



ZOHO People

SETUP GUIDE



CONTENTS



Introduction

Getting Started	3
Organization Settings	6
Adding Users	16
Setting up Leave	25
Setting up Attendance	33
Setting up Shifts	37
File Management	40
Services	42



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.





GETTING STARTED



Company Information

Help us setup your account

* Company Name

ABC Logistics

* Portal Name

abclogistics



Preview: <https://people.zoho.com/abclogistics/zp>

* Mobile

* Timezone

India Standard Time (Asia/Kolkata)



UPDATE

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 Administrators 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**

The screenshot shows the Zylker Organization Settings page. The left sidebar contains navigation options: Services, Home, Self-service, Organization, Leave, Attendance, Timesheet, Exit Service, and More. The main content area is divided into two columns. The left column displays the company profile information for Zylker, including the logo, website (www.zylker.com), contact details for C. Spalding (9876543210, charless@zylker.com), and address details (43455, Charles Street, Mumbai, India). The right column displays various settings: Super Administrator (Email ID: c.spalding@zylker.com), Email settings (Default from address: c.spalding@zylker.com), Locale Settings (Current Locale: India, Time Zone: India Standard Time (Asia/Calcutta)), Display Settings (Name to be displayed: First name Last name, Date Format: dd/MM/yyyy, Time Format: 24 - Hour(s)), Profile Photo Settings (Owner: Employee), Chat Settings (Chat: Enable), and Notification Settings (Notifications (Mail/Feeds): Enable). A 'Modify Settings' button is located at the bottom of the left column.

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**

The screenshot displays the 'Organization Settings' interface. On the left is a dark sidebar with a 'Settings' icon at the bottom. The main content area is titled 'Manage all the department details and the department hierarchy in your organization.' and features a '+ Add Department' button. Below the title is a grid of department cards, each with a name, email address, and a count in a blue circle. The departments listed are:

Department Name	Email Address	Count
Administration	admin@zylker.com Christine Spalding	7
Cardiology	Jennifer Paul	1
Dept of Human Resources	Brown Eileen	2
Finance	Vignesh TK	0
Legal	production@zylker.com Tina smith	17
Media	Aditi A	1
Nursing	inventory@zylker.com Allen Katie	7
Orthodontics	creative@zylker.com Gertrude Williams	1
Orthopaedics	PMG@zylker.com Easton Laura	2
Paediatrics	it@zylker.com Abigail Anderson	6
Public Relations	Anitha Joshi	0
Radiology	Vignesh TK	0



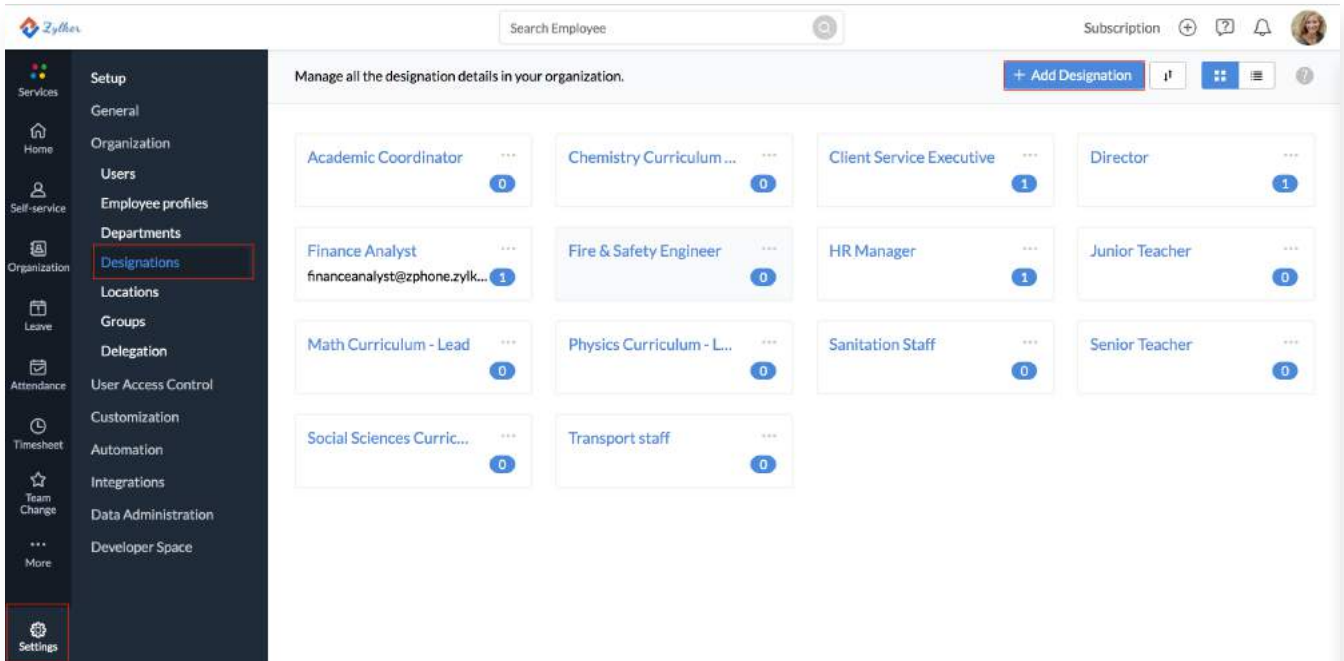
ORGANIZATION SETTINGS

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**





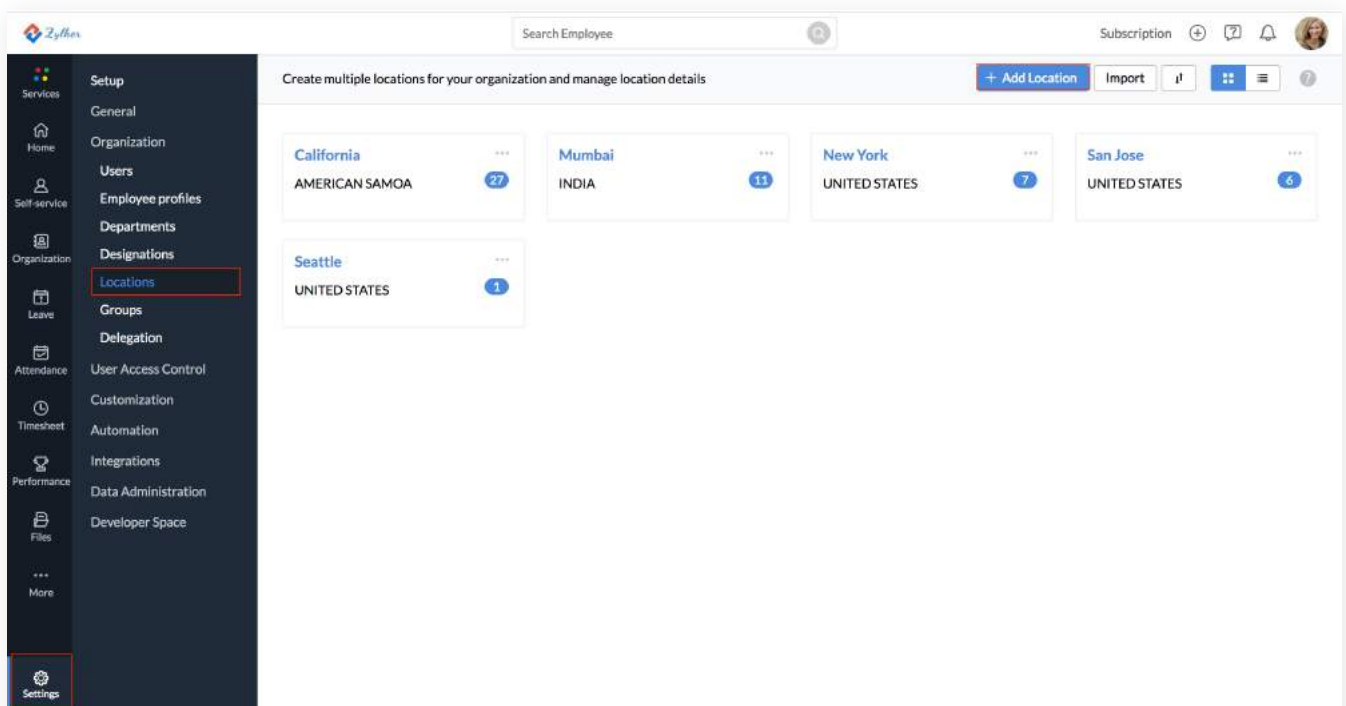
ORGANIZATION SETTINGS

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.

The screenshot displays the Zoho People Organization Settings interface. On the left is a dark sidebar with navigation options: Services, General, Organization, Self-service, Attendance, Timesheet, Exit Service, Team Change, and Settings. The main content area shows a search bar for employees and a '+ Add New Role' button. Below this, a heading reads 'Create different roles and assign permissions to each role to access organizational data.' The roles are listed in a grid:

Role Name	Count	Action
Admin	6	Configure Permissions
Contracted workers	0	Configure Permissions
Director	1	Configure Permissions
HR Manager	0	Configure Permissions
Manager	5	Configure Permissions
Teaching staff	0	Configure Permissions
Team member	117	Configure Permissions

Add New Role ✕

Role name

Clone role

Location Admin 1 Admin for a specific location



ORGANIZATION SETTINGS

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

Create and manage domain information of your organization. [+ Add Domain](#)

Domain Name	Verification status
zphone.zylker.com	Verified.
zylker.com	Verified.
zylker.directory.zoho.com	Verify
zylker1.one.zoho.com	Verify

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

The screenshot displays the Zoho People interface. On the left, a dark sidebar contains navigation options: Services, Home, Self-service, Organization, Attendance, Timesheet, Exit Service, Team Change, and Settings. The 'Leave' option under 'Organization' is highlighted with a red box, and 'Calendar Settings' is highlighted with a red box. The main content area shows the 'Calendar Settings' page with a search bar and a '+ Add' button. Below this is a table with columns for Location, Calendar Year, and Work week.

Location	Calendar Year	Work week
All locations	01/01/2018 - 31/12/2018	Monday - Friday
Mumbai	01/01/2013 - 31/01/2014	Monday - Friday



ORGANIZATION SETTINGS

Calendar Settings for **All locations** ✕

Week definition

Week starts on ▼

Work week starts on ▼

Work week ends on ▼

Weekend definition

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

Calendar Year

Current year (January to December)

The year starts from 📅 and ends on 📅

5. Define calendar year

6. Click **Submit**



ORGANIZATION SETTINGS

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](#)

The screenshot displays the Zyfler application interface. On the left is a dark sidebar with navigation options: Services, Home, Self-service, Organization, Leave, Attendance, Timesheet, Exit Service, Team Change, and Settings. The 'Calendar Settings' page is active, showing a table with columns for Location, Calendar Year, and Work week. Two entries are visible: 'All locations' for the year 01/01/2018 - 31/12/2018 with a 'Monday - Friday' work week, and 'Mumbai' for the year 01/01/2013 - 31/01/2014 with a 'Monday - Friday' work week. A '+ Add' button is present in the top right of the table area.

Overlaid on the bottom right is the 'Configure Pay Period' modal dialog. It contains the following fields and options:

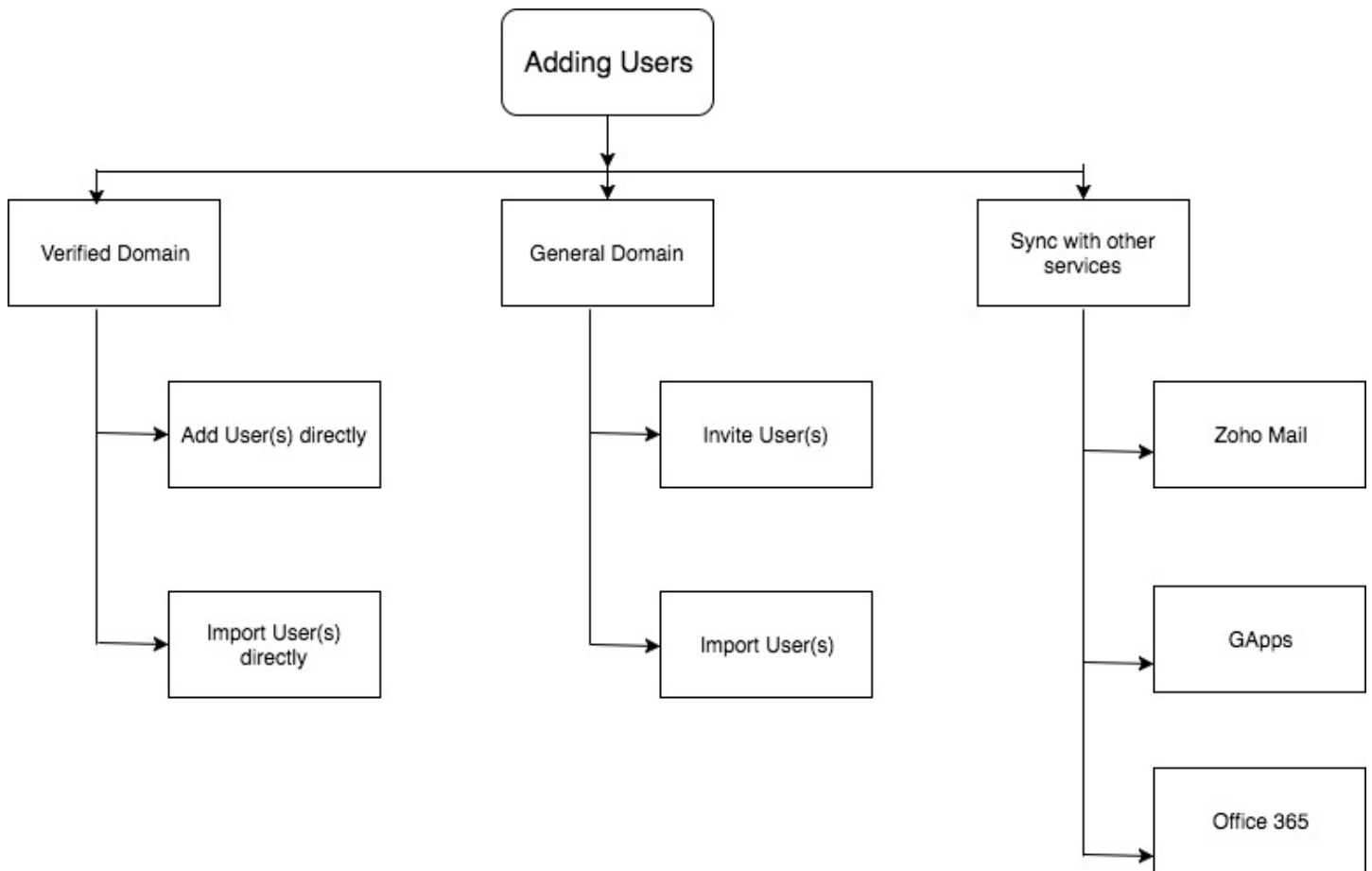
- Pay Period Name:** A text input field.
- Pay Period Cycle:** A dropdown menu with 'Monthly' selected.
- Start Day:** A dropdown menu.
- End Day:** A dropdown menu.
- Processing Day:** A dropdown menu with 'None' selected.
- Lock:** A checkbox with the text: "Lock (Any modification(s) to Attendance, Leave and Timesheet entries for the period mentioned above, will be locked after the processing day)".
- Applicable Location:** A dropdown menu with 'Select' as the current value.

At the bottom of the modal are 'Save' and 'Cancel' buttons.



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**

The screenshot shows the Zylker user management interface. On the left is a navigation sidebar with 'Settings' highlighted. The main content area shows a list of users under the 'Users' tab. A dropdown menu is open from the 'Add' button, showing options: 'Invite User', 'Invite Multiple Users', 'Add User Directly', and 'Add Multiple Users Directly'. The 'Add User Directly' option is highlighted with a red box.

Total Users: #		Add		Import	Sync	Filter	Share	Help
<input type="checkbox"/>	Basic information ↓	Date of Joining ↓	Role(s)					
<input type="checkbox"/>	albertolane albertolane, HRM2 albertolane@zylker.com		Team member					
<input type="checkbox"/>	Mathew Michel, 1121 mathew@zylker.com		Team member					
<input type="checkbox"/>	John Darron, 1120 John@zylker.com	03/07/2017	Team member	California	Active			
<input type="checkbox"/>	Michel Rob, 1119 michel@zylker.com	01/06/2016	Team member	Mumbai	Active			
<input type="checkbox"/>	Rita Daniel, 1117 rita@zylker.com	05/04/2017	Team member	Mumbai	Active			
<input type="checkbox"/>	Emma Cartner, 4585 emma.cartner@zylker.com	01/06/2017	Team member	California	Active			
<input type="checkbox"/>	Tai Chang, 4584 chang.tai@zylker.com	04/06/2018	Team member	California	Active			
<input type="checkbox"/>	Quinn Rivers, 4583 quinn.rivers@zylker.com	01/10/2015	Team member	California	Active			
<input type="checkbox"/>	Abigail Anderson, 4580 abigail.anderson@zylker.com	01/04/2015	Team member	California	Active			
<input type="checkbox"/>	Raghav Rao, 4579 raghav.rao@zylker.com	03/10/2017	Team member	California	Active			



ADDING USERS

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

Add user
✕

Employees added: 122 License count left: 28

[Account Details](#) Basic information

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

* Email address

@

zphone.zylker.com
▼

* Password

Next

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:

Add Multiple Users Directly
✕

Employees added: 122 License count left: 28

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

Email-Id	Domain Name	Password
	@ <div style="border: 1px solid #ccc; padding: 2px;"> zylker.com ▼ </div>	
+ Add new		

Save
Cancel



ADDING USERS

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**

The screenshot shows the Zylker user management interface. On the left is a navigation sidebar with 'Settings' highlighted. The main area displays a table of users. At the top right, there is an 'Add' button with a dropdown menu open, showing 'Import User' and 'Import Users Directly' (highlighted with a red box). Below the table, there is a search bar and a 'Subscription' button.

Basic information ↓	Date of Joining ↓	Role(s)	Locat	Import User
<input type="checkbox"/> albertolane albertolane, HRM2 albertolane@zylker.com		Team member		<input type="checkbox"/>
<input type="checkbox"/> Mathew Michel, 1121 mathew@zylker.com		Team member	Active	<input type="checkbox"/>
<input type="checkbox"/> John Darron, 1120 John@zylker.com	03/07/2017	Team member	California	Active <input type="checkbox"/>
<input type="checkbox"/> Michel Rob, 1119 michel@zylker.com	01/06/2016	Team member	Mumbai	Active <input type="checkbox"/>
<input type="checkbox"/> Rita Daniel, 1117 rita@zylker.com	05/04/2017	Team member	Mumbai	Active <input type="checkbox"/>
<input type="checkbox"/> Emma Cartner, 4585 emma.cartner@zylker.com	01/06/2017	Team member	California	Active <input type="checkbox"/>
<input type="checkbox"/> Tai Chang, 4584 chang.tai@zylker.com	04/06/2018	Team member	California	Active <input type="checkbox"/>
<input type="checkbox"/> Quinn Rivers, 4583 quinn.rivers@zylker.com	01/10/2015	Team member	California	Active <input type="checkbox"/>
<input type="checkbox"/> Abigail Anderson, 4580 abigail.anderson@zylker.com	01/04/2015	Team member	California	Active <input type="checkbox"/>
<input type="checkbox"/> Raghav Rao, 4579 raghav.rao@zylker.com	03/10/2017	Team member	California	Active <input type="checkbox"/>

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](#)

The screenshot shows the Zylker user management interface. On the left is a navigation sidebar with 'Settings' highlighted. The main area displays a table of users with columns for 'Basic information', 'Date of Joining', 'Role(s)', 'Location', and 'Status'. An 'Add' dropdown menu is open, showing options: 'Invite User', 'Invite Multiple Users', 'Add User Directly', and 'Add Multiple Users Directly'. The 'Add User Directly' and 'Add Multiple Users Directly' options are highlighted with a red box.

Basic information	Date of Joining	Role(s)	Location	Status
albertolane albertolane, HRM2 albertolane@zylker.com		Team member		Active
Mathew Michel, 1121 mathew@zylker.com		Team member		Active
John Darron, 1120 John@zylker.com	03/07/2017	Team member	California	Active
Michel Rob, 1119 michel@zylker.com	01/06/2016	Team member	Mumbai	Active
Rita Daniel, 1117 rita@zylker.com	05/04/2017	Team member	Mumbai	Active
Emma Cartner, 4585 emma.cartner@zylker.com	01/06/2017	Team member	California	Active
Tai Chang, 4584 chang.tai@zylker.com	04/06/2018	Team member	California	Active
Quinn Rivers, 4583 quinn.rivers@zylker.com	01/10/2015	Team member	California	Active
Abigail Anderson, 4580 abigail.anderson@zylker.com	01/04/2015	Team member	California	Active
Raghav Rao, 4579 raghav.rao@zylker.com	03/10/2017	Team member	California	Active



ADDING USERS

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

The 'Invite User' dialog box features a title bar with a close button (X). Below the title bar, it displays 'Employees added: 123' and 'License count left: 27'. A central instruction reads: 'Fill in the mandatory fields, and click invite. User gets email invitation sent to the email id mentioned. Once the invitation is accepted, the user becomes part of the organization.' The form contains four mandatory fields, each marked with an asterisk: 'Employee ID' (with a dropdown menu showing 'Last Employee ID HRM2'), 'First Name', 'Last Name', and 'Email address'. A blue 'Invite' button is located at the bottom left of the dialog.

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

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

The 'Invite Multiple Users' dialog box has a title bar with a close button (X). It shows 'Employees added: 123' and 'License count left: 27'. The instruction states: 'Enter multiple email ids separated by comma. Users get email invitations to their email id's and will become part of the organization once they accept the invitation.' Below this is a text area labeled 'Employee Email IDs' with an example: 'Example: michael@zillium.com, sarah@zillium.com, ...'. At the bottom, there are two buttons: a blue 'Invite' button and a white 'Cancel' button.



ADDING USERS

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.

<input type="checkbox"/>	Basic information ↓	Date of Joining ↓	Role(s)	Location	Status
<input type="checkbox"/>	 lewis.gardener lewis.gardener, HRM3 lewis.gardener@zylker.com		Team member		Inactive Resend 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



ADDING USERS

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](#)

Basic information ↓	Date of Joining ↓	Role(s)	Location	Status
<input type="checkbox"/> Ahmed Hussain, ZY300 ahmed@zylker.com	11/01/2018	Team member	Seattle	Active
<input type="checkbox"/> Neha, EP1 Neha@zylker.com	23/08/2017	Team member	Mumbai	Active

[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](#)

New Leave Type

* Name

Code

* Type

* Unit Days Hours

Description

Validity



SETTING UP LEAVE

Entitlement:

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

New Leave Type

Entitlement Applicable Restrictions

Effective After
(Date of Joining) 0 Year(s) ▾

Accrual Yearly ▾ on 1st ▾ Jan ▾ No. of Days 0

Reset Yearly ▾ on Last Day ▾ Dec ▾

Carry Forward 0 Percentage ▾ Expires in Month(s) ▾

Encashment 0 Percentage ▾

Prorate Accrual Start of Policy ▾ **Advanced**

[More Options +](#)

[+ Add new policy](#)

Submit **Cancel**

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



SETTING UP LEAVE

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.

New Leave Type
✕

Entitlement
Applicable
Restrictions

Applicable	Exceptions
Gender <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Others	
Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married	
Department <input style="width: 100%;" type="text"/>	
Designation <input style="width: 100%;" type="text"/>	
Location <input style="width: 100%;" type="text"/>	
Role <input style="width: 100%;" type="text"/>	
+ Add field	
(OR)	
Employee <input style="width: 100%;" type="text" value="x All Employees"/>	

Submit
Cancel



SETTING UP LEAVE

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.

New Leave Type

Entitlement
Applicable
Restrictions

Weekends Between Leave Period :

Count as leave: Count after days

Don't count as leave

Holidays Between Leave Period :

Count as leave: Count after days

Don't count as leave

While Applying Leave, Exceed Leave Balance :

Don't Allow Allow Allow and Mark as LOP

Duration(s) Allowed :

Full Day Half Day Quarter Day Hourly

Report Configuration :

Allow users to view Complete Leave Summary

Balance to be displayed Accrual Period Balance

Maximum number of consecutive days of Leave allowed

Leave Application should be submitted before days

Enable file upload option if the applied leave period exceeds days

These options are disabled by default

This leave cannot be taken together with x Maternity Leave x Paternity leave



SETTING UP LEAVE

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




SETTING UP LEAVE

Upload File > Mapping Details ✕



Choose the file to be imported
[only xls and csv formats are supported]

Import file

* Modify the balance on 

Example:

	A	B	C
1	Employee mail ID/Employee ID	Leave Type	New Balance
2	ZCON001	Casual Leave	14
3	charles.stones@zylker.com	Permission Hours	38

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>



SETTING UP LEAVE

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)

General Settings

Holidays / Weekend Settings

Number of consecutive days after which Holidays/weekends in the leave period should be considered as leave

Applicable for

Compensatory Off

Enable users to add compensatory off entry Both

Leave to be credited when work is done on a Weekend 1 x 1.0 (i.e) 1 day(s) x 1 = 1 day(s), 3 hour(s) x 1 = 3.00 hour(s)

Leave to be credited when work is done on a Holidays 1 x 1.0 (i.e) 1 day(s) x 1 = 1 day(s), 3 hour(s) x 1 = 3.00 hour(s)

Credited leave expires after 120 day(s)

Unit(s) Allowed Both

Duration(s) Allowed Full Day Half Day Quarter Day

Time Input Enable Disable

Submit Reset



SETTING UP LEAVE

Permissions

User Availability Report Access Department data to department m... ▾

Payroll Report Settings

Enable Payroll Report for Admin Enable Disable

Include Weekend(s) Enable Disable

Include Holidays Enable Disable

LOP Report settings

Unpaid leave to be marked as Loss of pay Carry Over to next pay period

Export Settings

Enable Password Protection ⓘ

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.

The screenshot shows the 'General Settings' page for the Attendance module in Zoho People. The left sidebar contains navigation options like Services, Views, Home, Self-service, Reports, Leave tracker, Time tracker, Attendance, Files, Organization, and Settings. The main content area is titled 'General Settings' and includes a 'General' section with fields for 'Effective from' (01-Jan-13), 'Default shift time' (General [00-00]), and 'Scale view' (Enable/Disable). Below this is the 'Working Hours' section, which includes 'Total hours calculation' (First Check-in & Last Check-out/Every Valid Check-in & Check-out), 'Minimum hours required for day' (Strict Mode/Lenient Mode), 'Manual Input/Shift Hours' (Full Day 8:00, Half Day 4:00), and 'Maximum hours required for day' (Enable/Disable). A 'Show Over / Deviation Time' checkbox is checked. Buttons for 'Submit' and 'Reset' are at the bottom right.

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.



SETTING UP ATTENDANCE

General Settings

Pay Days/Hours Calculation

Include Weekend(s) Enable Disable

Include Holidays Enable Disable

Include Leave Enable Disable

General Settings

Permissions

Web Check-in / Check-out Enable Disable

Mobile Check-in / Check-out Enable Disable

Show all Check-in / Check-out entries Enable Disable

View their sub-ordinates' entries Enable Disable

Edit their sub-ordinates' entries Enable Disable

Notify

Edit their own entries Enable Disable

Show attendance report page ▼

Show balance over time view ▼

Edit balance over time view ▼

Show Check-in/Check-out location Enable Disable

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

Regularization Settings

Regularization for future dates Enable Disable

Regularization request can be raised

day(s) from the date to be regularized ⓘ

day(s) a ⌵

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		

Setup

General

Dashboard

Company Profile

Domains

Rebranding

Organization

User Access Control

Customization

Automation

Integrations

Data Administration

Developer Space

Zylker

www.zylker.com

C.Spalding

9876543210

charless@zylker.com

Address Details

43455, Charles Street, Mumbai, India.

Add your organization's details, define Super Administrator, personalise using your company logo and create other company related settings. ⓘ

Super Administrator

Email ID c.spalding@zylker.com

Email settings

Default from address c.spalding@zylker.com

Locale Settings

Current Locale India

Time Zone India Standard Time (Asia/Calcutta)

Display Settings

Name to be displayed First name Last name

Date Format dd/MM/yyyy

Time Format 24 - Hour(s)

Profile Photo Settings

Owner Employee

Chat Settings

Chat Enable



SETTING UP ATTENDANCE

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.*

Add Schedule

Schedule Name

Time of Schedule 12:00 AM

Attendance Date Before 1 day(s) from current/schedule date

Push entry to leave module
 Notify through Email

Applicable For



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](#)

Shift Name	Time
<input type="checkbox"/> General	00:00 - 00:00



SETTING UP SHIFTS

Add Shift
✕

Shift Name

From

To

Weekend Location Based Shift Based

Weekend definition

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

Shift Allowance Enable Disable

Note: Creating shift-based-weekends will override Location-based-weekends if they already exist for this record.

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**



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](#)

Add Organization File ✕ ℹ

* File ℹ

File Name

Location

Allow download

Description

* Category

Valid Until 📅

Notify through Email

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**.



FILE MANAGEMENT

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](#)

Add Employee File [Close]

* File ⓘ

File Name

File View Active Employee Based Role Based

Employee ▼

Hide from employee

Share this with Reporting Manager

Description

* Category

Notify through Email

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.

Use case:

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

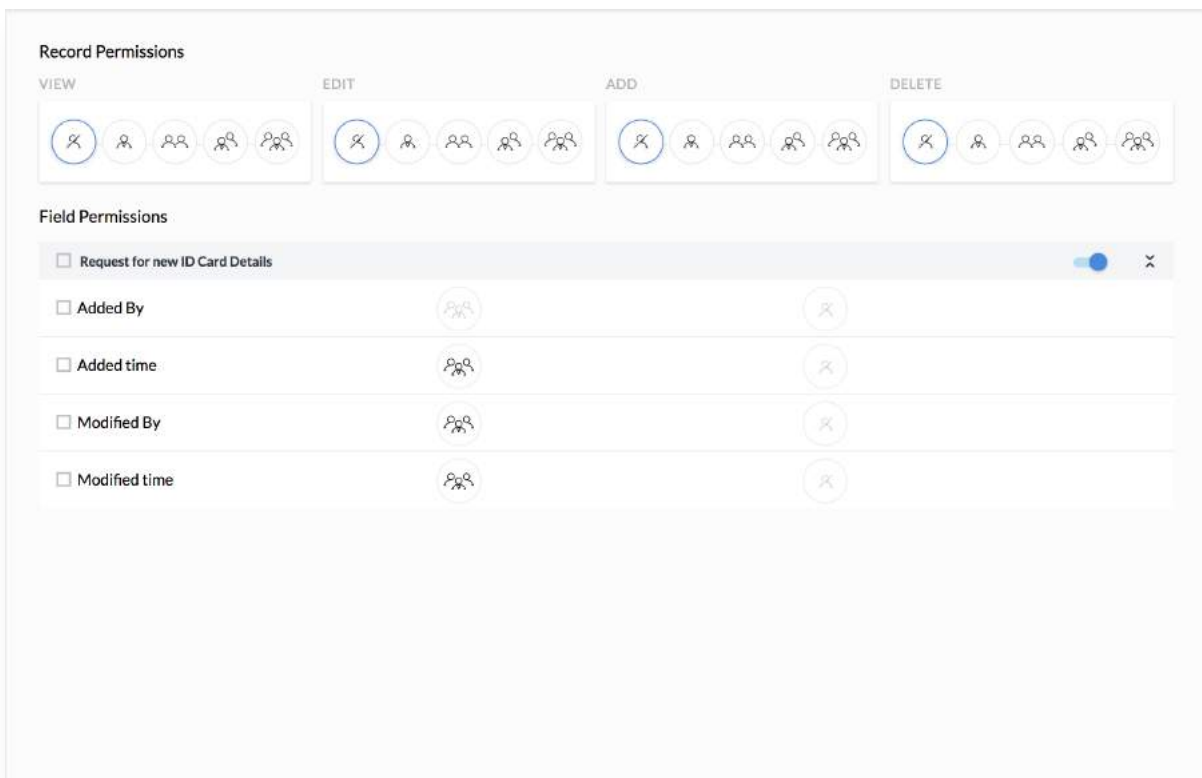
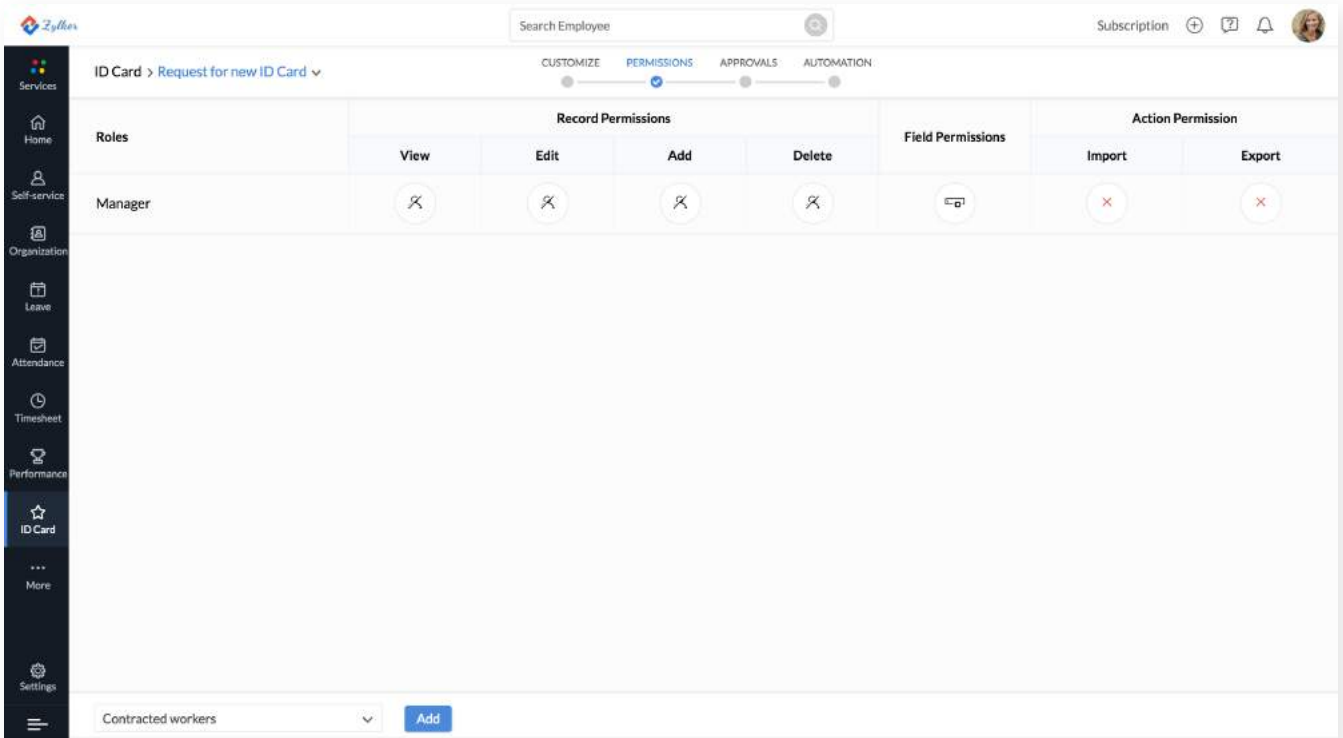
The screenshot displays the Zoho People Services configuration interface for a new service named "Request for new ID Card Request". The interface is divided into several sections:

- Left Sidebar:** Contains navigation options such as Setup, Services, Home, Organization, User Access Control, Self-service, Customization, Forms, Custom Action, Templates, Copy Customization, Automation, Integrations, Data Administration, Developer Space, ID Card, and Settings.
- Search Employee:** A search bar at the top center.
- Add Field Panel:** A panel on the left side of the main form area, listing various field types for selection, including Single Line, Multi Line, Email ID, Number, Currency, Add Notes, Dropdown, Blood Group, Image, Phone, Date, Formula, Date-Time, URL, File upload, Gender, Decimal, Lookup, Radio, Country, Decision box, and Multi-select.
- Main Form Area:** Titled "Request for new ID Card Details", it shows a form with several fields: Name (dropdown), Date of Joining (dropdown), Emergency Contact (dropdown), Blood Group (dropdown), Added By (dropdown), Modified By (dropdown), Added time (calendar icon), Modified time (calendar icon), Added IP Address, and Modified IP Address. A red box highlights the "Added By" and "Modified By" fields, with a note below stating "These are default fields present in all forms".
- Right Panel:** Contains configuration options for the form, including Form Properties and Field Properties. The Field Properties section includes:
 - Display Name: Blood Group
 - Label Name: Blood_Group
 - Validation: Mandatory field
 - General Configuration: Audit
 - Appearance: Field Type (Blood Group dropdown), Tooltip (Tooltip text box)



SERVICES

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





SERVICES

8. Configure the approvals for this service

The screenshot shows the 'Add Approval' configuration interface. The breadcrumb path is 'ID Card > Request for new ID Card'. The top navigation bar includes 'CUSTOMIZE', 'PERMISSIONS', 'APPROVALS' (selected), and 'AUTOMATION'. The left sidebar shows the 'ID Card' service selected.

Form Name: Request for new ID Card

Name of the Approval: ID card replacement request

Criteria: The workflow will be triggered when the following criteria requirements are satisfied. [Set Criteria](#)

Approvals: Reporting To: [Dropdown], Single Level: [Dropdown]

1 Level(s) of Reporting To > Approved / Rejected

Enable follow-up option for this approval

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

9. Configure Automation for this service

The screenshot shows the 'Add Workflow' configuration interface. The breadcrumb path is 'ID Card > Request for new ID Card'. The top navigation bar includes 'CUSTOMIZE', 'PERMISSIONS', 'APPROVALS', and 'AUTOMATION' (selected). The left sidebar shows the 'ID Card' service selected.

Form Name: Request for new ID Card

Workflow Name: New ID card Issue

Status: Active

Description: [Text Field]

Trigger Process: Execute based on action

- Create
- Edit
- Cancel
- Create or Edit
- Field Update
- Approve
- Reject

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

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