Zoho People

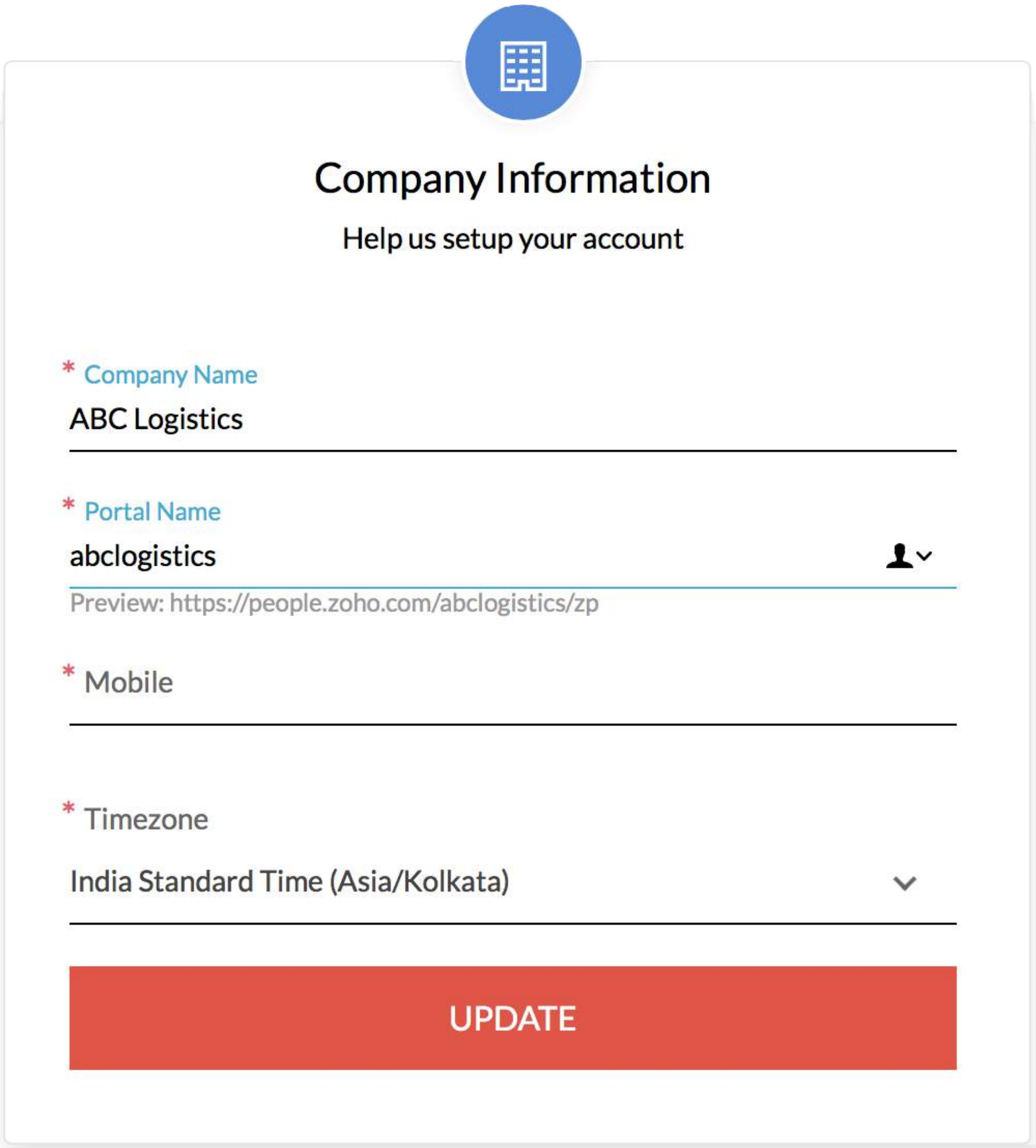
SETUP GUIDE

CONTENTS

Introduction

INTRODUCTION

This guide is intended to help you set all the basic details of your organization to have Zoho People up and running. Setting up these steps is crucial to benefit from Zoho People. With this easy step-by-step guide, you can set up your organization in Zoho People with great ease.



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

GETTING STARTED

Fill in your basic organization's details to get started - company name, portal name, mobile number and timezone.

Once you have entered the details you will land on the Getting Started page.
Here you can view the overview video - both Admin and Employee to gain a better understanding on the product.

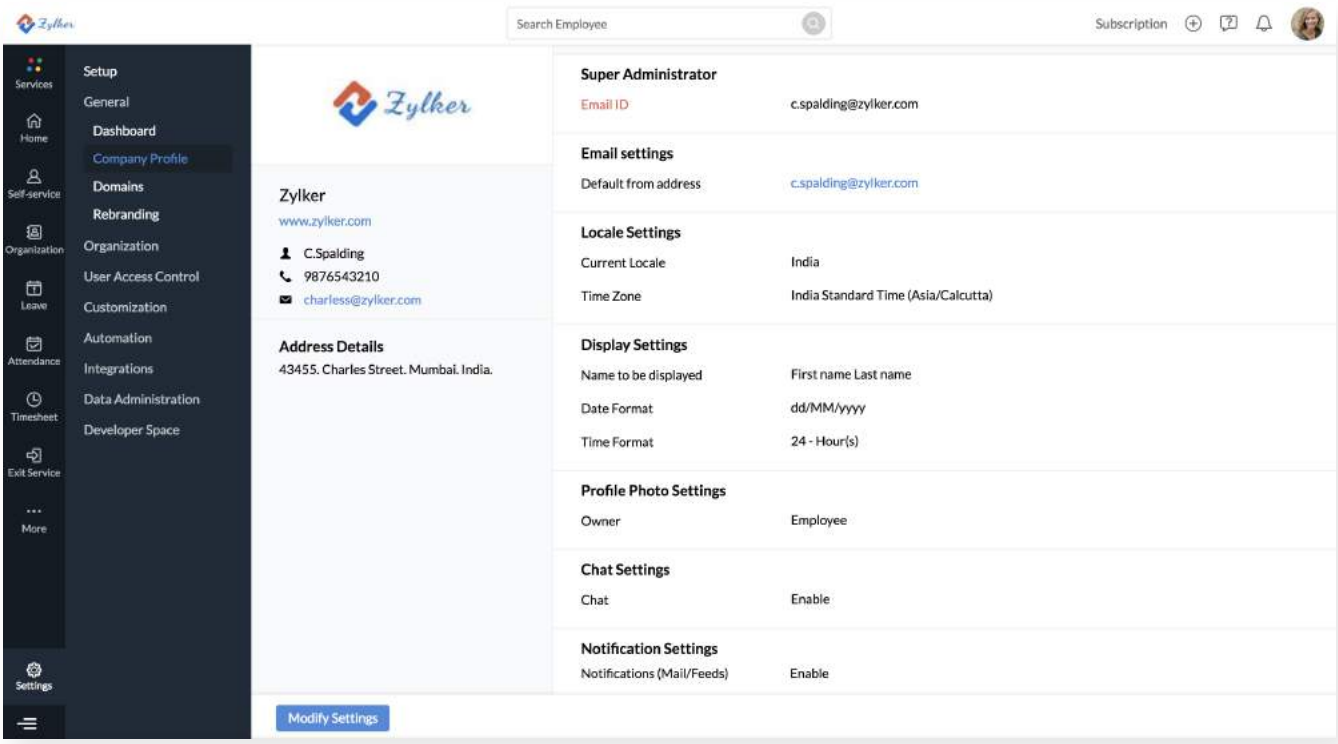
Now let us look at the important modules that we need to set up in Zoho People.

All steps in setting up your organization happens under Settings. The Settings tab is only visible to the Administators of your organization , typically your Human Resources team and the Top Management team.The Setting tab will not be visible in other employee's account.

ORGANIZATION SETTINGS

Under Organization settings we are configuring all grassroot details about the organization.

*Go to **Settings** > **General** > **Company Profile***



On the left side you can enter your company name, logo , contact numbers, mail address and location address.

On the right side you will find all the important company profile settings.
The one setting up the account is the Super Administrator. The Email ID is the Super Administrator's. Once you have setup more than one administrator, you can transfer the admin rights and change the super administrator by clicking Transfer Admin rights.

Note: *The admin users in the drop down are those who have been assigned the Administrator role in the Employee form.*

ORGANIZATION SETTINGS

Other Settings that can be done:

1. Email Settings - The default from address for your organization

2. Location and time zone

3. Display Settings - How the names of your employees should be displayed , the date format and the time format

4. Profile Photo Settings - should the employee or the admin be the able to set the profile photo

5. Chat Settings - should the chat bar be visible or not within Zoho People

6. Notification Settings - should all notifications through mail or feeds be enabled or disabled within Zoho People

Click on **Modify Settings** to make any changes you need and click **Save** to have your changes saved.

ORGANIZATION SETTINGS

Departments, Designations ,Locations and Roles:

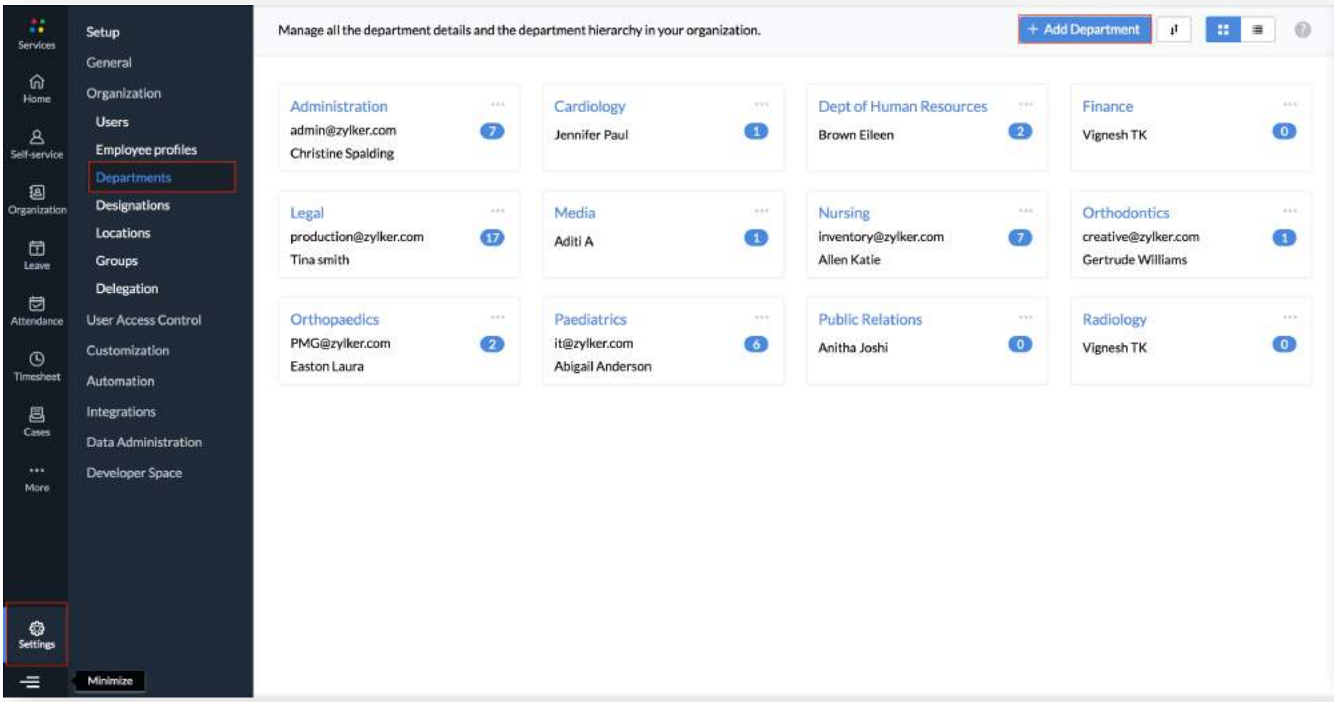
Once you have successfully set up the company profile, you can now move on to creating the various departments, designations, locations and roles of your organization

Departments:

Based on the nature of your organization, you can create the various departments such as HR, Legal, Admin, Payroll etc.

To create a new Department.

1. Go to *Settings > Organization > Departments.*
2. *Click Add Department.*
3. *Enter your details and click Save*

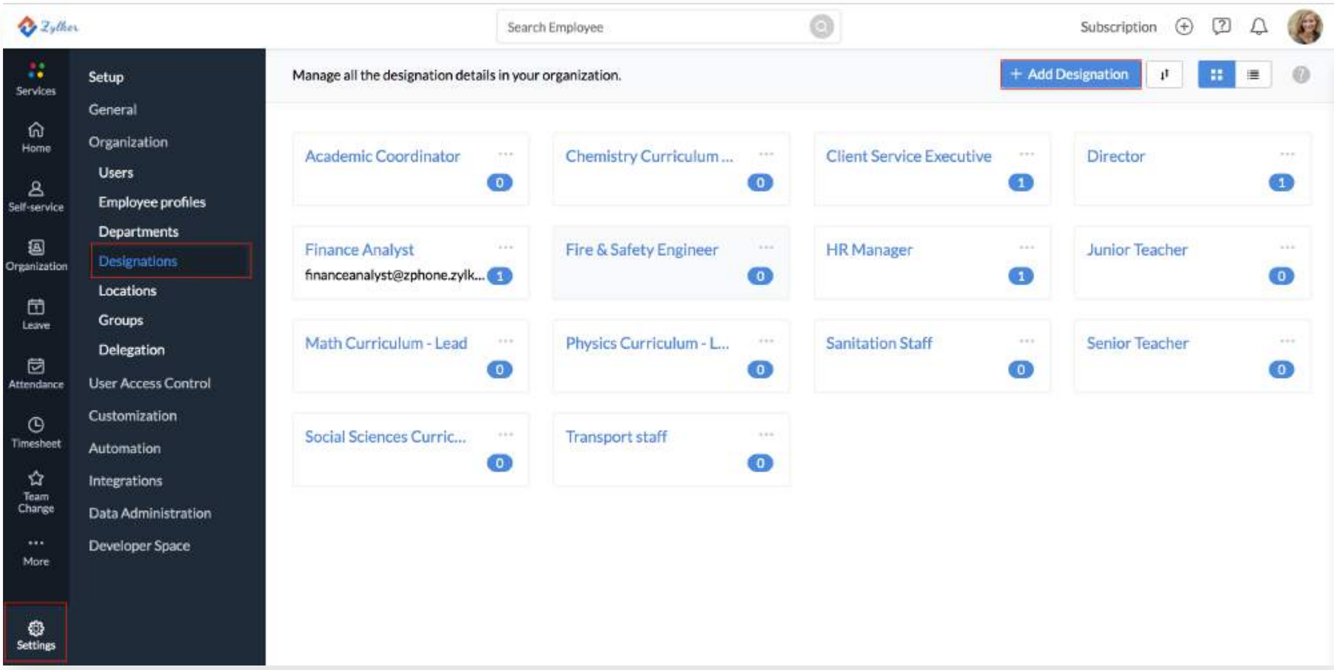


Designations:

Under Designations, you can create all the designation types that belong to your organization such as Chief Executive Officer, Chief Financial Officer, Training Head etc.

To create a new Designation,

1. Go to *Settings > Organization > Designation.*
2. *Click Add Designation.*
3. *Enter your details and click Save*



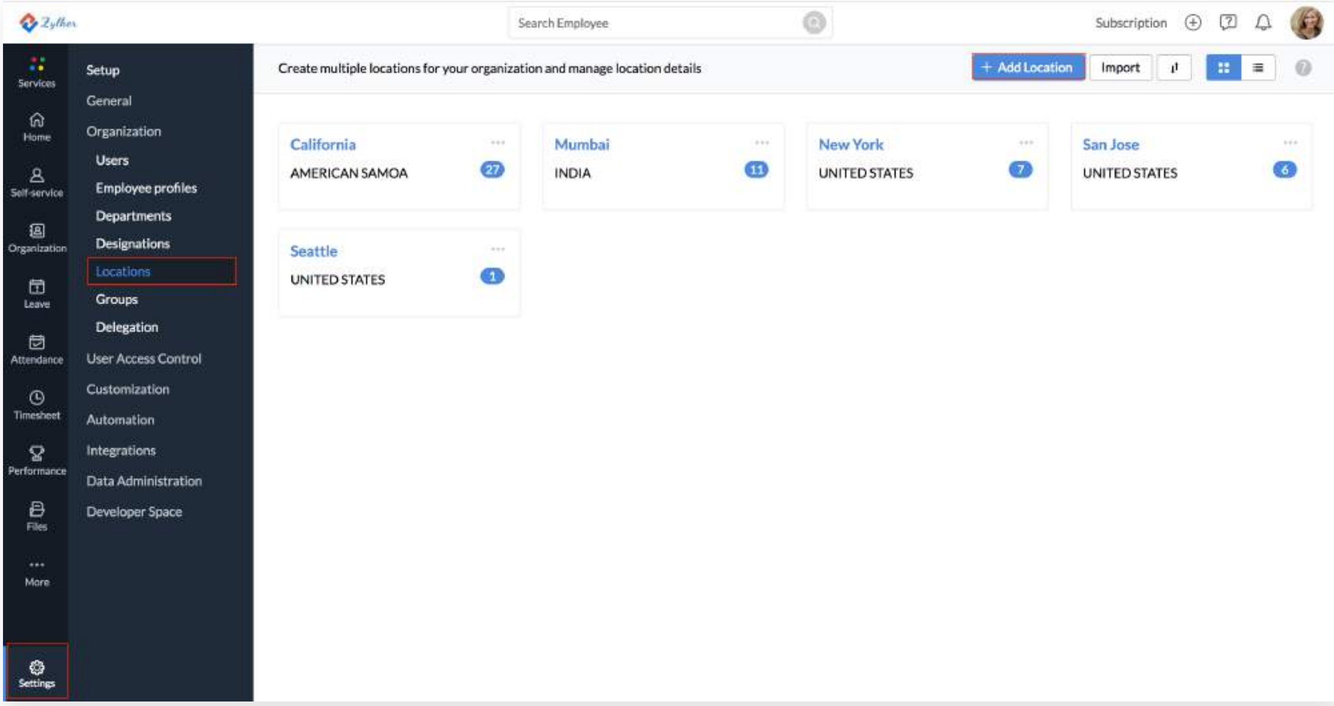
Locations:

If your organization is located in multiple cities or countries, setting up location becomes essential.

To create a domain for your organization:

1. Go to *Settings > Organization > Locations*

2. Click *Add Designation*
3. Enter your details and click *Save*



To edit or delete Departments, Designations or Locations, click on the ellipsis icon on the top-right corner.

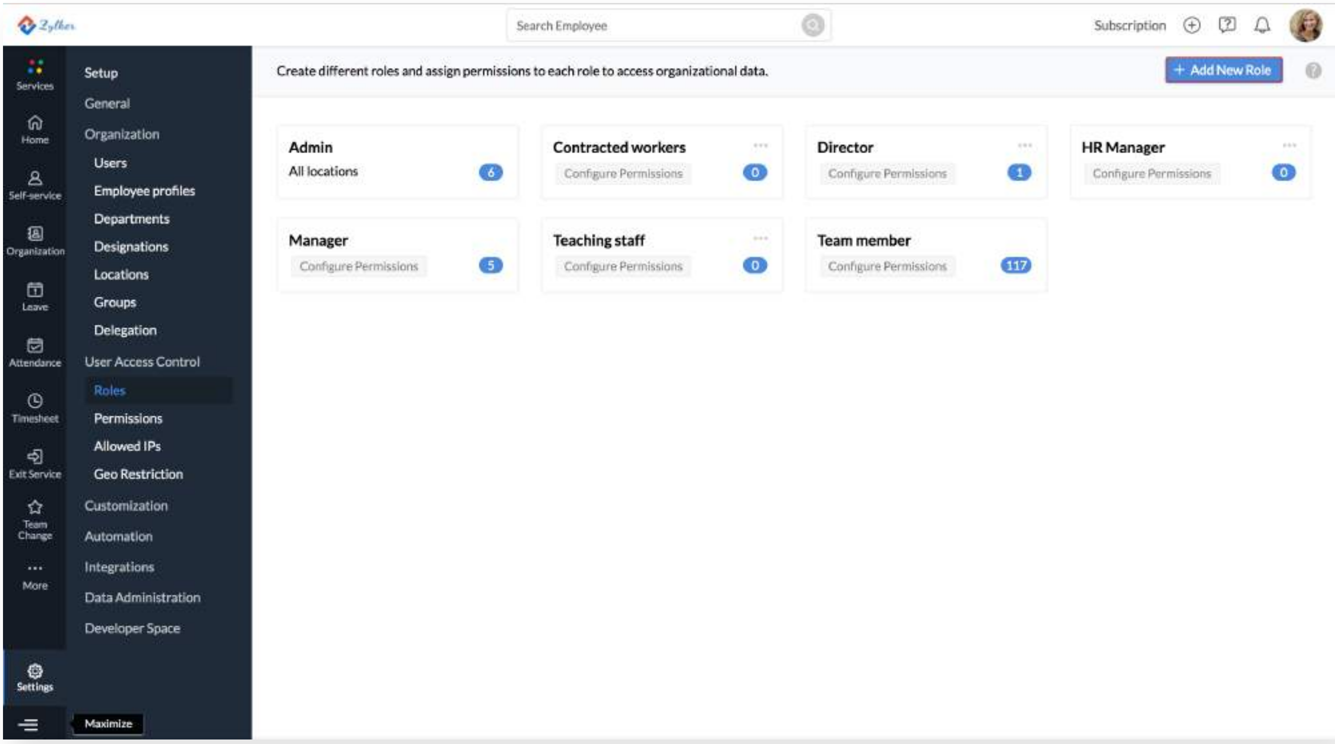
Roles:

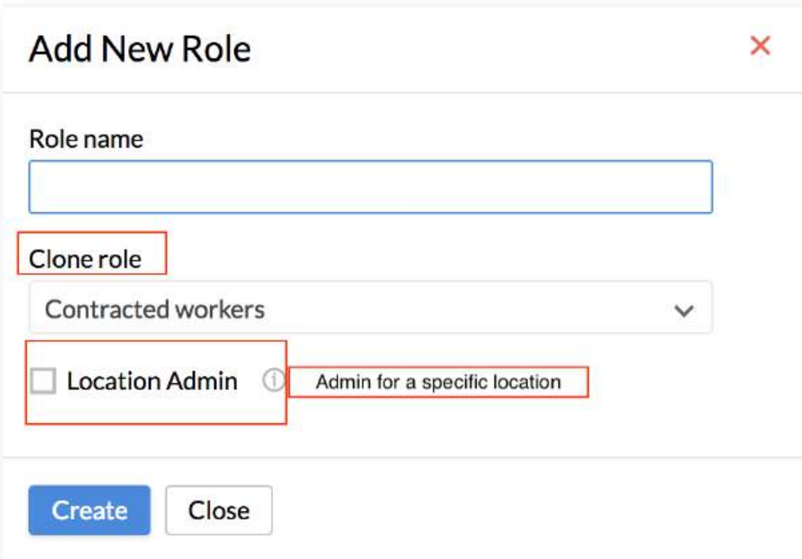
It is crucial to define the roles of your organization when creating your hierarchical structure. In Zoho People, permissions to access data is linked to roles, so it is important to assign roles for each employee.

1. Go to *Settings > User Access Control > Roles*
2. Click *Add New Role*
2. Enter your details and click *Save*

ORGANIZATION SETTINGS

Administrator, Manager, Team Incharge, Team Manager and Director are roles that have been configured by default in Zoho People. While creating new roles, you can clone existing roles for which you want the same permissions configured. You can also make a role the Admin for a location.





Domains:

A domain is a unique name that represents your organization, using which you can define your organization.With a verified domain you can add users directly into Zoho People.

To add your Domain,

1. Go to ***Settings > General > Domains***
2. Click ***Add Domain***
3. Enter your domain name and click ***Save***

If your domain has been verified and you are still getting an error, then you can follow these steps to ensure you CName has been mapped:

1. Login to the Domain Management Page (eg: GoDaddy) and go to Product List

2. Find the domain you want to use with Unbounce and click Manage DNS

3. On the Records page, click Add to add a new record

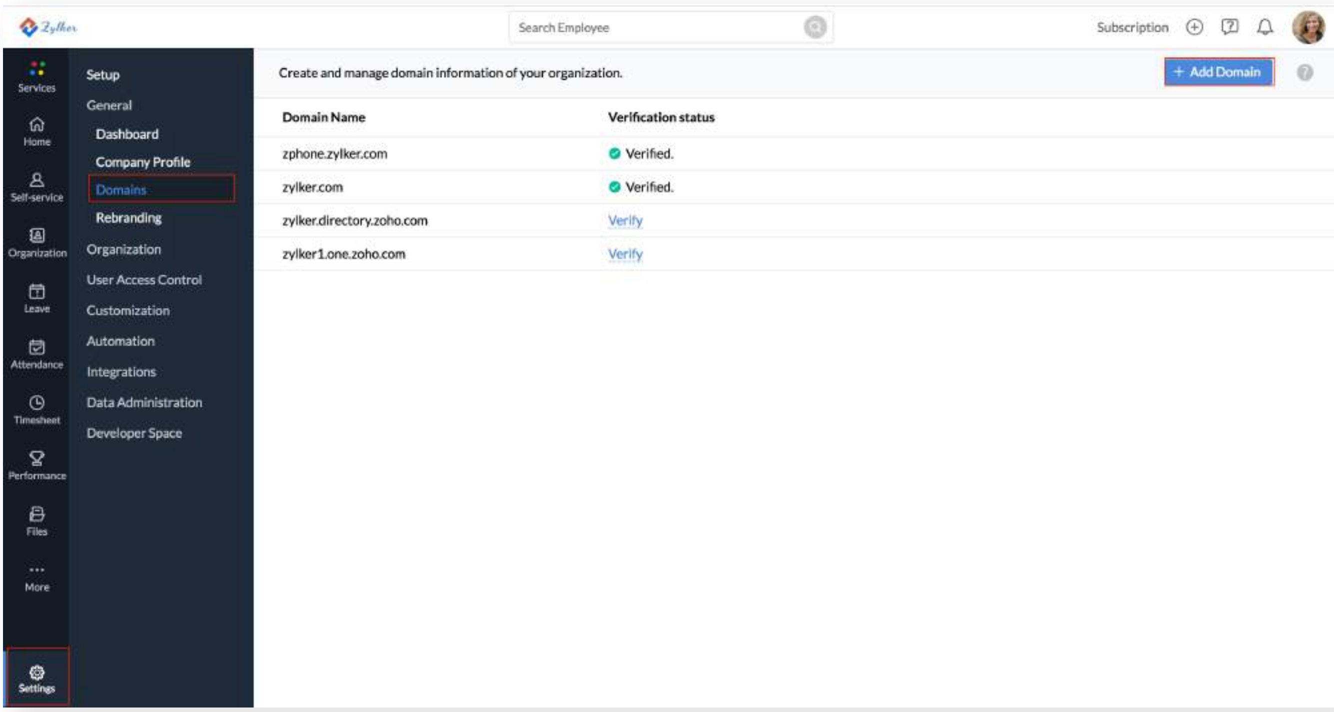
4. In the Type drop down menu, select CNAME

5. In the Host field, enter the sub domain to which the CNAME applies

6. In the Points To field, enter people.zoho.com

7. Leave the TTL field as 1 Hour

8. Click Save to update the changes made



Note: *The above steps are intended for general troubleshooting. Refer to the help documentation of the hosting site for further assistance.*

ORGANIZATION SETTINGS

Rebranding:

If you want a personalized URL for your organization, you can do that with Rebranding. Before you rebrand , your domain must be verified. With a verified domain, your organization will get rebranded automatically if you are a Premium or Enterprise User.

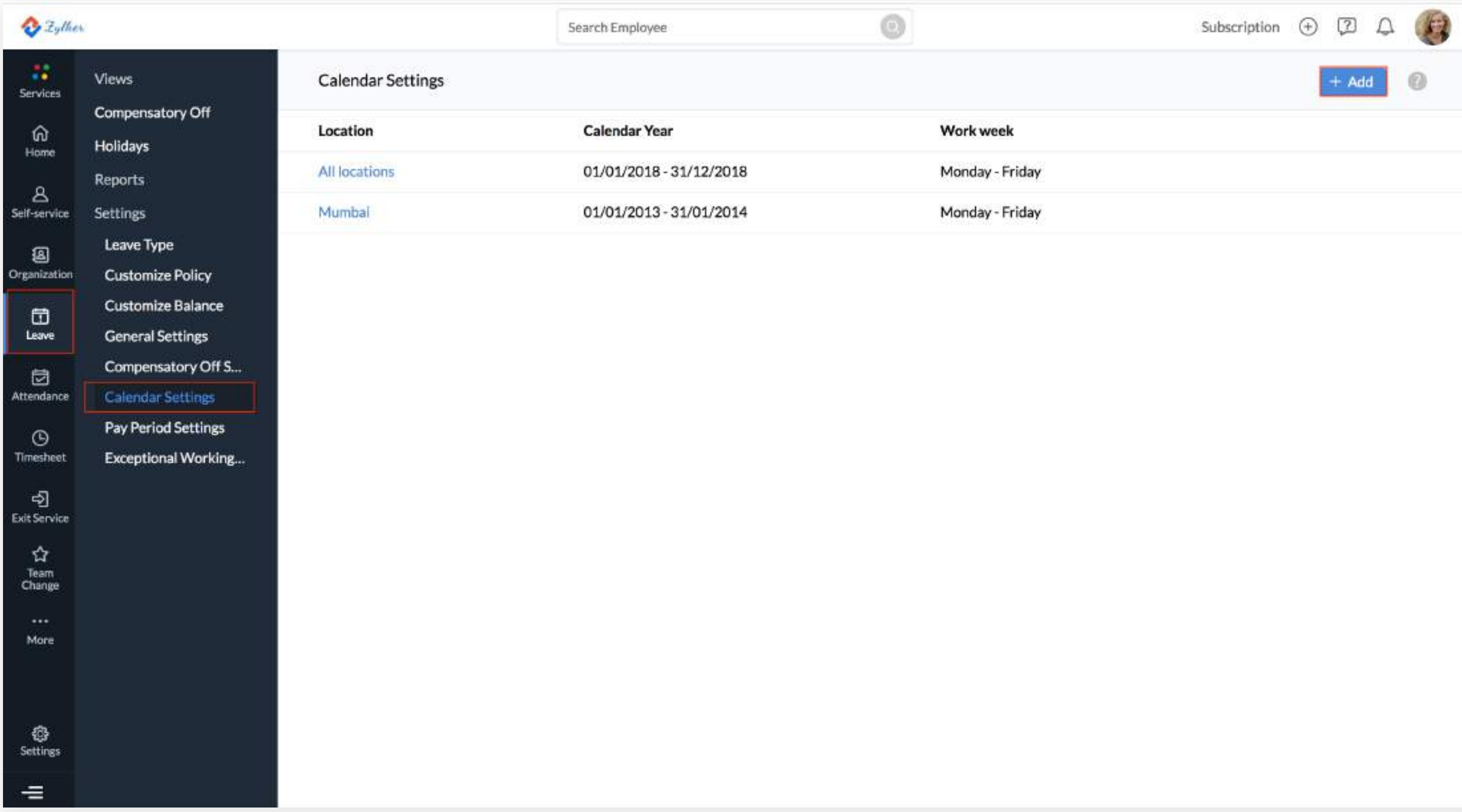
Note: *Ensure that you have mapped the CNAME entry and linked it to people.cs.zohohost.com before you map your domain with Zoho People*

Org Calendar Settings:

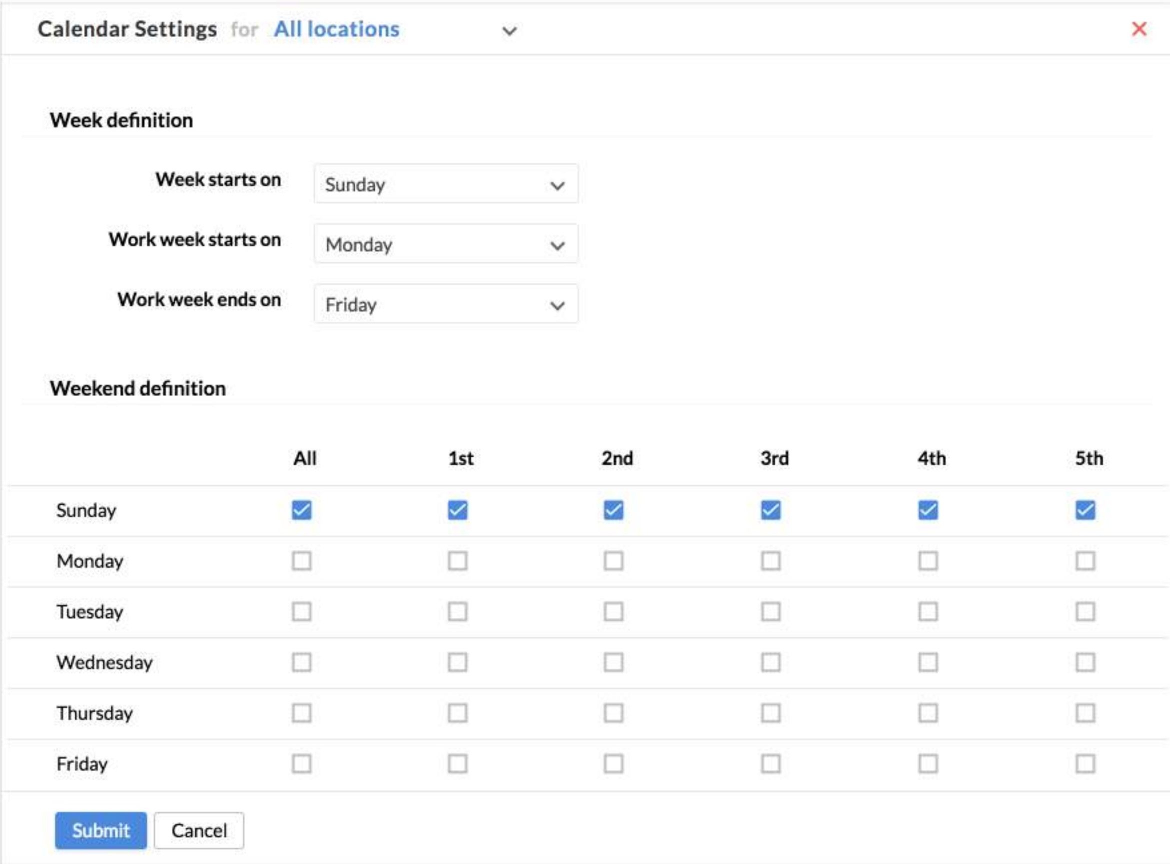
The org calendar settings helps you define your organization's work week, weekends and calendar year which is an important part of setting up your organization's account with Zoho People.

To define your Calendar,

1. *Go to **Leave > Settings > Calendar Settings***
2. *Click **Add***
3. *Define the week*
4. *Define the weekend*



ORGANIZATION SETTINGS



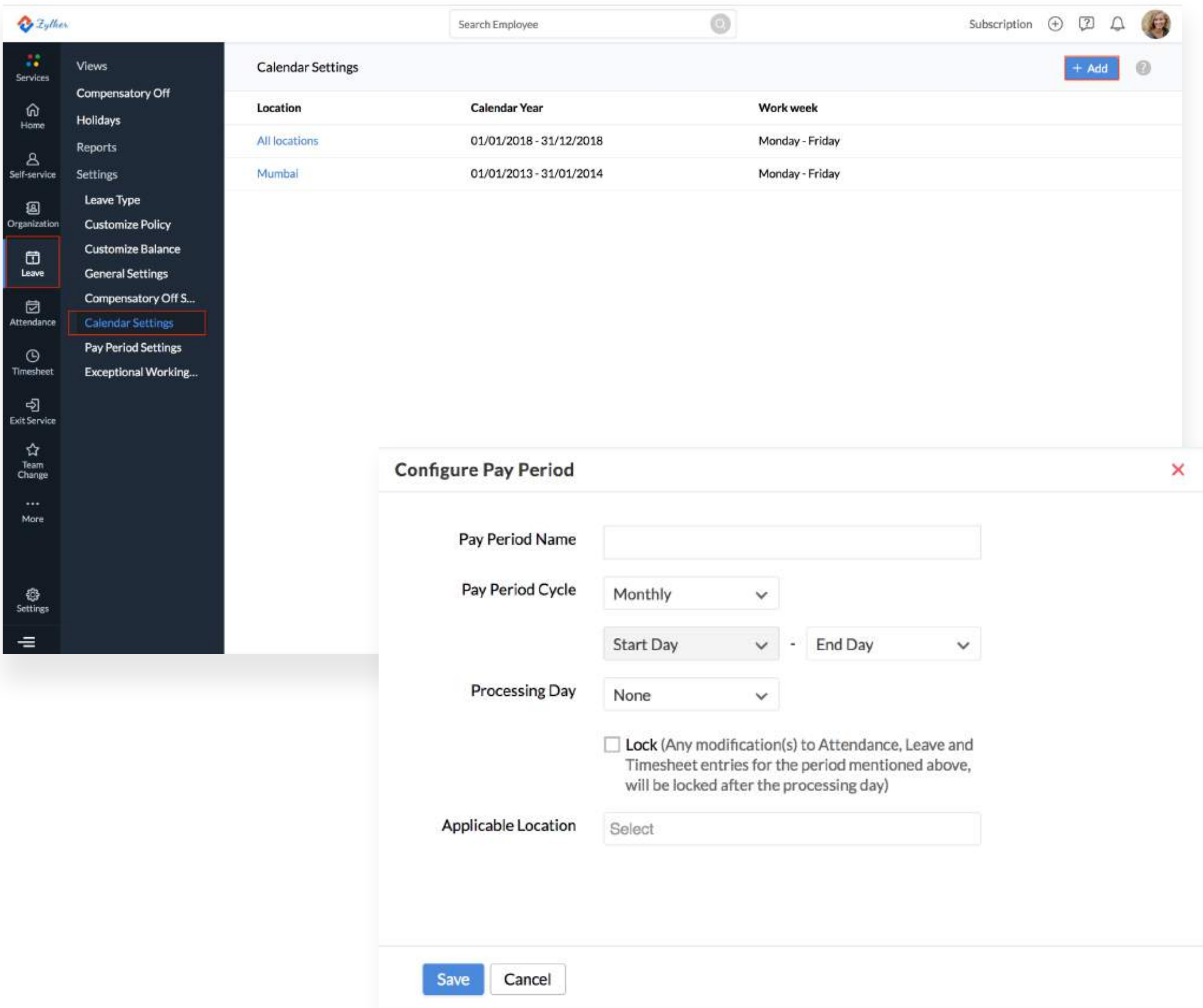
5. *Define calendar year*
6. *Click **Submit***

Pay Period Settings:

Pay Period is the period you set to calculate the leave and attendance details of employees, to be utilized for payroll purposes.

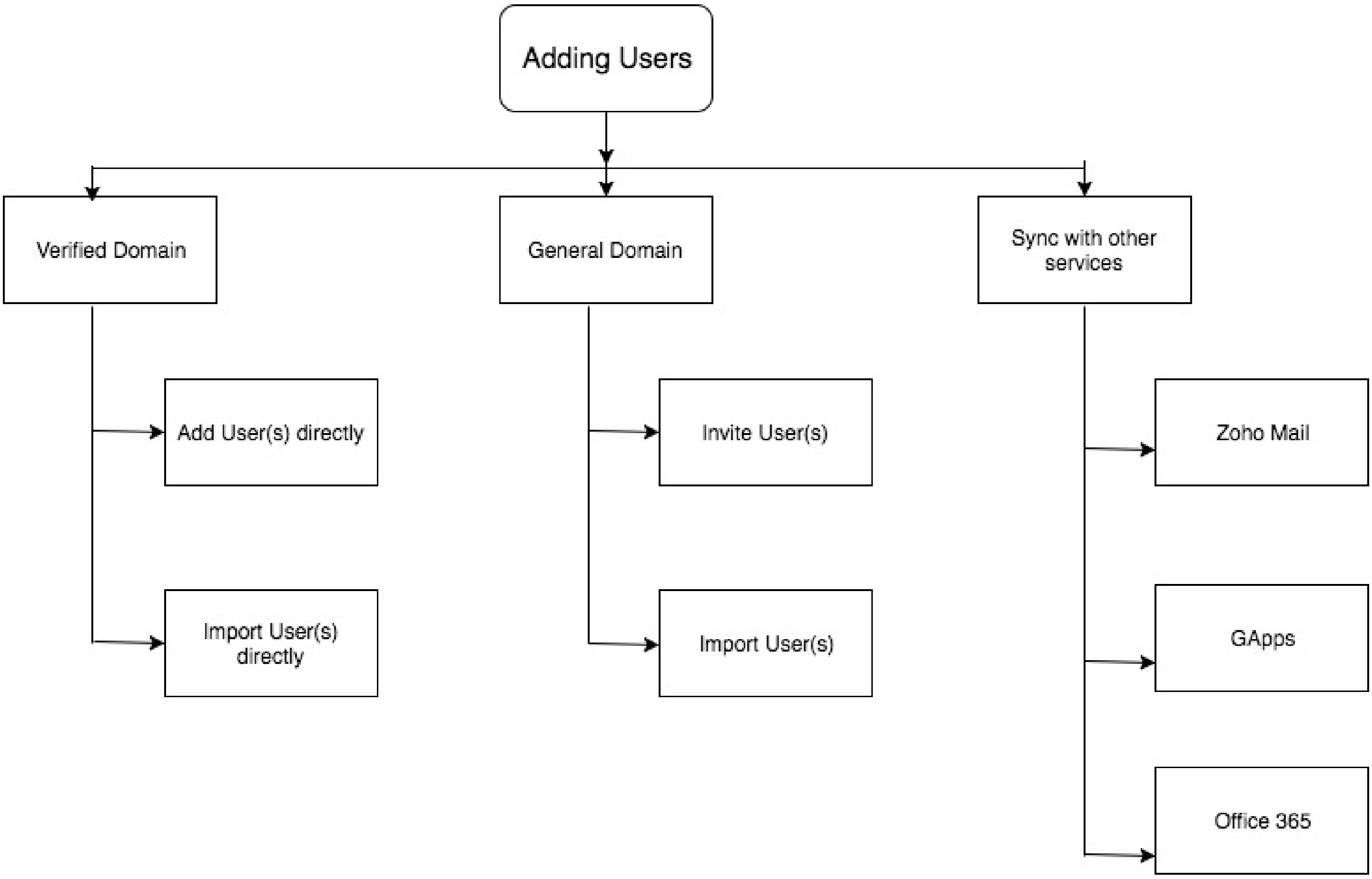
To configure a Pay Period,

1. *Go to **Leave/Attendance > Settings > Pay Period Settings***
2. *Click **Configure Pay Period***
3. *Give a Name for the Pay Period*
4. *Select the pay period cycle and processing day*
5. *Select the applicable location*
6. *Click **Save***



ADDING USERS

Once you have set up the organizational details, the next important step is to add your employees into the account. There are 3 methods to add users to your account.



I - VERIFIED DOMAIN:

You can sign up for a Zoho People account using either an organization account or a general account.

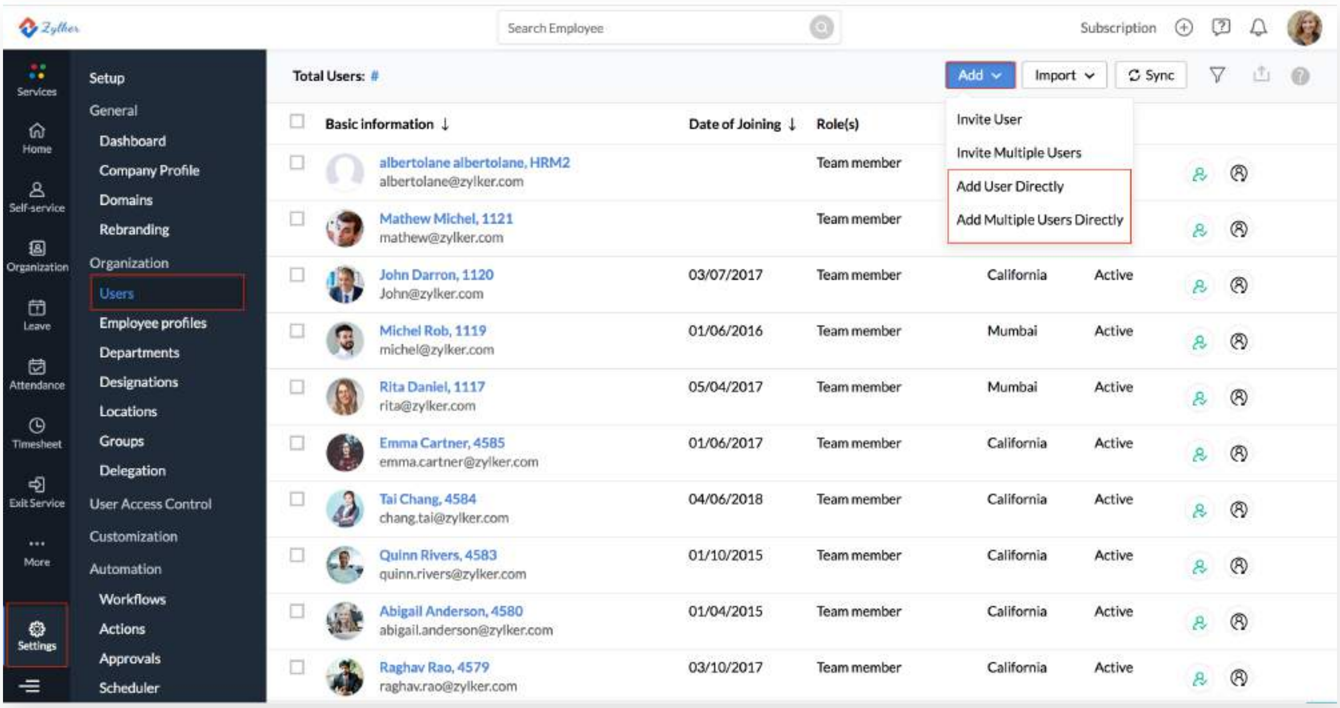
ADDING USERS

Add users directly:

If you have a verified domain, you can add employees as Users directly into the your organization's account.

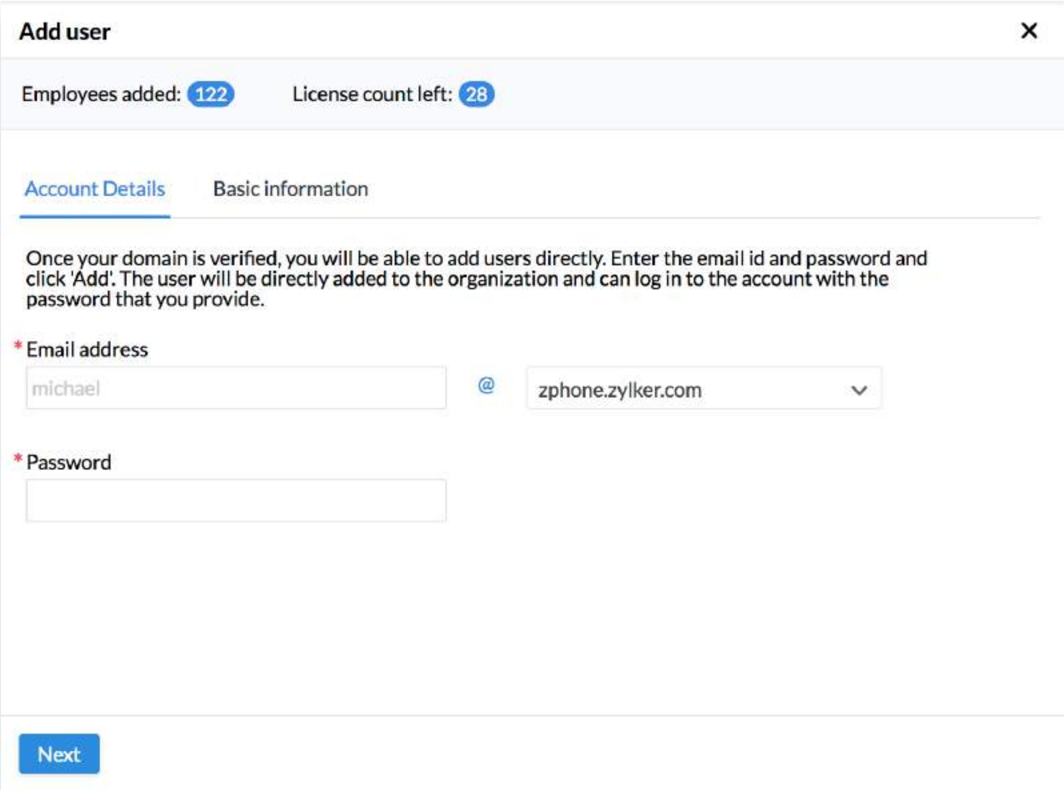
To add Users directly,

1. *Go to **Settings > Organization > Users***
2. *Click Add and select **Add User Directly or Add Multiple Users directly***



ADDING USERS

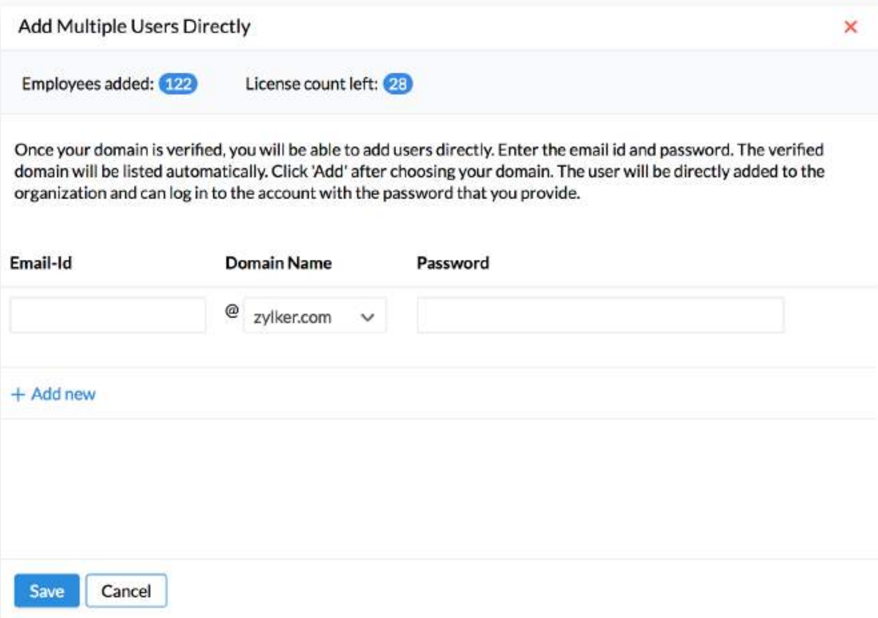
When you select Add User Directly, the following screen will appear :



To add Users directly,

1. *Enter the details and click* ***Next***
2. *Enter the basic information and click* ***Add***

When you select Add Multiple Users Directly, the following screen will appear:



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

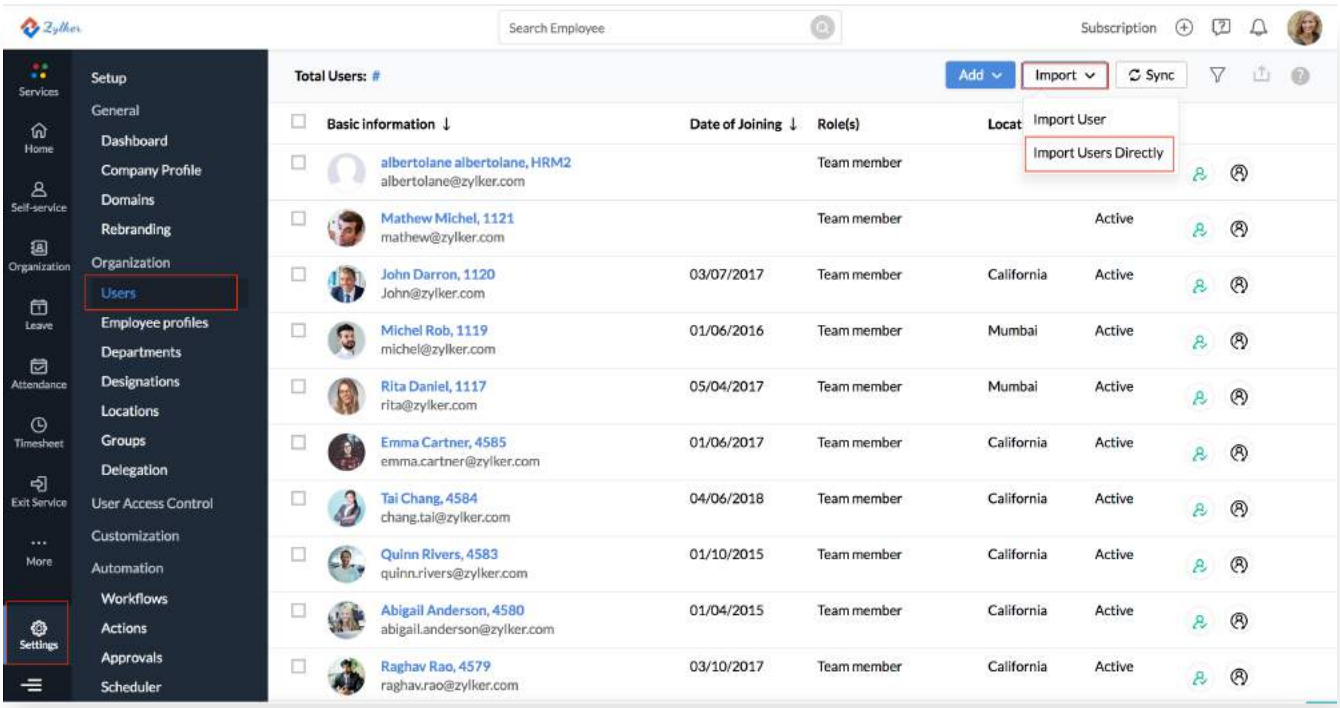
The users will now be added into the system. You will need to provide them with login passwords the first time they login. They can reset their passwords once they are into the system.

Import users directly:

When you have a lot of users to add, you can use Import Users with a verified domain.

To Import Users directly,

1. *Go to Settings > Organization > Users*
2. *Click Import and select Import Users Directly*



Only xls, xlsx and csv formats are supported.

Sample format for importing users directly

ADDING USERS

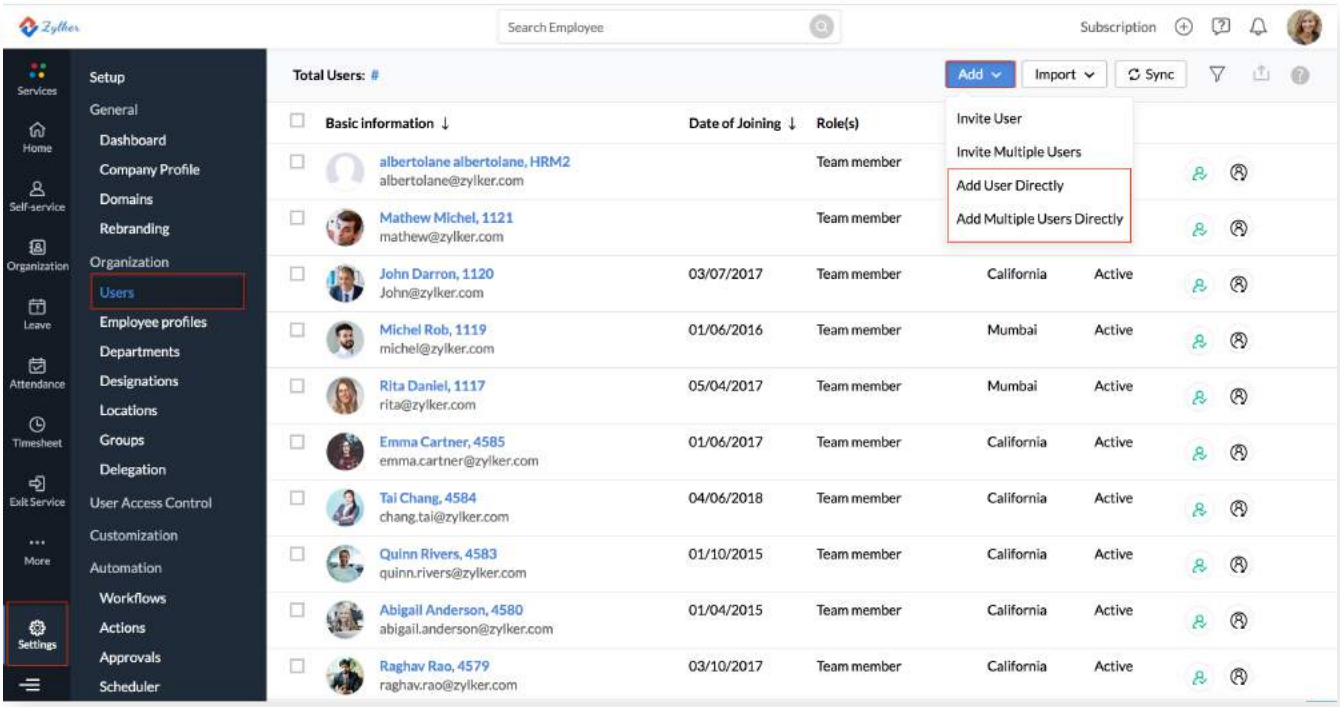
General Domain:

If you have signed up using a general domain, then you will only be able to invite users to your account. (only with a verified domain you can add users directly).

Note: *By General Domain we mean that there is no domain based email address for your Organisation. For example, your Organisation domain is "abc.com" but the users in your org have an email that is different from abc.com*

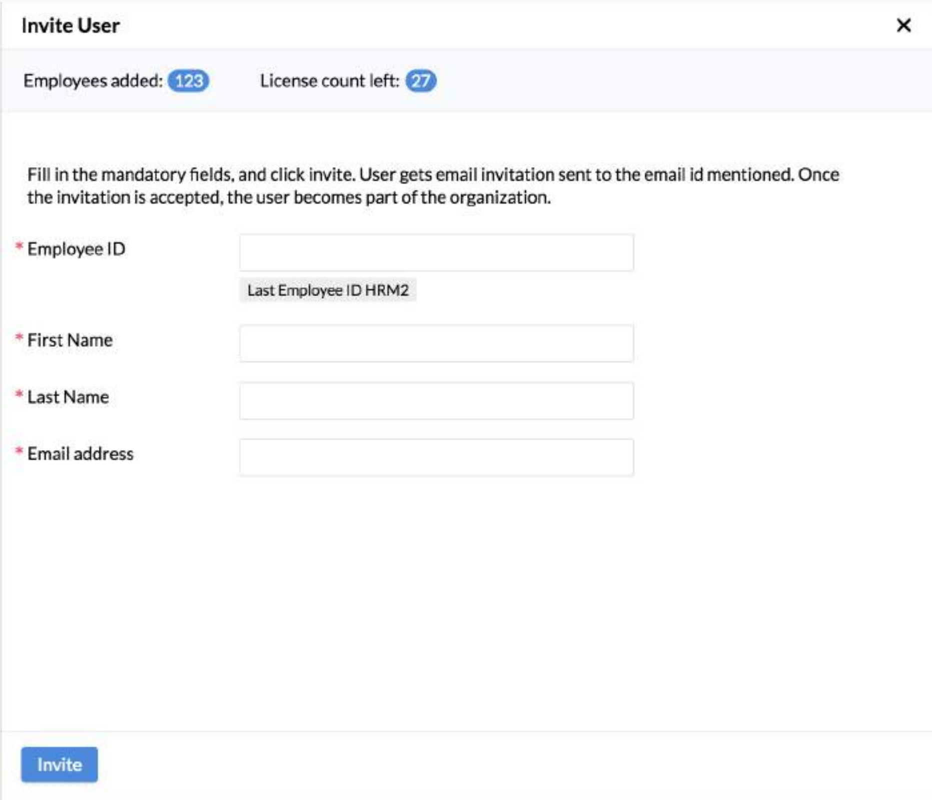
To Invite Userst,

1. *Go to Settings > Organization > Users*
2. *Click Add and select Invite User or Invite Multiple Users*



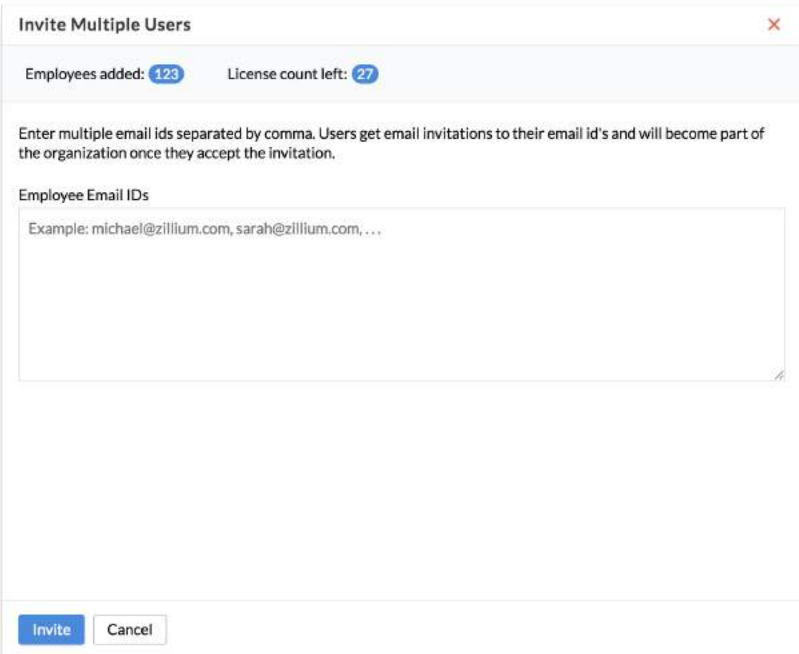
ADDING USERS

When you choose Invite User, the following screen will appear:



Fill in the details and click **Invite.**

When you choose Invite Multiple Users, the following screen will appear:



Fill in the details and click **Invite**. An invitation will be sent to the entered mail address. The user has to accept the invite within 7 days. If this period expires, then the user has to be reinvited. To reinvite users, filter the Invited list of Users and resend the invitation.

Importing Users in Bulk :

Once Users have been added into their system, all their details can be imported in bulk using this method.

To Import Users in bulk,

1. Go to *Organization > Employee*

2. Click Import under the ellipsis icon

3. Choose the file to be imported (to be as per the below given format)

Note: *Locations, Departments and Designations must be updated (imported or added) before importing users in bulk.*

Sample template for importing users in bulk

Syncing with other Services:

You can add users to your Zoho People account, synchronizing with other services like Zoho Mail, G Suite, and Office365. To do so, follow the steps below.

To sync with Zoho Mail,

1. Go to Settings > Organization > Users

2. Click Sync and select Import from Zoho Mail

3. Search or select the users and click Import User

The user will be added to your Zoho People account and you can view them under **Employee** > **Users.**

To sync with GApps,

1. Go to Settings > Organization > Users

2. Click Sync and select Import from GApps

3. Select the users and click Import User

The user will be added to your Zoho People account and you can view them under **Employee** > **Users.**

Note: *Users will need to register with Zoho People using the same email address they used to register for G Suite.*
If your organization domain is verified, the users can become part of the organization once you import them from G Suite. If your organization domain is not verified, the users will be prompted to create a Zoho account.

Note: *You need to install Zoho People app from the Google marketplace to use this function.*

To import from Office365,

1. Go to Settings > Organization > Users

2. Click Sync and select Import from Office365

3. Select the users and click Import User

ADDING USERS

The users will be added to your Zoho People account. You will be able to view them under Employee > Users.

Note: *Users will need to register with Zoho People using the same email address they used to register for Office365.*

Note: *You will need to install the Zoho People app from the Office store to use this function.*

Employee profiles:

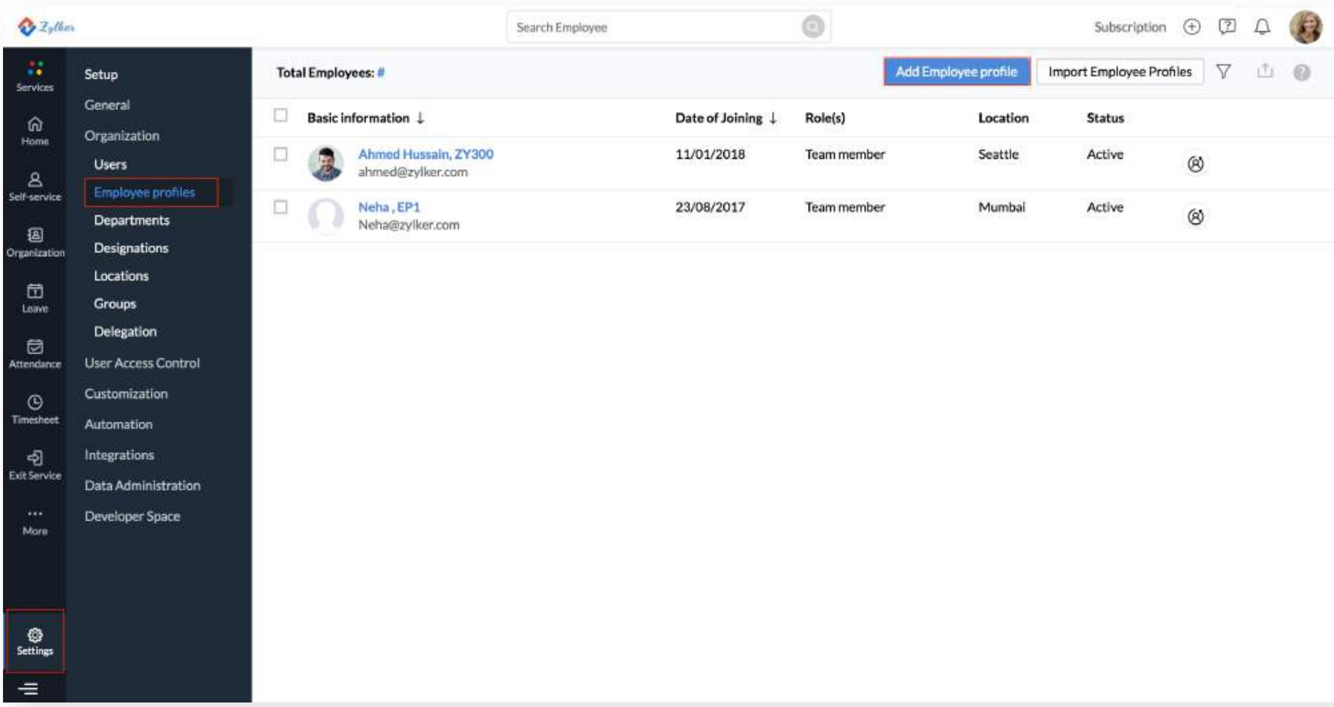
In addition to active users, you may have staff who are on a contract or a temporary basis. These employees can be set up as Non-Users. In Zoho People, you can store their details on the system without providing them any access to the program.

To import from Office365,

1. Go to Settings > Organization > Employee Profiles

2. Click Add Employee Profile

3. Fill in the details and click Add



Sample format for importing employee profiles

SETTING UP LEAVE

One of the most common ways employees will use an HRMS is applying for leave. Creating leave policies that work for your organization is one of the first things you'll need to do. Zoho People offers flexible customization to help you build the right policies.

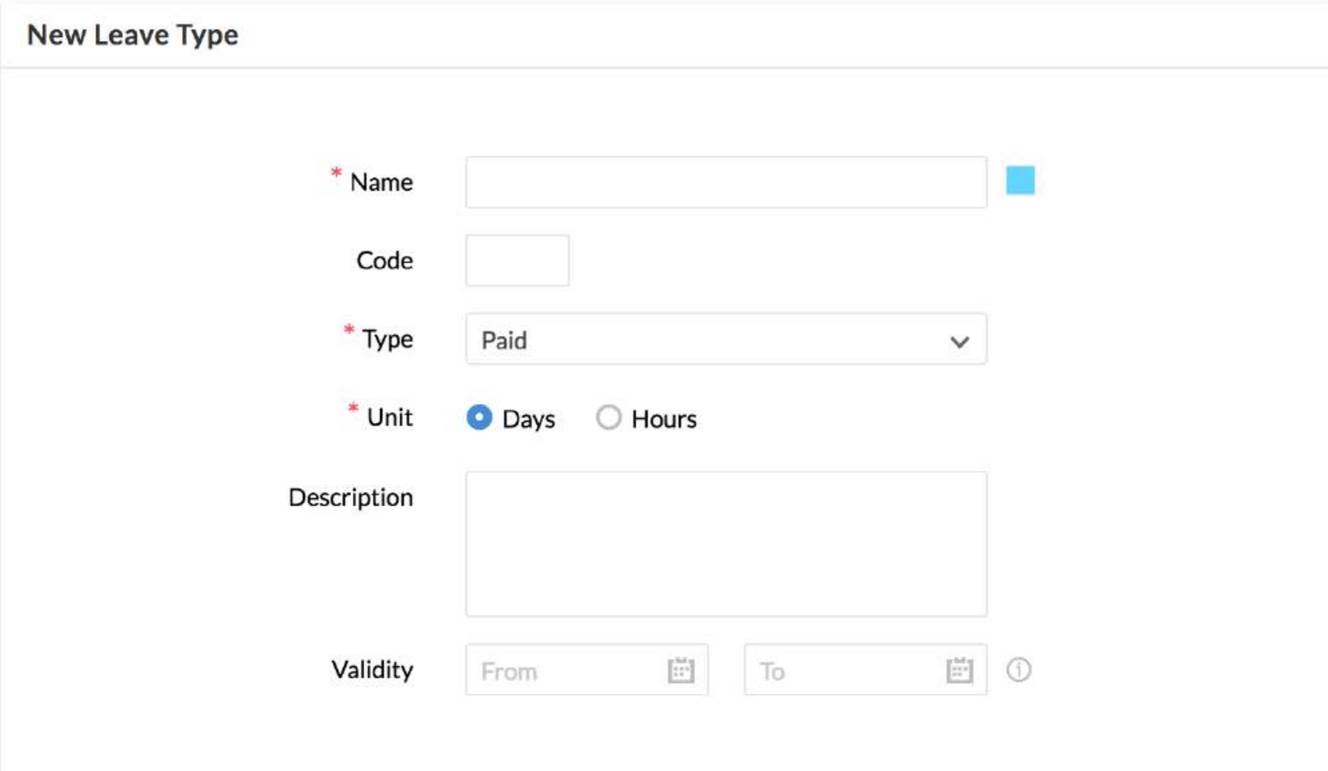
To configure a new leave policy,

*1. Go to **Leave > Settings > Leave Type***

*2. Click **Add***

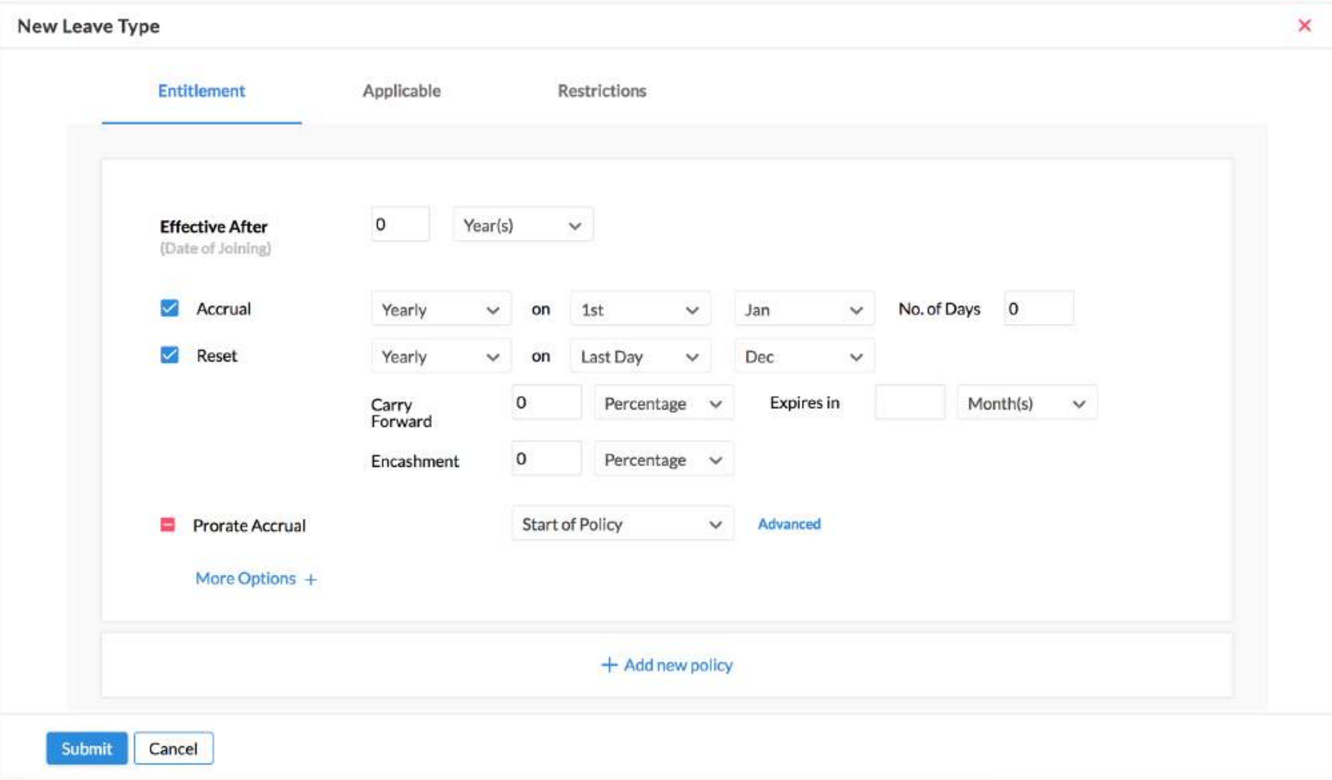
*3. Fill in **name, code, type, unit** and **validity** of the **leave***

*4. Click **Submit***



Entitlement:

Here we define how much leave gets credited to an employee using various options.



Some important terminologies to help you set up your new leave type:

Effective After - the period after which the policy is applicable.

Accrual- Intervals within which leave is credited. Under accrual you can set the periodicity such as yearly or monthly, select the specific date and the month and define the number of days to be given under the leave type.

Reset - Define intervals within which leave is to lapse. Here again , as in accrual, you can set the periodicity.

You can also apply the following options to the unused leave:

1. Carry Forward - Unused leave to be carried forward (Expires in - Duration after which the carried forward leave expires)
2. Encashment - Unused leave to be converted monetarily

Prorate Accrual - Allows leave to be credited when the employee enters the policy. The following options are available under prorate accrual:

1. Start of Policy - First accrual of the policy will be prorated

2. Start and End of Policy - First and Last accrual of the policy will be prorated

3. Do not Prorate - Full entitled leave is credited

Advanced - More options to define how the leave can be prorated:

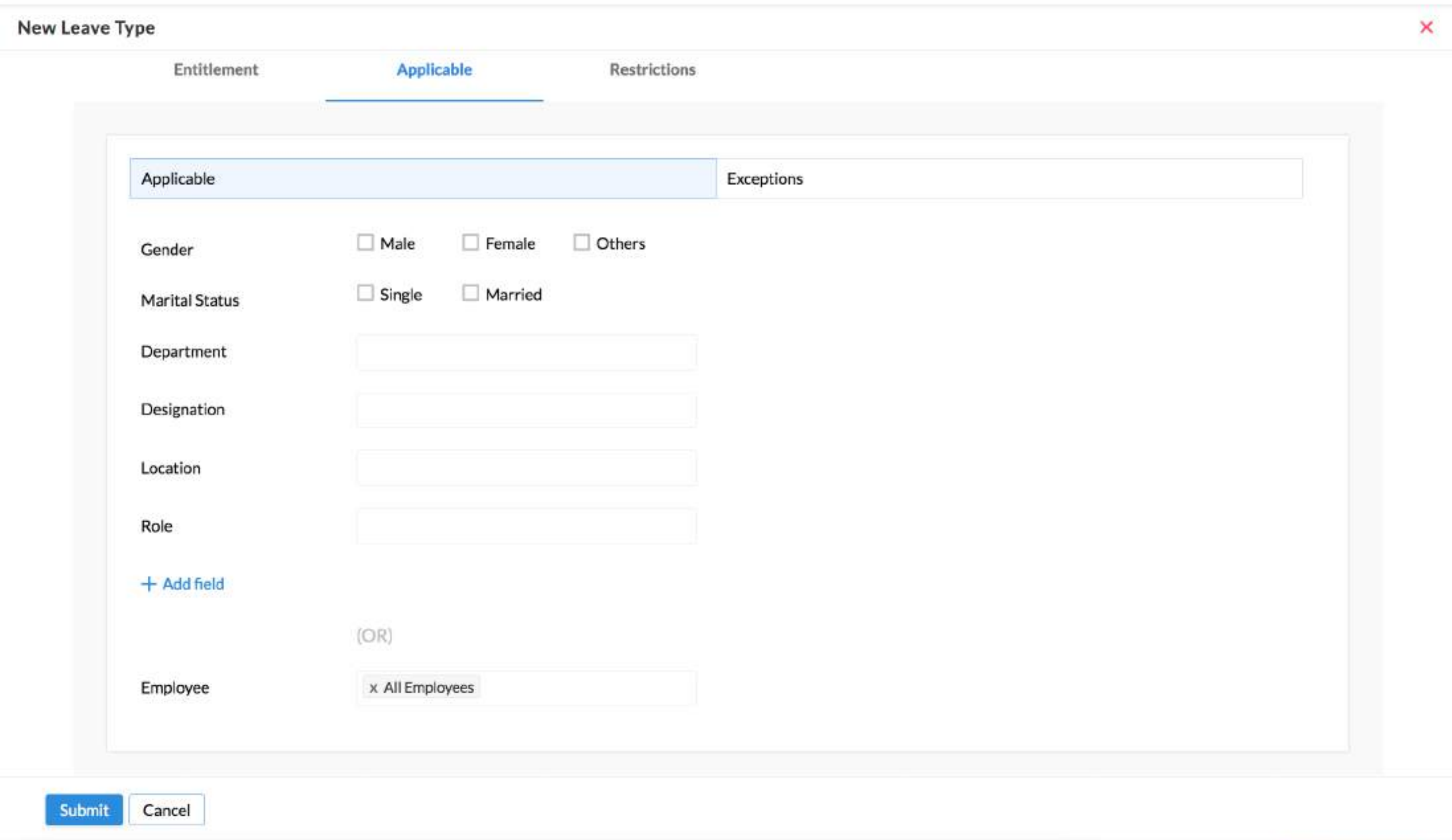
1. Prorate by - Define how to prorate entitled leave

2. Round - off - Define how to round-off prorated entitled leave

3. First Month Rule -Define how leave is credited for the first month of entering the policy based on date of the month

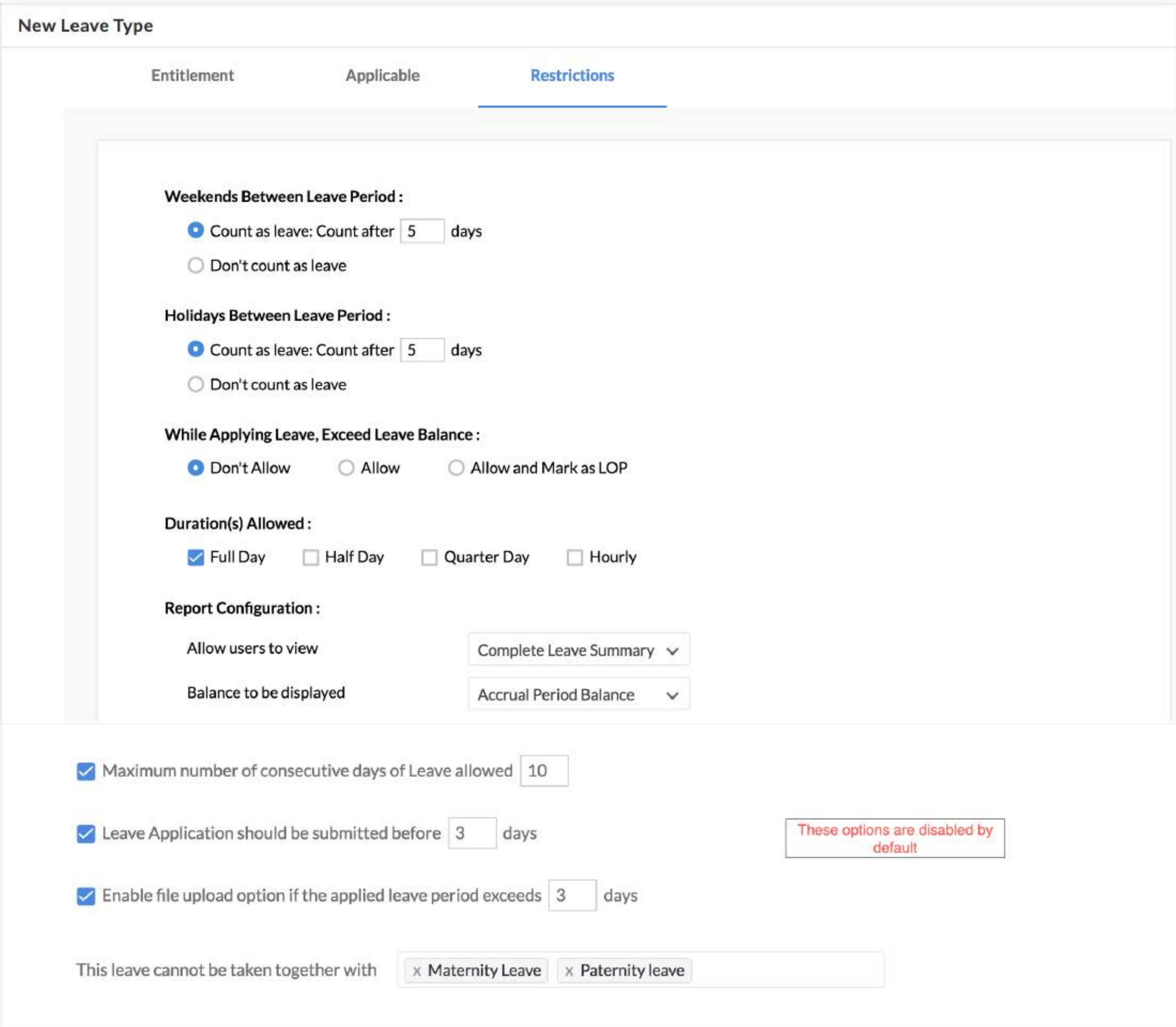
Applicability:

You can define who the leave is 'Applicable' to. You have options like Gender, Marital Status, Department, Designation, Location, Role here.



Exceptions: Those who are exempted from the applicable group can be included under Exceptions. Let us say for example you are creating a Maternity Leave and your applicable group will be Female. Under Exceptions you can include contracted workers so that women in that role will be excluded from this leave type.

Restrictions: With restrictions you can further add more limitations to your leave type.



Points to Note:

The Report Configuration option lets you choose how users can see leave summaries and their leave balances.

Note: Absent and Compensatory-Off leave types are available by default.

Customizing leave policies:

This option is useful if you would like to tailor the policy for one or a specific set of employees.

To customize a leave policy,

*1. Go to **Leave > Settings > Customize Policy***

2. Select the policy you want to customize

*3. Make the changes and click **Submit***

Customize leave balance :

This option is useful when you want to change the leave balance for one or a specific set of employees.

To customize leave balance,

*1. Go to **Leave >Settings > Customize Balance***

*2. Click **Customize***

3. Select the employee's name from the drop down

*4. Make the changes and click **Submit***

Importing Leave Balance :

Leave balance from one system to another can be imported in Customize Balance.

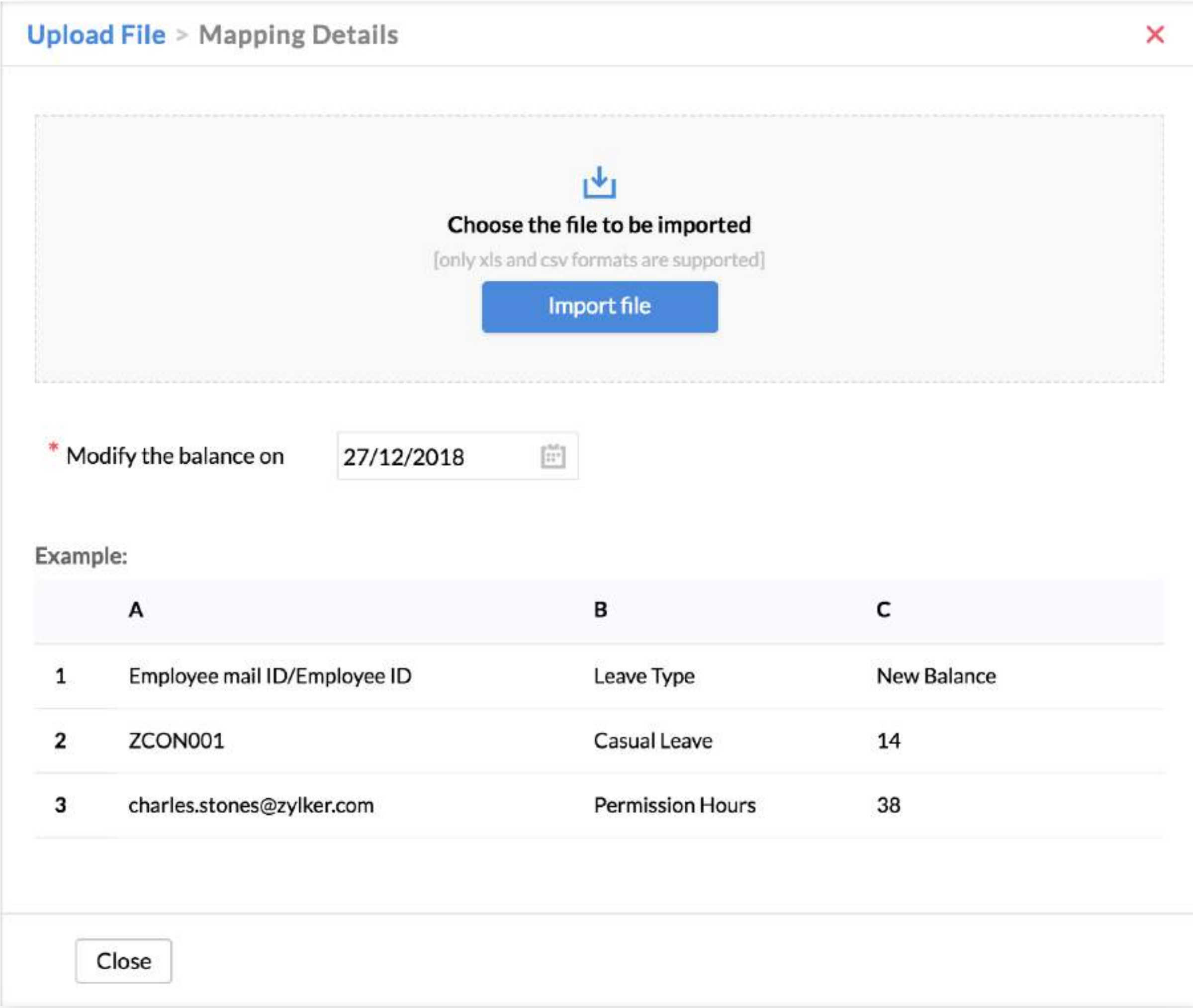
To import leave balance,

*1. Go to **Leave > Settings > Customize Balance***

2. Click the ellipsis icon

3. Select Import

4. Import the file in the below given format



Note: *The Leave type name in Excel file should be the same as the one set up in Zoho People as it's Case-Sensitive.*
The New Balance is the overall balance that will be reflected in the user account which will be updated on a specified date. As per the above screenshot the balance has been modified on <27/12/2018>

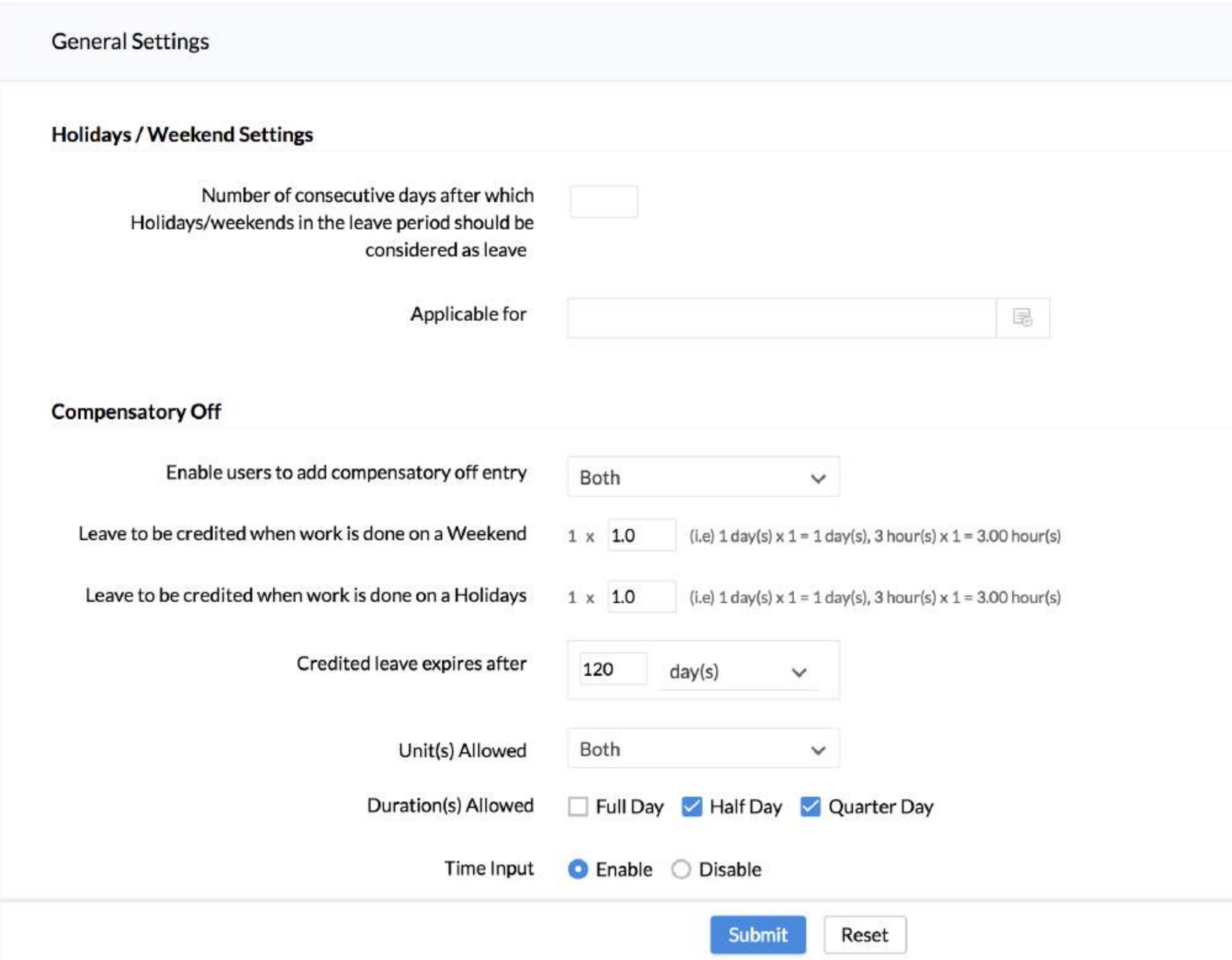
General Settings in Leave:

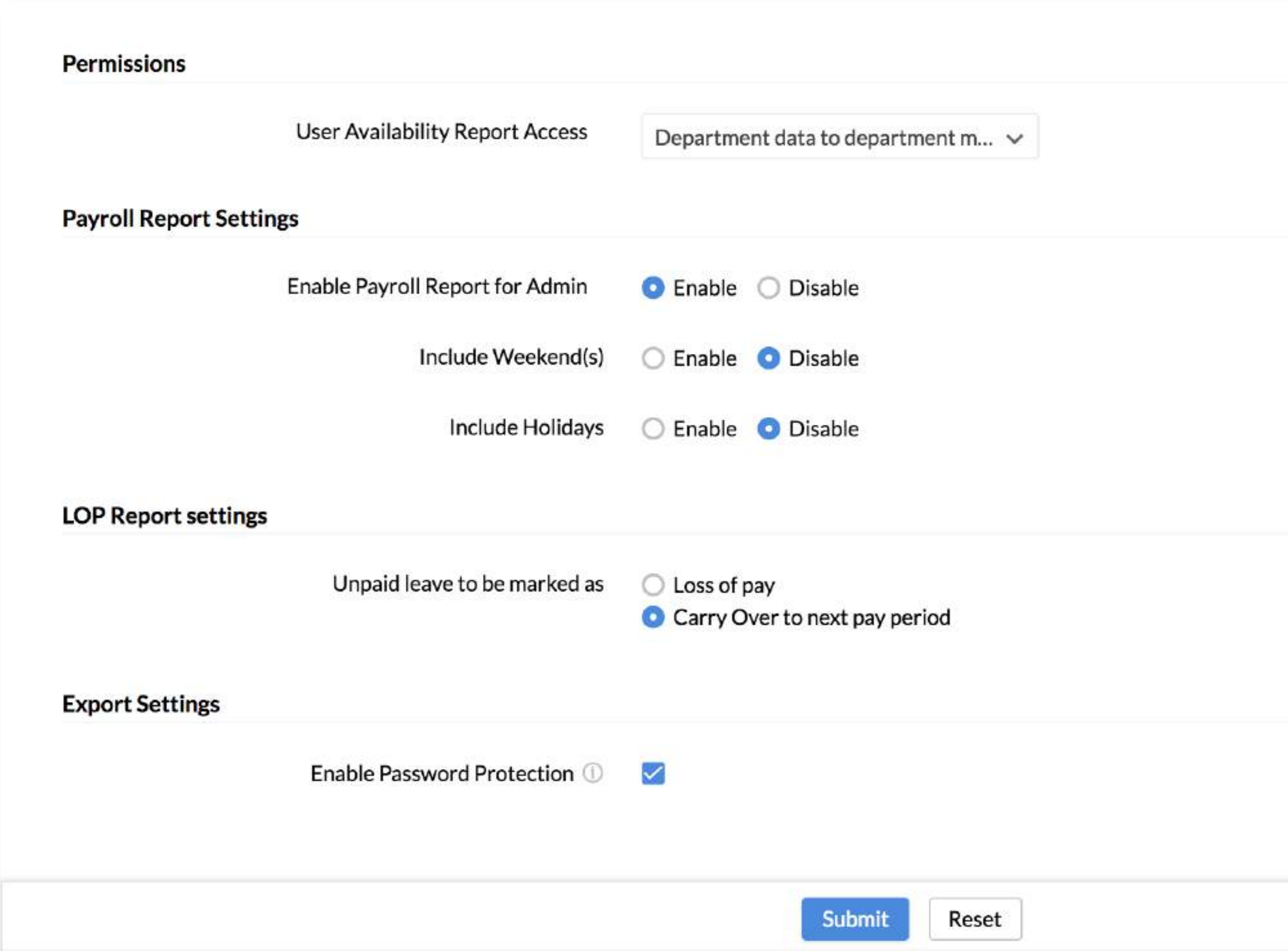
There are some general settings that you can use to make your leave policies workable.

Points to note:

1. If Automatic is chosen under **Enable users to add compensatory off entry** then you can use the Compensatory - Off scheduler to schedule the leave to be added

(go to Settings > Compensatory Off Scheduler)





Leave Applications:

Exporting leave applications along with details of date of request is possible in Zoho People. You can also create your own customized view and export the data based on that view

To export Leave Applications,

1. *Go to* ***Leave > Leave Applications***
2. *Select the view you want to export*
3. *Click the ellipsis icon*
4. *Select* ***Export***

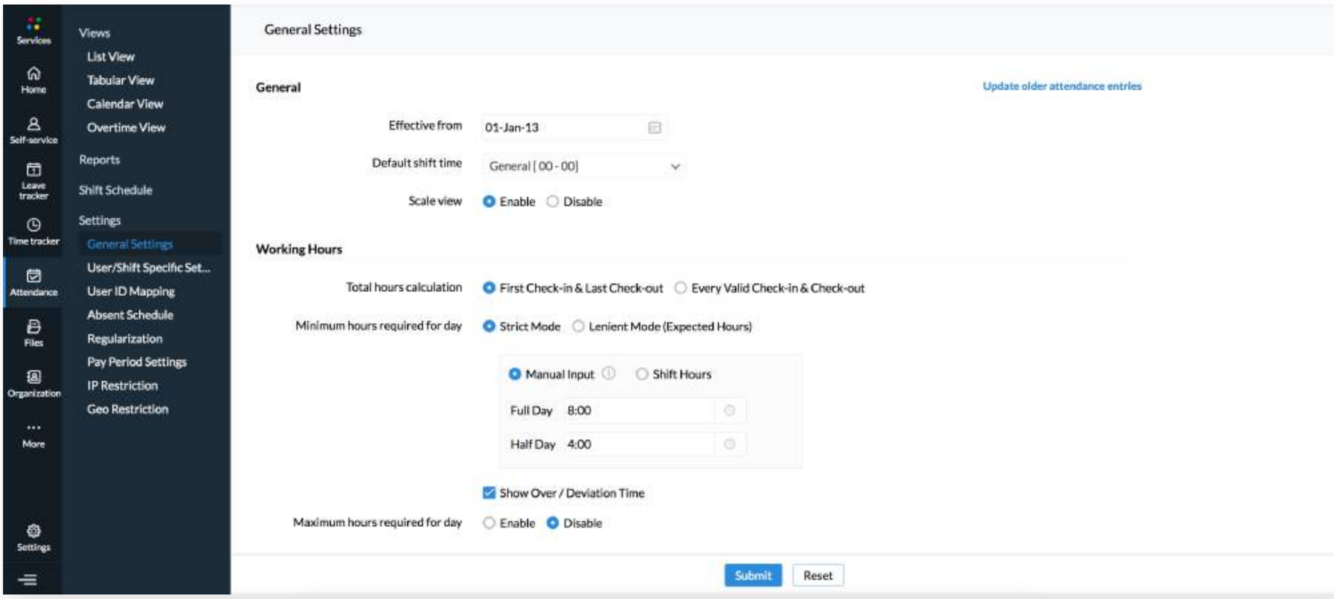
Note: *Leave Form can be customized to add desired fields*

SETTING UP ATTENDANCE

Using Zoho People's Attendance Module, you can track and capture your employees attendance in 3 ways - web-based check-in, mobile-based check-in and with biometric device integration.

General Settings:

Under the general settings, you can configure all the main aspects of your organization's attendance patterns to record the attendance of your employees accurately.



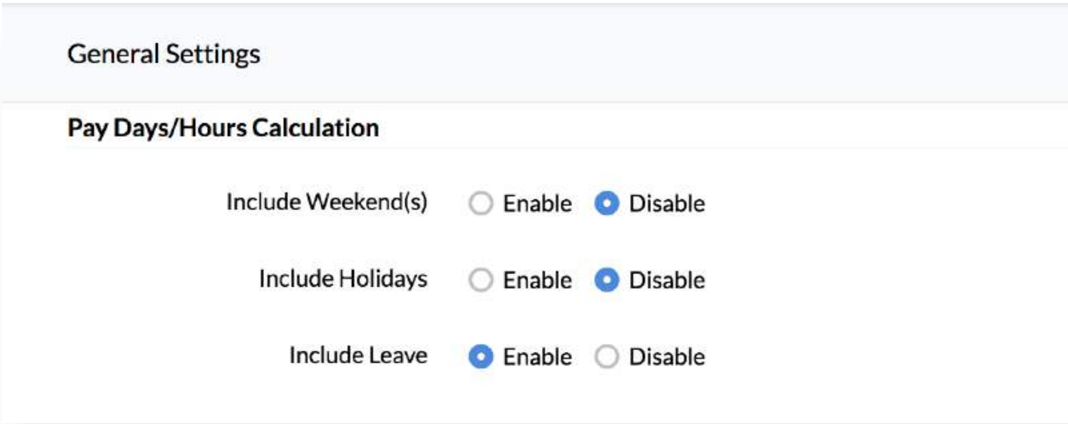
1. From your home page, go to Settings (gear icon) > Employee > Employee Profiles.

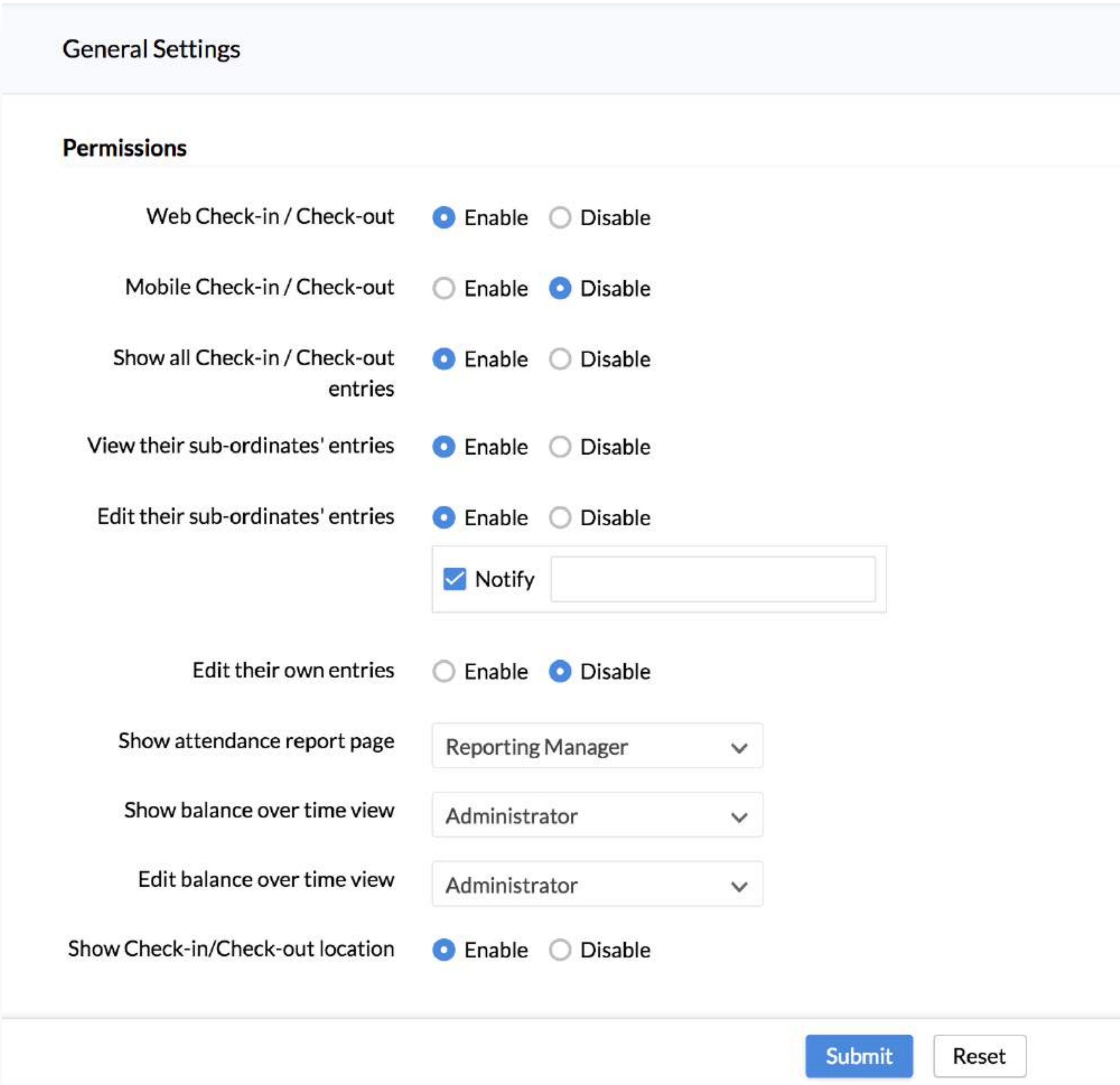
2. Click on Import Employee Profiles.

Points to note:

1. The **Strict Mode** is for organizations that want to ensure that their employees are in office for a specific number of hours to consider them present and calculate pay. Organizations that are flexible with the number of hours can choose the **Lenient Mode.**

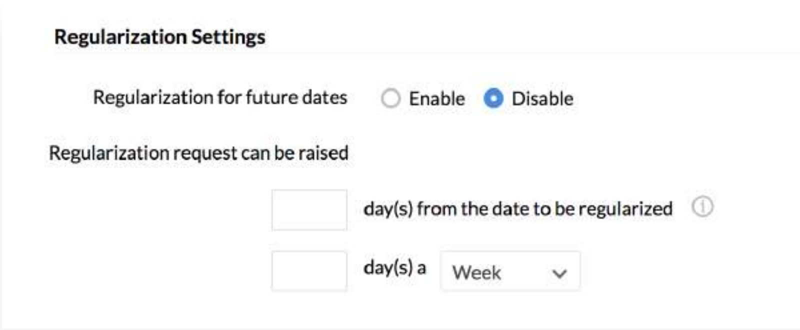
2. Subsequently, you can opt for the First Check-in & last Check- out or Every Valid Check-in & Check-out depending on your organization's working style.





3. Regularization - Regularization allows the users to edit their attendance entries when they find any discrepancies. (provided they are given permission to do so under Permissions). Here you can impose some limitations on when are how regularization requests are raised.

SETTING UP ATTENDANCE



Notes: ***If Edit their own entries is*** *enabled and* ***Regularization*** *is enabled, then employees will be able to see their entries and add comments but cannot edit them.*

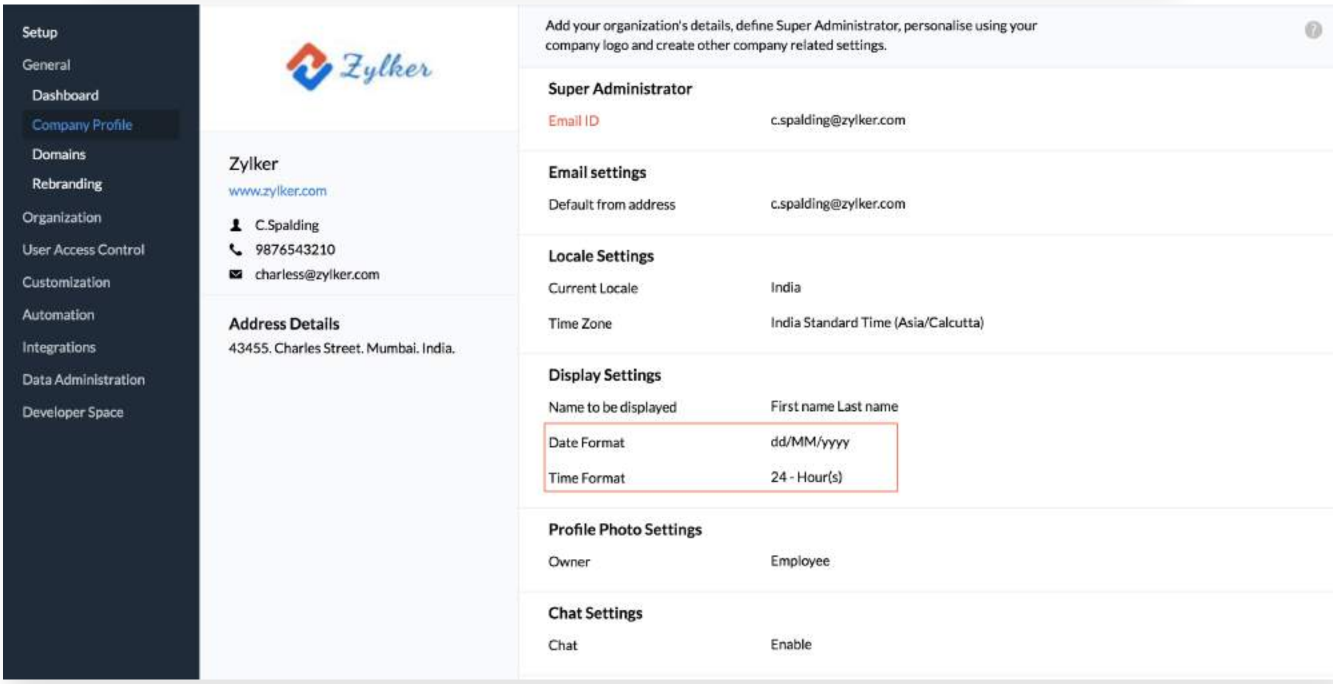
Importing and Exporting Attendance details:

By using Import and Export option, your organization can save a lot of manual time and effort.

To Import Attendance Details,

1. *Go to **Attendance > Views***
2. *Click the ellipsis icon and select **Import***
3. *Choose the file to be imported (as per sample format)*
4. *Map the fields, handle the duplicates and click **Next***

Employee ID	Check In	Check Out		
1	01-Apr-2016 09:00 AM	01-Apr-2016 05:00 PM		
2	02-Apr-2016 09:00 AM	02-Apr-2016 05:00 PM		
3	03-Apr-2016 09:00 AM	03-Apr-2016 05:00 PM		
4	04-Apr-2016 09:00 AM	04-Apr-2016 05:00 PM		



Absent Schedules:

If an employee does not mark attendance for a given day, this will be captured as an absence using the Absent Schedule. This will be listed for the employee in the Leave list view under the Absent leave type. The employee can then convert this to any of the leave types by clicking **Convert to leave.** This allows you to track every time an employee doesn't check in.

To Import Attendance Details,

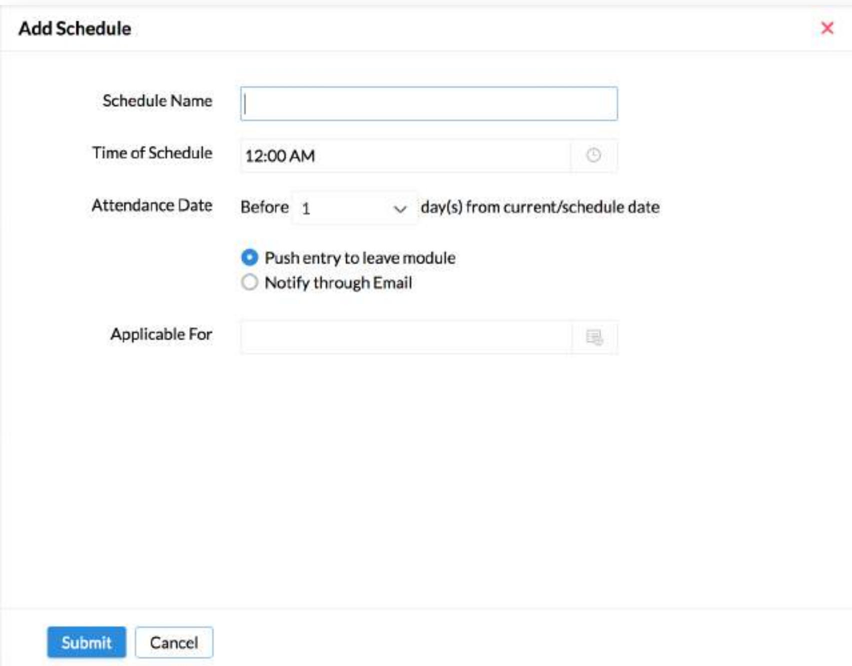
1. *Go to* ***Attendance > Settings > Absent Schedule***
2. *Click* ***Add Schedule***
3. *Enter the details of schedule*
4. *Click* ***Submit***

Enable Push to Leave module option - The Absent entries would be pushed to Leave Module as "Absent" if this option is chosen

If you want a notification to be sent, you can enable the **Notify through email** option. If you select this option, the employee and their reporting manager will be sent an email notifying them that the absent entry should be converted to leave or on-duty.

Under Applicable For, select details such as the Roles, Department, and Designation to run the schedule for.

Notes: *If you do not select anything here, the schedule will apply to the entire organization.*

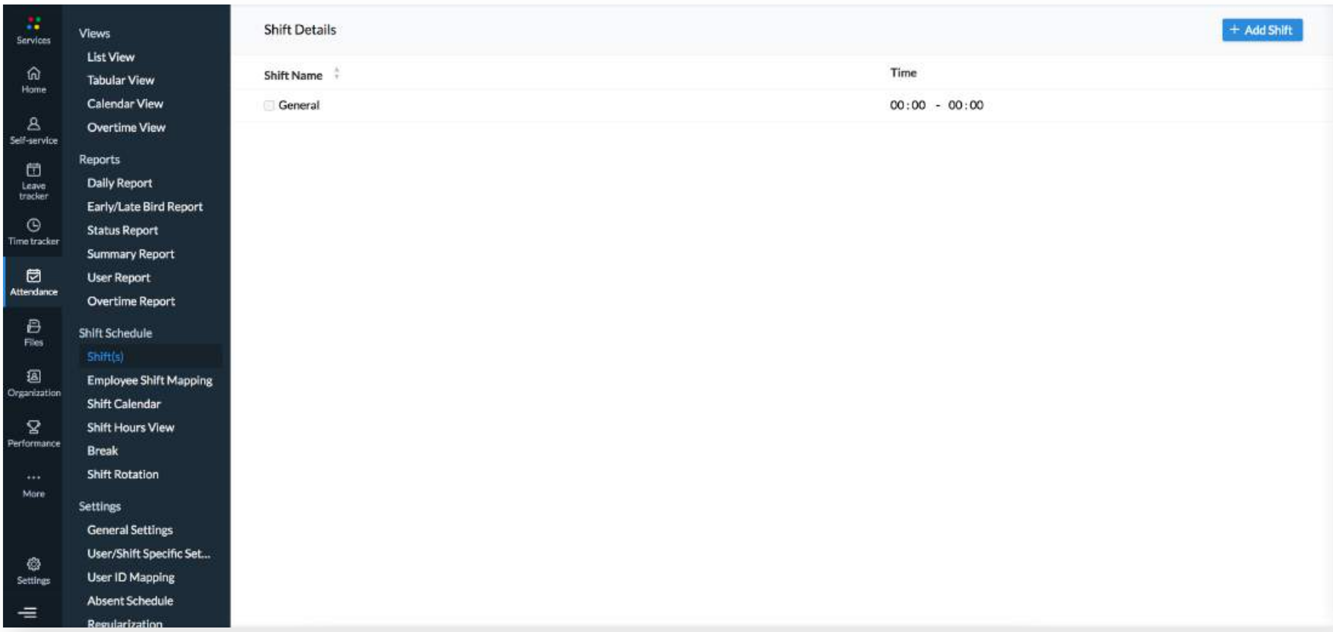


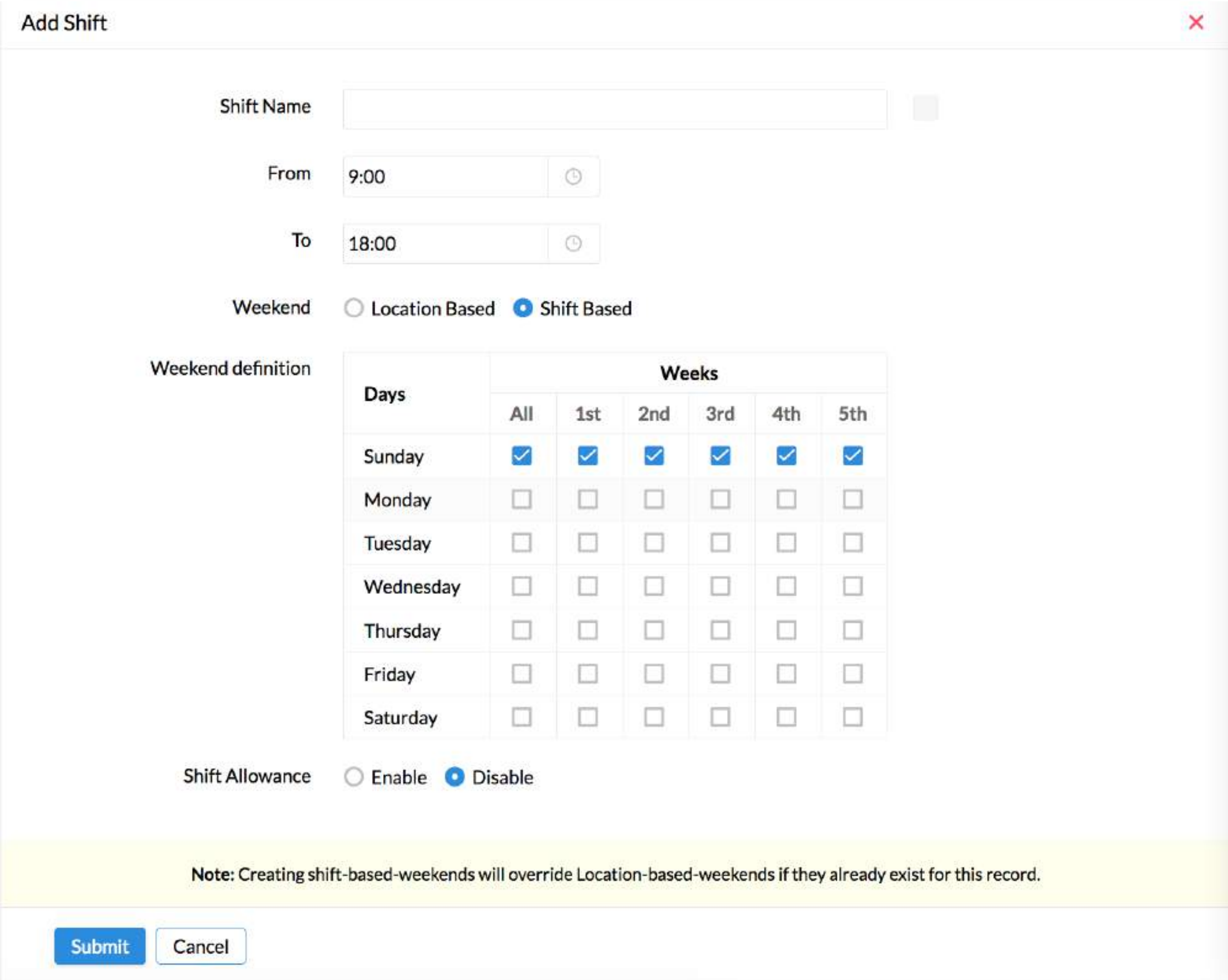
SETTING UP SHIFTS

If your organization has more than one shift, you'll need a tool to manage your shifts. With Zoho People you can create multiple shifts and assign employees to specific shifts and automate shift rotation.

To add a Shift,

1. *Go to **Attendance > Shift Schedule > Shifts***
2. *Click **Add Shift***
3. *Enter the Shift details*
4. *Select if the weekend should be based on location or shifts*
5. *Select if Shift Location is enabled or disabled*
6. *Enter the rate per day if Shift Allowance is enabled*
7. *Click **Submit***





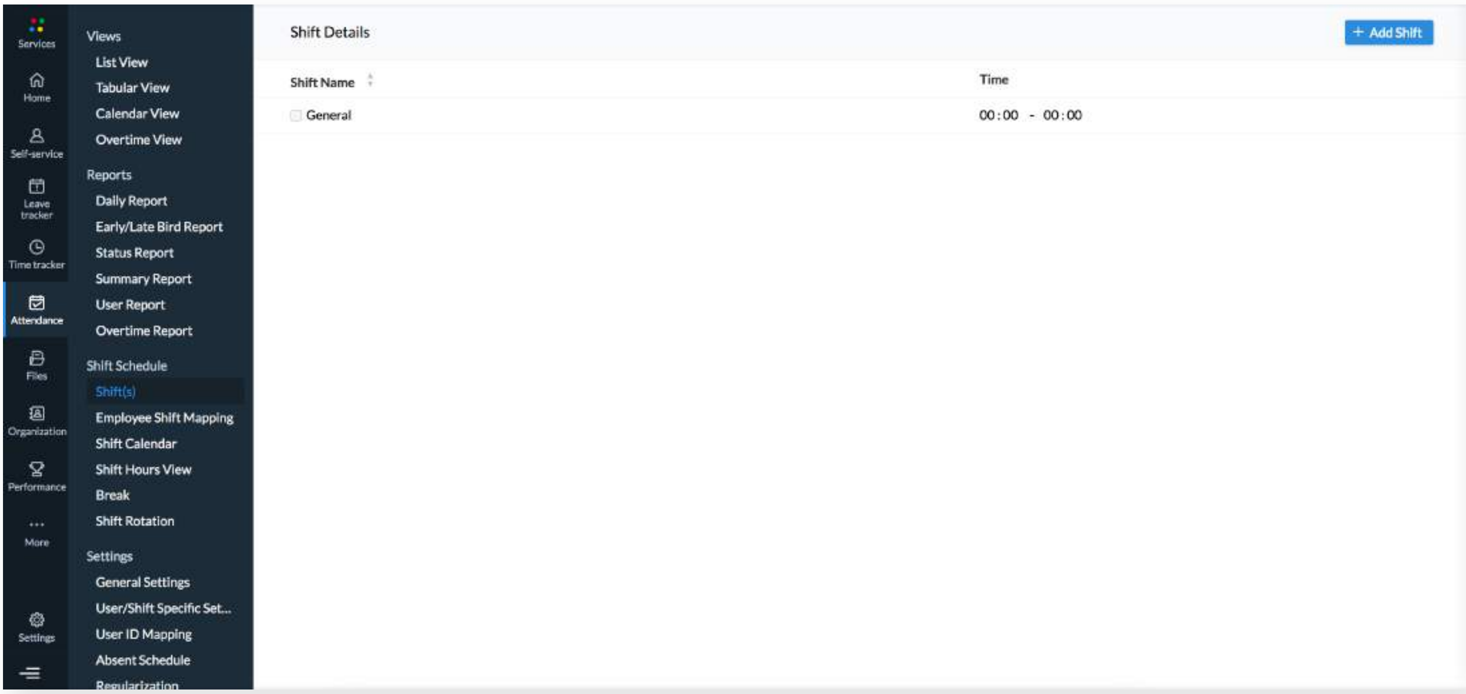
Assigning Employees and Users to Shifts:

An employee can be assigned to a shift in many ways.

Step 1 : From Employee Shift Mapping

To assign as employee to a shift,

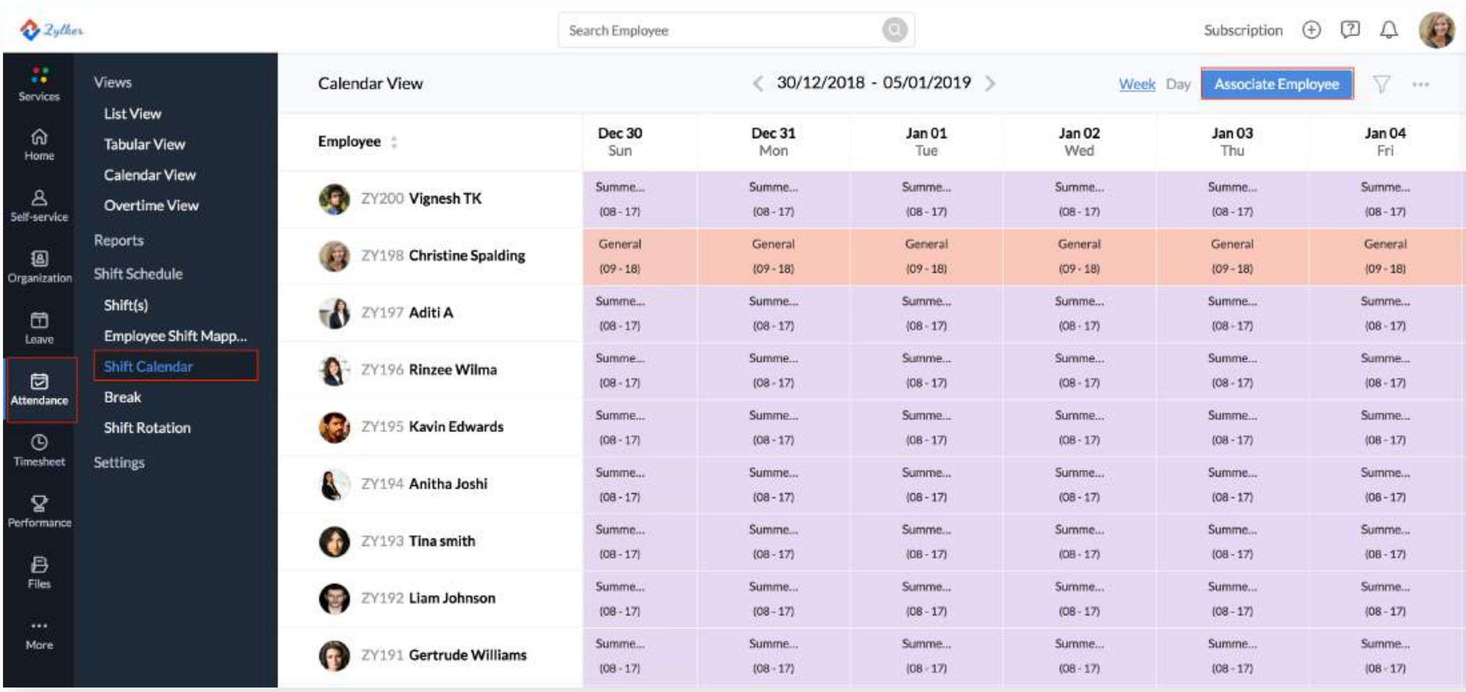
1. *Go to **Attendance > Shift Schedule > Employee Shift Mapping***
2. *Click **Associate Employee***
3. *Select the Users or Locations this shift is applicable for*
4. *Select the Name and Date Range*
5. *Click **Submit***



Step 2 : From Shift Calendar

To assign an employee to a shift,

1. *Go to* ***Attendance > Shift Schedule > Shift Calendar***
2. *Follow the same steps as mentioned in the previous method*



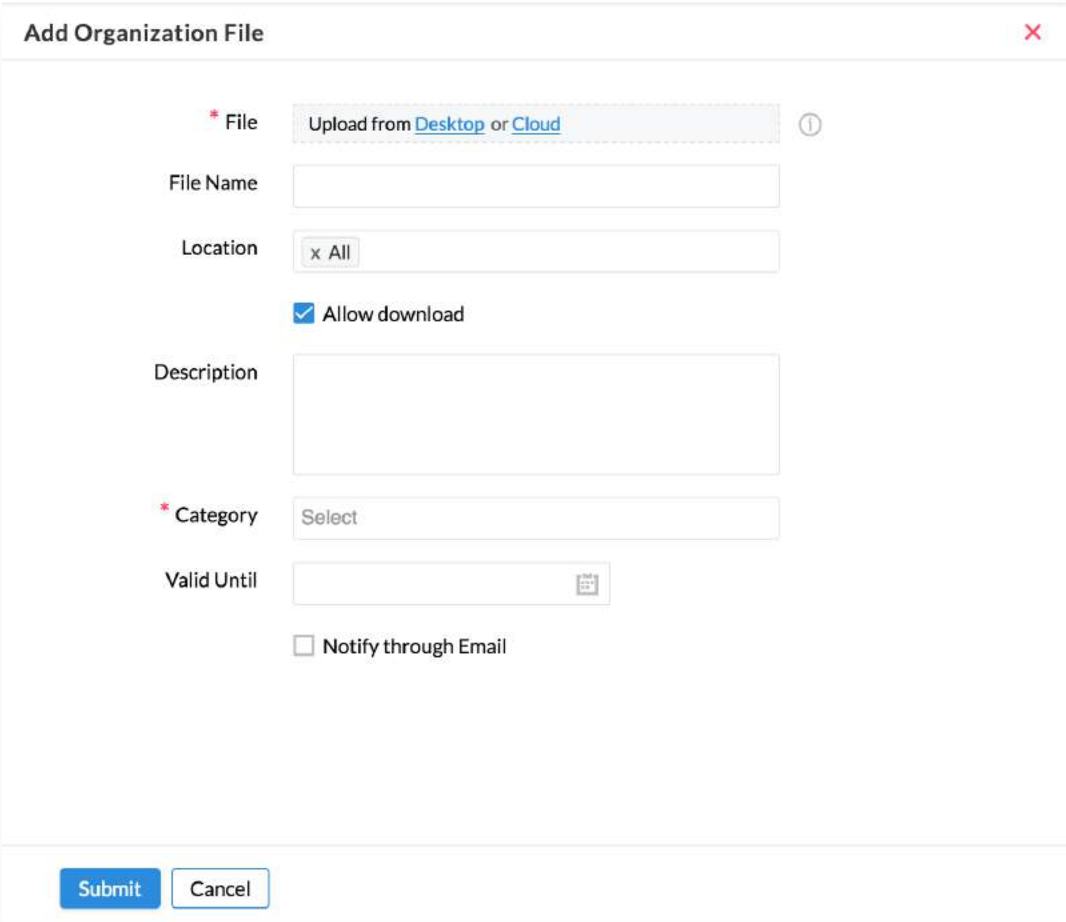
FILE MANAGEMENT

With Zoho People, you have can a central repository for all your files. Files are subdivided as :

1. Organization files - files that the company wants to share with all its employees. Organization files are typically policy documents that apply to all employees at large.

To add an Organization File,

1. *Go to **Files > Organization File > Add***

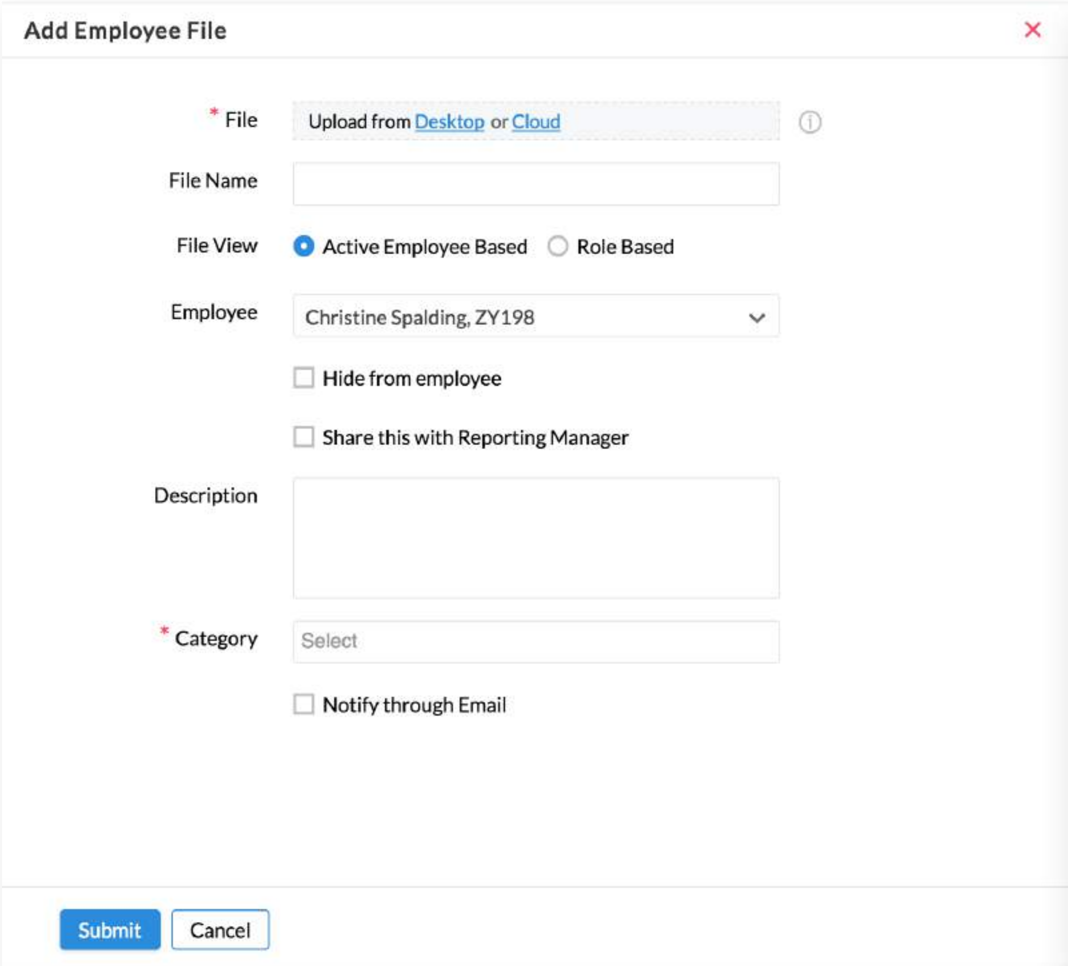


2. *Select the file you would like to add. You can either upload the file from your desktop or from cloud.*
3. *Name the file.*
4. *Select the Location or select **All.***
5. *Check the **Allow Download** option if needed.*
6. *Give a description if needed.*
7. Under Category, select the category or add a new category.
8. *Check the box to notify your employees through email about this file.*
9. *Click **Submit.***

2. Employee files - files that are confidential in nature that belong to specific employees such as a promotion letter or an increment letter.

To add an Employee File,

*1. Go to **Files > Employee File > Add***



2. Upload the offer letter from your desktop or Cloud

3. Enter the file name as 'Offer Letter'

4. Select the employee name from the drop down if you chose Employee Based.

*5. Check **Hide from Employee,** if necessary*

*6. Check **Share this to Reporting Manager,** if necessary*

7. Give a description, if required

8. Select the category

*9. Click **Notify through email,** if necessary*

*10. If you chose **Role Based** instead of **Employee Based,** you can select the Role from the drop down*

*11. Click **Submit***

SERVICES

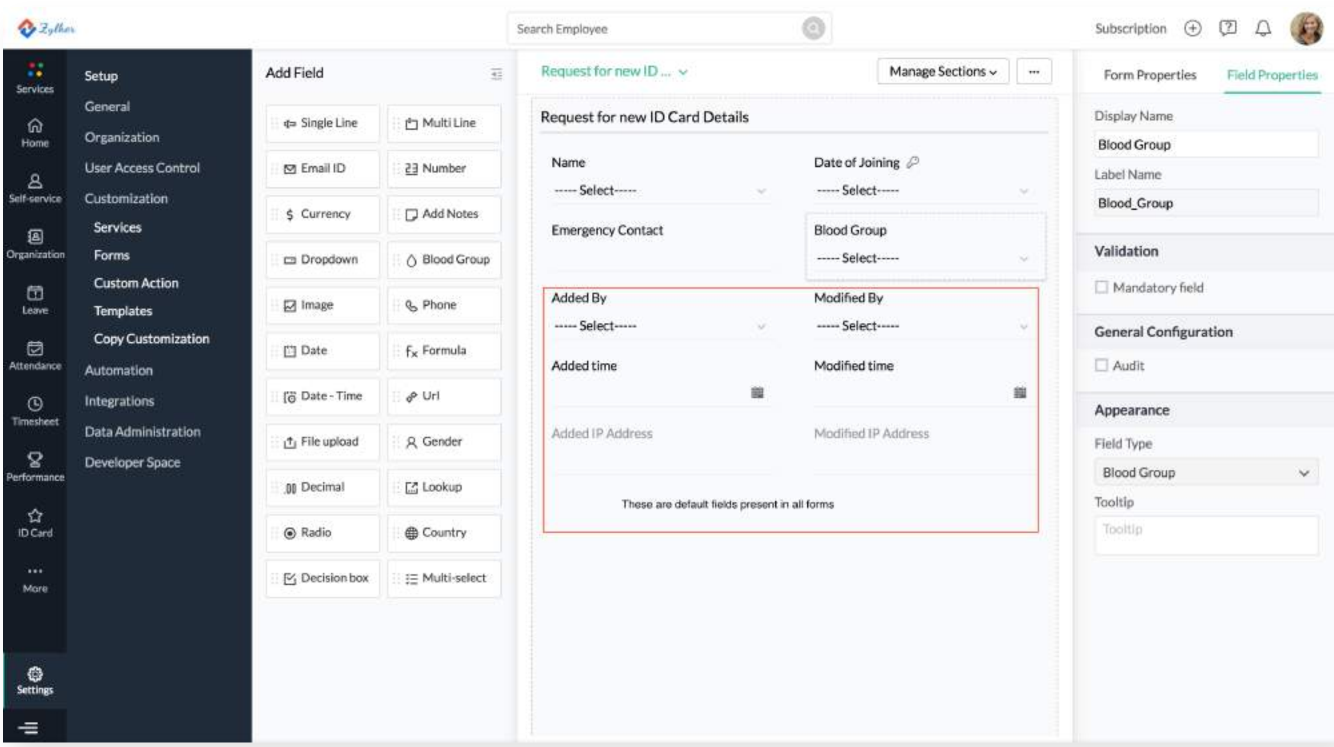
Zoho People's Services lets you set up and access all your HR functions in one central place. You can create and customize end-to-end services with step-by-step processes and configure forms, permissions, and even approvals and workflows. All important services such as Leave, Attendance and other specialized services such as Cab Request or Team Change all can be configured here.

Usecase:

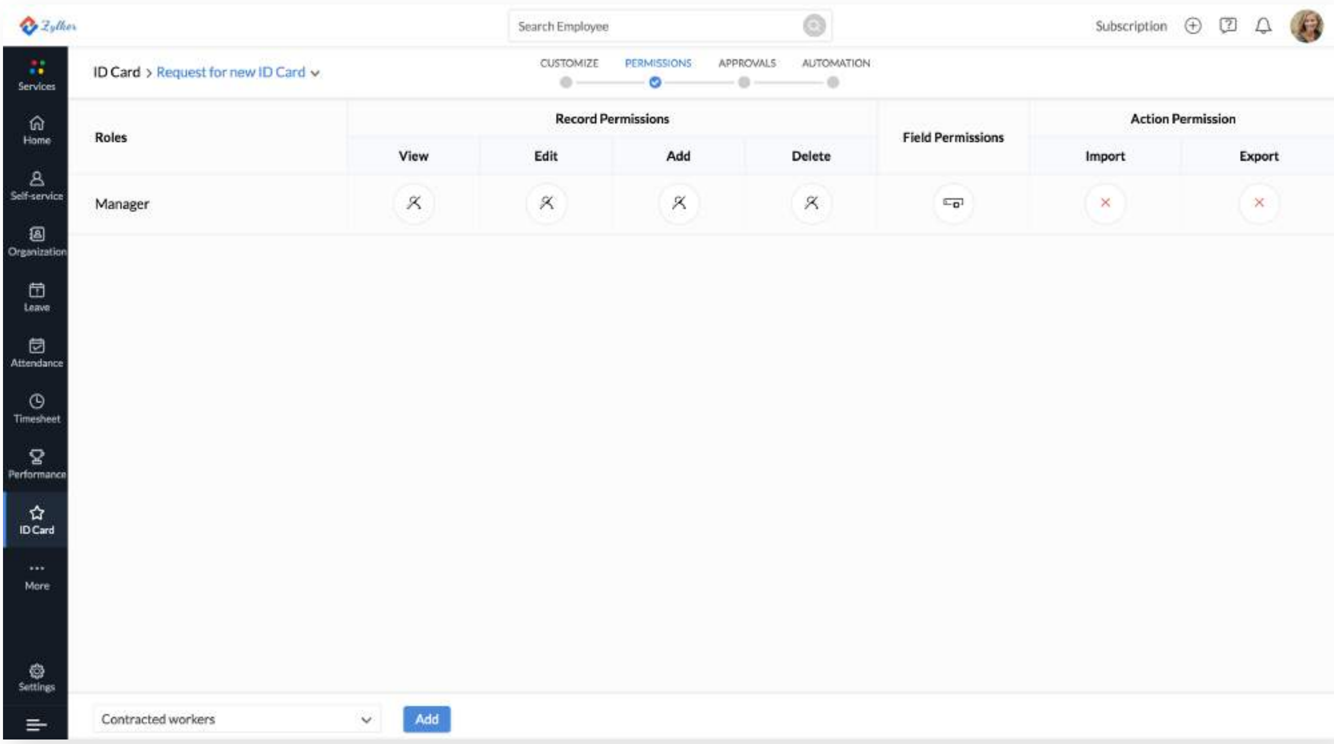
Service - ID Card Request

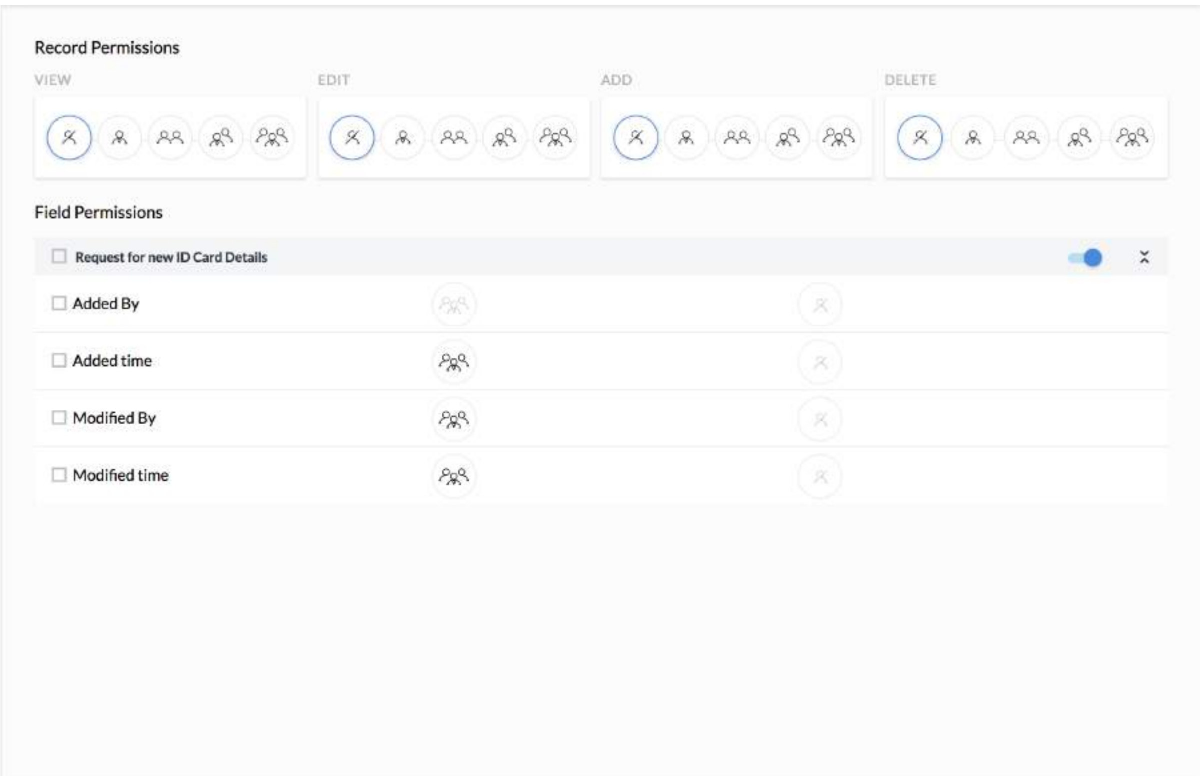
To create a new service,

1. *Go to Services*
2. *Click on* ***Create New Service***
3. *Give a Name and Description to the new Service, in this case ID Card Request*
4. *Click* ***Add New Form***
5. *Give a Form Name and other details , in this case Request for new ID card*
6. *Customize the Form by adding desired fields with drag and drop motion*

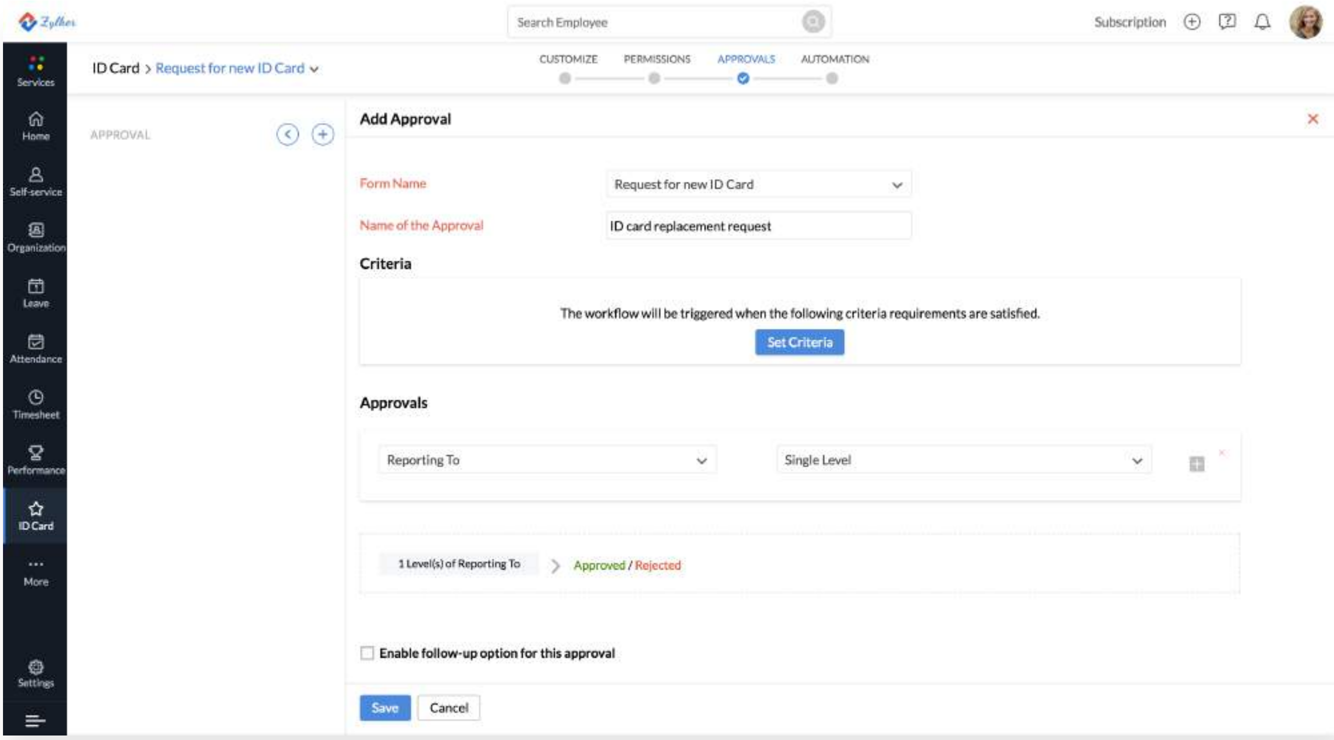


7. *Set Permissions on who can view what information under record and field permissions*

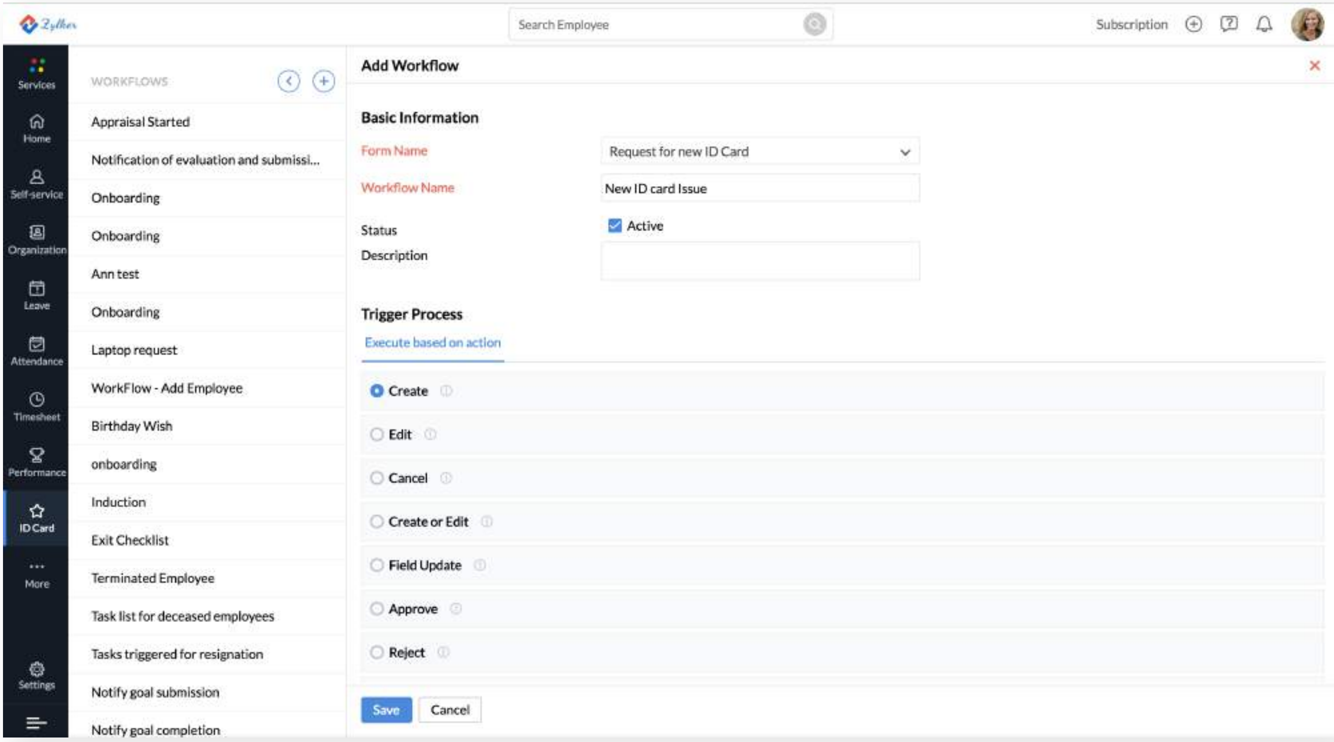




8. *Configure the approvals for this service*



9. *Configure Automation for this service*



Once all steps are configured the new service will be visible under Services.