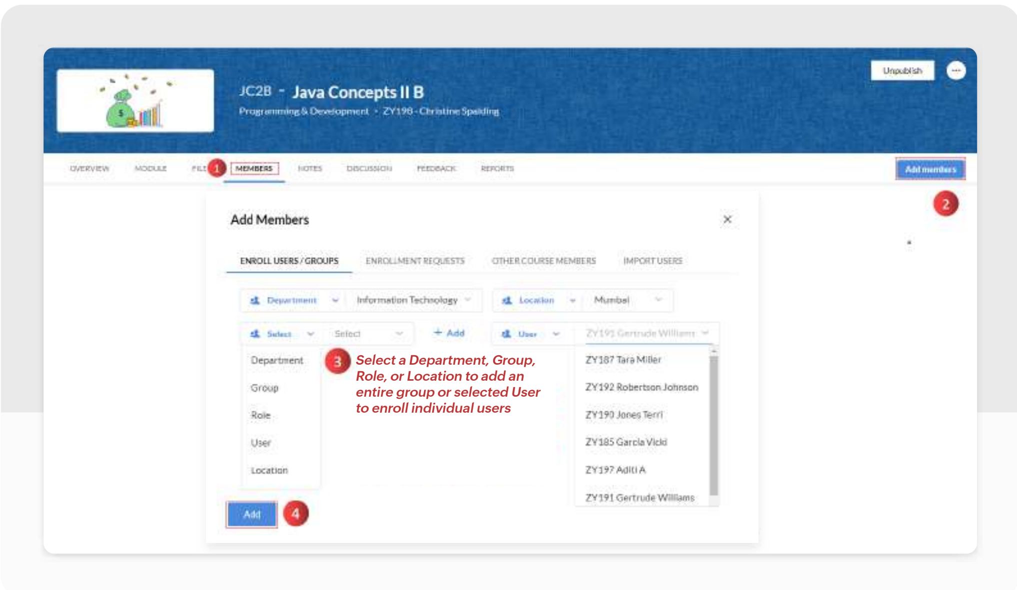
   - To add members to the course, go to the Members tab.
   - To add quick notes, go to the Notes tab. All your existing notes will also be accessible here.
   - To begin a new discussion, go to the Discussion tab and click ***Start a discussion***.
   - To share feedback, go to the Feedback tab.

Enrolling members into a course

By default, all applicable courses and learning plans can be accessed via the Course Catalogue. However, any user can be enrolled into any course by using the ***Enroll Users / Groups*** feature.

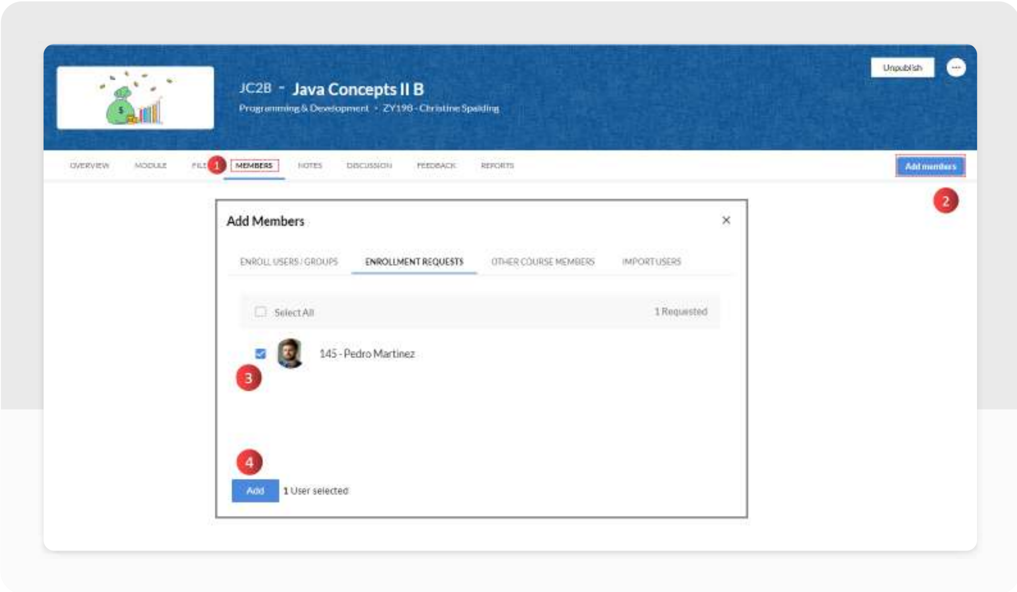
To enroll a user or a group of users:

1. Open any course and go to the **Members** tab
2. Click **Add Members** and navigate to **Enroll Users / Groups** tab
3. Using the dropdown, select a desired department, group, role, location to add entire groups or select User to add individual users
4. Click ***Add***



Enrollment Requests

If you wish to add a member who has requested enrollment, you can do so from Add Members > Enrollment Requests tab. You can view all the pending requests and accept multiple requests as well.

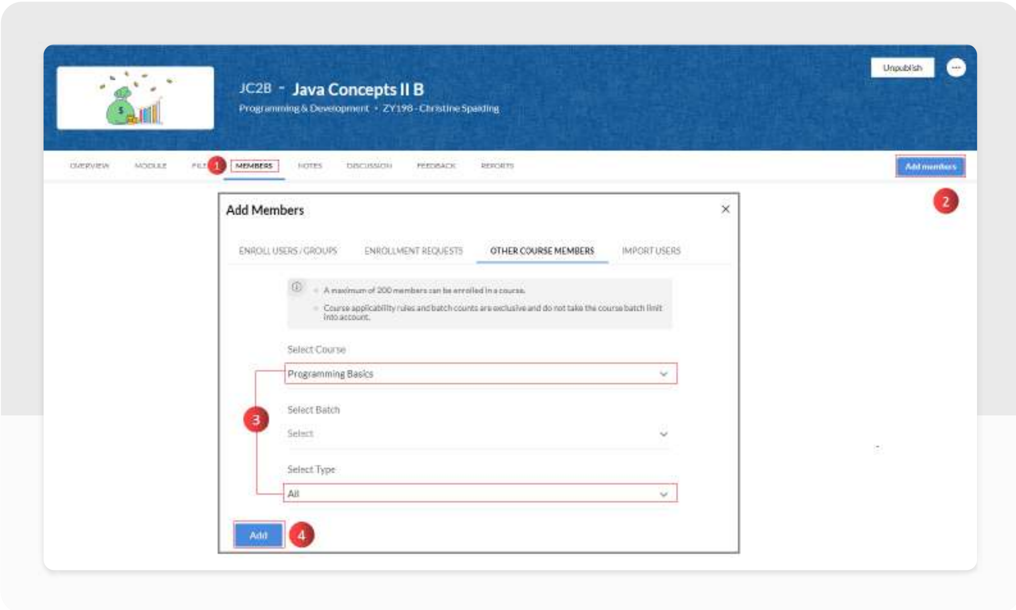


Other Course Members

Using the Other Course Members tab, members who are already part of any other course can be directly enrolled into this course.

To add other course members to this course:

1. Open the course you wish to add other group members to
2. Go to **Members** > **Add Members** > **Other Course Members**
3. Using the provided dropdowns, select a course, batch (if applicable)
4. The third dropdown has three options to vary who is to be added from the selected course: All, Completed, In progress. Make a preferred selection
5. Click **Add**



It is also possible to import users from a .XLS, .XLSX, .CSV file. Learn more.

Online Test

Create a test that learners can take up online within the Zoho People interface. Handpick questions from the question bank or use the random question generator. Custom questions can be added too. Once the learner completes a test, the result is shown. Unlike the offline test which essentially involves uploading a soft copy question paper, online tests are carried out online and is accessible through a link.

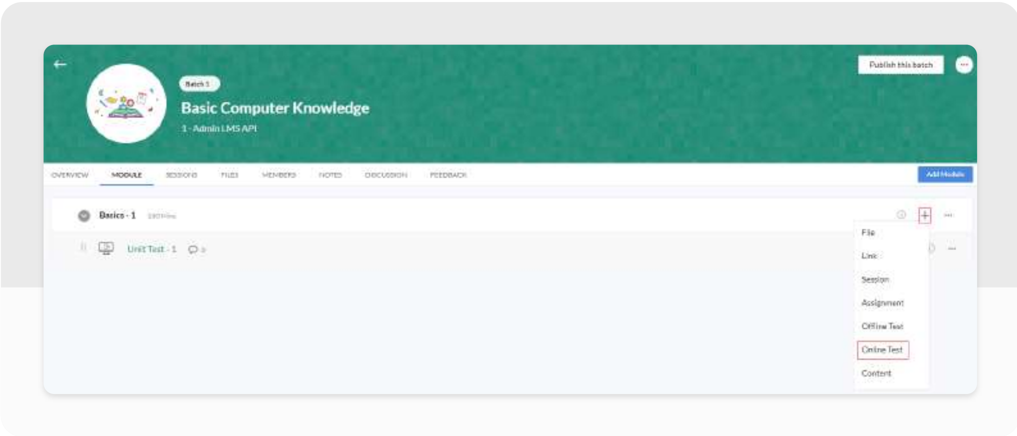
Creating an online test

1. Navigate to the module tab in an existing course (**LMS > My Courses** > select a particular course > **Module tab > + > Online Test**)

   or

   Create a new course (LMS > My Courses > + > Course > select blended or self-paced and add a new batch (a batch is only required for blended learning)

2. Now create a new module and add a test or from an existing module, click the add + icon and select Online Test

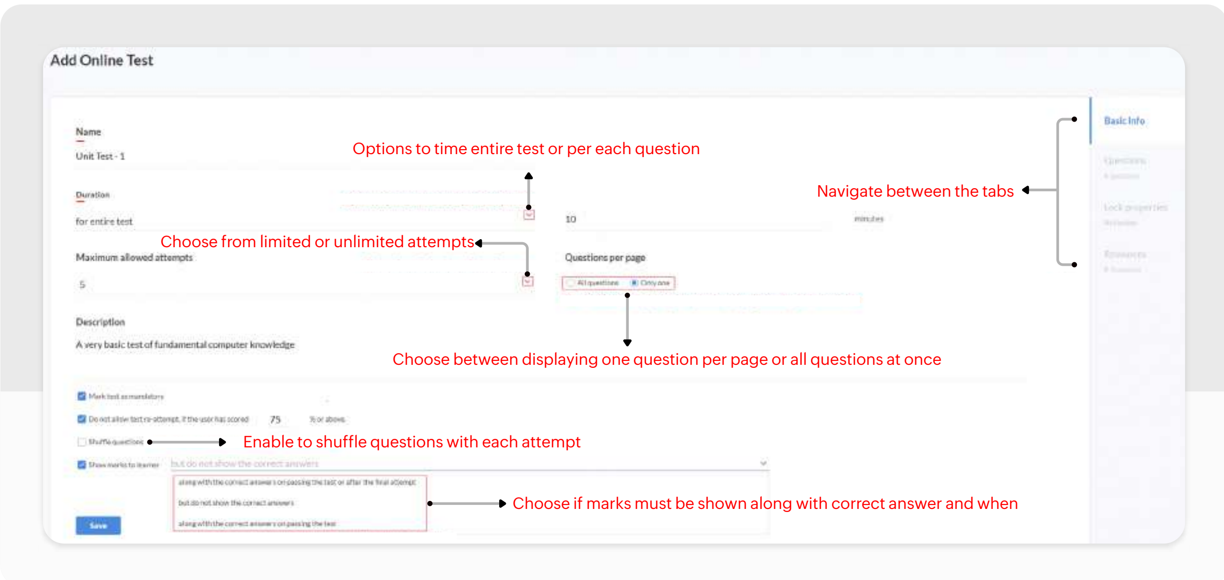


3. Now in the Add Online Test window, Enter the required basic info. Name, duration, description and you can also mark the test as mandatory if required

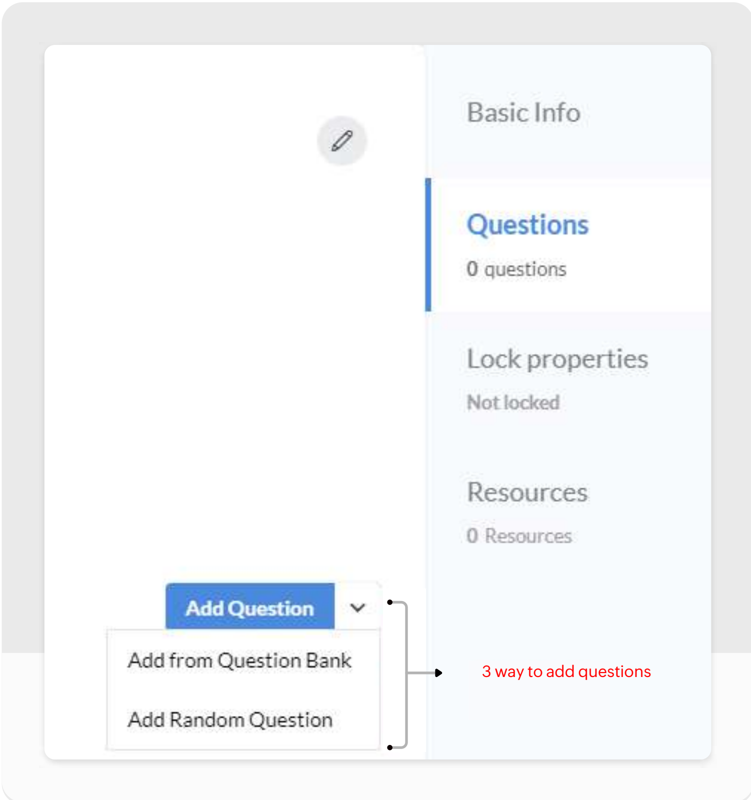
4. Use the Maximum allowed attempts option to limit the number of attempts specifically or allow unlimited attempts. You can also specify a marks percentage to decline further attempts

5. The duration can be allotted for the entire test or on a per-question basis. If you wish to display the marks of the test to the learner on completion, enable Show results to learner and choose a drop-down option to specify when and if the correct answers must be shown along with the marks

6. Once all information is added and options set, click Save and proceed to the next tab



7. It is now time to add questions, Navigate to Questions, there are 3 ways to add questions to your test as shown below



8. Adding question to your test, there are three methods:

   a) Add Questions.

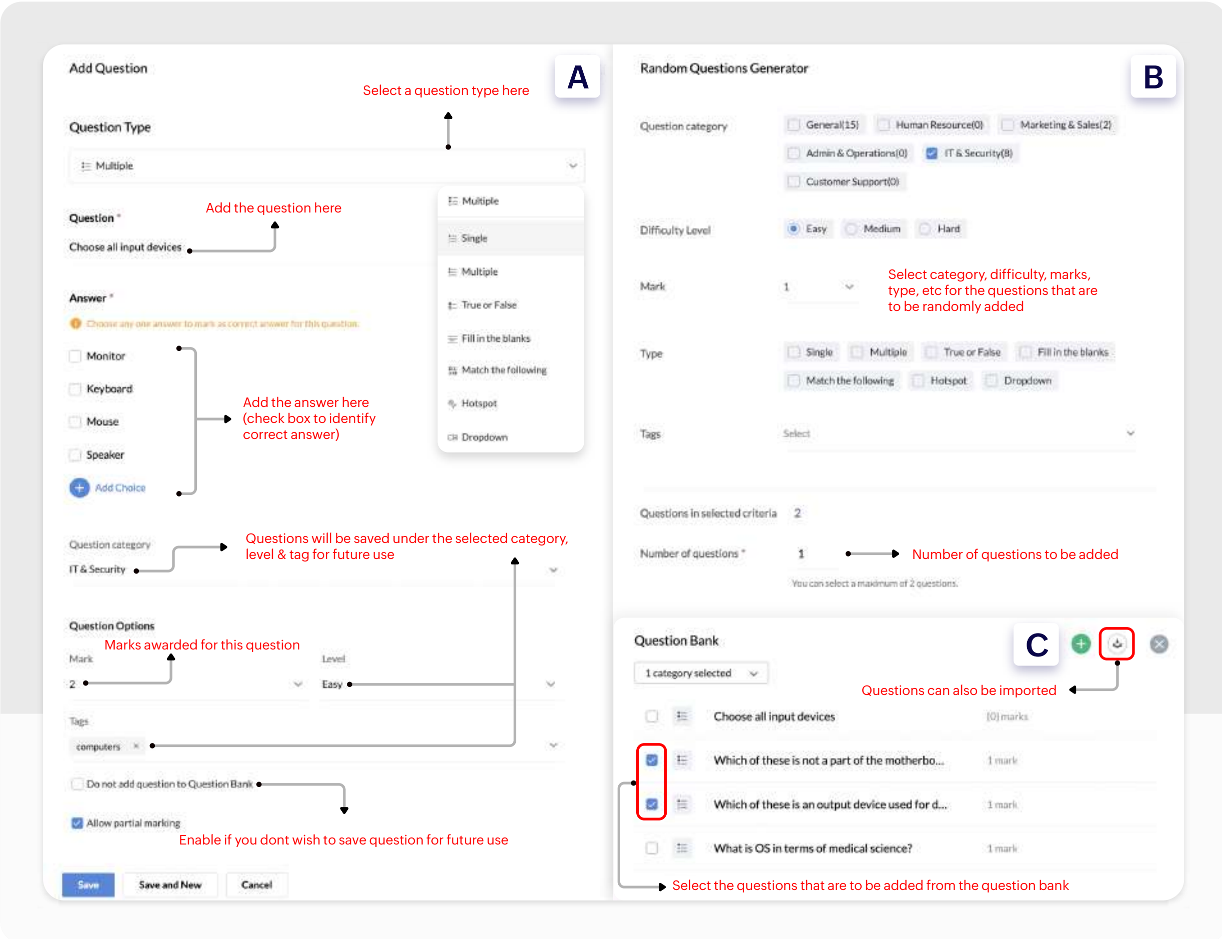
   Use this option to add your own question. There are 7 types of questions you can add to your test: Single ,Multiple ,True or false ,Fill in the blanks ,Match the following ,Hotspot ,Dropdown

   b) Using Random Question Generator.

   You can use the Random Questions Generator to automatically search and add the required number of questions based on the specified criteria from your question bank.
   (See screenshot B)

   c) Add from Question Bank

   Manually choose and add questions from the question bank (see screenshot C). When using the question bank option, you can also import questions (moodle XML format) by using the Import button.



NOTE:

- Partial marks are only available for multiple, fill in the blanks, and match the following question types.
- When Allow partial marking is disabled, (default) Candidates must get the answer completely correct to gain marks (choose all the correct choices / make the correct matches / fill the correct answers).
- When Allow partial marking is enabled, the total marks will be split between the correct choices (total marks / total number of correct answers) thus, the resulting partial marks will be awarded for each correct answer.

ADDITIONAL FEATURES IN PERFORMANCE MANAGEMENT

Grading:

In LMS, It is possible to Grade the learner based on their performance in each course. Learn more.

Learning Plan:

Learning plan in Zoho People is to help train employees with the help of a curriculum or a syllabus-like focused approach. Learn more.

Certificates:

Course Certificates can be created and used to reward learners who complete a course. In Zoho People's LMS, you can create and customize certificates from a variety of pre-designed templates and grant them to the members of the course after successful completion. Learn more.

LMS Reports:

LMS course reports includes several insightful reports that provides an insight into the various course related factors such as course attendance, progress and more. Learn more.

CASES MANAGEMENT

Handling employees’ queries is one of the biggest challenges of any HR department. As the function of HR transforms, we must strive to address the challenge of queries. Focused on handling employee queries across various categories, Cases functions like a help desk that allows employees to raise queries easily.

Cases can be configured to cater to all query handling needs and to address queries related to various departments or functions. To configure Cases, follow the steps below.

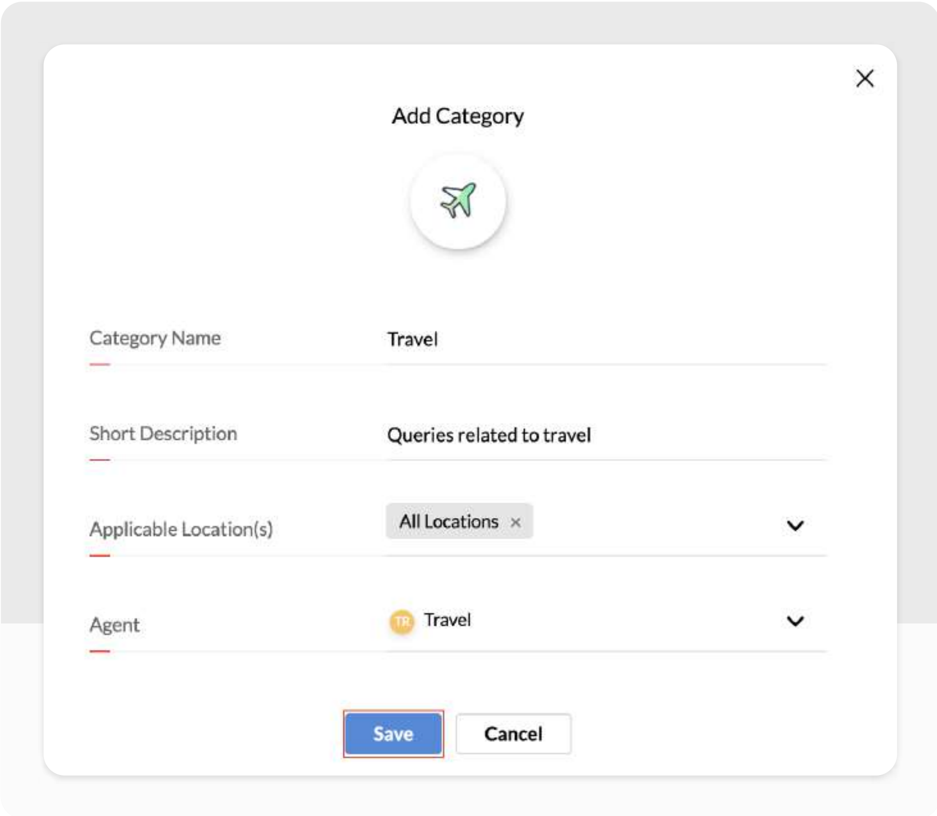
The general flow in the cases module:

1. A case or query is raised by someone in the organization
2. An individual users/group/department under the category picks up the case and work on it as Agents
3. The Agent starts work on the case if it is assigned to an individual user. If it's assigned to a group or a department, the group/department head can assign the case to a user who belongs to the group/department or the user can pick up a case assigned to their group or department
4. The agent can add comments to discuss the case
5. Agents can add and assign tasks to themselves or their reportees. Admin can assign tasks to any user in the organization
6. Once the case is completed, the status is changed

Setting up cases

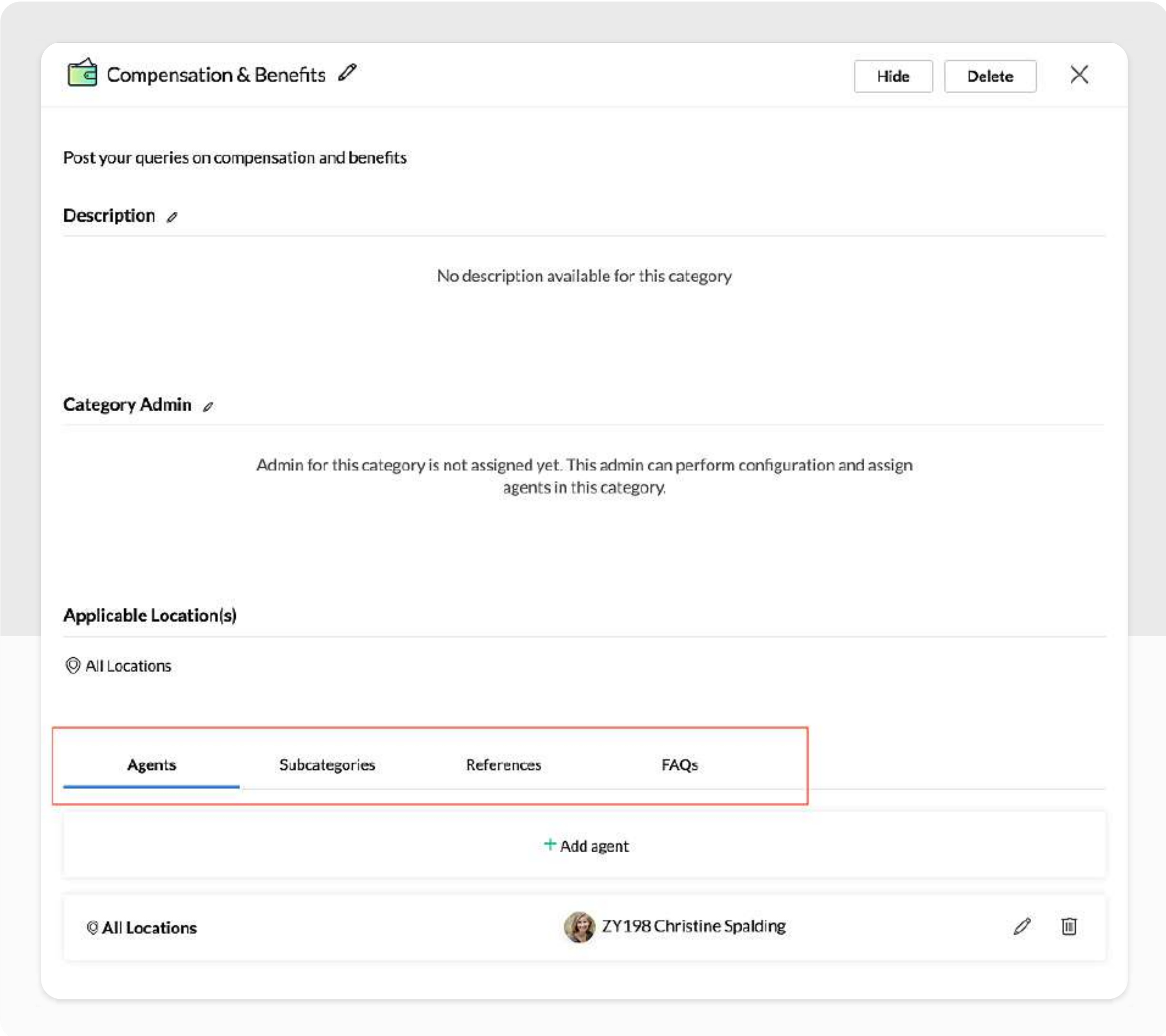
Adding a category

1. From your home page, go to **Cases > Settings > Categories > Add Category**
2. Give a name and choose an icon to match the category
3. Give a short description



4. Select the locations under *Applicable Locations*.
5. Select the agent for this category.
6. Click **Save**

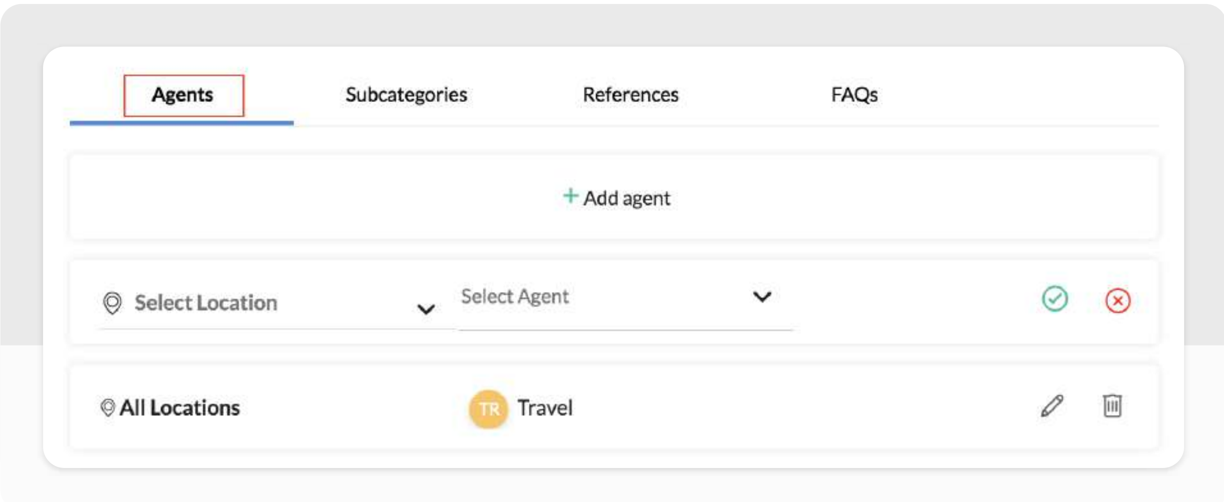
The new category is now in a draft mode.



Before publishing the category, the following actions can be done:

Adding an agents

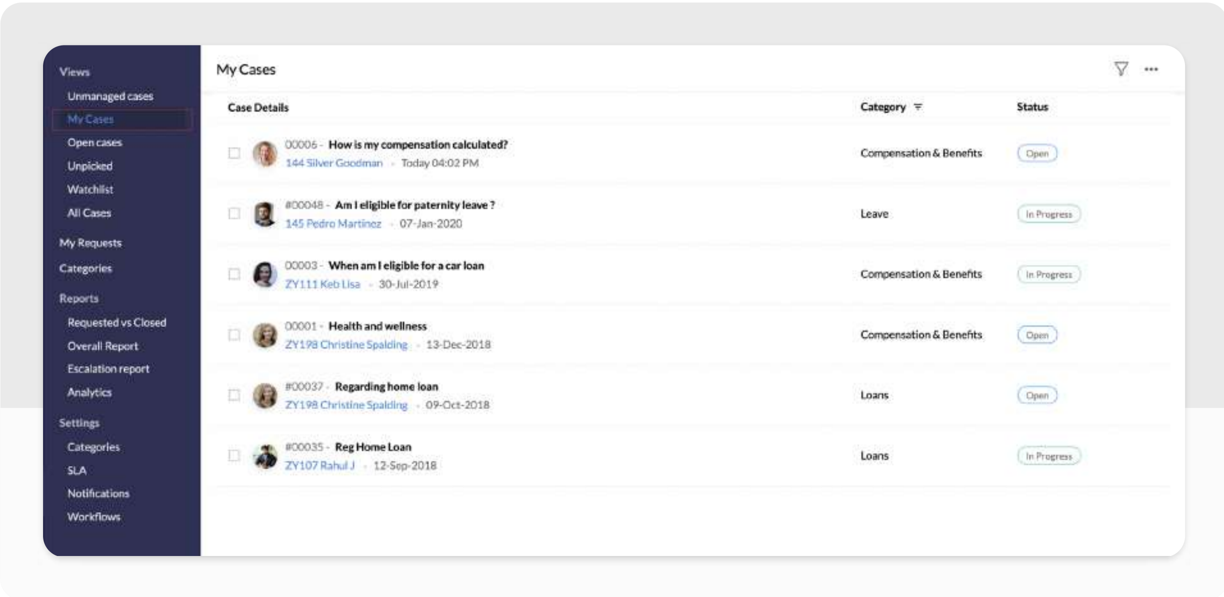
Tag more agents to specific locations.



Viewing cases

The Views tab under Cases provides different views by categorizing the cases into subsets.

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

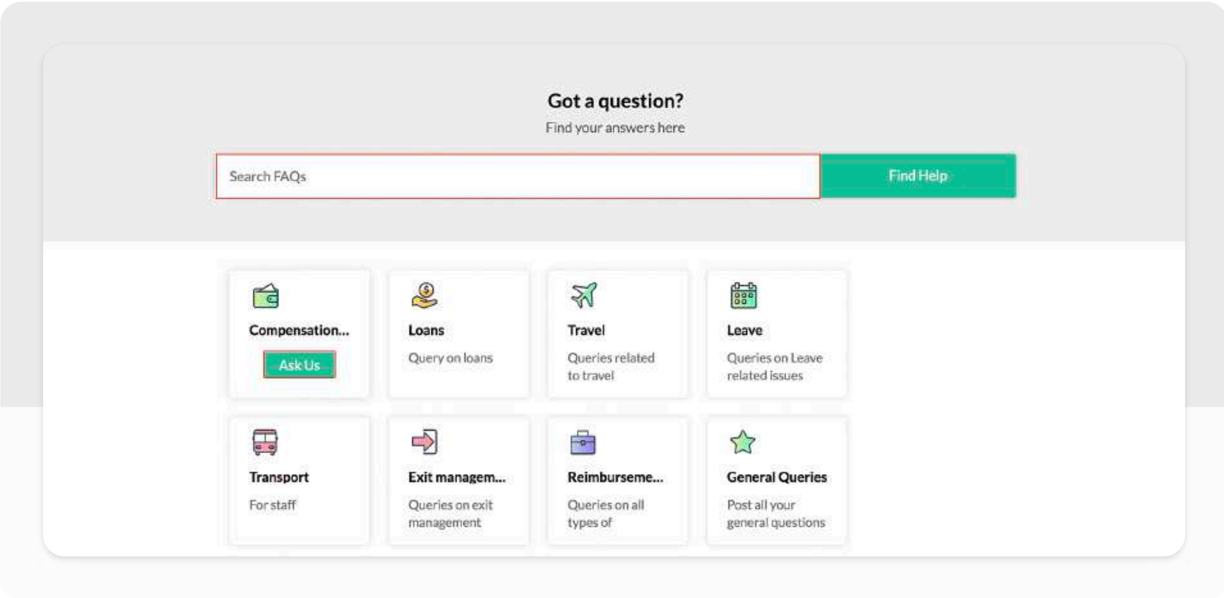


2. **Open cases**: All cases with an Open or In-Progress status will be shown
3. **Watchlist:** All cases in which the user has been @mentioned will be shown
4. **Unmanaged:** All cases that are yet to be assigned to an agent by the category admin will be shown
5. **Unpicked:** All cases which are assigned to a department or group but not to an agent yet will be shown
6. **All cases:** The admin will be able to view all the cases listed

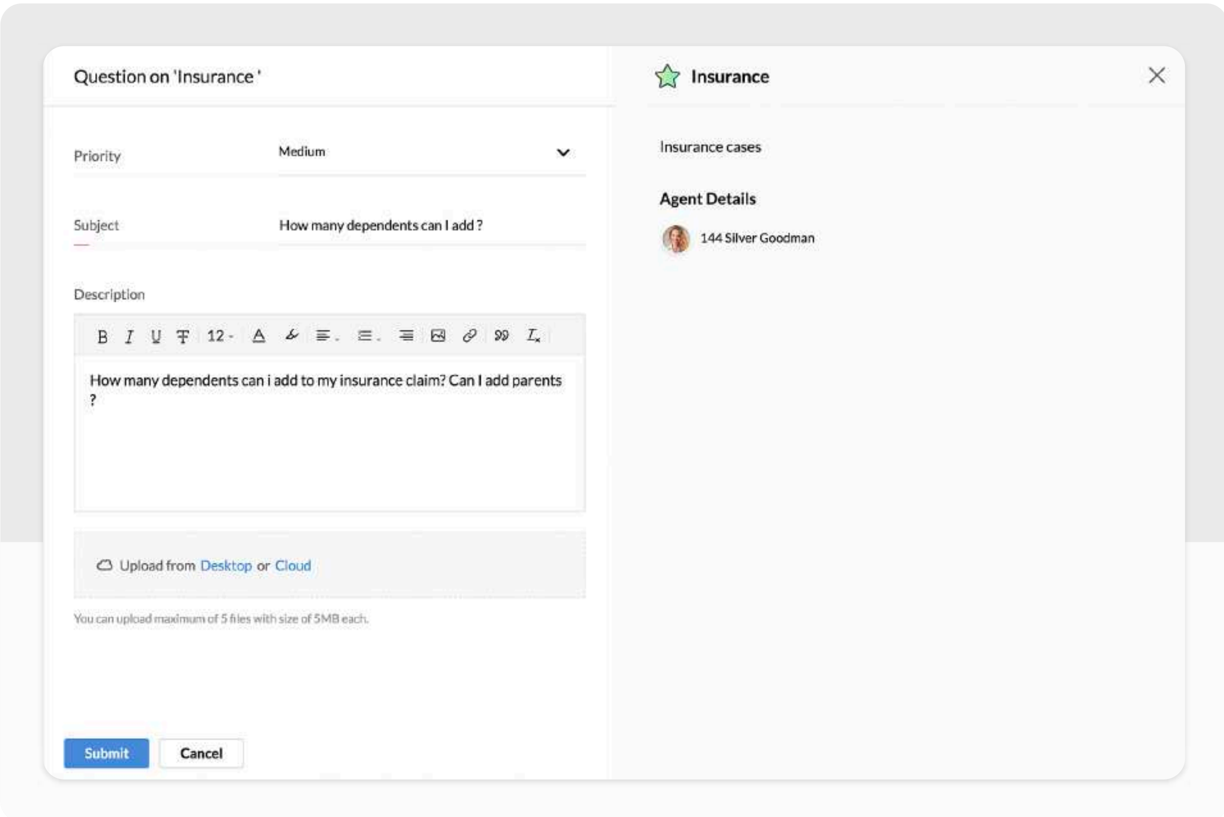
Raising and resolving queries

When an employee has a query and would like to use Cases to raise, these are steps they should follow:

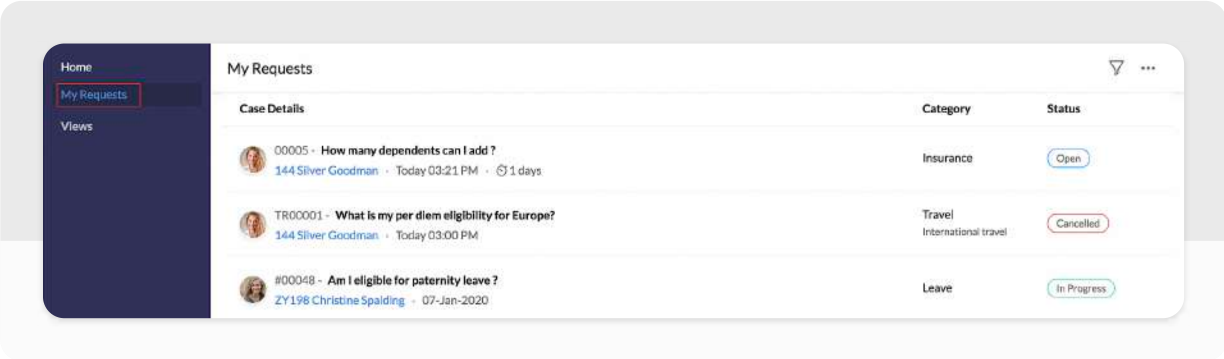
1. From their home page, go to **Cases > Home**



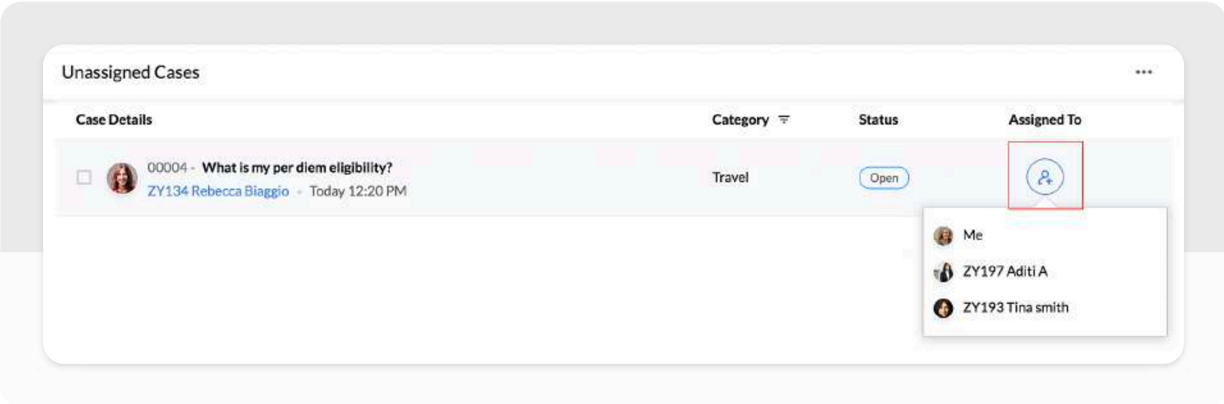
2. Type in your question in the search bar to see if any FAQs match your query.
3. If no FAQs match, click on the relevant category and click **Ask Us**
4. Type in the query Subject and Description
5. Upload attachments if any
6. Click **Submit**



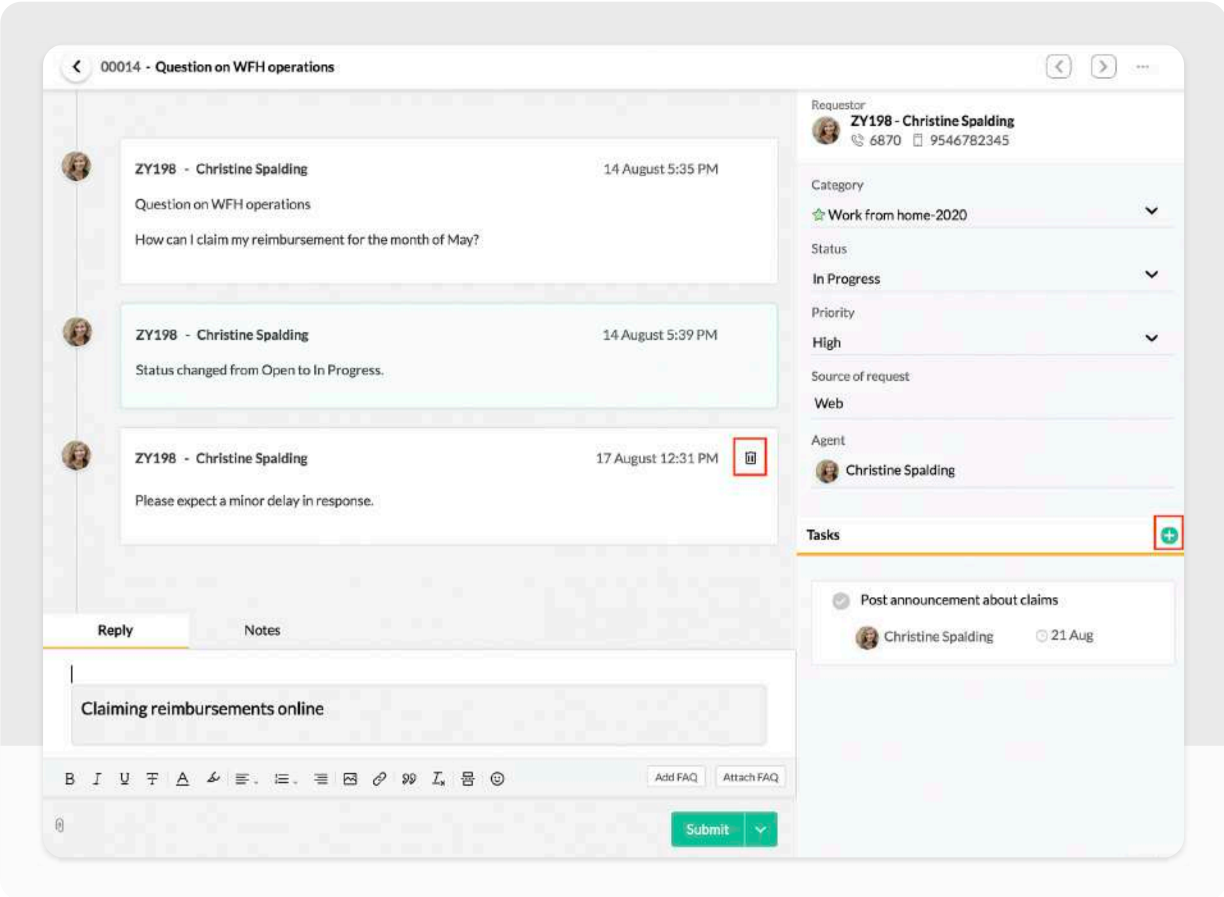
The raised query and its status can be viewed under **Cases > My requests.**



The assigned agent will pick up the query (under My Cases). If the case isn't assigned, they can go to **Cases > View > Unassigned** and pick the case.



The agent can respond and chat with the requestor via comments.



Comments can be deleted by the person who made them, by clicking on the delete icon beside it. Tasks can also be assigned when necessary by clicking **Add Task** When the query has been responded to, click **Submit**

ADDITIONAL FEATURES IN CASE MANAGEMENT

Sub Categories:

Categories within categories can be used to place cases more accurately. Example domestic within travel. Learn more.

References:

This refers to content related to a category such as URLs and documents which are related to a category. Learn more.

FAQs:

Before raising a query, you can look at the frequently asked questions in the category. Learn more.

Feedback:

Enable and collect feedback for cases. Learn more.

Cases Reports:

Provides a quick overview of cases. Learn more.

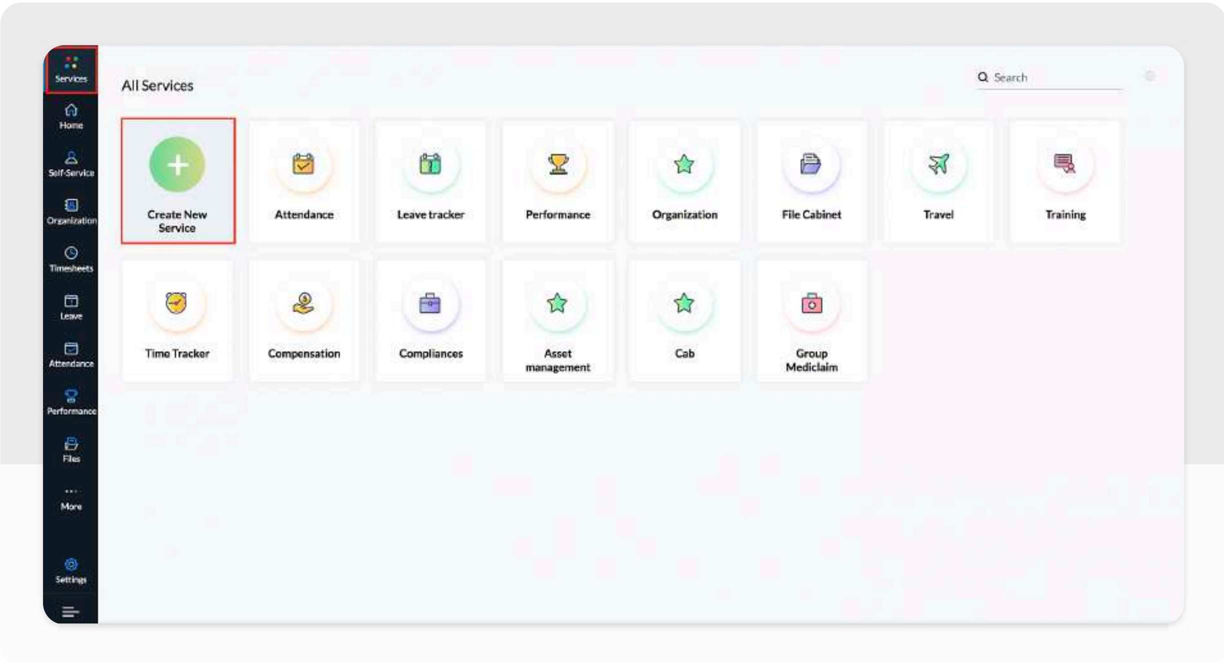
CUSTOM SERVICES

Some services come predefined in Zoho People, existing services can be configured to suit your organization's requirement or a new custom services can be created. Adding a new end-to-end service involves 4 key steps - Customize, Permissions, Approvals, and Automation. Let's look at the steps to create a new service.

This custom service will encompass Forms, Permissions, Approval, Automation and Tasks.

Create a custom service:

1. Navigate to Services on the left-hand side menu
2. Click **Create New Service**



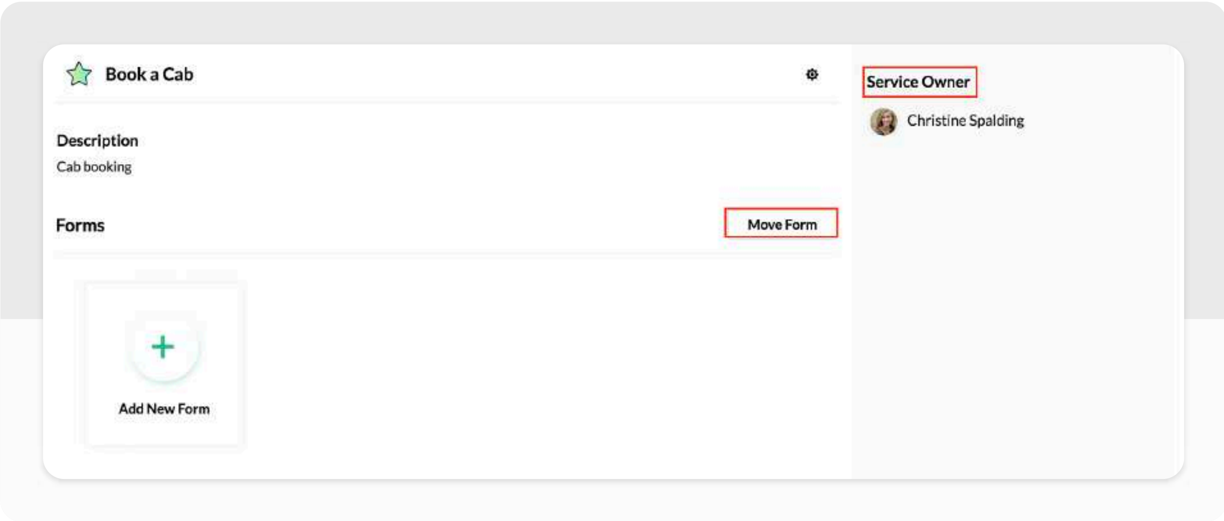
3. Give a name, icon, and description
4. Click **Save**

You have now created the service successfully.

Adding Forms

You can either add existing forms or create new forms for the service.

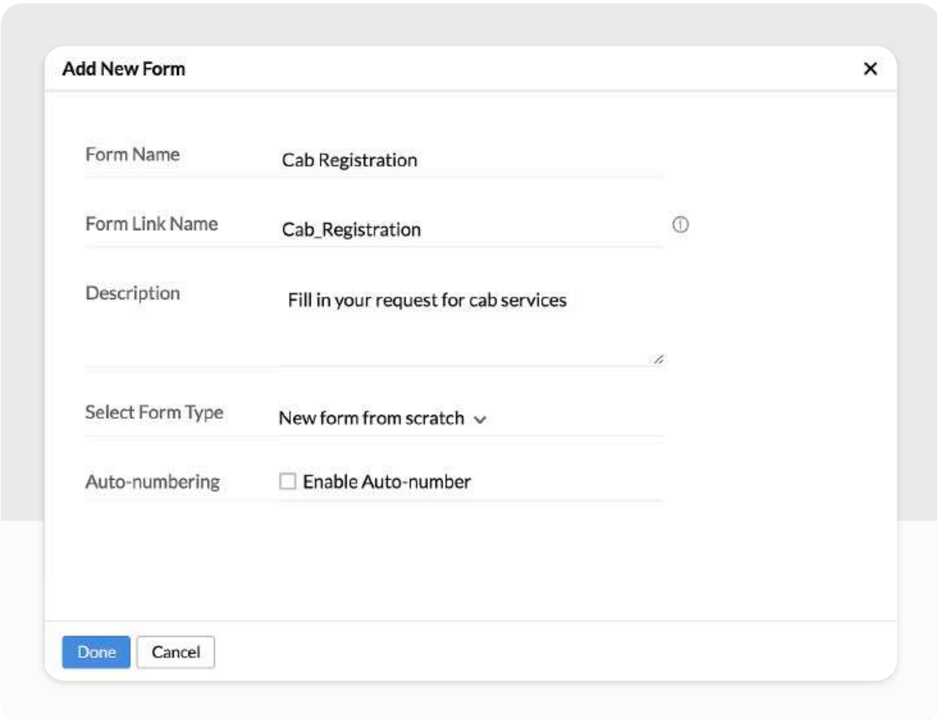
Move Form: If you have a form in any other service that you would like to move to the service that is newly created, click **Move Form**



You will see the list of other services. Click on the service and drag and drop the relevant fields.

To add a new form:

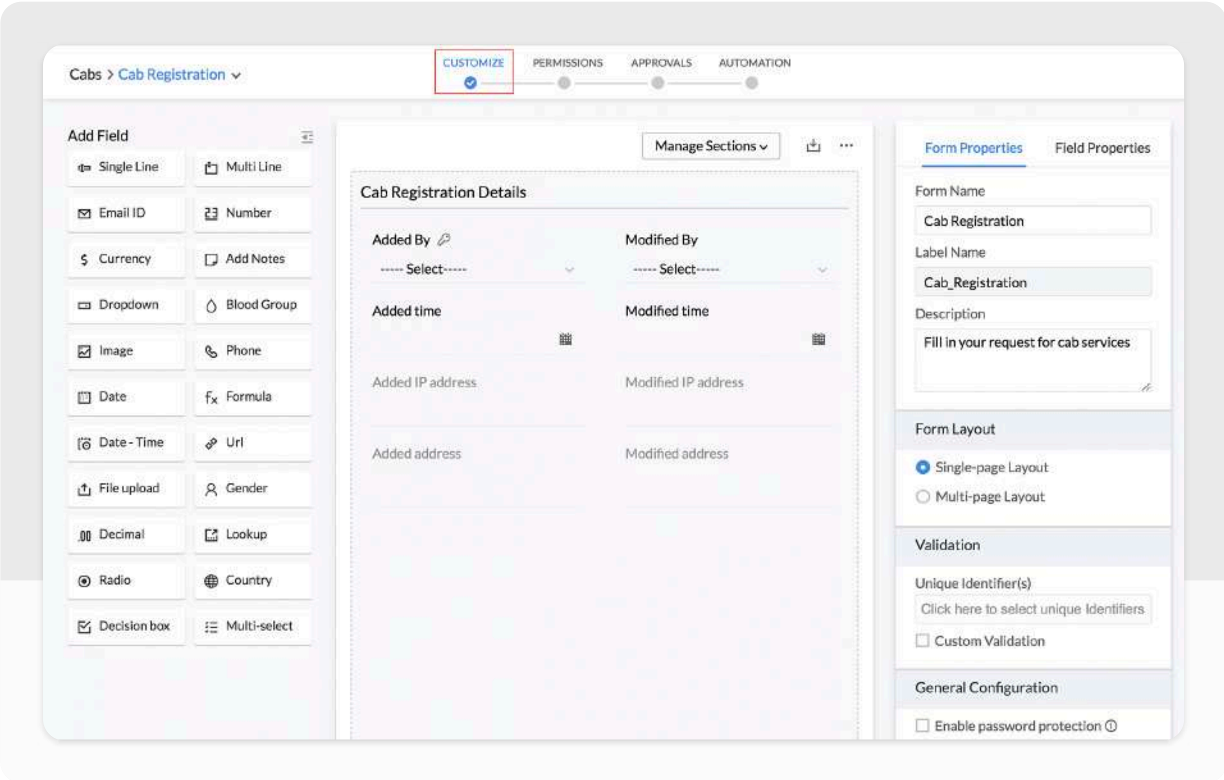
1. Click on **Add New Form**



2. Enter the required details and click **Done**

Customize the form

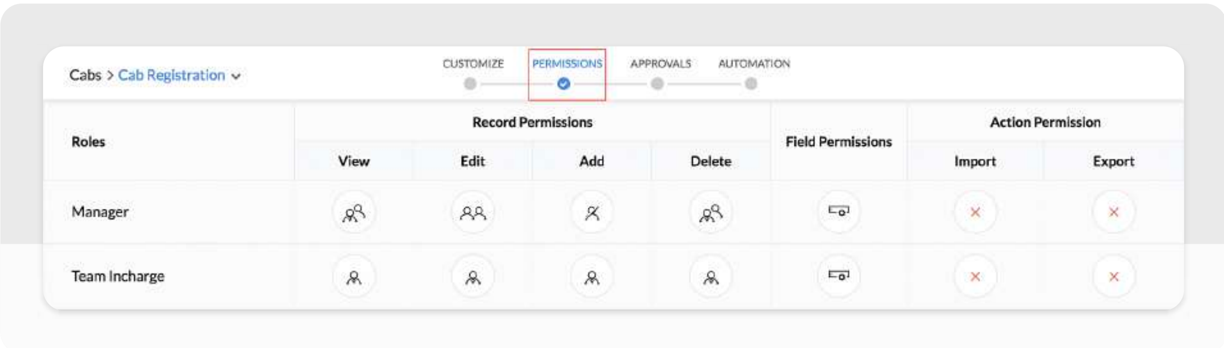
Drag and drop the required fields in the form and customize it according to your needs.



Learn more about Forms.

Add permissions to the service

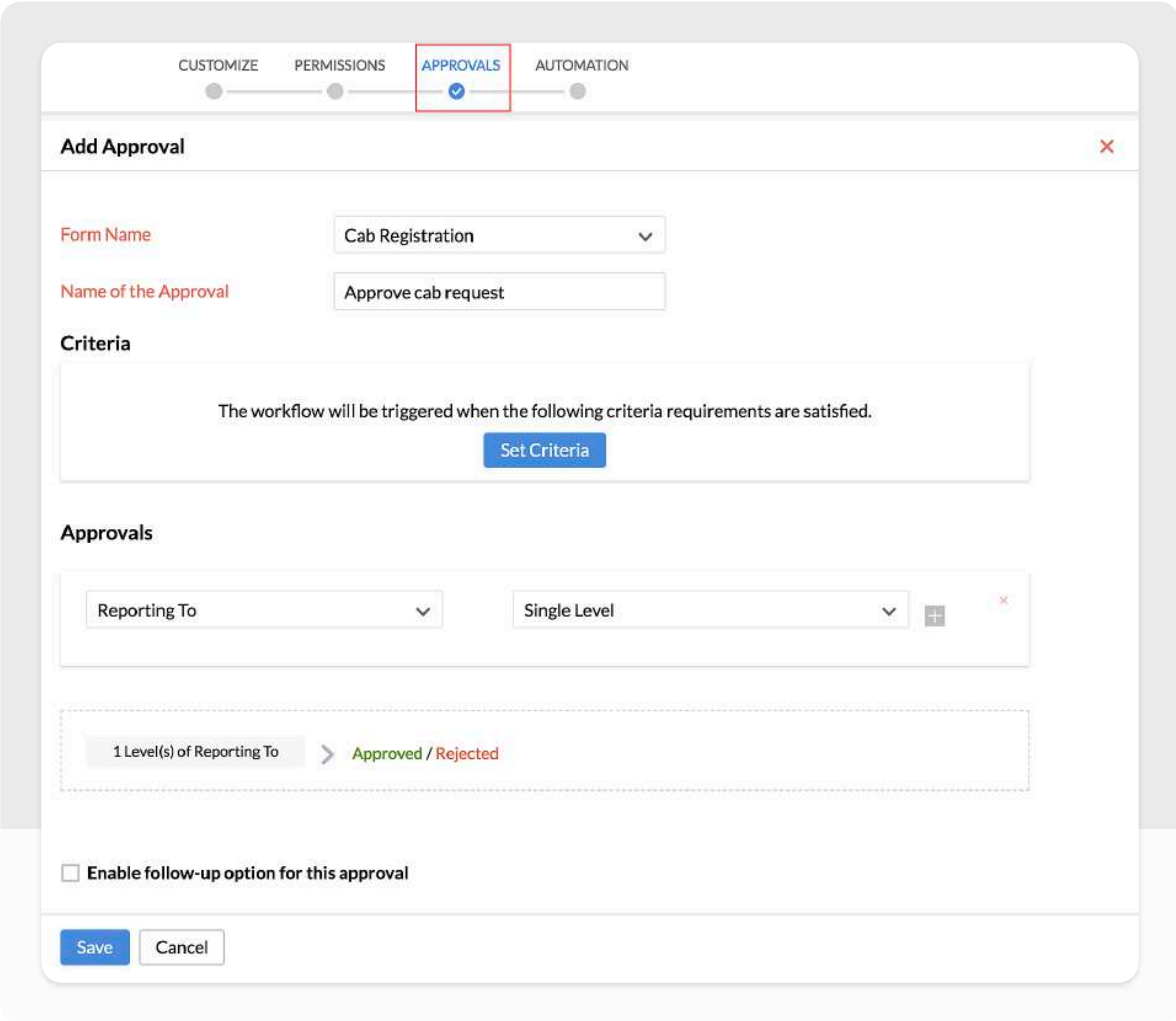
Here, you can add roles and assign specific record, field and action permissions.



Learn more about Permissions.

Configure Approvals for the service

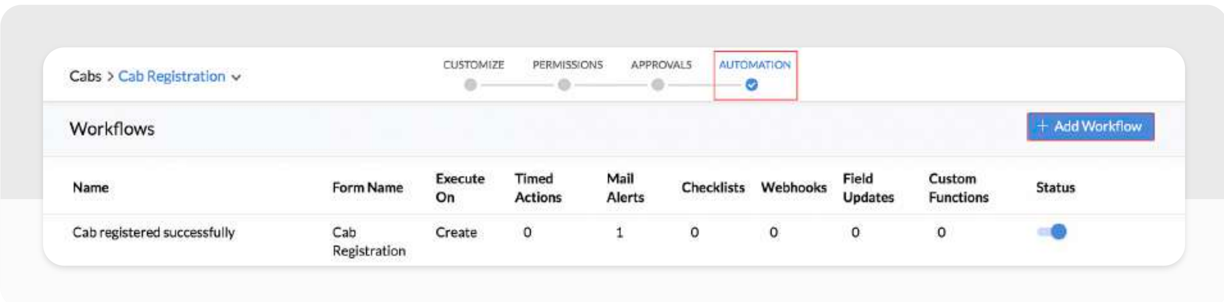
Give a name for the approval and configure a simple single-level approver or multi-level according to your organization's needs.



Learn more about Approvals.

Automate related actions

As a part of the service, you can also configure workflows to automate processes in the service.



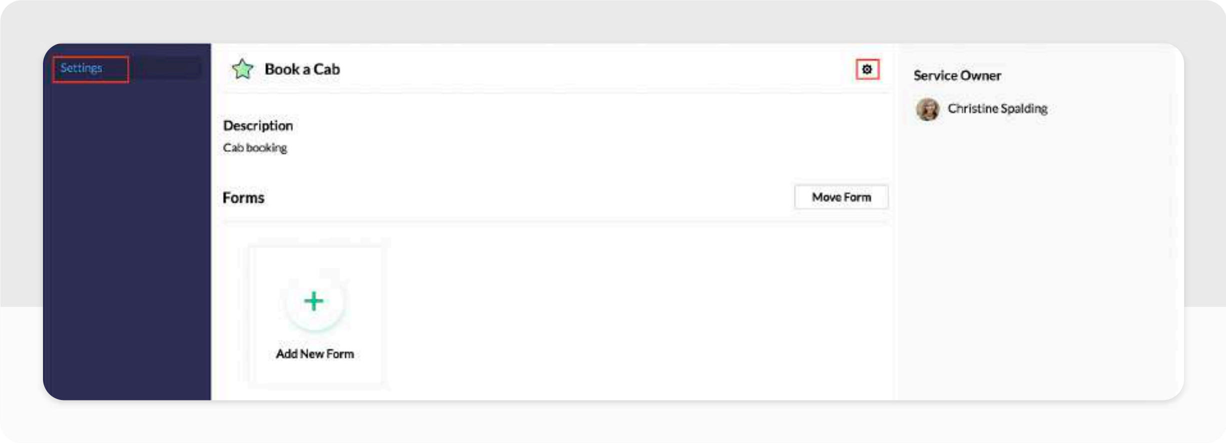
Learn more about Automation.

With customized forms, permissions, approvals and automatic actions in place, an employee will be able to use a Service seamlessly.

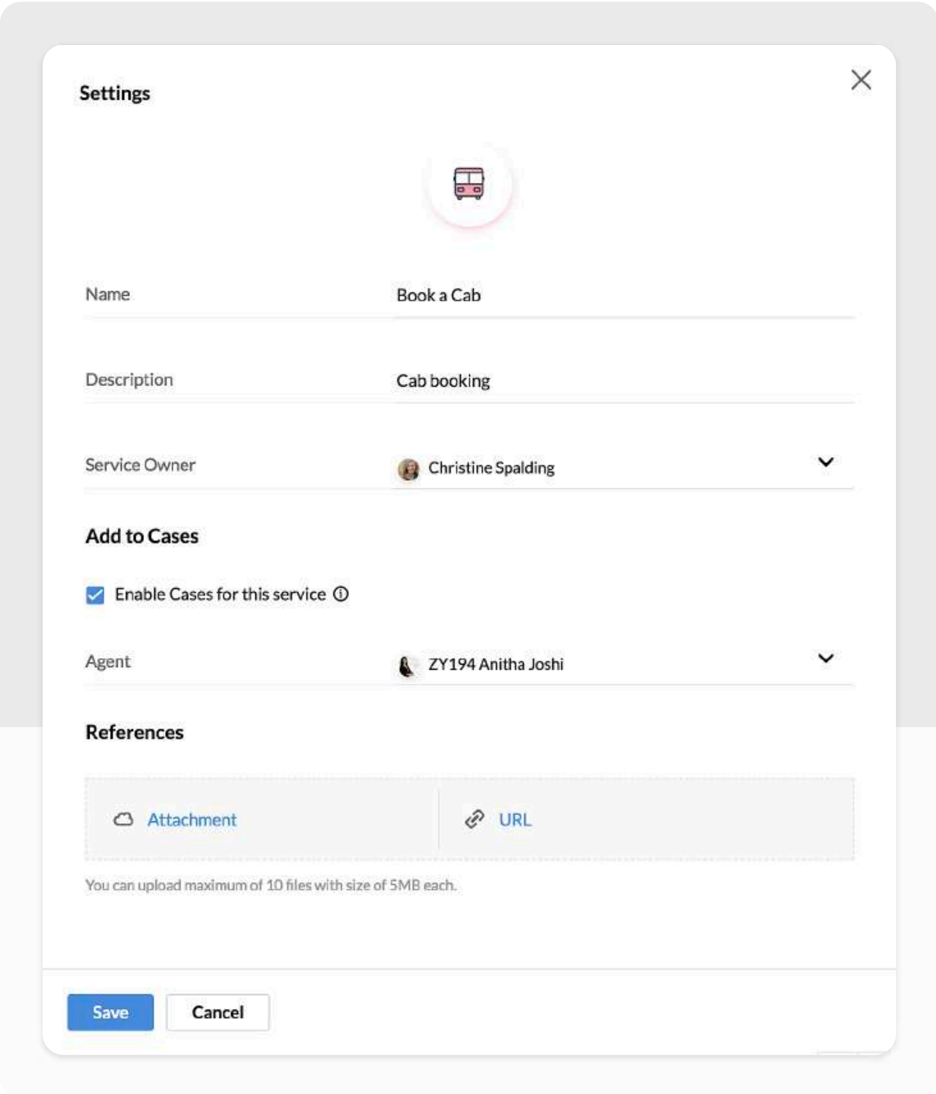
Service Settings

To configure service related settings,

1. Go to the specific service > **Settings**



2. Click the **gear** icon on the top right corner
3. Modify the name, icon, and description if needed



4. Select the *Service Owner*
5. If you want to add this service as a category in Cases, check Enable Cases for this service
6. Select an Agent for the category in Cases
7. Attach references if required
8. Click **Save**

Exit Management - Custom Service

Exit Management usually includes a lot of activities like submission of resignation, triggering tasks through the entire exit process etc. It also involves issuing of standard letters like Experience Letter to the employees who resign from the organization. Using Zoho People, you can automate the entire exit process. Learn more.

AUTOMATION IN ZOHO PEOPLE

Automation helps you configure mail alerts for improved workflow, create checklists to track tasks, schedule reminders for key events, set multi-level approvals and integrate with third-party APIs. By automating most of your everyday HR activities, you can eliminate redundancy, increase accuracy, and ensure your data is always timely and complete.

Automation helps you configure mail alerts for improved workflow, create checklists to track tasks, schedule reminders for key events, set multi-level approvals and integrate with third-party APIs. By automating most of your everyday HR activities, you can eliminate redundancy, increase accuracy, and ensure your data is always timely and complete.

Blueprint:
Blueprint is a systematic flowchart of your HR processes, created digitally, in Zoho People. It captures each and every stage in an HR process that you follow offline.

Workflow:
Workflow automation helps you automate all your HR processes, by eliminating most of the manual administrative work. You can preset and customize the workflow process and full access control to the administrative processes will be given.

Mail Alert:
Improve your workflow with automatic email alerts and be up-to-date at all times. Get instant notifications when specific actions such as requests, status updates, edits, and approvals are executed.

Checklist:
Make sure everything that needs to be done, gets done. Track your tasks and schedule time to be more efficient and productive.

Tasks:
Creating Tasks and assigning them to respective owners helps to have a track of the job done by individuals and also helps to maintain a record of activities to be completed.

Field Update:
The field gets automatically updated in the related form when selecting or providing the specific lookup value in the form. This feature is very useful to avoid manual value entries in the related forms and thus saves time.

Webhook:
It communicates with the third-party applications by sending instant notifications every time when a user performs an action in the Zoho People organizational account data. Webhooks are so useful, flexible and totally customizable.

Custom Functions:
Custom functions let you create user-defined functions that can be reused anywhere in Zoho People. You can maintain and edit custom functions and the script will be in one central location. These functions are mainly created to manipulate data, connect with a third party and internal applications and update responses in Zoho People.

Creating a workflow - onboarding process use case

Adding a category

To know about the complete automation procedure of the new joinee onboarding process. When a new employee joins an organization, the basic things that an HR must do is to create login access for the employee(s), provide ID card, allocate a place, provide work computer, phone, configure a system, enroll employees in the benefit plans, etc. Given below is the step by step procedure to achieve this using workflows.

Workflow process

To create a Welcome Letter Template:

1. From your home page, go to **Settings (gear icon)** > **Customization** > **Templates** > **Record Template** > **Add Template**
2. Select *Employee from* the Form Name drop-down list
3. Provide Template Name as Welcome letter
4. Select Record Template as Template Type
5. Select the required fields from the available merge fields
6. Select System Fields from the drop down if you would like to insert fields like Company Logo, Company Name, Company First Address etc. as required
7. Click **Save**

You can create an offer letter template with Mail Merge as well. Follow the steps given below to do it.

Mail Merge is useful when you have some standard letters like Employment Contract, Probation Confirmation Letter etc to be sent across to many people at one go. A template can be created and the dynamic fields can be changed as per the need.

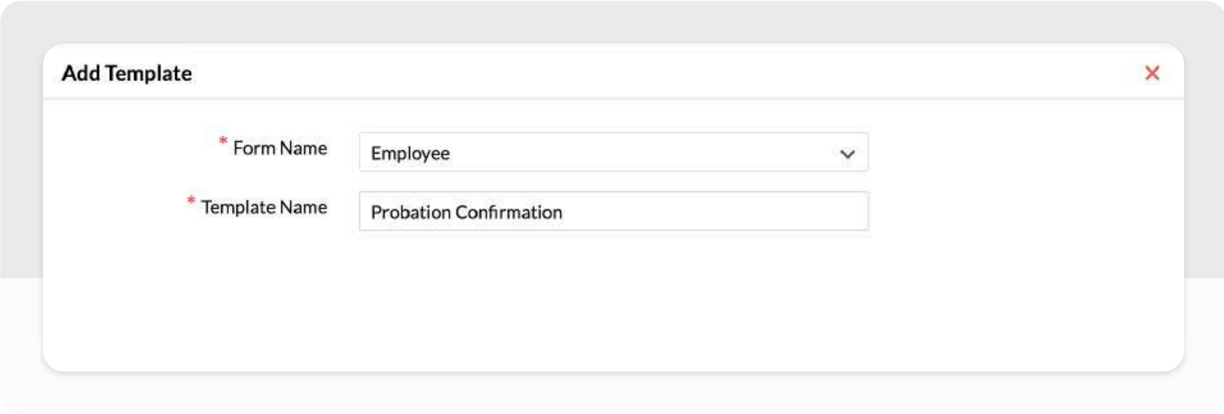
Zoho People is integrated with Zoho Writer and this gives enhanced editing options for standard letters.

Consider an example of sending Probation Confirmation Letters to a set of employees.

Follow the steps given below to use Mail Merge to get this done.

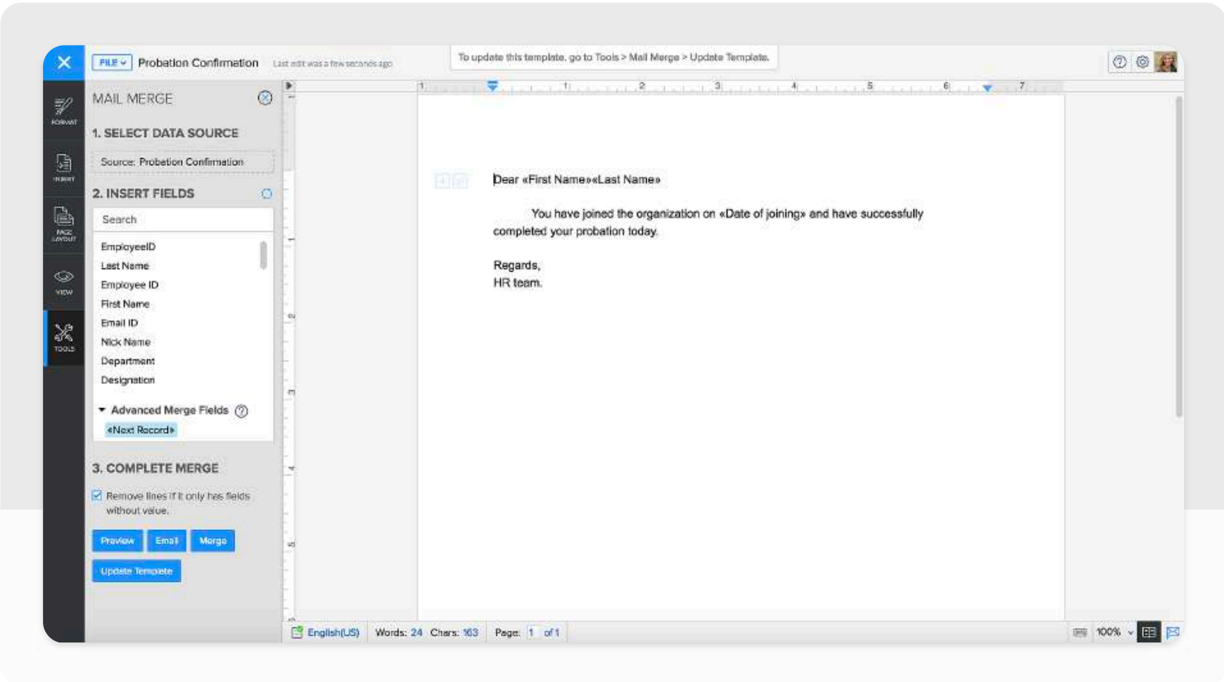
1. From your home page, go to **Settings** > **Customization** > **Templates** > **Mail Merge Template**
2. Click on **Add Template**
3. Select a form - for eg. If you would like to use Mail Merge for Probation Confirmation Letters, then select the Employee Form

4. Give a Template Name - Eg - Probation Confirmation template



5. Click **Save**

You will be taken to the Zoho Writer page where you can create your template as shown in the below image



For eg -

"Dear (Insert First Name, Last Name by clicking on the fields from the left-hand side)

You joined the organization on (Insert 'Date Of Joining' from the left-hand side) and have successfully completed your probation period today.

Regards

HR Team"

Now you have created a mail merge template. Click on 'Update Template' if you make any changes to the template.

OTHER NOTABLE ZOHO PEOPLE FEATURES

Announcements:

Announcements makes it easy for you to communicate with your employees about general company information and to send important alerts and updates across the organization. Learn more.

Feeds:

Feeds enables your employees to post messages to specific members, to department and groups. Feeds can be used to have meaningful official discussions or announcements related to the team. Learn more.

Dashboard:

The dashboard in Zoho People has various widgets that provide the user with quick access to a lot of important information. Learn more.

Office Readiness:

Office Readiness in Zoho People helps gather all the vital information you need when opening offices for employees who want to return and work in their office. Learn more.

Vaccination Status:

An organization can collect information about an employee's Covid-19 vaccination status using the Vaccination Status form. Learn more.

Maintaining employee's health information:

You can record and maintain employee's health information using the Employee health status form in Zoho People. Learn more.

THANK YOU

zoho.com/people

support@zohopeople.com

youtube.com/c/ZohoPeopleOfficial